Proven Product, Proven Company

Batch Scanning Solution

Setup Guide

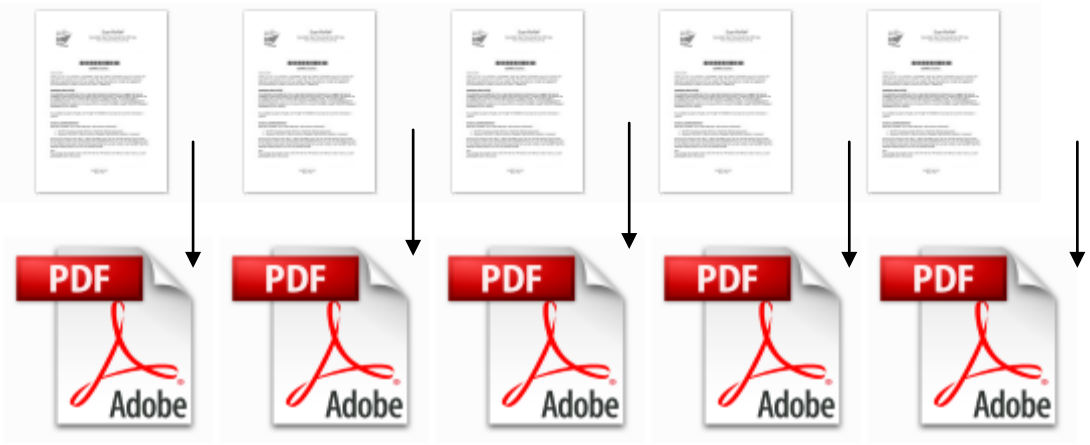
INTRODUCTION

Thank you for evaluating our Batch Scanning Solution. This solution is designed to make the most of your scanners document feeder and make your scanning process as quick and efficient as possible.

There are three ways of separating batches of scanned pages into individual PDF documents using barcodes.

1. **Batch Separation Type 1 -** Your documents have barcodes on the 1st page of each batch - every time a new barcode is read a new PDF document is started. The PDF document is named using the Barcode Value on the first of the scanned pages.

2. **Batch Separation Type 2 -** Each and every page of your batch of scanned pages has a barcode – every time a page is scanned a document is created using the barcode value as the name of the file. If a barcode is read more than once, ScanToPDF will add the page to the existing document (at the beginning, end or any place you configure it)



3. **Batch Separation Type 3 -** Your documents do not have barcodes so you need a barcoded separator page -every time a separator page is detected a new PDF document is started. The document can be named using the barcode on the separator page, or with other methods using the auto-filenamer.

Please note the separator page can be removed or kept in the finished document

How To Download And Install The Evaluation System

Visit our web site www.scantopdf.com and download the evaluation from the Barcode Batch Scanning Solution product page or from the Latest Downloads page

How To Configure The Required Settings

All the settings are configured through a single menu

- Start ScanToPDF
- Click Edit
- Click Options

Save Settings

Make sure the "Automatic trigger of save process after scan" option is checked.
All other settings can be set as required by the user and will not affect the batch scanning operation

Filenamer Settings

The settings for the filename plug-in will depend on the batch separation type being used.

Filename Format

For types 1 and 2 where the document is named using the barcode values on the document pages the filename format should have the variable {%barcode%}

Example
c:\pdf files\invoices\{%barcode%}.pdf

For batch separation type 3 (using a separator page) the document filename must be configured for some other value using the auto-naming variables available, such as date and time functions or simple incrementing numbers

Example
C:\pdf files\invoices\{%datetime%:ddMMyyyy}\{%increment%:00000}.pdf

Handling Missing Or Un-Read Barcodes
For situations where every page has a barcode, ScanToPDF can be set to handle a missing barcode situation by having separate configuration for documents where a barcode cannot be read. These are configured using the "Error case file name generation" TAB. The filename format in this instance should use one of the auto-naming functions described above.

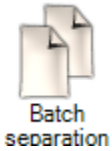
To speed document processing the "Show file save dialog" option should be left un-checked. If this option is left checked the user will be presented with the file save dialog box.

All other settings can be set as required by the user and will not affect the batch scanning operation

BARCODE RECOGNITION SETTINGS

Type
This will be set based upon the kind of barcode on the document being scanned. The evaluation system uses code39. If you are not sure of your barcode type you can check all types. **See appendix 1 if you do not know what type of barcode your documents have.**

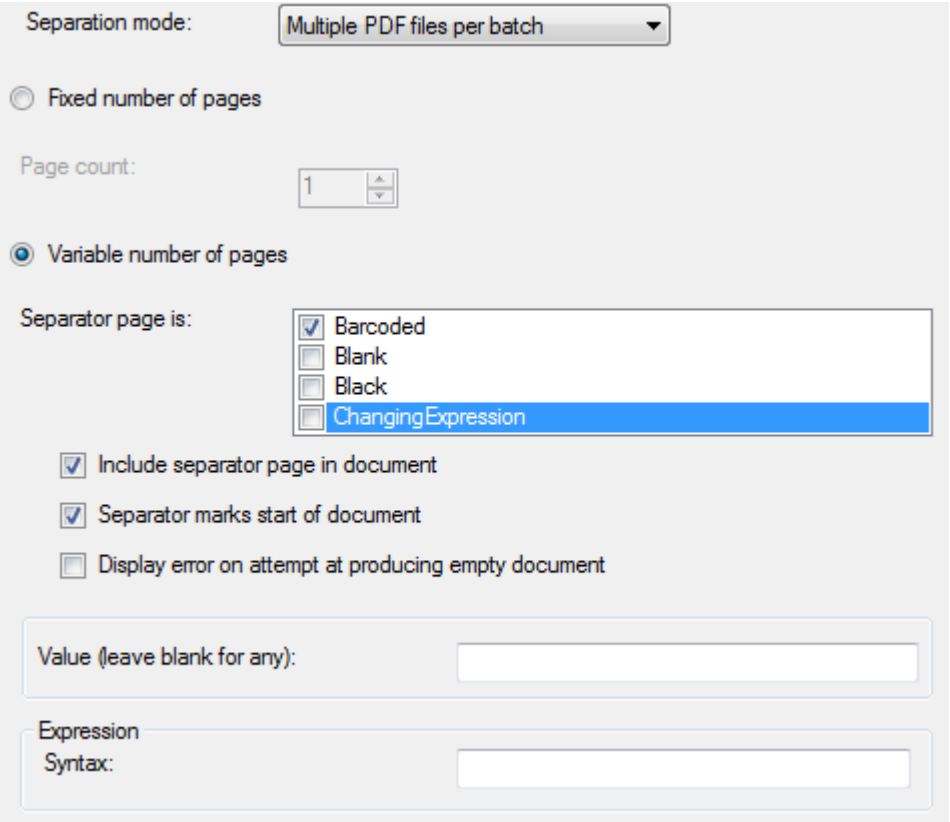
All other settings can be set as required by the user and will not affect the batch scanning operation.



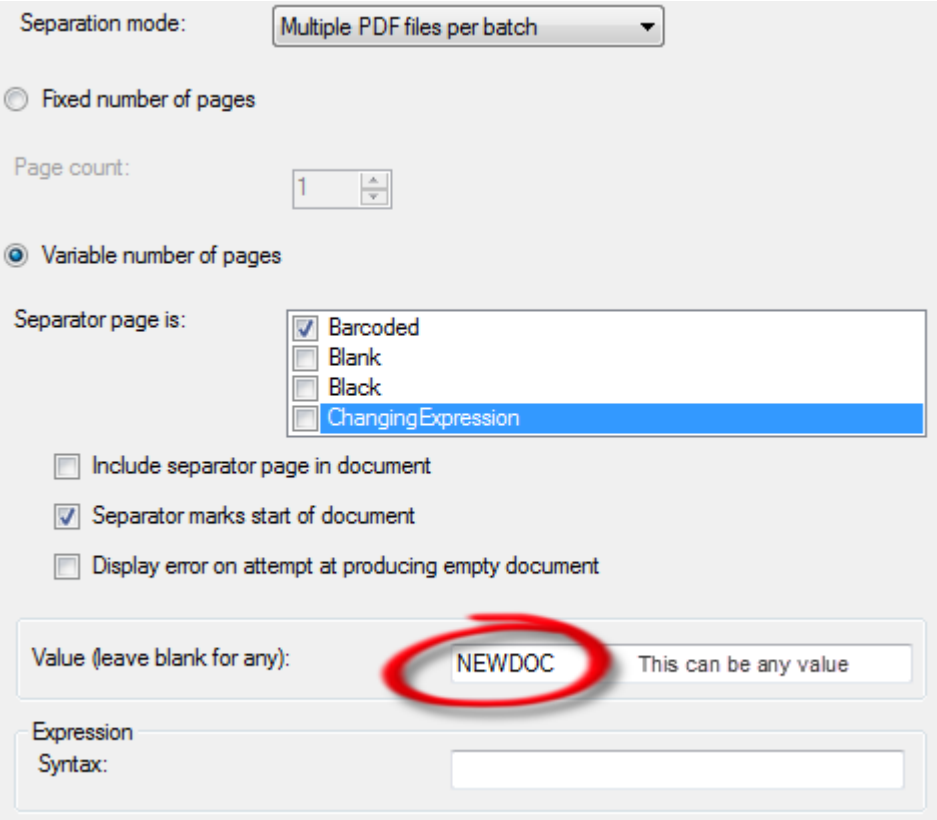
BATCH SEPARATION SETTINGS

The "Save mode is" setting should always be set to "Multiple PDF files per batch"

All other settings need to be set depending on the type of batch separation being used.
For types 1 and 2 (barcodes within document) the settings would usually be



For type 3 (separator pages), the settings would usually be



The value NEWDOC can be replaced by any barcode value that is used on the separator pages, it can be left blank, in which case any barcode on the document will trigger batch separation. You can download a separator page from our website on the "Downloads" page.

Other Settings

All other settings can be set as required by the user and will not affect the batch scanning operation.
It should be noted, batch separation can be added to other solutions (document indexing for example).
Please contact OiC for further details.

Advanced Settings – Barcode Filtering

In situations where your documents have several barcodes which may affect naming or batch separation, more advanced settings can be applied to ensure that these barcodes do not cause naming or batch splitting issues.

ScanToPDF uses Regular Expression (RegEx) pattern matching to enable the user to "filter out" barcodes which are not to be used for file naming and put the values into a variable that can be used in ScanToPDF settings. These are set in the Regex Capture TAB of the barcode recognition settings. We set a variable to capture the barcode value and then use it in the filenamer settings.

Example

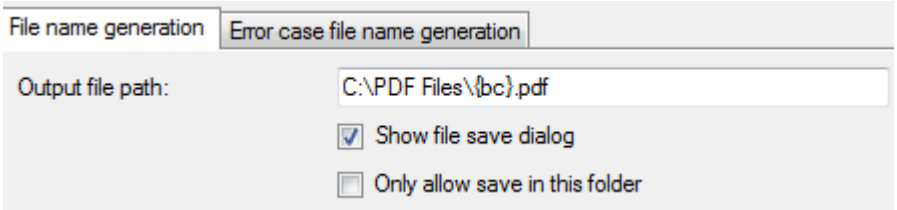
Although it is not possible to explain all the features of the Regex system (which is a very flexible and powerful system), hopefully this simple example will show what is capable.

Filenamer Settings

When we need to use a ScanToPDF variable in any area of the settings we must enclose it in curly braces, our example is going to use a variable called bc so when we use it, it will be typed as {bc}

Change the filenamer to use the bc variable we are going to capture
Start ScanToPDF

- Click Edit
- Click Options
- Click the Filenamer icon
- In the output path box enter c:\pdf files\{bc}.pdf

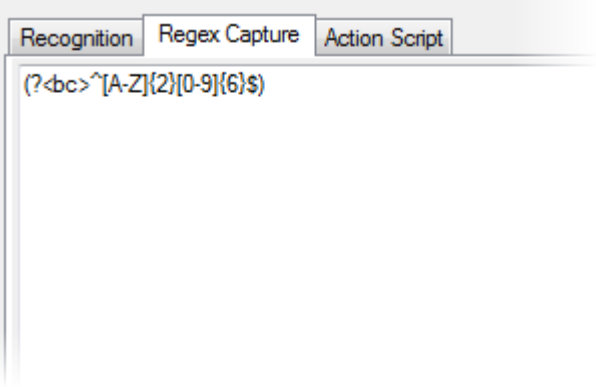


Barcode Settings

Suppose the barcodes that need to be processed are always the same pattern, for example 2 Alpha Characters and then 6 numeric digits we would enter a regular expression of (?<bc>^[A-Z]{2}[0-9]{6}$) to instruct ScanToPDF to only match those barcodes that match the pattern and put this barcode value into a ScanToPDF variable called "bc". Any other barcodes will be ignored unless they match the RegEx pattern.

Here are step-by-step instructions to set this Regex

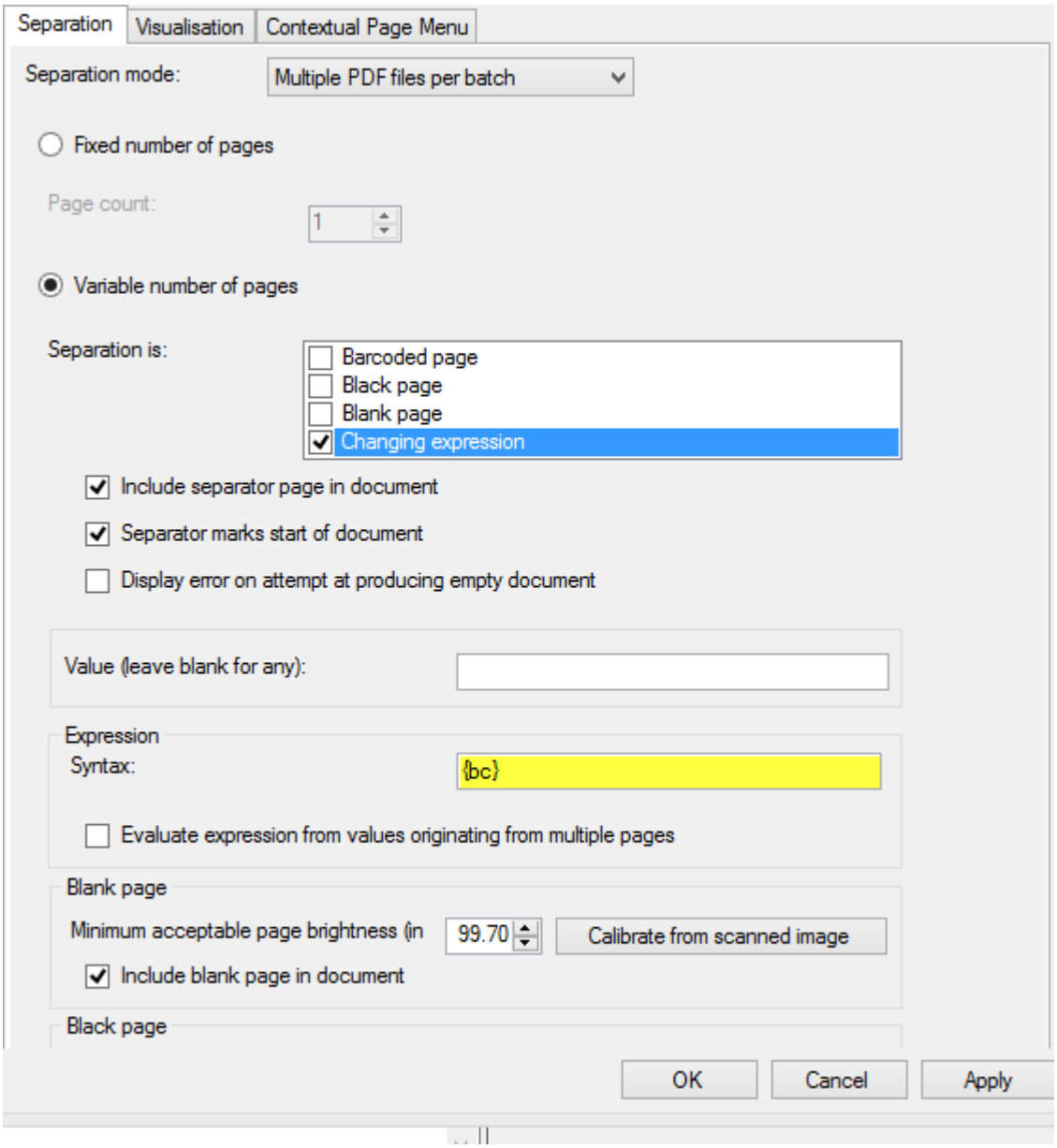
- Start ScanToPDF
- Click Edit
- Click Options
- Click the Barcode Recognition icon
- Click the "Regex Capture" TAB
- In the text box enter the value (?<bc>^[A-Z]{2}[0-9]{6}$)
- Click OK to close the settings dialog



Batch Separation Settings

A similar method of Regex pattern matching can be used in the batch separation settings to ensure that only barcodes that match the required pattern are recognized and used to separate the batch.

- Start ScanToPDF
- Click Edit
- Click Options
- Click the Batch Separation icon
- Set the “Separation is” option to “Changing Expression”
- In the “Expression->Syntax setting” enter {bc} as shown below



There are more details about Regex pattern matching on the following web pages
http://en.wikipedia.org/wiki/Regular_expression
http://www.regular-expressions.info/
http://regexlib.com/

Print out page 10 of this document and scan it. You will notice that despite the page having several barcodes, only the one that matched our pattern was recognized and then used for the filename.

Please contact us if you need any help with Regex. We'll be pleased to help

This is a test document please print out and scan this document to test the barcode batch scanning solution settings

FILENAME WITH NON ADVANCED SETTINGS

*** I N V O I C E 1 2 3 4 5 6 ***

INVOICE123456

FILENAME WITH ADVANCED SETTINGS

*** Z N 1 2 3 4 5 6 ***

ZN123456

The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the
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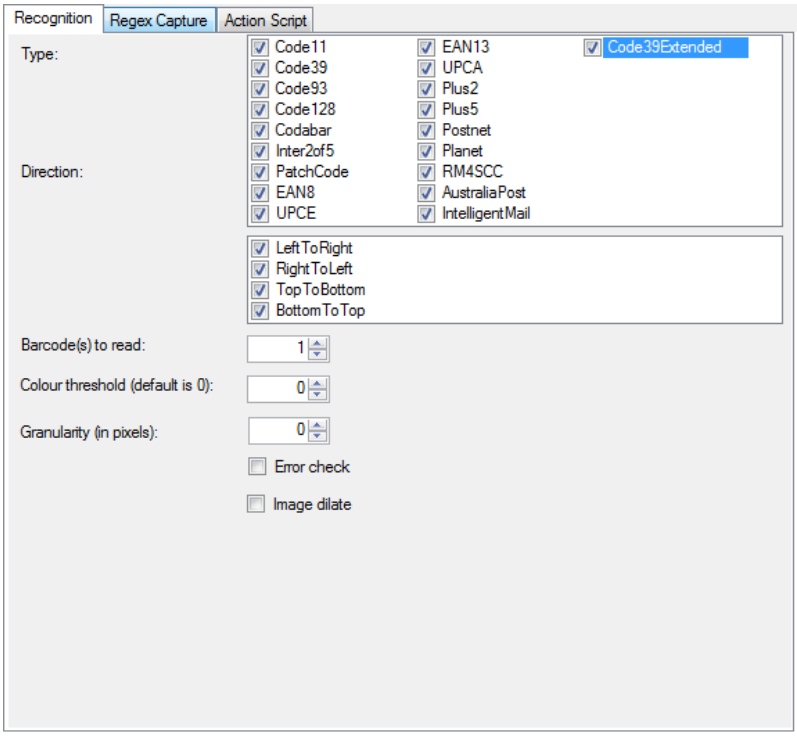
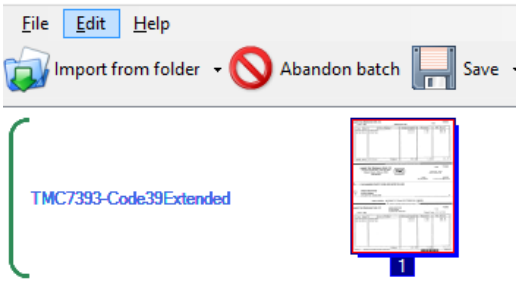
Appendix One – Determining Your Barcode Type

Start ScanToPDF
Click Edit
Click Options
Click the Barcode Recognition ICON
Select all the Barcode types by clicking each one so that each is ticked as shown below, also set all of the directions.



Click the “Apply” button

Click the “Batch Separation” ICON
Click the “Batch Visualisation” TAB
Check the “Enable batch separation visualisation” setting
In the Page Caption” setting, enter {GetBarcode().Text}-{GetBarcode().Type.ToString()}
Click “Apply”
Click the “Save” ICON
Un-Check the “Automatic save of PDF after capture” and click “OK”

Scan and save a document with a barcode on. The thumbnail will display the barcode value and the barcode type as shown below. You can now set the “Barcode Recognition->Recognition->Type” setting to this barcode type ONLY and un-check the rest. Setting the type to as few barcodes types as possible will greatly improve system performance