

Document Profiler System

Installation Guide



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Installation Requirements

Minimum System Requirements

DPS can be run in a single-user or network environment. If you will be using an existing server within your company as the storage area for your images and not for scanning, then the only requirements are that you have sufficient storage space to meet your needs. You should check with your Network Administrator for the location to install the program.

If you are going to use a separate computer to act as the DPS Server to scan and store information, then you should follow these recommendations:

TABLE 1.

Component	Requirement
Processor	Pentium® or equivalent – the faster the better.
Operating System	NT4 / 2000 / XP (2000 Pro or XP Pro can be used if you will not have more than 5 network connections to the computer or if it will not be on a network)
Hard Drive Space	100GB (depends on needs)
System Memory	128 MB
Other Drives	CD-R / CD-RW or DVD-R / DVD-RW (for backup purposes)
Monitor/Display	17" or larger monitor and a video card capable of 16-bit or better color at a minimum of 800x600 resolution (1024 x 768 recommended)
Pointing Device	Mouse

The table below shows the recommended components for **networked workstations** accessing images only:

TABLE 2.

Component	Requirement
Processor	Pentium® or equivalent
Operating System	Windows 98* / NT Workstation / 2000 Professional/ XP Professional.
Hard Drive Space	75 MB
System Memory	64 MB
Other Drives	NA
Monitor/Display	17" or larger monitor and a video card capable of 16-bit or better color at a minimum 800x600 resolution (1024 x 768 recommended)
Pointing Device	Mouse

**Microsoft will soon stop supporting the Windows 98 operating system and therefore we do not recommend using it. Because of changing technology, future releases of DPS may not work in Windows 98.*

Scanner Requirements

DPS supports TWAIN devices. We recommend scanners with an Automatic Document Feeder (ADF). In addition to ADF, you can also use scanners with full-duplex (scans front and back) capability. In choosing a scanner, make sure the page-per-minute scan rate will meet your production needs.

Getting Technical Support

Contacting Agency Technologies

The table below lists the ways to contact Agency Technologies:

Contact Method	Address or Number
E-mail	support@agencytechnologies.com
Telephone (Customer Support):	1-800-336-4284
Fax:	1-800-285-6877
Website:	www.agencytechnologies.com
Mail:	Agency Technologies, Inc. P.O. Box 100507 2141 Enterprise Drive Florence, SC 29501-0507

About Tool Tips

To see the name of a tool, place the cursor over it and a hint, referred to as a Tool Tip, will appear.

Other Resources

We recommend that new DPS users also read the Help files. To access Help in either DPS Server or DPS Client, choose Help on the menu bar. **Note:** DPS Client Help contains user Help files only. DPS Server Help contains administrative and user Help files.

DPS also includes context-sensitive Help throughout the application. Press F1 on any window for assistance.

Setting Up a Shared DPS Folder

The installation should be performed at the workstation that will be used as the primary DPS Server; this means it will be the computer used to run the DPS Server program and that has a scanner attached. The DPS Server program must be installed to the local drive (defaults to C:\Program Files\DPSServer); the data files can be located anywhere on your network, including the DPS Server workstation.

If you are installing DPS in a network environment, the preliminary step before installing DPS is to create a folder on a network drive that can be accessed by all users. The installation routine will create the common folders used by DPS to store data within. You may need to consult with your network administrator before continuing with the installation. A suggested folder name is DPSSDATA.

To create this folder:

1. Access the shared drive and view the existing folders.
2. Click on **File** → **New** → **Folder** and then enter the name of the new folder (e.g. DPSSDATA).

The table below lists the common folders that will be created:

TABLE 3.

Folder	Use
Data	Contains the tables required for indexing and system settings.
Images	Contains scanned documents and/or other files imported for indexing. Once documents are indexed, Year/Month sub-folders are created dynamically. Indexed images are stored in the appropriate Year/Month folder by processing date.
Work	Contains sub-folders for each operator. Each operator's folder contains documents that they have scanned. Each operator's work folder is automatically created when the operator information is saved.
OCR	This is used by DPS as a work folder during OCR processing.
OCR Pending	Used to store copies of indexed documents that have not yet been processed by the system for Optical Character Recognition (OCR).
Client	Contains the DPS Client setup program. This program must be run once from each workstation during program setup.

Installing DPS

To install DPS:

1. Insert the DPS Installation CD into your CD-ROM drive (OR if you downloaded the trial version, locate the DPSSSetup.exe file and double-click on it to run it).

Note: The CD-ROM is autoplay, which means that Windows should detect the presence of the CD and automatically start the installation program. If the program does not start, you can go to Windows Explorer to navigate the CD-ROM contents and then double-click on DPSSSetup.exe.

2. When the DPS installation program begins, read the end-user license agreement. If you accept the agreement, click **I Accept** to continue the installation.

Important: Network users should pay special attention to the *Data and Work File* destination. On the Choose Destination Location screen, make sure this destination is the shared location on the server that you have set up for DPS.

3. Follow the screen prompts to complete DPS installation.

Introduction

What is DPS?

The Document Profiler System (or DPS) is a document indexing and management system designed to help you meet your company's document storage and retrieval needs. Whether your company's objective is to reduce or eliminate physical file maintenance or to establish an alternate document storage system, DPS is an effective solution. DPS can be used either to replace or to compliment a traditional paper filing system.

DPS Server and DPS Client

DPS consists of two modules:

DPS Server - DPS Server is required for initial program setup and should be installed on the primary workstation used for scanning and indexing. Access to the DPS Server will be restricted to those operators you have indicated as being an Administrator or Scanner Operator. Only Administrators will be able to access system default and setup information. The DPS Server is licensed for installation and use on a single system.

DPS Client – DPS Client gives you full access to searching, viewing, printing and e-mailing documents. DPS Client can be installed on as many systems as needed without having to buy additional licenses. This is referred to as the View Mode. As an option, you can purchase licenses for the DPS Client that will allow you to use additional workstations as scanning and indexing workstations. In this mode, the DPS Client operates much the same as the DPS Server without the administrative functions. These are concurrent licenses so you can purchase only the number of licenses you need. If you have licensed two concurrent users, then the third user that accesses the system will operate in the View Mode.

Customization and Flexibility

Once a document is scanned, it is first indexed by a major category or **Document Type**, then by **Document Description** and finally by up to six **Identifiers** such as Customer Name, Policy Number, Employee Name or Social Security Number. ALL Document Types, Descriptions and Field Identifiers are user-defined. This is just one example of the flexibility inherent within DPS. With DPS you can:

- Set document access levels by user and protect sensitive documents.
- Require that specific index fields be completed before a user can complete the process to index a document.
- Set which indexing fields can be updated or modified after the initial indexing of the document.
- Allow users to add to pick lists "on-the-fly" while indexing.

Program Features

DPS offers a large selection of features, including:

- Powerful document editing tools that allow you to correct and enhance document appearance
- Document management tools that let you control how you want your documents to appear on the screen. (You can, for example, view thumbnails of document images or magnify a very small area of the document.)
- The ability to import documents from other applications such as Word or Excel and index them
- The ability to scan and store color images
- Advanced Boolean search capability
- Optical Character Recognition (OCR) search capability. DPS offers advanced OCR processing whereby each word on your indexed images are "read" and stored in a cross-reference file. During the processing of the files, each word is compared to an **Excluded Words** list. If an excluded word is found, it will be left out of the cross-reference file. The default list that comes with DPS contains approximately 1,400 of the most commonly used words found in the English language. You can customize this list by adding words to the list and by removing words from the list.
- Automated re-index request submission to notify the administrator of indexing errors

- The ability to associate notes with an indexed document. Notes can be appended but never deleted. Each time a user enters a note, his or her user initials, along with a date and time stamp, are automatically entered. Other notes are system-generated. For example, if a user edits a modifiable field, a note indicating when the record was updated and by whom is appended to the record.
- The ability to drag-and-drop scanned documents onto existing indexed documents. This feature enables you to append a newly scanned document to an already indexed document.

Pre-Installation Preparation

The Logical Indexing System

Understanding how to set up a logical indexing system is the key to making DPS work for your business. A sound and well-planned indexing system is critical for proper document storage and retrieval. We recommend that you design the system in advance. Restructuring the way documents are indexed in midstream will depreciate the system's integrity and is therefore not recommended. The affects of restructuring your system after indexing has begun will be particularly noticeable in the area of document retrieval. Search results and any reports generated from the results may no longer be reliable.

Unsafe changes include deleting or renaming document types, descriptions and field identifiers, reordering or repositioning field identifiers and editing the spelling of items in pick list after documents have already been indexed under the criteria. (All terms mentioned here will be explained in detail later in this section.) Acceptable changes include the addition of new document types, descriptions and field identifiers, and the addition or removal of items to or from a pick list.

Designing a Logical Indexing System

To create a logical indexing system with DPS, you should begin by listing the major categories of documents you will be indexing. Then, for each major category, you should list the specific documents that fall under that category. In DPS, the major category is called the **Document Type**. The specific documents that relate to the Document Type are called **Document Descriptions**. In DPS, you can have an unlimited number of Document Types and corresponding Document Descriptions. In the example below, XYZ Auto Insurance Agency has set up a Document Type called Insured Information and has identified the corresponding Document Descriptions:

FIGURE 1.

Insured Information is the **Document Type** or major category.

Document Descriptions are specific classifications within the Document Type

Insured Information



Contract, Vehicle Title, Auto Application, Loss Notice, Endorsement, Cancellation Notice, Cancellation Request, Bill of Sale

The next step is to list **Field Identifiers** for each Document Type. Field Identifiers represent indexing criteria. These criteria are specific and relevant data assigned to every document indexed and are critical for document identification and retrieval. In a continuation of the previous example, note the Field Identifiers set up at XYZ Insurance Agency for the Document Type called Insured Information:

FIGURE 2.

When you index a document in DPS, you select the **Document Type** first and the **Document Description** second ...

... **Field Identifiers** for the selected **Document Type** appear as data entry fields. Indexing criteria is entered in these fields.

Insured Information



Insured Name, Policy Number, Account Number, Producer

For each Document Type, you may define up to six Field Identifiers. There are four text fields and two value or numeric fields. The first text field must be defined. It is the primary or key identifier. Typically, this will be a name (i.e., Insured Name, Employee Name, Company Name, etc.) but could also be a number of other things depending on the Document Type.

Of the remaining five fields, the fourth text field can be used either as a standard data entry field or as a pick list. A pick list is a drop down list containing pre-defined entries. After defining field identifiers for a document type, if you intend to

employ the pick list, define your list in advance.

For example, at XYZ Insurance Agency, the fourth Text Field Identifier is Producer. The Producer is the employee who processed or handled the document. If the fourth text field is set up as a regular data entry field, the indexer will have to enter the producer's name each time. If the fourth field is set up as a pick list, the correct name can be selected from the pick list. This method will save time and ensure data integrity by standardizing the entry.

Sample Indexing System

The table below will help you understand more about how to set up a logical indexing system

Example: Lightyear Systems, Inc.

Lightyear Systems is a computer equipment leasing and maintenance company. Their setup illustrates how easy it is to customize DPS to your company's needs while maintaining consistency. In a preceding section, Document Type was defined as the major document category. As Lightyear Systems' setup illustrates, the major document category can be as specific or as general as you need it to be. Note that there are several instances where the Document Type is so specific that a single Document Description is defined. The setup also illustrates that the Document Type can be a broad category with many Document Descriptions. Notice also that Lightyear systems uses the same Field Identifier names and positions where possible. **This is important for performing global searches.** In the case of Lightyear Systems, Text Field 1 is nearly always used for Customer Name or Vendor Name. Since the first text field will nearly always be used for a name, they can perform a general search on all document types and descriptions and indicate that Text Field 1 must be equal to a specified name.

TABLE 1.

	DOCUMENT TYPE	DOCUMENT TYPE	DOCUMENT TYPE	DOCUMENT TYPE
	Installation Calendars	Return Merchandise Authorizations	Payables	Customer Docs
DOCUMENT DESCRIPTION(S)	1) Installation Calendar	1) Return Merchandise Authorization	1) Payable	1) Requisition 2) Service Order 3) Rental Agreement 4) Maintenance Agreement 5) Promissory Note
Text Field 1 (Primary Identifier) (40 characters)	Year/Month	Vendor Name	Vendor Name	Customer Name
Text Field 2 (20 characters)		RMA Number	Invoice Number	Customer Number
Text Field 3 (20 characters)		Transaction Date	Purchase Order Number	Transaction Date
Text Field 4 (20 characters)			Check Number	
Value Field 1			Check Amount	
Value Field 2				

Preparing the Operator Listing







Once you have designed your indexing system, the next step is to define a list of operators. Operators are the individuals who have access to the program. For each operator, you will identify a user name, user initials, a user ID number, a password and an access level. The assignment of an ID Number is optional but can be used as an identifier (i.e., employee number, Social Security Number, etc.). Although the assignment of a password is also optional, we recommend that you identify a unique password for each operator. This is the only way you will be able to track tasks performed by users (including the date and time that the task was performed). The Access Level controls which software features each Operator can use. The following access levels are available in DPS:

TABLE 2.



Indicate this mode...	To grant this access level...
Administrator	Access to all areas of DPS Server and DPS Client applications.
Scanner Operator	Access to all areas of DPS Client and all areas of DPS Server except System Defaults. (System Defaults is where Indexing fields such as Document Types, Descriptions and Field Identifiers are set up and stored. Operator information, program licensing information, and data file locations are also set up and stored here.)
Power User	Access to all areas of DPS Client. Users can scan documents, import documents, index documents, search for documents, and generate reports. Note: Scanning functions require the purchase of a Client license.
Basic User	Access to all areas of DPS Client minus the ability to scan documents, import documents and index documents.

Program Setup

Action	Steps
1. Start DPS and access the Setup screens.	<ol style="list-style-type: none"> 1. On the Windows Desktop, double-click on the DPSTServer icon. 2. In DPS server, click Options on the menu bar and then select System Defaults.
2. Enter customer information.	<ol style="list-style-type: none"> 1. Click the Customer Info tab. 2. Enter your company name in the Customer Name field. 3. Enter applicable company information in the following fields: Address, City, State, Zip Code, Contact Person, Phone, Email. <p>Important: Do not make any changes to the following fields without direction from Agency Technologies, Inc.: Customer#, License Code, Client License Code.</p>
3. Specify file locations.	<ol style="list-style-type: none"> 1. Click the File Locations tab. 2. By default, the Main Data Source Folder directory should be pointing to the folder where DPS is installed. This is where the installation program created your data folders. If the location of the main data source folder is NOT shown, specify the top level folder where DPS data files will be stored: <ol style="list-style-type: none"> a. Right-click in the Main Data Source Folder data entry field and choose Select Directory. b. Select the correct drive and the top-level folder where DPS data files will be stored and click OK. (Common DPS data folders are typically located in the DPSTServer folder on the drive or server location where you installed DPS. In special situations, you may need to store data in a location other than where DPS is installed. In this case, you will need to manually create or copy the data folders to the desired location and specify their location here. For more information on DPS data folders, see Pre-installation Preparations.) c. The data folder location should now be shown in the Main Data Source Folder field. For example: C:\DPSTServer\. 3. If you are a Policy Profiler user, specify the location of Policy Profiler data files. <ol style="list-style-type: none"> a. Right-click in the Main Data Source Folder field and choose Select Directory. b. Select the correct drive and the top-level folder where DPS data files will be stored and click OK. <p>Note: The Profiler Data Files field only applies to installations that are running Policy Profiler, an insurance agency management program available from ATI. Leave this entry <u>blank</u> if you</p>

Action	Steps
4. Enter document types and enter document descriptions for each document type.	<p>are not using this product.</p> <ol style="list-style-type: none"> 1. Click the Document Definitions tab. 2. Enter Document Types: <ol style="list-style-type: none"> a. Click in the Add/Edit field under the Document Types section. b. Click the Insert Record  button. c. Enter the document type. d. Click the Post Edit  button to add the entry to the Document Types list. e. To continue adding document types, repeat steps 2b through 2d. 3. Enter Document Descriptions for each Document Type: <ol style="list-style-type: none"> a. Under Document Types, click on a type to select it. b. Click in the Add/Edit field in the Document Descriptions section. c. Click the Insert Record  button. d. Enter the document description. e. Click the Post Edit  button to add the entry to the Document Descriptions list. f. To continue adding document descriptions for the selected document type, repeat steps 3b through 3e. g. When finished adding document descriptions for the selected document type, click on another document type and repeat steps 3b through 3e.
5. Enter field identifiers for each document type.	<ol style="list-style-type: none"> 1. Click the Field Identifiers tab. 2. Under Document Type, click the  button and select a document type. (By default, the first document type in the list will be shown. Accept the default entry if you are defining field identifiers for the first document type. Thereafter, you will select the next document type in the list.) 3. In the data entry boxes shown, enter text and value fields for the selected document type. 4. For each identifier, specify applicable settings. (To turn on a setting, click in the check box that is on the corresponding row with the field identifier. A check mark in the box indicates that the setting is turned on): <ul style="list-style-type: none"> • Required - When this setting is turned on, data entry is required in this field before the user can finalize the indexing process. If the user attempts to index the image without entering the data, a message will display prompting the user to enter the required data before continuing. • Display - When this setting is turned on, the field is displayed among the other fields a user sees when indexing an image. • Modifiable - When this setting is turned on, users can edit what was entered in this field after the image has been indexed. • Proper Name - When this setting is turned on, entries will be stored in Last Name, First Name format. For example, the name JOHN DOE would be stored DOE*JOHN. 5. If you are using a pick list for Text Field 4, add the list elements: <ol style="list-style-type: none"> a. Click in the Add/Edit field under the Text Field 4 Pick List section. b. Click the Insert Record  button.

Action	Steps
	<ol style="list-style-type: none"> c. Enter the list element. d. Click the Post Edit <input checked="" type="checkbox"/> button to add the entry to the pick list. e. To continue adding list elements, repeat steps 5b through 5d.
<p>6. Specify imaging and Optical Character Recognition (OCR) setup.</p>	<p>Note: The default Excluded Words list contains over 1,400 of the most commonly used words in the English language. You can use the default list as is or you can customize it by deleting words or by adding new words.</p> <ol style="list-style-type: none"> 1. To delete a word from the Excluded Words list: <ol style="list-style-type: none"> a. Locate the word you want to delete. (Use the vertical scroll bar or type the word into the Search field and then press Enter). b. With the word you want to delete highlighted, click the Delete Record <input type="checkbox"/> button. 2. To add a word to the Excluded Words list: <ol style="list-style-type: none"> a. Click the Insert Record <input type="checkbox"/> button. b. At the insertion point, enter the word. c. Click the Post Edit <input checked="" type="checkbox"/> button. The word is inserted alphabetically into the list. 3. Edit imaging defaults, if necessary. <ul style="list-style-type: none"> • Max Pixel width for color documents: This controls the file size of imported images from digital cameras and scanned color pictures. Most photos will display and print adequately as a 4x6 print. The default setting of 600 pixels will cause any picture that is wider or taller than 600 pixels to be resampled. • JPEG Quality: This controls the compression factor for color images. A setting of 100 results in very little compression and provides the best quality. Quality starts to diminish as this setting is lowered.
<p>7. Enter operators and set user access levels.</p>	<ol style="list-style-type: none"> 1. Click the Operators tab. 2. Add operators and access levels: <ol style="list-style-type: none"> a. Click the Insert Record <input type="checkbox"/> button. b. Enter the user's Name and Initials. c. Select the user's Access Level from the drop down list. d. Optional: Enter the user's ID Number (i.e., employee number, social security number, etc.) e. Enter the user's Password. <p>Note: The user's name and password are both used to log in to DPS and they are <u>both</u> case sensitive. At login, they must be entered exactly as specified in the operator listing.</p> e. Click the Post Edit <input checked="" type="checkbox"/> button to save the operator record. The record should now appear in the Operator listing located to left of the data entry fields. f. Repeat steps 2a through 2f to continue adding operators.
<p>8. Save program setup information.</p>	<p>When you have verified that program setup tabs are complete and correct, click the OK button to save all changes and exit program setup.</p>
<p>9. Select a scanning device and create scan sets.</p>	<p>Before selecting a scanner device in DPS, you must have already set up the device according to the manufacturer's instructions. After selecting the scanner in DPS, you will create scan sets. In DPS, users can create different scan sets for different types of scanning jobs. Scan sets contain settings for elements such as brightness, contract and threshold that you have</p>

Action	Steps
	<p>found to provide satisfactory when scanning different documents. A default set is what is used for the majority of your scanning needs and is probably the only one you will create at first. You will need to scan several documents and adjust settings along the way to determine your default settings. (You can delete the sample documents later.) Later, as you scan more documents, you can create different scan sets for color pictures, documents on color paper or light print.</p> <ol style="list-style-type: none"> 1. To select a scanner device: <ol style="list-style-type: none"> a. In the Work Area , on the Document Management toolbar, click the Scan Documents  button. b. On the Scan window, click Show Settings. c. Under Scanner Information, click Select Device. d. On the Select Source window, click on the desired scanner and then click the Select button. 2. To create scan sets: <ol style="list-style-type: none"> a. With the Scan window still set to show all settings, in the Scan Set field, type in the name of the new scanner set. (Example: Color Docs) b. Enter scan settings. (Review the Appendix at the end of this manual for explanations of each field.) c. When finished, click Store to save the scan set. d. Continue adding scan sets or click Finished to exit.
<p>10. Run DPS Client Setup on <u>each</u> workstation.</p>	<p>Note: Even if you have not purchased any client licenses, you must run client setup on each workstation in order for users to have access to DPS Client in Viewer mode.</p> <ol style="list-style-type: none"> 1. Install DPS Client software on each workstation: <ol style="list-style-type: none"> a. At a workstation, go to Explorer and locate the shared location of DPS on the server. b. Double-click on the DPSTServer folder. c. Double-click on the Client folder. d. Double-click on DPSCient.exe. 2. Follow the screen prompts. Note: On the Choose Destination Location screen, make sure the program destination is the workstation's local hard drive. 2. Double-click on the DPS Client icon on the user's desktop. <p>Note: The first time the DPS Viewer is run from the workstation, a message may appear indicating that the data files could not be located. The Setup Screen will appear automatically.</p> 3. By default, the Main Data Source Folder directory points to the folder or shared server location where DPS is installed. If the location of the main data source folder is NOT shown, specify the top-level folder where DPS data files will be stored: <ol style="list-style-type: none"> a. Right-click in the Main Data Source Folder data entry field and choose Select Directory. b. Select the correct drive and the top-level folder where DPS data files will be stored and click OK. (Common DPS data folders are typically located in the DPSTServer folder on the drive or server location where you installed DPS. In special

Action	Steps
	<p>situations, you may need to store data in a location other than where DPS is installed. In this case, you will need to manually create or copy the data folders to the desired location and specify their location here.</p> <ol style="list-style-type: none"> <li data-bbox="511 283 1485 346">c. The data folder location should now be shown in the Main Data Source Folder field. For example: F:\DPSTerver\. <ol style="list-style-type: none"> <li data-bbox="462 367 1437 399">4. If you are a Policy Profiler user, specify the location of Policy Profiler data files. <ol style="list-style-type: none"> <li data-bbox="511 409 1485 472">a. Right-click in the Main Data Source Folder data entry field and choose Select Directory. <li data-bbox="511 493 1534 556">b. Select the correct drive and the top-level folder where DPS data files will be stored and click OK. <p>Note: The Profiler Data Files field only applies to installations that are running Policy Profiler, an insurance agency management program available from ATI. Leave this entry <u>blank</u> if you are not using this product.</p>

Appendix – Definitions of Scanner Settings

Scanner Settings
Scan Set
<p>DPS allows you to create scan sets for different document types and/or settings. The Default should be configured to handle the majority of your scanning needs.</p> <p>To create a new set, make sure all of the scanner settings are displayed by clicking Show Settings and then type the name of the set (e.g., Color Pictures). The Update button changes to Store, indicating that you are creating a new set. Make the required changes to the settings and then click Store. The new set is saved.</p> <p>To select an existing set, click the drop-down arrow to choose other sets you have already created.</p> <p>To update an existing set, select the scan set and simply change the desired settings. When finished, click Update to save the changes. Use this to fine tune an existing scan set.</p>
Scan As
<p>Click the drop down arrow to select the type of document you will be scanning:</p> <p>B&W is used for most printed materials. Selecting this option results in a scanned image that contains only black and white areas.</p> <p>Gray Scale will scan the document in shades of gray. This is best used on documents that have shaded areas containing text. The text will be lost if scanned using the B&W setting.</p> <p>Color 8 Bit is best on documents that contain color but no photographs.</p> <p>Color 24 Bit is used when scanning color photographs and/or any document that contains a wide range of colors that are required to be seen in the scanned image.</p>
Show Scanner Interface
<p>When selected, this option launches the software that came with your scanner so that you can make further adjustments before the scanning is carried out. Leave this unchecked if you are comfortable with the settings so that scanning can begin immediately.</p>
Use ADF
<p>Select this option if your scanner has an ADF (Automatic Document Feeder) and you will be loading a stack of documents for scanning. Leave this option unchecked if you do not have an ADF or if you want to use the flat bed scanning mode for</p>

the particular scan set or for just the current scan job.
Scan Both Sides
If your scanner has the ability to scan both sides of a document at the same time (full duplex mode) then you can check this option to utilize that feature. Both pages will be stored in a single file. This option is typically enabled at the start of a scan job when scanning double-sided documents. We recommend that you do not leave this option turned on when you are scanning single sided documents. Doing this slows down the scanning process.
Scan As One Document
Select this option if you are scanning a multi-page document that will be indexed as a single document. When used with an ADF, load only the pages you want scanned as one document. The option is typically enabled at the start of a scan job.
Auto Detect Blank Pages
When checked, DPS will ignore pages it determines are blank. This is useful if you have selected Scan Both Sides and not all pages will have printing on the back
Source Documents
Unit Size
This represents the scale used by your scanner to display the scan area. The default setting is inches .
Paper Size
This sets the scan area for your scanner to reflect the size of the document you will be scanning. The default setting of US Letter is typically used for most documents. This setting can be changed at the start of a scan job.
Paper Orientation
If supported by your scanner, this would indicate which direction to rotate the scanned image in order to display it right side up. You would need to perform your own test to determine if it is a supported feature of your scanner. If changing this has no affect, try indicating the Image Rotation by Scanner .
Image Rotation by Scanner
If supported by your scanner, this would indicate which direction to rotate the scanned image in order to display it right side up. You would need to perform your own test to determine if it is a supported feature of your scanner. If changing this has no affect, try indicating the Paper Orientation .
Image Control
Brightness
Controls the brightness of your scanned images. If scanning in B&W mode, this can be used to obtain more detail by setting the slider towards the darker setting. Moving it too far though could also result in a muddled effect.
Contrast
Controls the contrast of your scanned images. Unlike the Brightness control, which affects overall brightness, contrast determines the levels of gray between black and white. If you have documents that are on carbon paper such as invoices, then you could enhance the scan by moving the contrast slider to the left for more contrast and by moving the brightness slider to the right for less brightness.
Threshold
Controls the point at which a level of gray is considered black. Unlike the Contrast control that affects both the white and black areas, threshold indicates the point at which gray should be translated as black. For example, if the document you are scanning contains gray lines, they may not be shown in the scanned image. In this case, you would move the threshold slider to the right so that lighter shades of gray will be detected and translated as black. If the document you are scanning contains gray boxes with text in them, it may scan as a solid black box. In this case, you would move the threshold slider to the right so that only darker gray and/or solid black objects are detected and translated as black.

DPI
Indicates the scanning resolution. A setting of 200 results in enough detail for most documents to be viewed and printed without loss of detail. A higher setting will result in more detail but will also require more disk space to store the image.
Reset
Resets the image controls to the default settings.
Blank Page Setting
This setting is used in conjunction with the Auto Detect Blank Page setting to determine if the scanned document is a blank page. DPS does this by calculating the percent of white space in the document. It will be determined to be blank if this value is equal to or greater than this setting. A setting of 98.30 is the default starting point. Testing should be completed on sample documents to ensure pages containing only a few words are not treated as blank pages.
Scan Margins
If supported by your scanner, this presets the scanning area to a specific area.
Scanner Information
Show Active
Shows the TWAIN scanner currently being used.
Select Device
Displays the list of TWAIN devices installed on your system and allows you to select which one to use for the current scan job. This setting is not saved with scan set.
Action Buttons
Delete
Deletes the current scan set.
Reload
Reloads the current scan set from the last save operation.
Update/Store
Stores the current scan set.
Start
Starts the scan job using the currently selected scan set.
Finished
Closes the Scan window.