KMD WORKZONE

_Content Server

2021.0

WorkZone Content Server Imaging

Installation Guide

Contents

1. WorkZone Content Server Imaging 2021.0 Installation Guide

The purpose of this Installation Guide is to ensure that WorkZone Content Server Imaging 2021.0 is installed and configured correctly for WorkZone Content Server version.

The guide describes how you install and configure the WorkZone Content Server Imaging (Server scanning) for WorkZone Content Server.

The intended target audience for this guide is technicians who are responsible for installing and configuring the WorkZone Content Server Imaging.

Related product documentation

> Installation Guide for WorkZone Content Server

> Database Installation Guide for WorkZone Content Server

> Brugervejledning til Serverskan

WorkZone links

- WorkZone documentation

- WorkZone support

- WorkZone website

- WorkZone portal

2. What's new

WorkZone Content Server Imaging 2021.0

No changes in this release.

WorkZone Content Server Imaging 2020.1

No changes in this release.

WorkZone Content Server Imaging 2020.0

No changes in this release.

WorkZone Content Server 2019,3

No changes in this release.

WorkZone Content Server Imaging 2019.2

No changes in this release.

WorkZone Content Server Imaging 2019.1

No changes in this release.

WorkZone Content Server Imaging 2019.0

No changes in this release.

WorkZone Content Server Imaging 2018.2

No changes in this release.

WorkZone Content Server Imaging 2018.1

No changes in this release.

WorkZone Content Server Imaging 2018.0

No changes in this release.

WorkZone Content Server Imaging 2017

No changes in this release.

WorkZone Content Server Imaging 2016 R2

No changes in this release.

WorkZone Content Server Imaging 2016

No changes in this release.

WorkZone Content Server Imaging 2014 R2

No changes in this release.

WorkZone Content Server Imaging 2014

Installation paths throughout the guide have been updated to reflect the new installation location.

3. Prerequisites

Scanner type and configuration

It is outside the scope of this document to deal with the individual types of scanners, for example, stand-alone scanner or Multifunction Printer. However, it is a prerequisite that the scanner meets the general scanner requirements (see below) and has been set up to support the customer's scanning analysis with regard to resolution, color or b/w, and duplex.

All other issues regarding the installation and configuration of WorkZone Content Server Imaging are defined in this document.

Scanner requirements

You scanner must be either:

- Twain compatible

  -Or-

- A network scanner

The scanner must meet the following minimum digitization requirements:

- Scan multiple pages in TIFF format

- 300 dpi resolution

- B/W (bitonal)

Upgrading issue

Important: From the international version of WorkZone Content Server Imaging 4.1i and newer versions, Enterprise Imaging, it is very important — in conjunction

with an upgrade — to use the standard cfg-file with table groups and field names in the record register translated into English.

If your current installation uses a customized cfg file, you need to re-configure these settings in order to concur with the standard cfg.

Cover page and separator sheet

In WorkZone Content Server Imaging, the two terms cover page and separator sheet are used interchangeably.

Prerequisites for using WorkZone Content Server Imaging

WorkZone Content Server Imaging prerequisites the following:

- The WorkZone Content Server Indexing Service and the WorkZone Content Server OCR Service must be installed together with the WorkZone Content Server. For more information on their installation, see the Installation Guide for WorkZone Content Server.

- The WorkZone Content Server XdiDataConsumer must be configured. For more information, see the Installation Guide for WorkZone Content Server.

- The WorkZone Content Serverdatabase must be installed. For more information on the installation, see the Database Installation Guide for WorkZone Content Server.

- In the WorkZone Content Server database, the following custom labels must be configured on the **record_info** subtable of the **record** table, Configure custom labels:

  - IndScanPers

  - IndScanSide

  - IndScanTid

- In the WorkZone Content Server database, the following custom label must be configured on the record_name subtable of the record table, see Configure Custom Labels:

    - CPR-no

- The record type **I** must be available as default.

- A shared drive must be available for the scanning client with scanner and for the scanning server.

- If you want to use the InfoScan Setup program, for example, because you need a new `cfg`. file, the following entries must be available in the registry:

    ```
    [HKEY_LOCAL_MACHINE\SOFTWARE\InfoCD\InfoScan\Filters]

    "FILTER013"="Just FileScan;ISFILTER013.ISFILTER"

    "FILTER025"="XML;ISFILTER025.ISFILTER"
    ```

One value must be available for each filter to be used.

> **Important:** The **InfoScan installation** program automatically inserts FILTER013. Filter025 must be inserted manually.

Usage of services

The WorkZone Content Server Indexing Service is used for free text indexing. The WorkZone Content ServerOCR Service is used for OCR handling of scanned documents, which takes place in the WorkZone Content Server database. The WorkZone Content Server XdiDataConsumer fetches files with scanned documents and sends them to WorkZone Content Server.

Folders for scanned documents

When you configure the WorkZone Content Server XdiDataConsumer, you specify the name of the folder, from which the WorkZone Content Server XdiDataConsumer must fetch the files containing the scanned documents. For more information on configuration

of the WorkZone Content Server XdiDataConsumer, see the Installation Guide for WorkZone Content Server.

You need to configure the WorkZone Content ServerImaging to place the files containing the scanned documents in the same folder as the one used by the WorkZone Content Server XdiDataConsumer. This folder is specified in the XML Out Folder field in the SJ ServerScan Admin window, For more information, see The SJ ServerScan Admin Window.

4. Working with WorkZone Content Server Enterprise Imaging

4.1 Overview of the scanning process

The WorkZone Content Server Imaging is used for scanning documents and archiving them in the WorkZone Content Server database. To perform a scan, the following is required:

- Scanner with driver (for more information, see Prerequisites).

- InfoScan program packet from InfoCD

- WorkZone Content Server system, in which the XdiDataConsumer is installed and various custom labels are configured. For more information, see Install XDI service for WorkZone Content Server Imaging in the WorkZone Content Server Installation Guide.

Scanning process

The list below shows stages of the scanning process from receiving a paper document until the document is digitized and stored in the WorkZone Content Server database.

1. The document arrives on paper.

2. The document is scanned on a local scanner or a multifunction printer.

   Note: Documents can be scanned with or without using cover pages. Whether cover pages must be used or not depends on how you configure

> the WorkZone Content ServerEnterprise Imaging. See Configure codes for cover pages.

3. The document is registered, that is, the information about the case handler, case number, access codes (if any), and so on, is added. The information can be added either automatically using the codes from a cover page as default values, or it can be entered manually in a registration window especially made for this purpose.

4. The document is stored in the WorkZone Content Serverdatabase and the registered information is attached as metadata.

The scanning takes place on a scanning client, which is a PC connected to a scanner or a multifunction printer. The scanned documents are imported as TIFF files to a server, where the documents are registered in the WorkZone Content Server database.

Automatic or manual registration

The scanning can take place either with automatic registration of the scanned documents, or with manual registration, during which the user must enter the registration information to be added in theWorkZone Content Server database together with the documents.

Automatic registration

With automatic registration the scanner is fed with documents separated by cover pages containing the registration information. From the scanner the documents are captured by the InfoScan Capture program, which is a part of the InfoScan program package.

Manual registration

Manual registration is done by using the program InfoScan Registration and/or SJ ServerScan Starter.

InfoScan Poll program

The InfoScan program InfoScan Poll fetches the files that have been scanned. The InfoScan Poll program can be configured to run as a Windows service, which will be appropriate because the program usually has to run all the time.

Configuration file

The scanning process is controlled by the configuration file, which is configured in SJ ServerScan Administrator and possibly InfoScan Setup so that the scanned documents are distributed as TIFF files to a number of different units called profiles.

WorkZone Content Server XdiDataConsumer

The TIFF files are imported to the WorkZone Content Server database by the WorkZone Content ServerXdiDataConsumer. The WorkZone Content ServerXdiDataConsumer is a data consumer plug-in applied in WorkZone Services (Service channel), which is a Windows NT service installed in connection with the installation of the WorkZone Content Server. Windows NT services are installed in connection with the installation of the WorkZone Content Server. See the Installation Guide for WorkZone Content Server.

XML filter

To establish communication between the InfoScan programs and the WorkZone Content Server XdiDataConsumer, you need to use a filter.

The filter is an XML file, which ensures that the InfoScan programs deliver a TIFF file with a scanned document together with a corresponding XML file, containing registration information, to a folder from which the files are fetched by the WorkZone Content Server XdiDataConsumer.

The registration information from the corresponding XML files is attached to the respective documents in the WorkZone Content Server database.

4.2 Overview of InfoScan programs

InfoScan Capture

The InfoScan Capture program performs the following tasks:

- Scanning from a local scanner.
- Fetching scanned files from folders.
- Separation of documents.
- Recognition of codes for cover pages.
- Removal of blank pages.
- OCR handling.
- Notification through the e-mail.

The files resulting from the process are placed either in a folder or sent to a filter as an XML file.

The user must provide further information to the files that are placed in a folder, before they are sent through the filter.

All files that have passed the filter are fetched by the WorkZone Content Server XdiDataConsumer.

InfoScan Poll

Fetches TIFF files from one or more folders dedicated to receiving scanned materials and delivering them to XDI Service. InfoScanPoll can perform the same tasks as InfoScan Capture.

InfoScan Registration

The user can enter the information on a scanned document before it is stored in the WorkZone Content Server database. InfoScan Registration is a program used for manual

registration of documents.

InfoScan Setup

Used for creating and editing configuration files for the other InfoScan programs.

4.3 Concepts

Profile

A profile is a unit to which you can scan, and which has a purpose and a number of characteristics and rules. The contents of a profile are described below.

Profile Distributor

Usually you create a number of profiles in a WorkZone Content Server Imaginginstallation. However, there is always a standard profile: Profile Distributor, whose purpose is to distribute documents to the other profiles. The distribution is done by using the cover pages.

XML database

The XML database is a virtual table (the XML table) containing X number of fields. The fields define all the properties of the scanning process from scanning the document until it is registered in the WorkZone Content Server database.

The XML database is located in a folder, and each XML file located in this folder represents a record in the virtual table and therefore can contain the fields, which are defined in the table. The XML database is called ISXML.

XML table

The XML table is the virtual table constituting the XML database. The XML table is called Root Element. The name has no importance and is only used because of the InfoScan programs requirements.

XML fields

The XML fields are all the fields, which are defined by the InfoScan programs, and which are located in the XML database. The fields can be of the following types:

- **InfoScan Fiel**d - this type is used for fields that are to be placed in the `<dkfm:metadata>` part of the finished XML files, which are fetched by the WorkZone Content Server XdiDataConsumer. <dkfm:metadata> is general document information fulfilling the OIO standard.

- **SJ Field** - this type is used for fields that are to be placed in the `<sj:metadata>` part of the finished XML files, which are fetched by the WorkZone Content Server XdiDataConsumer. The field is formatted as an `<sj:field>` element (for more information, see section 5.12 The Set XML Fields window). `<sj:metadata>` is special fields required by WorkZone Content Server.

- **SJ group** - this type is used for fields that are to be placed in the `<sj:metadata>` part of the finished XML files, which are fetched by the WorkZone Content Server XdiDataConsumer. The field is formatted as an <sj:group> element (for more information, see The Set XML Fields Window). `<sj:metadata>` is special fields required by WorkZone Content Server.

XML Output Folder

The XML Output Folder is the folder where finished XML files and corresponding TIFF files are placed.

CFG file

A CFG file is a configuration file used by the InfoScan programs. The configuration file defines paths, fields, and functions for InfoScan Capture, functions for InfoScan Registration, and so on. Thus, the configuration file is the data definition for the XML database.

Transformation file

When the XML filter generates an XML file containing registration information, a transformation file is used to ensure that the finished XML file fulfills the format requirements imposed by WorkZone Content Server.

Assign Values to Fields in the XML Database

Values can be assigned to the fields in the XML database in different ways. If several values are assigned to the same field, they are prioritized as defined below.

- A value is assigned by using the default value of the field. See Configure a default value for a field.

- A value is assigned by selecting a default value during configuration of the profiles. For more information, see SJ ServerScan Administrator and The Edit ServerScan Profile window. A value assigned from a profile overwrites any previous assignments of values. A value is assigned by a cover page (see Configure codes for cover pages). A value assigned by a cover page overwrites any previous assignments of values.

- A value is assigned by entering a value in InfoScan Registration during manual registration of a document. A value assigned during manual registration overwrites any values assigned previously.

End user Online help

A user guide to Serverskan is available on the WorkZone Documentation site.

Note: The user guide cannot be accessed from the Serverskan user interface.

5. Installing WorkZone Content Server Imaging

5.1 Installation and configuration process

You install and configure the WorkZone Content Server Imaging program in the following steps:

1. Install WorkZone Content Server and WorkZone Content Server database. For more information, see the Installation Guide for WorkZone Content Server and the Database Installation Guide for WorkZone Content Server.

2. Configure the custom labels.

3. Install InfoScan programs on the server.

4. Install InfoScan programs on the client.

5. Configure the shared drive, which is available for the scanning client with scanner and for the scanning server.

6. Configure general properties of the WorkZone Content Server Imaging.

7. Edit the master configuration files. This can include the following actions:

    -   Create new fields in the XML database.

    -   Edit existing fields in the XML database.

    -   Delete existing fields in the XML database.

- Configure default values of fields in the XML database.

- Configure additional properties of fields in the XML database.

- Configure, edit and delete codes for cover pages.

- Configure inheritance of information from cover pages.

- Configure the path to conversion table for codes for cover pages.

- Configure e-mail notifications for errors during polling.

- Design the window for manual registration of documents.

- Configure general properties for the window for manual registration of documents.

> **Important:** You must configure the fields in the XML database before you can make any other configurations.

5.2 Install WorkZone Content Server Imaging

Overview

To be able to use WorkZone Content Server Imaging, the InfoScan programs must be installed both on the server, which is importing the files with scanned documents to WorkZone Content Server, and on the scanning clients.

Several custom labels must be configured before the scanning can take place. The configurations are described below.

Configure custom labels

If the custom labels, which are a prerequisite for using WorkZone Content Server Imaging (for more information, see Prerequisites), are not already configured during the installation of the WorkZone Content Server database, you must perform the following procedure to configure the custom labels.

1. Start the `scansql.exe` program, select the relevant DSN and log on.

   The **ScanJour SQL** window appears.

2. Select **Sjbase** > **Load data** > **Skan**.

   The **Scanning module data** window appears.

   > **Note:** The remark in the window saying that further configuration is
   > required refers to the configuration described in the following.

3. Select the **Custom labels** check box and click **Execute**.

   The necessary custom labels are created and the **Scanning module data**
   window closes.

4. Close the **ScanJour SQL** window.

Install InfoScan on the Server

1. Start the installation program by double-clicking the `setup.exe` file in the
   folder

   ```
   ..\ServerScan\1.8.86\1.8.86.Server
   ```

   The **Vælg installationssproget** window appears.

2. Select the installation language from the list and click **OK**.

   The **InfoScan - Install Wizard for InfoScan** installation wizard appears.

3. Click **Next >**. Read the license agreement and if you accept it, click **I
   accept the terms in the license agreement**, and then click **Next >**.

4. On the **Setup Type** page, click **Typical** to install all program functions.

5. Click **Next >**. The **Ready to Install the Program** window appears.

6. Click **Install**. The installation process starts. When the installation has
   completed, the **Install Wizard Completed window** appears.

7. Click **Finish** to close the installation wizard and then restart the computer.

Install InfoScan on the Client

1. Start the installation program by double-clicking the `setup.exe` file in the folder The

   ```
   ..\ServerScan\1.8.86\1.8.86.Client
   ```

   Vælg installationssproget window appears.

2. Select the installation language from the list and click **OK**.

   The **Welcome to the Install Wizard for InfoScan** page appears.

3. Click **Next >**. Read the license agreement. If you accept it, click **I accept the terms in the license agreement**, and then click **Next >**

4. The **Setup Type** window appears. Do as follows:

- Select **Typical**, if you want to install all program functions and then go to step **8**.

  -Or-

- Select **Custom**, if you want to select the program functions to be installed

5. Click **Next >**. The **Custom Setup** page appears.
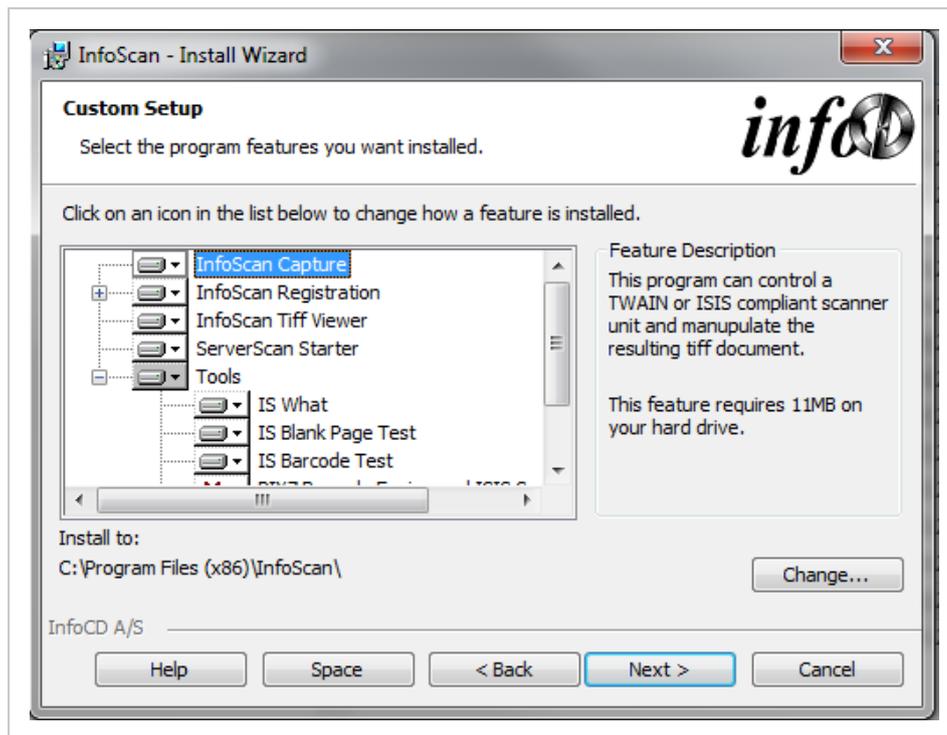
5. Select the programs and tools that you want to install. If you want to make the installation in a different folder than the one specified below the Install to: label, you can select another folder by clicking **Change...**.

6. Click **Next >**. The **Ready to install the Program** window appears.

7. Click **Install** to start the installation. When the installation is complete, the **Install Wizard Completed** page appears.

8. Click **Finish** to close the wizard.

5.3 Configuring WorkZone Content Server Imaging

5.3.1 Configure WorkZone Content Server Imaging

ScanJour ServerScan Administrator program

The program SJ ServerScan Administrator is used to configure the general properties of WorkZone Content Server Imaging and profiles.

The settings are saved in an INI file, and this file is automatically placed in the same folder as the program. The properties will not take effect before they are published, which means that you can edit and save them without affecting your installation.

Prerequisites:

The following prerequisites must be fulfilled if you use the program SJ ServerScan Administrator:

- WorkZone Content Server Imaging has been installed including the folders `CFG`, `CLIENT`, `LOGS`, `QUEUES`, `SCHEME`, `XSL`.

- The `CFG` folder contains a master configuration file called `sjPoll.cfg`, which contains all XML fields, fields of cover pages and a standard window for manual registration. The master configuration file is a file containing a standard configuration delivered together with the InfoScan programs.

- The program is executed on a PC, on which the InfoScan programs are installed.

- The `SJSKANROOT` folder is available both from the scanning client and the server, and thus the folder must be copied to the shared drive.

Configure general properties and profiles

This procedure describes how you configure the general properties of WorkZone Content Server Imaging and how you configure profiles in the SJ ServerScan Admin application. You must do the configuration on the server.

1. Copy `SJSKANROOT` folder to the shared drive.

2. Start the `SJServSkanAdmin.exe` program, which is located in the `SJSKANROOT` folder. The **SJ ServerScan Admin** window opens.
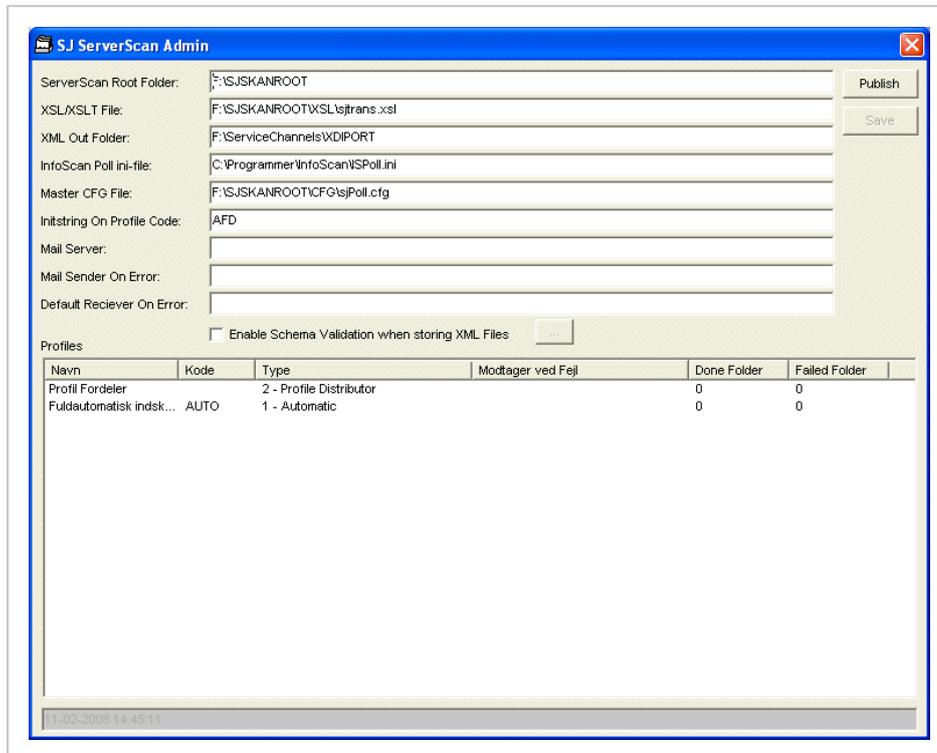
3. Specify the properties, which are common for WorkZone Content Server Imaging installation. For more information, see The SJ ServerScan Admin window.

4. Click **Save**.

5. Go to step **6**, if you want to create or edit profiles. Otherwise go to step **10**.

6. In the **Profiles** table, do one or both of the following:

   - Edit an existing profile by double-clicking it.

   - Create a new profile by right-clicking and then selecting **Create** in the pop-up menu.

   The **Edit ServerScan Profile** window appears.
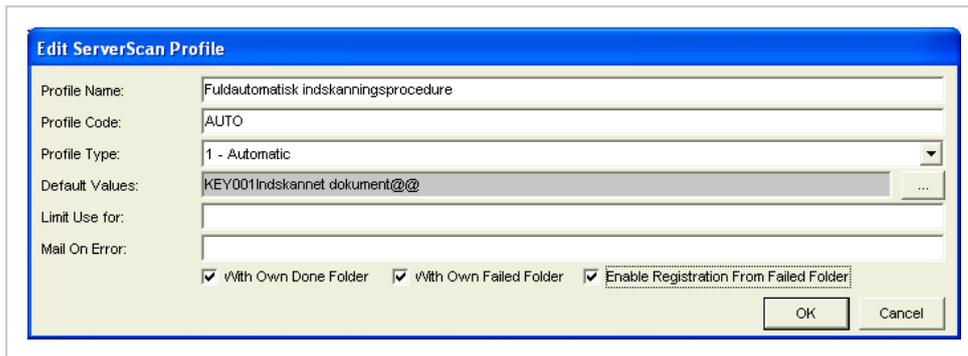
7. Specify properties of the profile. For more information, see The Edit ServerScan
   Profile window

8. Click **OK** to close the **Edit ServerScan Profile** window.

9. Create and/or edit all necessary profiles as described in steps 6-9.

10. Click **Publish**, when you have finished the configuration and want it to take
    effect in your installation.
    The **Publish ServerScan Konfiguration [Publish ServerScan
    Configuration]** window appears.

11. Select the **Slet Eksisterende CFG Filer til Registrering [Remove
    existing CFG files Registration]** check box, if you want to delete the
    existing CFG files and generate them anew.

    If you do not select this check box, the existing CFG files used in connection
    with manual registration will be updated only with information on XML schemas
    and the name of the XML Out Folder.

    The folder in which the finished XML files and TIFF files must be delivered (the
    name of the folder is the name that you have specified in the **XML Out Folder**
    field). This means, that any customer specific configuration done by means of
    InfoScan Setup is retained in the CFG files.

12. Click **OK** to close the **Publish ServerScan Konfiguration** window. It can take
    a while before the publication has finished. During the publication the CFG files
    are updated or generated and the program SJ ServerScan Administrator

creates the `SJServSkanAdmin.ini` file in the folder where the program itself is located.

Besides the `ispoll.ini` file is created and copied to the `C:\Program Files\InfoScan` folder, and the `SJServSkan.ini` file is created and copied to the `C:\SJSKANROOT\CLIENT` folder.

13. Close the **SJ ServerScan Admin** window.

14. Restart ISPOLL for all the changes to take effect.

Output from WorkZone Content Server Imaging

The output from the WorkZone Content Server Imaging is a folder containing the finished XML file (this file is called `sjfesdpacket.xml`) and the TIFF files with the scanned documents. The output is captured by WorkZone Content Server XdiDataConsumer.

Errors during scanning

If errors occur during scanning, an error catalog is generated which contains a log file that describes the errors, (see the error descriptions in Error situations). Errors from the WorkZone Content Server XdiDataConsumer are written to the Windows service log.

Remove files

Files are collected in the **DONE** folder. If you delete the folder, it is created again. You can create a batch file, which tidies up at regular intervals. The WorkZone Content Server XdiDataConsumer automatically tidies up in the captured files.

5.3.2 The Edit ServerScan Profile window

Field	Description
Profile Name	Defines the name of the profile. The name is used for identification of the profile. This name is the one you can see when you select a profile in the **SJ ServerScan Admin** window or the **SJ ServerScan Starter** window. See Control scanning with SJ ServerScan Starter.
Profile Code	Defines a code identifying the profile. The code must be short (for example, three letters), and it must be written in capital letters. The code is used for:

- Naming the files that are scanned by using the profile.

- Naming the folders that are generated in connection with the profile.

- Naming the CFG and LOG files that are generated in connection with the profile.

- Identification of the profile on cover pages.

- Identification of coverage code in connection with the Profile Distributor. See How do I scan to the Profile Distributor?

Profile Type	Each profile has a purpose. This purpose is defined by a type. The type can have one of the following values:

- **1 - Automatic**. When you select this type of profile, you must use cover pages when you scan. The combination of the profile, the cover pages and the default values mean that the document is registered completely automatically (that is, without manual

interference from the user).

- **2 - Profile Distributor**. This is the type of profile to which you must scan if you want to distribute the scanned documents to the other profiles.

- **3 - Manual Scan Without Separator Sheet**. This is the type of profile to which you scan without using cover pages. The documents, which are scanned to this type of profile, must be registered manually later on from a **ServerScan Registration** window. For more information, see Design the window for manual registration.

- **4 - Manual Scan With Separator Sheet**. This is the type of profile to which you scan by using cover pages, but the cover pages and the default values are not enough to complete the registration of the documents. The document registration must be completed manually later on from a **ServerScan Registration** window. For more information, see Design the window for manual registration.

- **5 - Automatic Form Scan**. This type of profile is identical to the type of profile with the value 1 - Automatic except for one thing: the codes for the cover page must be specified on the document directly instead of being specified on a cover page. Thus specific cover pages are not used for separating the documents.

Default Values	Defines the values, which are by default applied to the documents scanned to this profile. The default values cannot be specified in plain text, but must be selected by using the browse (**...**) button next to the field.
Limit Use for	Defines the names of the scanning clients, which have to be able to see the profile (and thus be able to use it). If you specify names of more scanning clients, the names must be separated by semicolons.
Mail On Error	If another person than the person specified in the **Default Receiver On Error** field must be notified in connection with errors from this profile, the e-mail address of the person must be specified in this field. For more information, see the **With Own Failed Folder** field.
With Own Done Folder	When this check box is selected, the finished documents for this profile will be placed in the profile's own DONE folder instead of the standard DONE folder of the installation. The name of the profile specific folder is DONE_ XXX, where XXX is identical with the code, which you specify in the **Profile Code** field.

With Own Failed Folder	When this check box is selected, the finished defective documents for this profile will be placed in the profile's own FAILED folder instead of the standard FAILED folder of the installation. The name of the profile specific folder is FAILED_XXX, where XXX is identical with the code, which you specify in the **Profile Code** field.
Enable Registration From Failed Folder	When this check box is selected, the user gets the possibility of making a manual registration of the files, which have ended up in the profile's own FAILED folder.

5.3.3 The SJ ServerScan Admin window

Field	Description
ServerScan Root Folder	Defines the path to the folder SJSKANROOT that contains the sub-folders CFG, CLIENT, and so on.
XSL/XSLT File	Defines the full UNC path to the XSL or XSLT file used as transformation file. The transformation file is used for translating the XML file, which is generated by the InfoScan programs, to an XML file with the format used by WorkZone Content Server. The transformation file is delivered together with the InfoScan programs

and has the name `sjtrans.xslt`. It is placed under

`..SJSKANROOT/XLS….`

XML Out Folder	Defines the path to the folder where finished XML files and TIFF files are delivered. This is where the Service Channels fetch the files.
InfoScan Poll ini-file	Defines the path to the folder in which the InfoScan programs are installed. If the server and the scanning client do not have the same path to program files, you can specify the path as `%ProgramFilesDir%\InfoScan.` A similar notation is used if the server and the scanning client use different installation languages.
Master CFG File	Defines the full UNC path to the `sjPoll.cfg file`, which has to function as the master configuration file of the entire installation.
Initstring On Profile Code	The profile that can distribute documents to other profiles. **Profile Distributor** must read the actual profile to be used from a cover page. The **Profile Distributor** must read a code, which identifies the profile to which a document must be distributed. Like all other codes for a cover page, this code must have an "initstring", so that WorkZone Content Server Imaging can distinguish this code from the other codes for the cover page. The code is put only on the main document – and not on the appendix documents. For more information, see How do I scan to the Profile Distributor? It is recommended that you use a maximum of three letters for an "initstring".
Mail Server	Defines the IP number or name of the mail server, from where e-mails related to the scanning process must be sent.
Mail Sender On Error	Defines the address of the sender on e-mails to be sent when errors occur during the scanning process.
Default Receiver On Error	Defines the address of the recipient of e-mails concerning errors which occur during the installation process. This property can be configured for each profile as well. For more information, see Mail On

	Error.
Enable Schema Validation when storing XML Files	If the **Enable Schema Validation when storing XML Files** check box is selected, then the XML files are validated against Schema before being delivered to **XML Out**.

5.4 Editing configuration files

5.4.1 Get access to editing CFG files

The way the InfoScan programs work depends on the contents of the CFG files that are used by the InfoScan programs. You can edit CFG files using the InfoScan Setup program. The following describes how you edit the master CFG file, which is defined in advance.

The procedure below describes how you get access to editing the CFG files and to configure the InfoScan programs.

1. Select **Start** > **All Programs** > **InfoCD** > **InfoScan** > **InfoScan Setup** to start the InfoScan Setup.

2. Click to open the **Load Configuration** dialog box.

3. In the **Configuration file** field, enter the name of the CFG file that you want to edit, or browse to find the file and then click **OK**.

   The **InfoScan Setup** window opens with the **Registration Setup** page and the **Search Setup** window displayed on top of it.

5.4.2 Manage fields in the XML database

Important: Before you can manage fields in the XML database, you must get access to editing CFG files.

Create a new field in the XML database

1. In the **InfoScan Setup** window, click [icon] in the toolbar to open the In the **Database Setup** window.

2. Click the browse button (**...**) next to the **Database Connection** field. The **The Set XML Fields window** opens.

3. In the **Fields** list, enter the name of the new field in an empty field.

> **Notes:**
>
> - You can use any names for the fields except for the name `iskonsep`, which is reserved. The content of the `iskonsep` field defines whether a cover page is an envelope cover page or a document cover page. See Types of cover pages.
>
> - Single-value fields must be placed before multi-value fields in the **Fields** list. If you need to change the order of fields, see Move a field in the XML database.

3. In the **Field Type** group box, select one of the options below:

- **InfoScan Field** - The field is placed in the `<dkfm:metadata>` part of the finished XML files.

- **SJ Field or SJ Group** - The field is placed in the `<sj:metadata>` part of the finished XML files.

  > **Note:** For single-value fields, select **SJ Field** in the **Field Type** group box.

  The content of the window changes according to the selected option.

4. In the fields below the **Field Type Attributes** and the **Additional Attributes**, enter the field attributes. See the description of the attributes in The Set XML Fields window.

> **Notes:**
>
>   - For single-value fields, both the group name and the field name must be entered in the `sjfieldname` field. The group name and the field name must be separated by a colon. For example, `ekstra:loa_pst`, where `ekstra` is the group name and `loa_pst is` the field name.
>   - For fields used for a date, you must enter the text `ISO8601` in the **sjscheme** field. Use only the format `YYYY-MM-DD` for a date.

5. In the **Use XSLT file to transform output** field, enter the name of the XSLT file to be used for transformation of the XML file, which is generated by the InfoScan programs.

> **Note:** The full path to the file must be specified.

6. Click **OK** to close the **Set XML Fields** window. The new field is defined.

Edit a field in the XML database

1. In the **InfoScan Setup** window, click in the toolbar to open the **Database Setup** window.

2. Click the browse button (**...**) next to the **Database Connection** field. The **Set XML Fields** window opens.

3. In the **Fields** list, select the field that you want to edit. The attributes of the selected field are displayed to the right.

4. Edit the attributes as required (see a description of the attributes in The Set XML Fields window) and then click **OK**. The **Set XML Fields** window closes, and the attribute values have been changed.

Move a field in the XML database

1. In the **InfoScan Setup** window, click ![icon] in the toolbar to open the **Database Setup** window.

2. Click the browse button (**...**) next to the **Database Connection** field. The **Set XML Fields** window opens.

3. Click the **Reorder Fields** button.
   A **del** button next to each field in the **Fields** list is activated, and the text on the **Reorder Fields** button is changed to **Edit/Add Fields**.

4. Use "drag-and-drop" to move the fields.

   > **Note:** Single-value fields must be placed before multi-value fields in the **Fields** list.

5. Click **OK** to close the **Set XML Fields window** when you have finished moving the fields.

Delete a field in the XML database

1. In the **InfoScan Setup** window, click ![icon] in the toolbar to open the **Database Setup** window.

2. Click the browse button (**...**) next to the **Database Connection** field. The **Set XML Fields** window appears.

3. Click the **Reorder Fields** button.

   The **del** button next to each field in the **Fields** list is activated, and the text on the **Reorder Fields** is changed to **Edit/Add Fields**.

4. Click **del** next to the field that you want to delete. The selected field is deleted.

5. Click **OK** to close the **Set XML Fields window**.

Configure a default value for a field

1. In the **InfoScan Setup** window, click ▣ in the toolbar to open the **Database Setup** window.

2. In the **Selected Fields** list, double-click the field for which you want to define a default value. The **Edit Field - <**_field name_**>** window opens.

3. In the **Default Value** group box, select a radio button.

   - **None** - No default value will be assigned to the field. Go to step **5**.
   - **User Defined** or **System Defined** - You can assign a default value to the field as described in step **4**.

   By default the following user defined values are used:

   - **Forfatter** [Author]: #TOM#
   - **Afsendt fra** [sent from]: #TOM#
   - **Afsendt af** [sent by]: #TOM#

4. Enter a value in the field next to **User Defined** or select a value from the list next to **System Defined**.

   Note: If you enter a value in the field next to **User Defined** , you must make sure that the value complies with the **OIO**[1] standard.

---

[1]OIO-standardization. OIO = Offentlig Information Online (Public Information Online). A Danish National Standard for handling metadata, joint standards and architecture within the public sector's IT projects.

5. Click **OK**. The **Edit Field - <*field name*>** window closes, and the default value for the field is defined.

Configure an additional property for a field

To configure additional properties for a field in the XML database, you can specify characters to be added as prefix or postfix (suffix) to the value of a field, or you can copy the value of a field to another field.

1. In the **InfoScan Setup** window, click in the toolbar to open the **Database Setup** window.

2. In the **Selected Fields** list, double-click the field for which you want to define a default value. The **Edit Field - <*field name*>** window appears.

3. In the **Extended Field Properties** group box, do one or more of the following:

   - In the **Fixed Prefix** field, enter the characters that you want to be a prefix to the value of the field that you selected in step 2.

   - In the **Fixed Postfix** field, enter the characters that you want to be a postfix to the value of the field that you selected in step 2.

   - In the **Copy Regvalue to Field** field, enter the name of the field to which you want to copy the value of the field that you selected in the step 2.

   - In the **Copy Finalvalue to Field** field, enter the name of the field to which you want to copy the value of the field that you selected in step 2, including prefix/postfix.

   For example:

   - The value of the field, which is selected in the **Selected Fields** list, is

`t9a.`

- In the **Fixed Prefix** field, the value `M:` has been entered.

- The **Fixed Postfix** field is empty.

- In the **Copy Regvalue to Field** field, the field name `sjindblik` has been entered.

- In the **Copy Finalvalue to Field** field, the field name `sjsagsbeh` has been entered.

The result is that the value `t9a` is copied to the field `<sj:field name="indblik">`, and that the value `M:t9a` is copied to the field `<sj:field name="sagsbeh">`.

4. Click **OK**. The **Edit Field - <*field name*>** window closes and the additional properties for the field are defined.

The Database Setup window

The **Database Setup** window contains the following elements:

Field	Description
Available Fields	Shows the list of fields available for insertion in the XML database. You can select fields in this list and move them to the **Selected Fields** list (for more information, see **Selected Fields**). The fields are defined by a name and a type.
Database Connection	Shows the name of the XML database. The XML database is always called ISXML, and the field cannot be edited.
Don't Save DAT Files	When this check box is selected, the DAT files of the InfoScan programs will not be saved together with the XML and TIFF files.
Don't Save OCR Files	When this check box is selected, the OCR files will not be saved.
Field to Contain Document	IS NOT USED in SJ solutions!
Field to Contain File Link	Specifies the field in the XML database, in which the link to the TIFF files must be placed. The field which is selected in the drop-down list will be used for saving path- and file names. Therefore you can select only fields of the type text. This is the field which is translated to the `<dc:HasPart>` element in the finished XML files.
Filename for Saved TIF Files	Provides the possibility of deciding how the TIFF files must be named. Default setting is `@UNIQUE@.TMP@UNIQUE@.tif`.
Folder to Store	Specifies the folder in which the finished XML files and TIFF files must be

Documents in	delivered. This is where the WorkZone Content Server XdiDataConsumer fetches the files. The folder is identical with the folder specified in the **XML Out Folder** field (for more information, see XML Out Folder.) You can either enter a path in the field or use the browse button to select the relevant drive and folder.
Save Document as File Link in Field	When this option is selected, the fields and buttons below it are activated. Then you can specify the attributes necessary for saving documents as TIFF files in a specified folder.
Save Document Embedded in Field	IS NOT USED in SJ solutions!
Selected Fields	The list shows the fields which are selected to be inserted in the XML database. You can select fields in this list and move them to the **Available Fields** list (for more information, seeAvailable Fields). The fields are defined by a name and a type.
Table Or View	Defines the name of the XML table. The XML table is always called **Root Element**. The name has no importance and is only used because the InfoScan programs must know a table name.

The Set XML Fields window

The **Set XML Fields** window contains the following elements:

Option	Description
Fields	Defines the list of fields which are contained in the XML database.
InfoScan Field	When this option is selected, the field, which is currently selected in the **Fields** list, is placed in the `<dkfm:metadata>` part of the finished XML files. The fields **isdestname** and **scheme** appear as attributes in the window.
isdestname	Defines the name of the element in which the value of the currently selected field in the **Fields** list must be placed in the finished XML file. **Example:** If, for instance, the **isdestname** attribute is defined as `dc:title`, and the field has the value `Hello`, it will look like this in the finished XML file: `<dc:title>Hello</dc:title>` The **isdestname** attribute only exists, if the **InfoScan Field** option is selected.
Name	Defines the name of an extra attribute, which must be inserted in the finished XML file. The value of the extra attribute is defined in the **Fixed Value** field. See also the example of usage of this field in sjgroupname.

Fixed Value	Defines the value of the attribute, which is defined in the **Name** field. See also the example of usage of this field in sjgroupname. In KMD's solution: IndScanPers.

scheme	Defines the value of the scheme attribute in the finished XML file.
	
	Example:
	
	If, for instance, the **isdestname** attribute is defined as `dc:HasPart`, the `scheme` attribute is defined as `URL`, and the currently selected field in the **Fields** list has the value **File**`:///c:/sjout/1.tif`, it will look like this in the finished XML file:
	
	`<dc:HasPart`
	
	`scheme="URL">File:///c:/sjout/1.tif</dc:HasPart>`
	
	The scheme attribute only exists, if the **InfoScan Field** option is selected.

SJ Field	When this option is selected, the currently selected field in the **Fields** list is placed in the `<sj:metadata>` part of the finished XML files. The fields **sjfieldname** and **sjscheme** appear as attributes in the window.
sjfieldname	Defines the value of the name attribute in the `<sj:field>` element in the finished XML file. **Example:** If, for instance, the **sjfieldname** attribute is defined as `indblik`, and the currently selected field in the **Fields** list has the value LBP, it will look like this in the finished XML file: `<sj:field name="indblik">LBP</sj:field>` The **sjfieldname** attribute only exists, if either the **SJ Field** or the **SJ Group** options is selected.
SJ Group	When this option is selected, the currently selected field in the **Fields** list is placed in the `<sj:metadata>` part of the finished XML files. The fields **sjgroupname**, **sjfieldname** and **sjscheme** appear as attributes in the window.
sjgroupname	Defines the value of the **name** attribute in the `<sj:group>` element in the finished XML file.

Example:

If, for instance, the **sjgroupname** attribute is defined as `datogroup`, the sjfieldname attribute is defined as `dato`, the **sjscheme** attribute is defined as `ISO8601`, the **Name** attribute is defined as `ledetxt`, the **Fixed Value** attribute is defined as `fødselsdato`, and the currently selected field in the **Fields** list has the value `2007-03-15`, it will look like this in the finished XML file:

```
<sj:group name="datogroup"><sj:field
name="ledetxt">fødselsdato</sj:field><sj:field
name="dato" scheme="ISO8601">2007-03-
15</sj:field></sj:group>
```

The **sjgroupname** attribute only exists, if the **SJ Group** option is selected.

sjscheme	Defines the value of the scheme attribute in the `<sj:field>` element in the finished XML file.

Example:

If, for instance, the **sjgroupname** attribute is defined as `datogroup`, the sjfieldname attribute is defined as `dato`, the **sjscheme** attribute is defined as `ISO8601`, the **Name** attribute is defined as `ledetxt`, the **Fixed Value** attribute is defined as `fødselsdato`, and the currently selected field in the **Fields** list has the value `2007-03-15`, it will look like this in the finished XML file:

```
<sj:group name="datogroup"><sj:field
name="ledetxt">fødselsdato</sj:field><sj:field
name="dato" scheme="ISO8601">2007-03-
15</sj:field></sj:group>
```

The **sjscheme** attribute only exists, if either the **SJ Field** or the **SJ**

	Group option is selected.
Use XSLT file to transform output	Defines the path to the XSLT transformation file, which must be used for transforming the format of the XML file of the InfoScan programs to the format used by the XML file of WorkZone Content Server.
	Note: When adding new fields the order of the fields is very important. The fields must be placed in the following order: **InfoScan Field**, **SJField** and **SJGroup**.

5.4.3 Configure codes for cover pages

Types of cover pages

There are two types of cover pages:

- **Envelope cover pages** - The purpose of an envelope cover page is to tell the scanner that scanning of a letter is going to start. An envelope cover page is identified by the initstring "**SKB1**".

- **Document cover pages** - The purpose of a document cover page is to separate different documents, which are placed between two envelope cover pages. For example, the document cover pages can separate a letter and the appendices belonging to it. A document cover page is identified by the initstring "**SKB0**".

Predefined codes for cover pages

Code	Description
KON	Defines that the page is a cover page. This initstring must be written on all cover pages.
SKB1	Defines that the page is an envelope cover page.
SKB0	Defines that the page is a document cover page.

The codes above identify the cover pages. The additional codes - information codes listed below - are used if you wish to supply specific information to the documents following a cover page.

SKB0 is used when you want to register the scanned document automatically. The codes for automatic registration of information on the document must always be supplied with additional values, for example, the code for "**Case handler**." This code must be supplied with the initials of the case handler, for example, *SBHCNK*.

If you write this code on a cover page, the case handler with the initials CNK will be registered as the case handler of the document.

> **Important:** Be aware that the codes for the cover pages always must be surrounded by asterisks (*), when you write them on a cover page.

Code	Description
AGR	Record group
ATY	Record type
ENH	Responsible unit
CPR	CPR number
EM1	Keyword1
EM2	Keyword2
IBK	Access code
SBH	Case handler
SNR	Case number
SFD	Reply deadline date

Format of codes for cover pages

On the cover pages, the codes must be written in bar codes and not as normal text. The bar code fonts are supplied on the WorkZone Content Server installation folder in `../Program files/KMD/WorkZone/Util`.

You can use either **3 of 9 Barcode** (this font has the filename `3OF9.TTF`) or **Free 3 of 9 extended** (this font has the filename `FRE3OF9X.TTF`).

It is recommended that the cover page codes are written in Microsoft WordPad and that you use Arial and font size 26 before you transfer it to bar code.

For example:

SBHCNK in bar code: ||||||||||||||||||||||||||||||||||

Configure the code identifying a cover page

You can configure the code which identifies a page as being a cover page. This code is predefined in the system and under normal conditions this procedure is not to be performed.

> **Important:** Before you can configure the code which identifies a page as being a cover page, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click in the toolbar. The **Capture Setup** window opens.

2. Select the **Separate Documents with Cover Pages** check box and click **Settings** next to the check box. The **Cover Page Settings** window opens.

3. Select the **Barcodes** option. The **InitString** field is activated.

4. In the **InitString** field, enter the text KON.

The text from the **InitString** field defines the code, which must be written on a cover page to make the InfoScan programs able to identify the page as being a cover page. This code is normally KON.

5. Click **OK** to close the **Cover Page Settings** window. The general code for identification of a cover page is defined.

6. Click **OK** to close the **Capture Setup** window.

Configure other codes for cover pages

Important: Before you can configure the other codes for cover pages, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click in the toolbar. The **Capture Setup** window opens.

2. Select the **Separate Documents with Cover pages** check box and click **Settings** next to the check box. The **Cover Page Settings** window appears.

3. Click in the toolbar button to create a new cover page field. The **Edit Cover page Field Properties** window opens.

4. Do the of the following:

    - In the **Name** field, enter the name of the code for the cover page.

    - In the **InitString** field, enter the code to be used on the cover page.

5. Click **OK** to close t he **Edit Cover page Field Properties** window. The new code is defined and can be seen in the list at the bottom of the **Cover page Settings** window.

6. Repeat steps **3** to **5** for each code that you want to define.

7. Click **OK** to close the **Cover Page Settings** window.

8. Click **OK** to close the **Capture Setup** window.

Edit a code for a cover page

Important: Before you can edit codes for cover pages, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click in the toolbar. The **Capture Setup** window opens.

2. Select the **Separate Documents with Cover pages** check box and click **Settings** next to the check box. The **Coverpage Settings** window opens.

3. In the list at the bottom of the window, select the code which you want to edit.

4. Click in the toolbar or double-click on code. The **Edit Cover page Field Properties** window opens and shows the properties of the selected code.

5. Edit the relevant properties and click **OK**. Tthe new properties of the code are defined and can be seen in the list at the bottom of the **Cover page Settings** window.

6. Repeat steps **3** to **5** for all the codes, which you want to edit.

7. Click **OK** to close the **Cover Page Settings** window.

8. Click **OK** to close the **Capture Setup** window.

Delete a code for a cover page

Important: Before you can delete codes for cover pages, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click in the toolbar. The **Capture Setup** window opens.

2. Select the **Separate Documents with Cover pages** check box and click **Settings** next to the check box. The **Coverpage Settings** window opens.

3. In the list at the bottom of the window, select the code that you want to delete.

4. Click in the toolbar and then **OK** to delete the code. The window closes, and the selected code is deleted from the list at the bottom of the **Coverpage Settings** window.

5. Repeat steps **3** to **4** for all the codes, which you want to delete.

6. Click **OK** to close the **Cover Page Settings** window.

7. Click **OK** to close the **Capture Setup** window.

Configure inheritance of information from cover pages

The scanning process can be configured so that appendices inherit the registration information from the cover page of the main document.

> **Important:** Before you can configure inheritance of information from cover pages, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click in the toolbar. The **Capture Setup** window opens.

2. Select the **Separate Documents with Cover pages** check box and click **Settings** next to the check box. The **Coverpage Settings** window opens.

3. In the **Inherit Values** list, select the value **From Main Document to Sub Documents** and click **OK** to close the **Coverpage Settings** window.

> **Notes:** The **Inherit Values** list contains two more values:
>
> - **No**, = inheritance is not wanted
>
> - **All**, = inheritance must be used between main documents.

4. Click **OK** to close the **Capture Setup** window.

Use a conversion table for special characters

If you have a need for using special characters in the codes for cover pages, you must define a conversion file containing a conversion table. You can find an example of a conversion file in

```
SJSKANROOT\skillebladskoder.txt
```

Codes for cover pages

The codes for cover pages can be interpreted using the conversion table in the conversion file. The conversion table is used, when you want to use a character in a code for a cover page and this character is not a part of the used bar code font. It can be characters such as | ^ (.

If you have a very long text, which cannot be held in one line, the conversion table can be used for making "abbreviations."

About The conversion table

A conversion table in WorkZone Content Server Imaging is a text file, which, for example, contains the following:

```
.1X;(

2X;)

..3X;|

.4X;&

.5X;(ALLEEMNER&648652)|(POST&0)
```

When converting the code for a cover page using a conversion table, the text on the left side of the semicolon in the conversion table is substituted by the text on the right side.

Example

Using the conversion table above, the code `IBK.5X` will be translated to the expression: `IBK(ALLEEMNER&648652)|(POST&0)`.

The path to the file that contains the conversion table must be specified in the **Cover Page Settings** window.

Configure the path to the conversion table

> **Important:** Before you can configure the path to the conversion table, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click in the toolbar. The **Capture Setup** window opens.

2. Select the **Separate Documents with Cover pages** check box and click **Settings** next to the check box. The **Coverpage Settings** window opens.

3. In the **Path To Conversion File** field, enter the path to the file containing the conversion table, and click **OK**.

4. Click **OK** to close the **Capture Setup** window.

5.4.4 Configure e-mail notifications

If errors occur when scanning a document, the system generates an error message, which is sent by e-mail. Therefore you must configure who is to receive e-mails in case of errors. This is usually done in the SJ ServerScan Admin window. This is a general configuration, which applies to all scanning, however you can also choose to configure the scanning separately, in case more than one person must receive error messages from specific scanning processes.

Important: Before you can configure individual e-mail notifications, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click in the toolbar. The **Capture Setup** window opens.

2. Select the **Poll from Disc** check box and click **Settings** next to the check box. The **Poll Settings** window opens.

3. In the list, select the poll type for which you want to configure e-mail notifications.

4. Click in the toolbar. The **IS Capture Error Mail Notification Properties** window opens.

5. In the **Address or IP number** field, enter the name or IP address of the computer acting as mail server.

6. In the **Email address of Sender** field, enter the e-mail address of the sender of e-mails.

7. Select the **Use same mail recipient for all IS Capture Errors** check box.

   Note: Do not select the **Use different mail recipients depending on IS Capture error** option.

8. In the **Email Address** field, enter the e-mail address of the recipient of e-mails.

9. Click **OK** to close the **IS Capture Error Mail Notification Properties** window. It is defined who is to receive e-mails in case of errors.

10. Click **OK** to close the **Poll Settings** window.

11. Click **OK** to close the **Capture Setup** window.

5.4.5 Design the window for manual registration

You can design the window used for manual registration of scanned documents (in the following called the registration window).

> **Important:** Before you can design the window used for manual registration of scanned documents, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click ⊞⊞ in the toolbar to open the **Registration Setup** window. The toolbar in the **Registration Setup** window contains buttons for inserting check boxes, buttons, labels, text fields, drop-down lists, and group boxes for grouping of elements.

2. Insert an element in the window by clicking on the button in the toolbar. An element of the selected type is inserted in the left side of the **Registration Setup** window.

3. Repeat step **2** for each element that you want to insert.

4. Move the inserted elements using drag-and-drop.

5. Double-click on the element to attach properties. The **Edit Control - New Control** window opens.

6. In the **Name** field, enter a unique name for the element. This name is only used for identifying the element in question in the complete registration window.

7. If you want to attach properties to a text field, a check box or a drop-down list,

   Do the following:

   - In the drop-down list in the **Database Link** group box, enter the name of the field in the XML database, to which the actual text field,

check box or drop-down list must be linked. When you enter a value in the text field, select the check box or select a value in the drop-down list during registration of a scanned document, the entered or selected value is saved in the field to which you link in the XML database.

- Select the **Clear after registration** check box, if the check box or the fields in the registration window must be cleared (emptied) when a document has been registered.This means that the check box or the field is empty, when a new document is fetched for registration. If the **Clear after registration** check box is not selected, a check mark respectively a text from the registration of the previous document will be retained in the registration window, when the next document is fetched for registration.

Otherwise - go to step **8**:

8. If you want to attach properties to a button,

   Do the following:

   - In the **On click** drop-down list in the **Actions** group box, select a relevant action to be performed by the button:

     - **Next Doc** - fetches the next document from the folder configured for the purpose.

     - **Fail Doc** - moves the current document to the folder for deleted and defective documents.

     - **Doc Done** - moves the current document to the folder for finished documents.

     - **Delete Page** - deletes the page which is currently shown on the screen.

- Save Pages - registers the scanned document from page 1 to the page which is currently shown on the screen. The registration uses the properties, which have been entered in the registration window.

- Change Queue - the function is not used. The purpose of the function is to make the program fetch documents from another folder than the current one.

Otherwise - go to step **9**.

9. In the **Size and Position** group box, enter the exact size and position of the element, if you want a precise specification (must be entered in TWIP). This option is used for fine-tuning your layout.

10. In the **Tab order** field, enter the number in the tab order that the element must have.

11. In the **Resizing Behavior** group box, specify how the element must react, if the user resizes the registration window.

12. Click **OK**.

The **Edit Control - New Control** window closes, and the properties of the element are defined. The input focus returns to the **Registration Setup** window.

13. Repeat step **5-12** for each of the elements in the registration window.

Configure general properties for the registration window

Important: Before you can configure general properties for the registration window, you must get access to editing CFG files.

1. In the **InfoScan Setup** window, click in the toolbar to open the **Registration Setup** window.

2. Click ![icon] in the toolbar to configure general properties. The **InfoScan Registration General Setup** window appears.

3. In the **Application title** field, enter the name to be displayed in the title bar of the registration window. The name will be the name that the user will see as the window title when registering scanned documents manually.

4. In the **Registration** group box, select the check box(es) specifying how the registration must be done:

   - **Automatically Get Next Document from Queue** - The next document in the queue will automatically be fetched to the registration window when the previous document is finished.

   - **Automatically Load Default Values in Form** - Default values will automatically be inserted in the registration window when a document is fetched for registration.

   - **Delete Queue Documents After Successful Registration** - Documents will be deleted from the queue when they have been registered without the errors.

5. In the **Available Functions on Toolbar/in Menus** group box, select the check boxes for functions, which must be available in the toolbar and the menus in the registration window.

6. Click **OK** to close the **InfoScan Registration General Setup** window and save the properties.

5.5 Installing InfoScan Poll

About the InfoScan Poll program

InfoScan Poll fetches TIFF files from the folder(s) to which the scanning clients scan. From InfoScan Poll the files are taken to **WorkZone Content Server XdiDataConsumer** and

then transferred to WorkZone Content Server.

Scanning to WorkZone Content Server is not possible, if the program InfoScan Poll is not running. The program can be started by means of the ispoll.exe file. You can make a shortcut to this file and copy it to the desktop. However, the most common is the run the program as a Windows service on the server.

Install InfoScan Poll as a Windows service

1. Double-click the `ispollserviceinstall.exe` file in the folder `C:\Program Files\InfoScan`.

   The **InfoScan Poll Service Install** window appears.

2. Click **Install Service**.

   The **InfoScan Poll Service Install** window closes, and the service is installed.

3. Select **Start** > **Settings** > **Control Panel** > **Administrative Tools** > **Services**.

   The **Services** window appears.

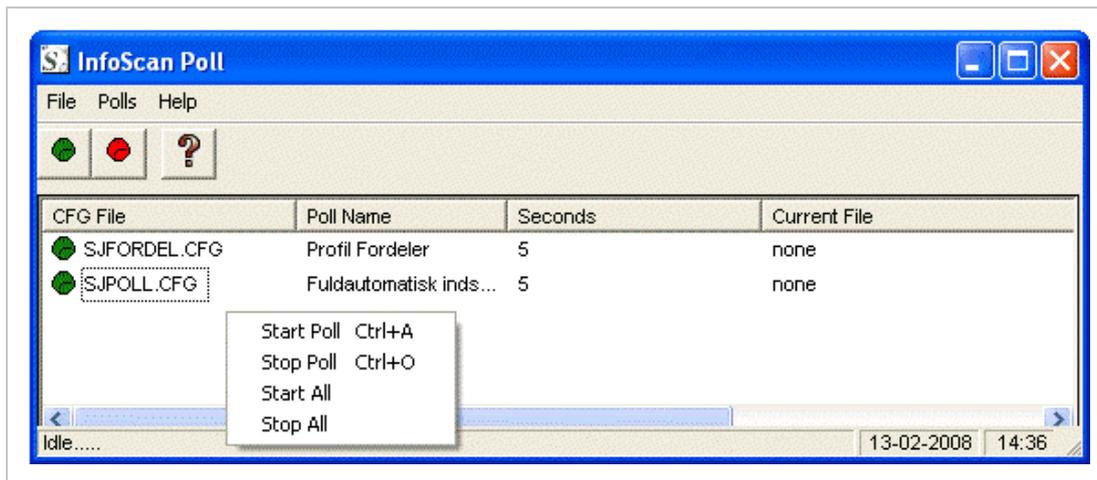4. In the **Name** column, select **.InfoScan Poll**.

5. Configure the service to start automatically and to log on as a user, who has privileges to access all folders used by the CFG files, which are used by the program InfoScan Poll.

6. Check that the service has started.

The InfoScan Poll window

When the **InfoScan Poll** program runs, the **InfoScan Poll** window is displayed:

In the **InfoScan Poll** window, you can read the status of the program. Each line in the window represents one polling according to the rules in one CFG file. If a line begins with a green icon, it signifies that the polling is running. A red icon signifies that the polling is not running.

Polling can be started and stopped through the pop-up menu, which appears when you right-click on a line in the window.

Troubleshooting

If a polling cannot be started (and shows a red icon), an error message is shown in the **Status** column in the **InfoScan Poll** window. A detailed error message appears, when you double-click on the line with the defective polling.

The most common errors are:

Error: 10000 Poll index folder does not exist

This error means that the program InfoScan Poll cannot find the folder from which the files must be fetched. If the InfoScan Poll program runs as a Windows service, this error can occur, if the service is not configured correctly. The service has to log on as a domain user with privileges to access the folders used by the program.

Error: 30002 File not found

This error means that the program InfoScan Poll cannot find the CFG file referred to in `ispoll.ini`.

5.6 Control scanning with SJ ServerScan Starter

SJ ServerScan Starter is used on the scanning clients used by users who perform the scanning. As a standard the program is located in the CLIENT folder, and it is accompanied by the last published INI file from the program SJ ServerScan Administrator.

Start SJ ServerScan Starter on a client

1. Start the scanning program by double-clicking the `SJServSkan.exe` file in the shared folder `\SCANROOT\CLIENT`.
   The **SJ ServerScan Starter** window appears.

2. In the **Start Program** group box, select whether you want to scan with manual or automatic registration (auto scan). Auto-scanning and scanning are in principle the same process, but in auto-scanning you do not have the possibility of specifying whether the scanning must be in color, duplex, etc. On the other hand, in auto-scanning you get a faster flow of work.

3. In the **Profiler** table, select the profile which you want to use in the scanning.

4. Click **Start**.
   The SJ ServerScan Starter window closes. The scanning program starts the program, which you selected in the **Start Program** group box. The program uses the CFG file associated with the selected profile in the **Profiler** table.

6. Supplementary installation notes

This section will be updated with released notes from our 3rd party vendor InfoScan either due to new software releases or bug handling by KMD.

Configure the page size of blank pages

In InfoScan Setup you can enable or disable a function that explores the page size of blank pages and removes "noise" from the pages.

When this function is enabled you can define a general page size for blank pages to be disregarded independently of the scanner make. It is a prerequisite, however, that all scanners have the exact same setup regarding paper size, color depth and resolution.

Install Service for several instances

It is possible to install Enterprise Imaging (ServerScan) as a service for more than one instance. To create several instances, you must substitute ISPollServiceInstall with ISPoll.

> **Important:** You can only run one instance per account. If you run several, you run the risk of mixing documents from several instances in the same queue.

When using InfoScan Poll service installation, you can enter the name of the **Service** and which `ispoll.ini` that the service must utilize.

You are able to install a service as a **Local System Account** or with an active user account. You can allow the service to show its interface but only when the service is installed with the **Local System Account**.

InfoScan automatically writes to the individual `ispoll.ini` which **Service** it is attached to.

To install ISPoll:

1. Open the properties of the shortcut.

2. Insert relevant parameters in the **Destination.** For example:

```
C:\Programmer\InfoScan\ISPoll.exe -install
```

   In connection with service for several instances the file NTSVC.ocx must be utilized. It is a Microsoft Active-X Control for controlling the services. You can read more here at Microsoft.com.

3. Register the file with `Regsvr32.exe`.

Setup in SJ ServerScan Admin

In SJ ServerScan Admin you are able to enter which `ispoll.ini`, you want to publish to.

In general practice, this means that you create multiple setups of SJScan. Furthermore, you are able to run these as Services with different configurations.

Paths in SJ ServerScan Admin must be entered in UNC format, for example:

```
\\ComputerName\SharedFolder\Resource
```

Set Filter013 to export directly to a document (ISFILTER013.DLL version 1.8.77)

In the **Database Setup** dialog in the section **Document Storage Properties**, it is possible to set up `ISFILTER013` to export to a specific document queue instead of the file system. The. FILTER013 explores the queue type and automatically queues the documents in the correct format.

In this case the document order is maintained and the risk of duplicates is eliminated.

1. Open the database **Setup Dialog**.

2. Enter the path of the queue in **Folder to Store Documents in**.

3. In **Filename for Saved TIF Files** enter `queuendx.dat`.
   The FILTER013.DLL will now export to this queue instead of the file system.

> **Important:**
>
> - Only queue type 0x02030001 (**InforRecon** scanned or created) is supported at the moment.
>
> - **SingleIrDocument** value is by default selected. If you wish to disable this selection, you must create a field named **SingleIrDocument** with the value `0`.

Change TWAIN scanning Tiff compression format

In the file `twain.cfg`, which is placed in the **InfoScan** folder, you can indicate which compression type of the scanned documents TIFF files that are accepted.

In the section `[Scanner]`, three keys can be entered to indicate the TIFF compression at either Black/white, Gray or Color.

```
[Scanner]

Name=FUJITSU fi-4120Cdj

BWCompression=3

GrayCompression=9

ColorCompression=9
```

If a specific compression type is wanted for a specific scanner, you must enter it in the fashion shown below in the `Twain.cfg`:

```
[FUJITSU fi-4120Cdj]

BWCompression=3

GrayCompression=9

ColorCompression=9
```

In the table below are shown the individual compression types and where they are valid.

Code	Description	Code Validaty		
		B\W	Gray	Color
-1	Benyt Twaindrivers kompressionstype	V	V	V

0	Ukomprimeret	V	V	V
1	CCITT modified Huffman RLE	V		
2	CCITT Group 3 fax encoding	V		
3	CCITT Group 4 fax encoding	V		
4	LZW	V	V	V
6	'new-style' JPEG		V	V
8	CCITT RLEW	V		
9	Apple Macintosh PackBits	V	V	V
12	PixarLog	V		
13	'old style' Defalte	V	V	V
18	Adobe Deflate	V	V	V

> **Note:** A scanned TIFF file is converted after the scanning has been fully performed and thus will create a time laps.

InfoScan's default TIFF compression is:

```
B/W: CCITT Group 4 fax (3)

Gray: Apple Macintosh PackBits (9)

Color: Apple Macintosh PackBits (9)
```

For up-to-date recommendations from The Danish State Archives please refer to http://www.sa.dk/content/us.

New Barcode Engine

Windows Vista, Windows 7 or Windows Server 2008 or newer demands new bar code engine.

The new barcode engine (DTK) is always installed by default from version 1.8.77 and onwards. The former barcode engine (PIX) can only be installed if you select it during setup..

If you select PIX at installation, this is the engine used to decode barcodes. If you at a later date want to revert to the new engine, you must remove the file: `ISBARCODE_ DLL.DLL` to force decoding with the DTK engine.

However, please note that PIX (the former barcode engine) is not supported for Windows Vista, Windows 7 or Windows Server 2008 or newer. In these cases only DTK may be used!

In InfoScan's barcode tester you can see which barcode engine that has been installed.

> **Important:** Note that version 1.8.76 is locked to the PIX barcode engine. If you wish scanning performed on the above-mentioned platforms, you must upgrade to 1.8.77 or newer.

Configure Barcode Reader (DTK) for Other Barcode Types

If you want to support other barcode types than the types installed by default, you will have to manually create an INI-file with the name `iscapture.ini` and place it in the `WINDOWS` folder.

The default barcode types are: `Code 39 + Code39 extended + Code128 + EAN13`

In the configuration file `iscapture.ini` you can indicate which barcode types should be read (decoded):

```
[BARCODES]

BARCODETYPE=xxx
```

`xxx` stands for a combination of the following codes, where the codes are added for reading several barcode types:

Code	Barcode type
1	Code11
2	Code39
4	Code93
8	Code128
16	Codabar
32	Inter2of5
64	PatchCode
128	EAN8
256	UPCE
512	EAN13
1024	UPCA
2048	Plus2

4096	Plus5
8192	PDF417
16384	DataMatrix
32768	QRCode
65536	Postnet
131072	Planet
262144	RM4SCC
524288	AustraliaPost
1948576	IntelligentMail
2097152	Code39Extended

You must add the codes of the barcode types you want the bar code engine (reader) to recognize and indicate the sum.

Example: Let's say you want to support `Code11, Code39, Code93` and `Code 128`. Now add up the code numbers: `1+2+4+8`. The sum is `15`.

In the `incapture.ini` file this should be indicated as follows:

```
[BARCODES]
BARCODETYPE=15
```

InfoScan ID is Not Compatible With Older Ispoll Versions

Workaround of error in manual scanning in version 1.8.76:

Since InfoScanID is incompatible with older versions of ispoll, the key below disables **InfoScanID=XXXXXXX** from the scanned or polled documents' dat files:

Added key to cfg files:

```
[SCAN]

DONTUSEDOCID=1
```

This key should only be added if `ispoll` older than version 1.8.56 or `isCapture` newer than version 1.8.56. And vice versa.

Minimize Barcode Errors

For a correct decoding of bar codes, it is important that the barcode font complies with specifications for ratios between black and white. Furthermore, the thickness of white and black bars also influences how the barcode should be read.

You can find many free bar code fonts on the net such as **Free3of9.tff** and **FRE3of9x.tff**, however common for all these fonts are that they are NOT certified. In other words, users of these fonts may experience that when they scale or curb the fonts at different sizes the ratio between black and white is skewed or the thickness varies to such an extent that error occur in the decoding process.

The font that is supplied with InfoScan's software package is a FREEWARE font and suffers from the same lack of certification as the ones mentioned above.

Another source of error is the scanner equipment itself. Local scanners with VRS usually generate a better result than older network scanners of the Xerox multifunction types.

Mind you that bar code sheets (cover pages) wears out over time and should be replaced time and again with a new printed version and NOT a photo copy!

To sum up our advice: to assure correct decoding we advise you to purchase a certified barcode from a trusted vendor, for example, www.idautomation.com.

And adhere to the following steps:

- Test the cover page fonts in both color and B/W
- Test cover pages in different sizes and resolutions
- Replace you cover page too early rather than too late
- DON'T copy but reprint your cover pages
- Wipe the scanner surface.

7. FAQs

This section contains a list of frequently asked questions on WorkZone Content Server Imaging functionality. Click any question below to see the answer.

When do I scan to the Profile Distributor?

You must scan to the **Profile Distributor**, if different documents in a bundle of documents for scanning must be handled by different profiles.

How do I scan to the Profile Distributor?

A cover page always contains one or more codes. One of these codes identifies the page as being a cover page (typically the code KON). All other codes for cover pages have an "initstring" and a value. For example the code SBHAHO means the case handler AHO.

To define on a cover page that a document must be handled by a specific profile, you also must specify this by means of an "initstring" and a value. The "initstring" must be the one, which is defined in the **Initstring på Profilkode** [Initstrings for profile Codes] field in the **SJ ServerScan Admin** window. For more information, see Configure WorkZone Content Server Imaging.

If, for instance, you have defined the value AFD in the **Initstring på Profilkode** field, and you have defined the value MAR in the **Profile Code** field, you can scan to the "Marketing department" by making a code with the text AFDMAR on your cover page. This code only has to be specified on the cover page for the main document.

What is created when I publish my configuration?

When you click **Publish** in the **SJ ServerScan Admin** window and then click **OK** in the **Publish ServerScan Konfiguration** window, the following happens:

1. The `sjPoll.cfg` file is updated with the general properties (settings), which you have defined in the **SJ ServerScan Admin** window. The `sjPoll.cfg` file contains all the XML fields, the codes for cover pages and a standard window for manual registration. All profiles with the value **1 – Automatic in the Profile Type** field, furthermore will be configured in this CFG file.

2. The `sjPoll.cfg` file is copied to the `sjPollForms.cfg` file. If the `sjPollForms.cfg`file already exists, the existing file will be deleted. The `sjPollForms.cfg` file contains all the XML fields, the codes for cover pages and a standard window for manual registration. All profiles with the value **5 – Automatic Form Scan** in the **Profile Type** field furthermore will be configured in this CFG file.

3. The `ispoll.ini` file is created.

4. The `sjFordel.cfg` file is created. If the `sjFordel.cfg` file already exists, the existing file will be deleted. The `sjFordel.cfg` file is the CFG file, which is used for scanning to the **Profile Distributo**r. The `SCANNED` folder for this profile is always the one called `\QUEUES\SCANNED`.

5. For each profile the following is created:

   - A `SCANNED` folder called `QUEUES\SCANNED_XXX` (where `XXX` is the same as the value in the **Profile Code** field). The folder is not overwritten, if it exists already.

   - A `DONE_XXX` and a `FAILED_XXX` folder, if it is specified in the profile that it has to have its own `DONE` and `FAILED` folders (`XXX` is the same as the value in the **Profile Code** field). The folders are not overwritten, if they exist already.

   - A `\CFG\ScanTo_XXX.cfg` file, which is the configuration file for scanning to this profile (`XXX` is the same as the value in the **Profile CodeProfile Code** field). The file is overwritten, if it exists already.

- A `\CFG\ManReg_XXX.cfg` file, which is the configuration file for standard manual registration (`XXX` is the same as the value in the **Profile Code** field). This file is only created for profiles with the value **3 – Manual Scan without Separator Sheet** or the value **4 – Manual Scan with Separator Sheet** in the **Profile Type** field. If the file already exists, the existing file is overwritten, if you have selected the **Slet Eksisterende CFG Filer til Registrering** [delete existing CFG files for Registration] checkbox in the **Publish ServerScan Konfiguration** window (see SJ ServerScan Administrator program).

- A `\CFG\ManReg_Failed_XXX.cfg` file, which is the configuration file for manual registration of failed documents (`XXX` is the same as the value in the **Profile Code** field). If the file exists already, the existing file is overwritten, if you have selected the **Slet Eksisterende CFG Filer til Registrering** [delete existing CFG files for Registration] checkbox in the **Publish ServerScan Konfiguration window** (see SJ ServerScan Administrator program).

- A `\CFG\sjPollManuel_XXX.cfg` file, which is the configuration file for recognition of codes for cover pages and for separating files, which must be registered manually (`XXX` is the same as the value in the **Profile Code** field). The file is a copy (with a few changes) of the `sjPoll.cfg` file. This file is only created for profiles with the value **3 – Manual Scan without Separator Sheet** or the value **4 – Manual Scan with Separator Sheet** in the **Profile Type** field. If the file exists already, the existing file is overwritten.

Can I edit the automatically generated CFG files?

You can edit all CFG files in Notepad or in the program InfoScan Setup. However, be

aware that some files are overwritten when new configurations are published.

How do I set up a multifunction printer?

When a multifunction printer is scanning to a profile, it must be set up to scan to the `\QUEUES\SCANNED_XXX` folder belonging to this profile (`XXX` is the same as the value in the **Profile Code** field). Scanning to the **Profile Distributor** takes place by scanning to the `\QUEUES\SCANNED` folder.

Can I use a configuration file from an existing installation?

If a customer already has an existing configuration, a new installation must be made and the master CFG file from the existing installation must be copied to `CFG\sjPoll.cfg`. The specific profiles then must be created again.

When should the existing CFG files not to be deleted in connection with publication?

The CFG files created for manual registration must not to be deleted, if corrections have been made to the files after the last publication of the configuration (possibly with changes of the window for manual registration).

Can shortcuts be created manually?

Shortcuts to the automatically generated CFG files can be created in the same manner as you normally create shortcuts to files.

Is it possible to scan in 24-bit color?

From version 1.8.73, it is possible to scan in 24-bit color. However, please be aware that when ServerScan has been configured for color scanning, this prevents reliable OCR (Optical Character Recognition) of the generated TIFF-files.

A possible workaround is to scan the document in both color and Black and White (bitonal) and attach the Black and White scan to the color TIFF for a letter perfect rendering.

You configure your color setting according to the specifications of your chosen scanner.

How do I set up support for PDF?

From version 1.8.79, there is limited support for PDF:

- Barcode reading and document splitting
- No PDF support for manual registration (ISReg)

From 1.8.83 there is support for document splitting for manual registration ISReg.

To set up support for PDF:

1. 1.In the InfoScan Setup window, click in the toolbar. The Capture Setup window opens.

2. Select the **Poll from Disc** check box and click **Settings** next to the check box.
   The **Poll Setting** window appears.

3. Double-click the poll type to select it.The **Edit Poll Properties** window appears.

4. In the **Look for files with extension (jpg, bmp….etc)**: field, type `PDF`.

5. Click **OK** to close the **Edit Poll Properties** window.

6. Click **OK** to close the **Poll Setting** window.

7. Click **OK** to close the **Capture Setup** window.

8. Troubleshooting

Click an issue below to see the solution or workaround.

Error with the installation

If the installation does not succeed, or if the InfoScan programs report errors such as:

- 429 Can't create object
- 438 Object doesn't support this property or method
- 5 Invalid procedure call or argument
- 6 Overflow

It is most often because of insufficient privileges. For example, if files cannot be copied during the installation because:

- They already exist or are in use.
- Of insufficient write access to the disk

Or, if files cannot be registered because of insufficient administrator privileges.

If these errors occur, you must ensure that you have administrator privileges, and you must close all programs, before you begin the installation. If this does not solve the problems, you must use the program IS What, which is located in the **InfoScan** folder. The program reads the InfoScan installation and delivers a report in a file called `iswhat.txt`. This file can be sent to InfoCD for analysis.

Error with InfoScan Registration

If errors occur in the program InfoScan Registration it is either because the installation is not performed correctly, or because there is no access to the folder used by the program.

Error with InfoScan Capture

If errors occur in the program InfoScan Capture it is either because the installation is not

performed correctly, or because there is no access to the folder used by the program.

Error with recognition of codes for cover pages

Problems with recognizing codes for cover pages can be caused either by incorrect installation of the components for recognition of the codes for the cover pages or incorrect configuration of the InfoScan programs with regards to recognizing codes for cover pages.

To find the cause of the error, you must start the program `isbartest.exe`, which is located in the **InfoScan** folder. When you start the program, the **InfoScan Barcode tester** window appears. This window shows the path to a file containing codes for cover pages that cannot be recognized. To show the codes for cover pages, which the InfoScan program cannot read, you have to click **Start Test** in the window.

If the program cannot find any codes for cover pages in the file, it can be because the file is scanned in a resolution which is too low, or because the cover page only contains illegal codes.

If the InfoScan program finds codes for cover pages in the file, but is not able to interpret them, it is because the codes are configured incorrectly. For more information on configuration of the codes for cover pages, see Configure codes for cover pages.

The "Autoregister failed" error

When the error "Autoregister failed" occurs in the log file after scanning of a document, it is because the XML files of the document cannot be delivered in the folder, which is defined as the XML output folder. This is most likely caused by insufficient privileges.

9. Terms and conditions

Intellectual property rights

This document is the property of KMD. The data contained herein, in whole or in part, may not be duplicated, used or disclosed outside the recipient for any purpose other than to conduct business and technical evaluation provided that this is approved by KMD according to the agreement between KMD and the recipient. This restriction does not limit the recipient's right to use information contained in the data if it is obtained from another source without restriction set out in the agreement between KMD and the recipient or by law.

Disclaimer

This document is intended for informational purposes only. Any information herein is believed to be reliable. However, KMD assumes no responsibility for the accuracy of the information. KMD reserves the right to change the document and the products described without notice. KMD and the authors disclaim any and all liabilities.