



USER GUIDE

MAFUNYANE TECHNOLOGIES

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Email: support@infofilesolutions.co.za

User Guide

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SYSTEM REQUIREMENTS

SERVER REQUIREMENTS

Infoscan Server requires Microsoft SQL Server 12+ Express, Standard or Enterprise to run. MS SQL

Minimum System requirements

CPU Requirements: Minimum: Quad Core Processor Recommended: Six Core Processor or more

Memory Requirements: Minimum: 6 GB of RAM Recommended: 8 GB of RAM

Operating System: Minimum: Windows 7 Recommended: Windows 8/10, or Windows Server 2008/2012

Network Configuration: Minimum: 100 Mbit/s Recommended: 1 Gbit/s

Disk Space: Depending on the number of images to be scanned and stored. Minimum recommended space 50 GB.

Installation Instructions for SQL Server

Step 1: Enable Microsoft .Net Framework 3.5 SP1. and Download and install Microsoft .Net Framework 4.0.

- Note: LocalDB does not require any .NET Framework installation.
- Note: SQL Server Express (with database engine only) can work with either .NET 3.5 SP1 or .NET 4, there is no need to have both enabled.

Step 2: Download Microsoft® SQL Server® 2012 Express by clicking the appropriate link below.

<https://www.microsoft.com/en-za/download/details.aspx?id=29062>.

Note: Microsoft® SQL Server® 2012 Express includes both 32-bit and 64-bit versions. SQLEXP32_x86 is a smaller package that can be used to install SQL Server Express onto only 32-bit operating systems. SQLEXP_x86 is the same product but supports installation onto both 32-bit and 64-bit (WoW) operating systems. SQLEXP_x64 is a native 64-bit SQL Server express and supports installation onto only 64-bit operating systems. There is no other difference between these packages. Microsoft® SQL Server® 2012 Express is not supported on IA64 systems.

WORKSTATION REQUIREMENTS

CPU Requirements: Minimum: Dual Core Processor Recommended: Quad Core Processor

Memory Requirements: Minimum: 4 GB of RAM Recommended: 8 GB of RAM

Hard Drive Space Requirements: Minimum: 800 MB for the program alone

Operating System: Minimum: Windows 7 or Windows 8 Required Components: .NET Framework 4.5

Network Configuration: Minimum: 10/100 Mbit/s Recommended: 1 Gbit/s

IMAGE STORAGE

Space: *This depends on the number of batches being held in Infoscan at one time. Recommended: 50 GB and above.

The images can be held in the same server as SQL server or any other shared drive in the network.

INSTALLATION

SERVER

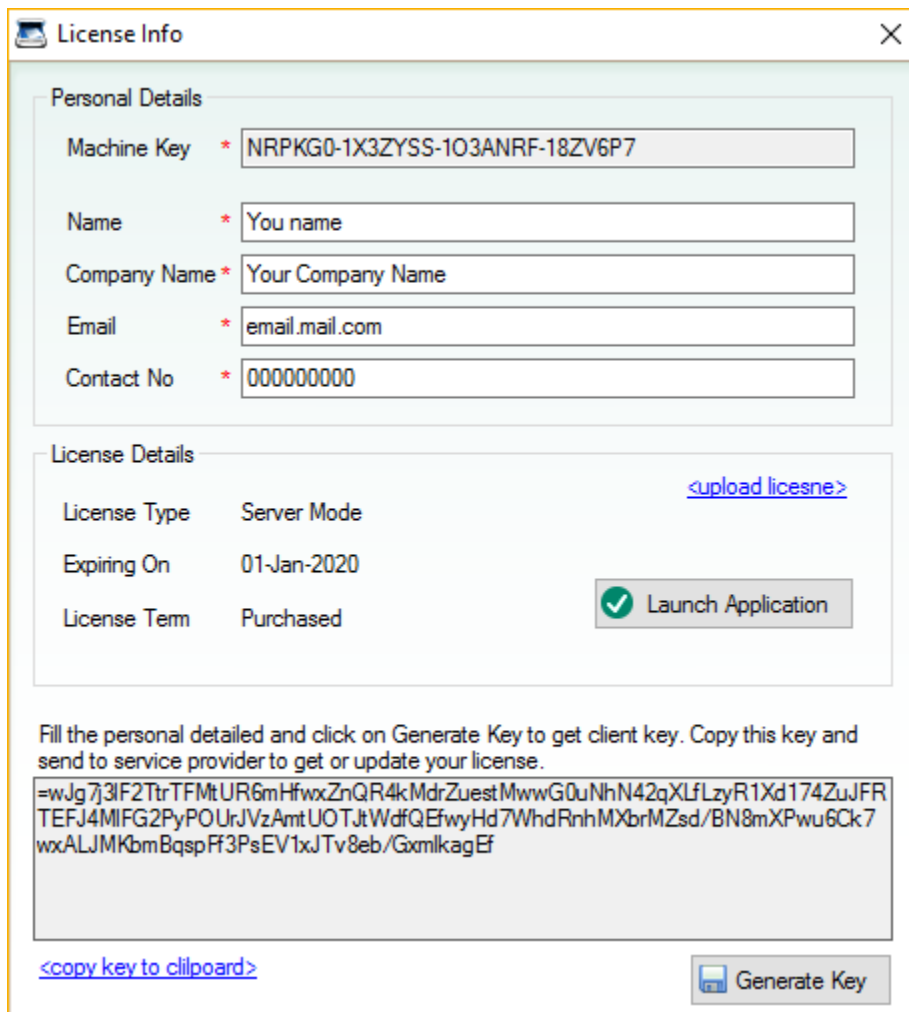
Follow installation instructions for SQL Server as described [above](#) in minimum server requirements.

WORKSTATION

- Copy Infoscan installation files to a central location on a file server.
- Click on Setup to start the installation process.
- After Setup has completed a shortcut will be placed on the desktop.

First time run

- Click the Infoscan Icon on the desktop to start the application
- You will receive a License request screen
- Complete all the required fields and click the *Generate Key* button

A screenshot of a 'License Info' dialog box. It contains two main sections: 'Personal Details' and 'License Details'. The 'Personal Details' section has five input fields: 'Machine Key' (pre-filled with 'NRPKG0-1X3ZYSS-103ANRF-18ZV6P7'), 'Name' (placeholder 'You name'), 'Company Name' (placeholder 'Your Company Name'), 'Email' (placeholder 'email.mail.com'), and 'Contact No' (placeholder '000000000'). The 'License Details' section shows 'License Type' as 'Server Mode', 'Expiring On' as '01-Jan-2020', and 'License Term' as 'Purchased'. There is a blue link '<upload licesne>' and a green 'Launch Application' button. At the bottom, there is a text area with a long alphanumeric key, a blue link '<copy key to cilpboard>', and a 'Generate Key' button.

License Info

Personal Details

Machine Key * NRPKG0-1X3ZYSS-103ANRF-18ZV6P7

Name * You name

Company Name * Your Company Name

Email * email.mail.com

Contact No * 000000000

License Details

License Type Server Mode [<upload licesne>](#)

Expiring On 01-Jan-2020

License Term Purchased ☒ Launch Application

Fill the personal detailed and click on Generate Key to get client key. Copy this key and send to service provider to get or update your license.

=wJg7j3lF2TrTFMtUR6mHfwxZnQR4kMdrZuestMwwG0uNhN42qXLfLzyR1Xd174ZuJFR
TEFJ4MIFG2PyPOUrJVzAmtUOTJtWdfQEfwyHd7WhdRnhMXbrMZsd/BN8mXPwu6Ck7
wxALJMKbmBqspFf3PsEV1xJTv8eb/GxmlkagEf

[<copy key to cilpboard>](#)

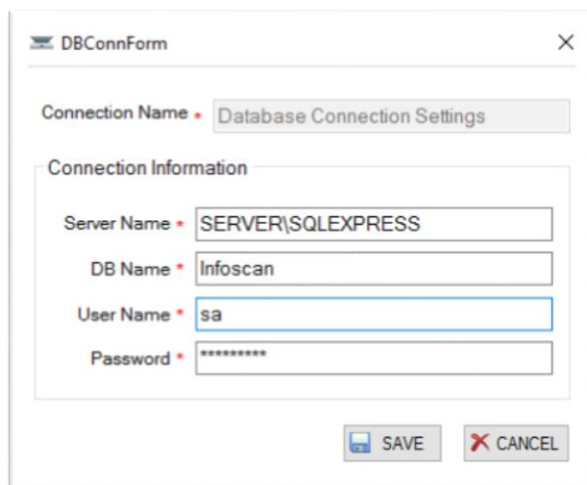
- Copy the key and paste in into your email program and send it to support@infofilesolutions.co.za

- You will receive an email back with a license file which you will use to activate your copy of Infoscan.
- Once you received the license file, use the *Upload license file* link to upload your license file.
- Exit Infoscan and restart to activate the license.
- When Infoscan starts, you will receive a Login screen.
- Click on the settings button at the bottom right of the login screen to configure the database settings.



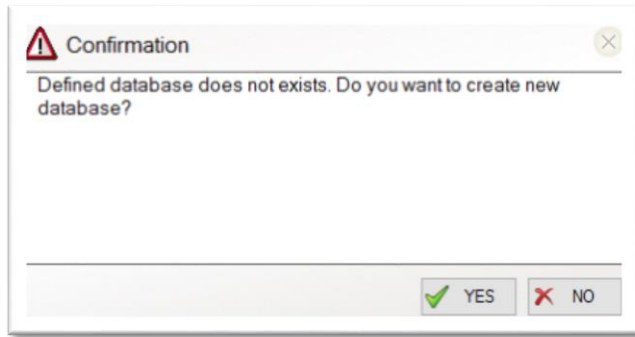
The image shows the Infoscan login interface. At the top left is the 'InfoScan' logo with a printer icon and the text 'Version : 1.0.0.44'. The background features a stylized globe and a car. In the center, there are two input fields labeled 'User Name *' and 'Password *', each with a red asterisk. To the right of the password field is a blue 'LOGIN' button with a key icon. At the bottom center, there is a copyright notice: '© 2016-17 Mafunyane Technologies. All rights reserved.' and a small gear icon for settings.

Click here to
configure
database settings



The image shows a 'DBConnForm' dialog box. It has a title bar with a close button. Inside, there is a 'Connection Name' field with the text 'Database Connection Settings'. Below this is a section titled 'Connection Information' containing four fields: 'Server Name' with 'SERVER\SQLEXPRESS', 'DB Name' with 'Infoscan', 'User Name' with 'sa', and 'Password' with a masked password '*****'. At the bottom right are two buttons: 'SAVE' and 'CANCEL'.

You will receive the following message



Click YES to create the database.

*** Very Important**

Please ensure that all workstations are configured with the same database settings otherwise multiple databases will be created and users will not be able to share job settings etc.

First time login

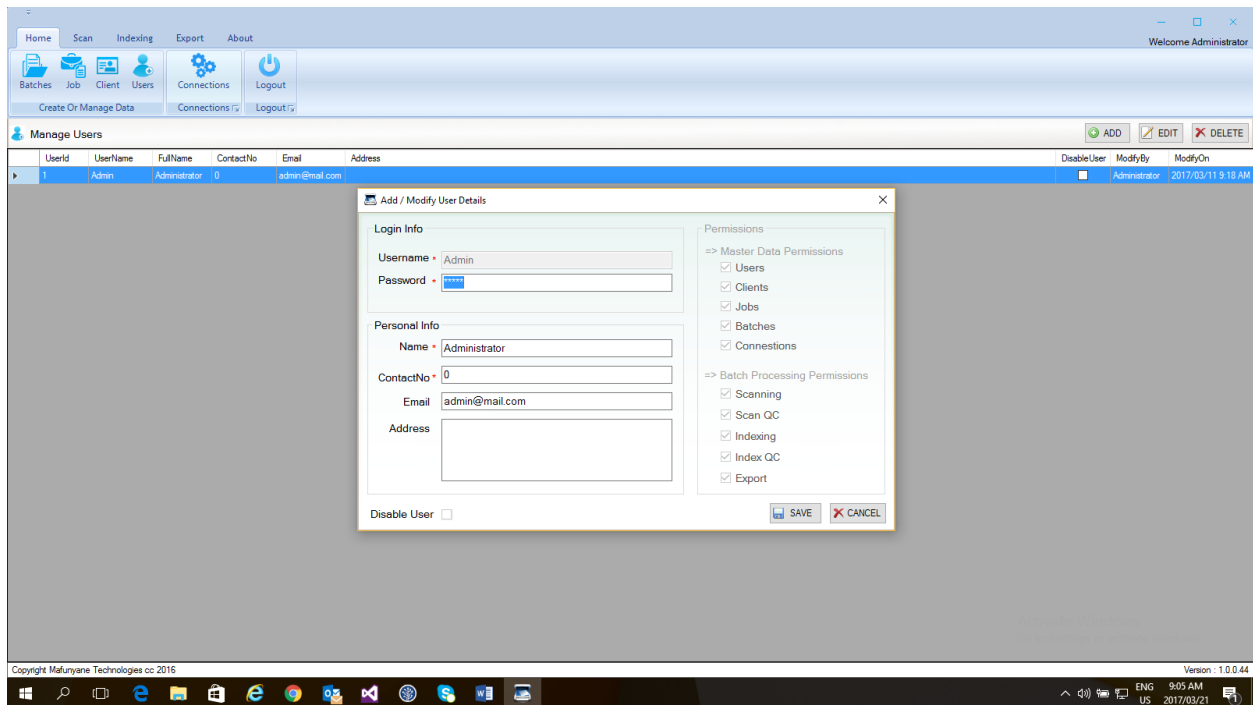
Login in with User Name: admin and Password: admin



CREATE NEW USERS

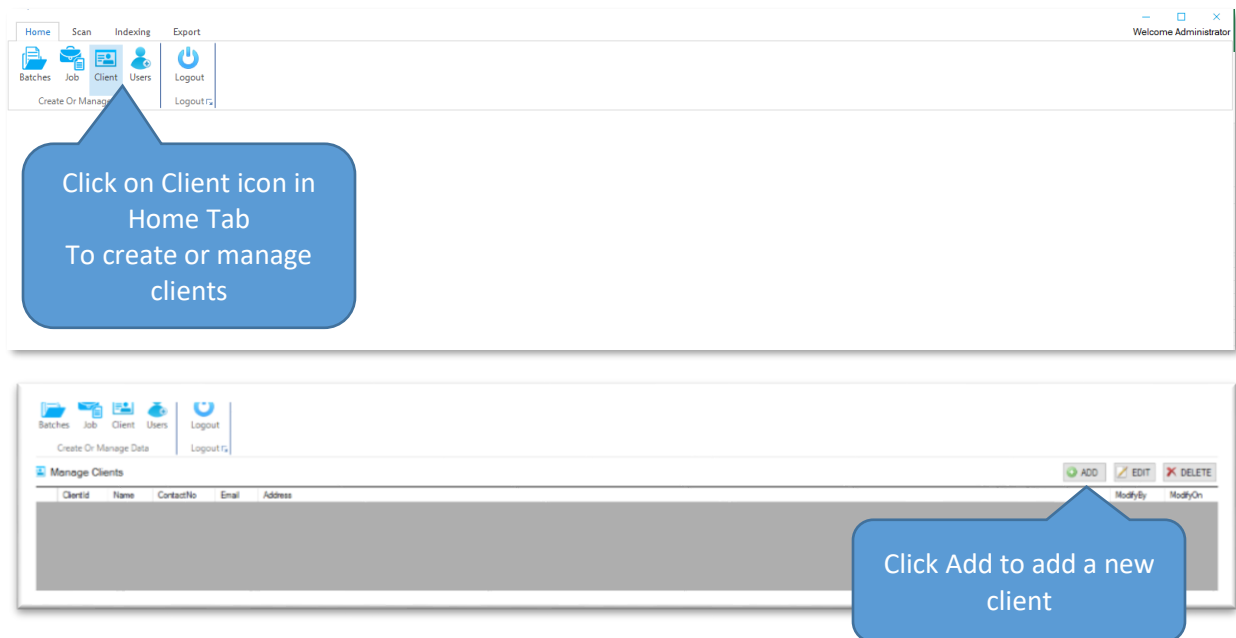
Infoscan comes standard with Admin user that has all the permissions to create and Manage Jobs, Clients etc. You can create additional users to perform Scanning, Indexing and Exporting functions.

To create additional users, navigate to the Home menu and click the Users Menu. Click Add to create a new User. Fill in all the required fields and select the permissions for the user.



CREATE NEW CLIENTS

Infoscan is designed around bulk scanning for clients based on job profiles. The first step would be to create a new client for whom jobs will be defined.



ient-form

Name * My Client

ContactNo * 000 555 5555

Email newclient@mail.com

Address

SAVE CANCEL

Complete client details as save.

CREATE NEW JOB

The next step is to create a Job Profile for the client. Job profiles define all the settings to standardize parameters to scan a specific job.

The screenshot shows the 'Manage Jobs' application interface. At the top, there is a navigation bar with tabs for 'Home', 'Scan', 'Indexing', and 'Export'. Below this, there are icons for 'Batches', 'Job', 'Client', 'Users', and 'Logout'. The main area is titled 'Manage Jobs' and contains a table with columns 'JobId', 'JobName', 'ClientName', and 'Description'. A modal window titled 'Job Details' is open, showing a form for creating a new job profile. The form has tabs for 'Job Details', 'Batches', 'Indexes', and 'Export'. The 'Job Details' tab is active, showing fields for 'Job Name', 'Client' (a dropdown menu), 'Image Location', and 'Description'. There are also checkboxes for 'Scan Settings' (Scanner, Resolution, Color, Size) and 'Document Separation' (Use Blank Sheet, Every N Sheets, Barcode). The 'Barcode' section includes checkboxes for 'Any Barcode Found', 'When Value Change', and 'When Specified Value is Found', along with a 'Value' field and a 'Barcode Types' list (CODE_39, CODE_128, QR_CODE). The form has 'SAVE' and 'CANCEL' buttons at the bottom.

JOB DETAILS

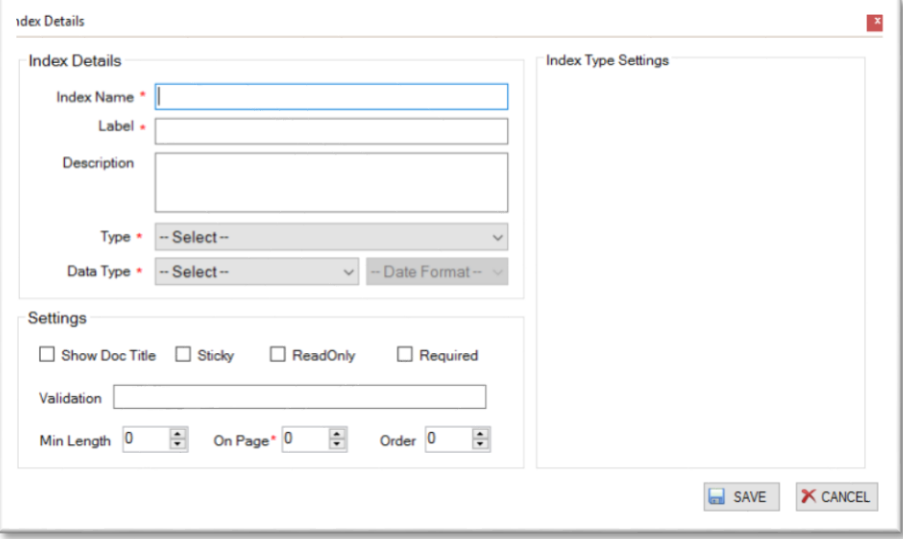
On the job details screen capture the following details

- Job Name
- Select the Client
- Define an image location. This would normally be a shared network drive where the raw images will be saved during scanning. ***Important:** Users must have Read, write and modify permissions for this folder. ***Important:** Make sure you have enough free disk space in the folder to hold the scanned images
- Provide a description of the job and any special instructions relating to the job.
- Scan settings. Here you can specify the scanner and scan settings that apply to this job like
 - Resolution
 - Colour
 - Paper size
 - Show or hide scanner UI during scan
 - Duplex Scanning
 - Delete Blank Pages
 - Auto Rotate
 - You can also disable indexing during scanning to improve performance
- Document Separation – you can specify parameters to split scanned images into documents based on
 - Blank page
 - Every (x) no of pages
 - Barcodes

Click the Save button to save the Job Details.

INDEXES

The next step is to define index fields for the Job. Select the Job and click the Edit button. Click on the Index tab to add new index fields.



The 'Index Details' dialog box is used to configure an index field. It contains the following sections:

- Index Details:** Fields for 'Index Name', 'Label', 'Description', 'Type' (dropdown), and 'Data Type' (dropdown). There is also a 'Date Format' dropdown.
- Settings:** Checkboxes for 'Show Doc Title', 'Sticky', 'ReadOnly', and 'Required'. A 'Validation' text field and three numeric spinners for 'Min Length', 'On Page', and 'Order'.
- Index Type Settings:** A large empty area for defining the index type.
- Buttons:** 'SAVE' and 'CANCEL' buttons at the bottom right.

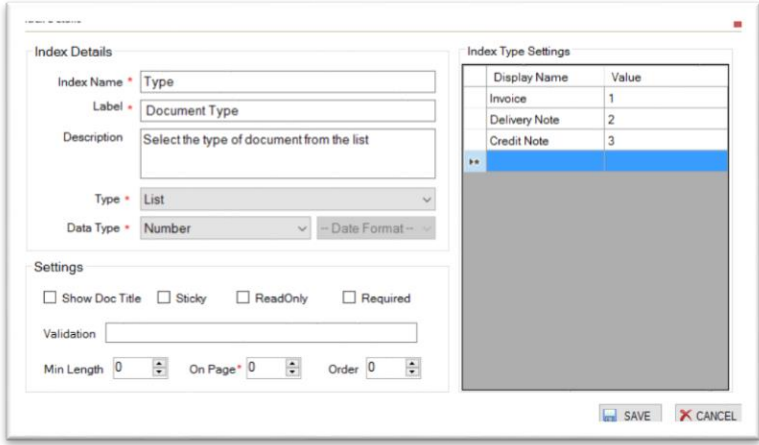
Index Details

- Specify a name for the index field. Eg "IDNumber"
- Specify the display name for that index field in the index explorer. Eg "ID Number"
- Enter a description for index field. Eg, "Enter the ID Number of the Applicant"
- Select the Type of Index the options are:
 - Normal,
 - List
 - OCR Zone
 - Barcode
 - Database Lookup

Normal

Normal will provide a text box during indexing and the user can type any value in the text box.

List



The 'Index Details' dialog box is shown with the 'List' type selected. The 'Index Type Settings' section contains a table with the following data:

Display Name	Value
Invoice	1
Delivery Note	2
Credit Note	3
..	

The 'Index Details' section shows 'Index Name' as 'Type', 'Label' as 'Document Type', and 'Description' as 'Select the type of document from the list'. The 'Type' dropdown is set to 'List' and 'Data Type' is set to 'Number'.

The List type index allows you to specify a list of values that can be selected during indexing. Define Display names and values. The Display field is a description and the value field will be the value that will be used to index the document.

OCR Zone

The OCR Zone Type index will allow you to define an area on the document that must be OCR'ed during indexing.

The screenshot shows a configuration window titled 'Index Details' and 'Index Type Settings'. The 'Index Details' section on the left contains the following fields:

- Index Name: Index2
- Label: OCR Value
- Description: (empty text box)
- Type: OCRZone (dropdown menu)
- Data Type: -- Select -- (dropdown menu)
- Date Format: -- Date Format -- (dropdown menu)

The 'Settings' section below contains:

- Checkboxes: Show Doc Title, Sticky, ReadOnly, Required
- Validation: (empty text box)
- Min Length: 0 (spinner)
- On Page: 0 (spinner)
- Order: 0 (spinner)

The 'Index Type Settings' section on the right has a link 'upload zone selection>' and a large blue callout bubble pointing to it with the text 'Click link to define area'. Below the link is a large, blurry image of the number '000000'. At the bottom right are 'SAVE' and 'CANCEL' buttons.

You can then upload a sample image of the document that will be indexed. Select the area that must be OCR'd

The screenshot shows a sample invoice document. At the top left is a link 'upload sample image>' and a 'SELECT' button. The invoice header includes the word 'INVOICE' and contact information: '647-444-1234', 'your@email.com', and 'yourwebsite.com'. It also has a section for '1 Your Address' with fields for 'City, State, Country' and 'ZIP CODE'. The 'Billed To' section includes 'Client Name', '1 Client Address', 'City, State, Country', and 'ZIP CODE'. The 'Invoice Number' is '000000' and the 'Date Of Issue' is '10/07/14'. The 'Invoice Total' is '\$4520.00'. The main body of the invoice is a table with the following columns: 'Description', 'Unit Cost', 'Qty / Hr Rate', and 'Amount'. There are four rows of items, each with a 'Your item Name' and 'Item description goes here'. The 'Subtotal' is '\$4000.00' and the 'Tax' is '\$520.00'.

Description	Unit Cost	Qty / Hr Rate	Amount
Your item Name Item description goes here	\$1000	1	1000
Your item Name Item description goes here	\$1000	1	1000
Your item Name Item description goes here	\$1000	1	1000
Your item Name Item description goes here	\$1000	1	1000
Subtotal			\$4000.00
Tax			\$520.00

Barcode

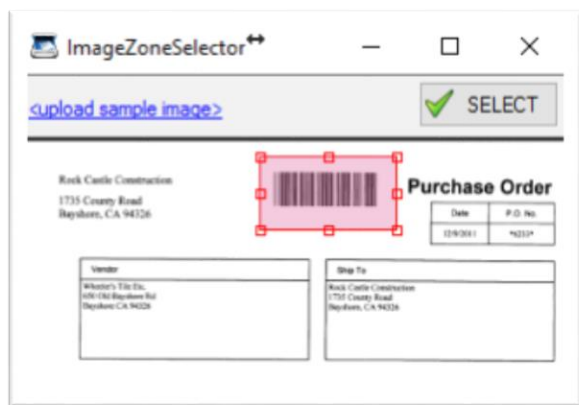
The Barcode type index allows you to specify the types of bar codes to read. Infoscan can read the following types of barcode

- Code 39
- Code 128
- QR codes

You can specify the index of the barcode on the page to read. Barcodes are read from left to right and top to bottom. Eg. Index 2 will be the second barcode from top left of the page.

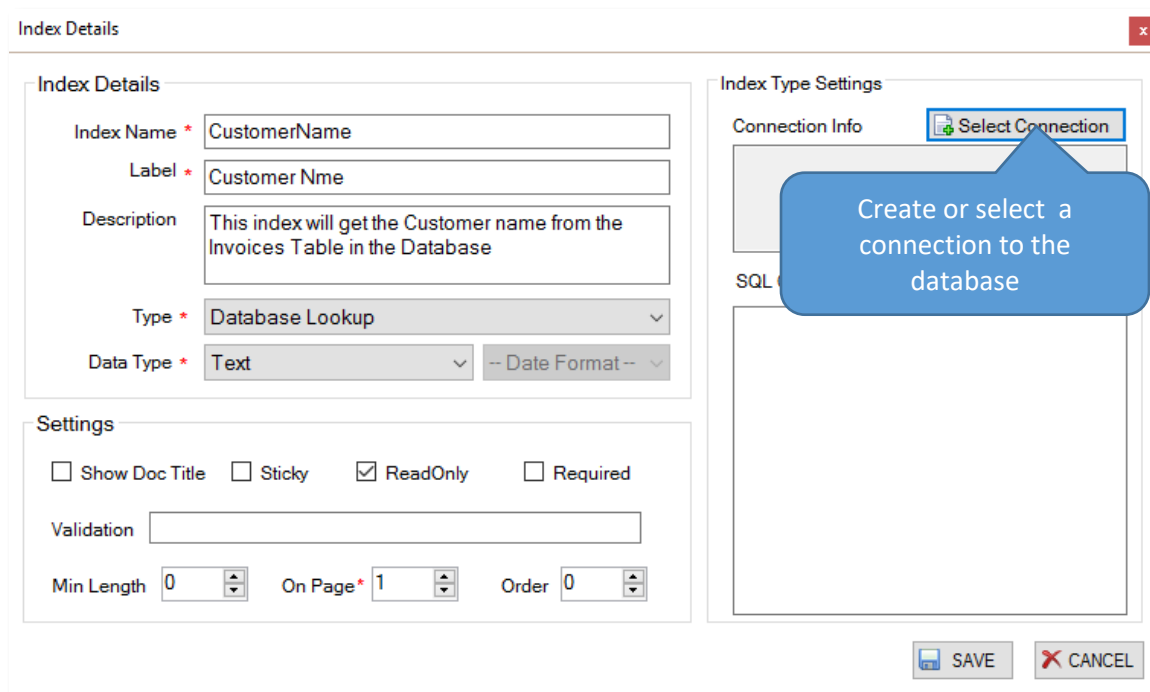
The screenshot shows the 'Index Details' dialog box. It has two main sections: 'Index Details' and 'Index Type Settings'. In the 'Index Details' section, 'Index Name' is 'Index2', 'Label' is 'barcode', 'Type' is 'Barcode', and 'Data Type' is '-- Select --'. The 'Settings' section has checkboxes for 'Show Doc Title', 'Sticky', 'ReadOnly', and 'Required', all of which are unchecked. There is a 'Validation' field and 'Min Length' set to 0. In the 'Index Type Settings' section, 'Barcode Type' is set to 'CODE_39', 'CODE_128', and 'QR_CODE'. The 'Index' is set to 1. There are fields for 'Barcode Zone', 'X', 'Width', 'Y', and 'Height'. A 'Zone Sample Image' field has a link to '<upload zone selection>'. At the bottom are 'SAVE' and 'CANCEL' buttons.

In cases where the barcode is always in the same place on the page you can also specify the location. Use the Upload Zone Selection option to load a sample image and define the location by dragging the pink square over the barcode location. Please make sure you only include the barcode and not any other text.



Database Lookup

The database lookup type index allows you to read additional index values from a database. Currently only SQL server databases are supported but other database types will be added in future.

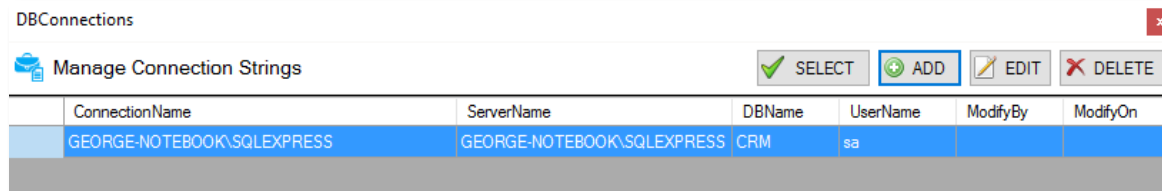


The 'Index Details' dialog box is shown with the following fields and settings:

- Index Name:** CustomerName
- Label:** Customer Nme
- Description:** This index will get the Customer name from the Invoices Table in the Database
- Type:** Database Lookup
- Data Type:** Text
- Settings:**
 - ☐ Show Doc Title
 - ☐ Sticky
 - ☒ ReadOnly
 - ☐ Required
 - Validation:** (empty field)
 - Min Length:** 0
 - On Page:** 1
 - Order:** 0

The 'Index Type Settings' panel on the right shows a 'Select Connection' button. A blue callout bubble points to this button with the text: 'Create or select a connection to the database'. At the bottom are 'SAVE' and 'CANCEL' buttons.

Specify the Index Details and Settings for this index. Next create or select a database connection.

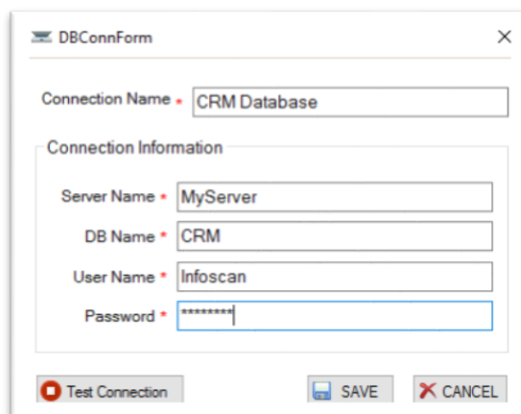


The 'DBConnections' dialog box shows a table of existing connections:

ConnectionName	ServerName	DBName	UserName	ModifyBy	ModifyOn
GEORGE-NOTEBOOK\SQLEXPRESS	GEORGE-NOTEBOOK\SQLEXPRESS	CRM	sa		

Buttons at the top include 'SELECT', 'ADD', 'EDIT', and 'DELETE'. The 'ADD' button is highlighted.

To create a new connection, click 'Add' and complete the Database Connection Form.



The 'DBConnForm' dialog box is used to create a new database connection with the following details:

- Connection Name:** CRM Database
- Server Name:** MyServer
- DB Name:** CRM
- User Name:** Infoscan
- Password:** (masked with asterisks)

Buttons at the bottom include 'Test Connection', 'SAVE', and 'CANCEL'.

Once the Database connection has been selected you can enter any valid SQL statement to retrieve a value from the database to populate the index field form. You can use existing indexes as parameters to filter the results of your sql query. ***Tip: Please test your query to ensure it will return results otherwise you may receive empty values.**

Index Details

Index Name * CustomerName

Label * Customer Name

Description

Type * Database Lookup

Data Type * Text -- Date Format --

Settings

☐ Show Doc Title ☐ Sticky ☐ ReadOnly ☐ Required

Validation

Min Length 0 On Page * 1 Order 0

Index Type Settings

Connection Info Select Connection

Connection : GEORGE-NOTEBOOK \SQLEXPRESS

ServerName : GEORGE-NOTEBOOK \SQLEXPRESS

SQL Query * -- Parameters --

Select Top (1) Customer from Invoices where InvoiceNo = '{@Index-InvoiceNo}'

SAVE CANCEL

Index Settings

Index settings allows you to specify additional settings for the Index.

Sticky

Select Sticky to repeat the same value for all documents. If you change the value in this index fields all subsequent documents will default to that same value until you change it again.

Read Only

The user cannot change the value in this field. This is normally used for Database Lookup type indexes.

Required

Use this to ensure the index field is completed. The user will not be able to complete indexing unless this field is populated.

Validation

Enter a regular Expression to validate the value captured in the index field. You can use this to ensure a user types only letters or only numbers etc.

For more info visit <http://www.regular-expressions.info/> or <http://regexpr.com/>

Min Length

Specify the minimum number of characters that must be captured in the index field. For example, if you are capturing Invoice Numbers and you know that all invoice numbers must have 10 characters, you can specify 10 as min length.

On Page

This is the location of the index on the page of the document. The default is 1 which refers to the first page but if the index is on the second or third page you can specify it as such. This will be used during indexing to automatically display the specified page for easy capturing.

Order

Specify the order in which indexes will be displayed in the index explorer.

	IndexName	IndexValue
	Invoice No	
	Customer Name	

EXPORT SETTINGS

The Export settings allows you to specify one or more ways to export the scanned documents and associated index data.

Export to File

Job Details

Job Details Batches Indexes Export

Export To File Export to Share Point Export To Database

☒ Export to File

Export Path * C:\Users\georgeb\Documents

File Type * PDF - Uncompressed ☐ Is Searchable Pdf

File Name * '{@BatchName}\{@Index-InvoiceNo}'

Quality (100%)

☒ Generate Index File

File Path * ☐ Custom ☒ Same as Export Path

File Type * Comma Separated

Columns in Index File - File Name IndexData

Column Name	Column Value
Invoice No	{@Index-InvoiceNo}
Customer Name	{@Index-CustomerName}

Parameters Refresh

Folder Separator (\)

{@ClientName}

{@JobName}

{@BatchName}

{@DocId}

{@UserName}

{@PageCount}

{@Index-InvoiceNo}

{@Index-CustomerName}

SAVE

Specify the path to a folder where the exported documents should be saved. You can use parameters to define a file naming convention. Place your cursor inside the File Name box and double click the required parameter to create the file naming convention. ***Tip: You can combine different parameters as well as standard text to create a custom file naming convention.**

You can use the Quality slider to reduce the quality of the exported images. This will also reduce the size of the images. You need to test this setting to get the best acceptable balance between size and quality.

You can also choose to export an associated Index file that contains the index data. Choose the path and filename for the index data. You can also customize the path and filename with a combination of standard text and index field parameters. You can further select and re-order the index fields to include. You can also create additional fields with a custom value based on standard text and Index parameters.

Export to SharePoint

Job Details

Job Details Batches Indexes Export

Export To File Export to Share Point Export To Database

☒ Export to Share Point

Site URL *

User Name *

Password *

Document Library*

Field Name	Field Type	Index Field
Title	Text	{@Index-FileNo} {@Index-DocType}
Patient Name	Text	{@Index-PatientName}
Admission Date	Text	{@Index-AdmissionDate}
Patient No	Text	{@Index-PatientNo}
File No	Text	{@Index-FileNo}

File Options

File Type * ☐ Is Searchable Pdf

File Name *

Quality (100%)

Parameters

Folder Separator (\)

{@ClientName}

{@JobName}

{@BatchName}

{@DocId}

{@UserName}

{@PageCount}

{@Index-PatientNo}

{@Index-PatientName}

{@Index-AdmissionDate}

{@Index-DocType}

{@Index-FileNo}

The SharePoint Connector allows you to export your documents to a SharePoint document Library.

Specify the URL of the SharePoint Site, User Name and Password. ***Important: currently Infoscan only support forms based security. The user must have Contribute permissions on the document library.**

Click on the Connect button to connect to the site. Select the appropriate document library from the list. All list of fields will display in the grid below. Populate the Index field column by placing your cursor in the index field box and double clicking on the Parameter that you want to use to populate the field.

*** Important: Use compatible data types to populate the SharePoint Fields**

Specify the File Name Options. You can create a custom file name based on a combination of fixed text characters and Index Parameters.

Export to Email

Export To Email

To *

CC

BCC

Subject * From

Times New Roman 3 **B** *I* U A A

Folder Separator (\)
{ClientName}
{JobName}
{BatchName}
{DocId}
{DocKey}
{UserName}
{PageCount}

{Index-FileName}
{Index-ProjNo}
{Index-ProjName}

☐ Attach Document in Email

File Type * ☐ Is Searchable Pdf

File Name *

Quality (100%)

SMTP Server

Select SMTP Server

With the Export to email connector you can send scanned documents directly to an email recipient. You can use index fields to automatically populate recipients, Subject etc.

You can also compose the email body with a combination of index fields. Just double click on any of the index parameters to include the index value in the mail.

Export to Database

ExportToDB

Connection

Select Connection

Export Image Options

☒ Export to file

☐ Export to database table

File Options

Export Path *

File Type *

☐ Searchable Pdf ☐ Overwrite File If Exists

File Name *

Quality

Folder Separator (\)

- { \$ClientName }
- { \$JobName }
- { \$BatchName }
- { \$DocId }
- { \$DocKey }
- { \$UserName }
- { \$PageCount }
- { \$Index-FileName }
- { \$Index-ProjNo }
- { \$Index-ProjName }

Query to insert / update index data

SAVE CANCEL

The Export to Database connector allows for the exporting of images and index data directly to a database like SQL Server.

You can either export your image to the file system and insert a record in a database that points to the image location or you can directly export the image to an image field in a database table.

You can further update related tables with any of the index field parameters.

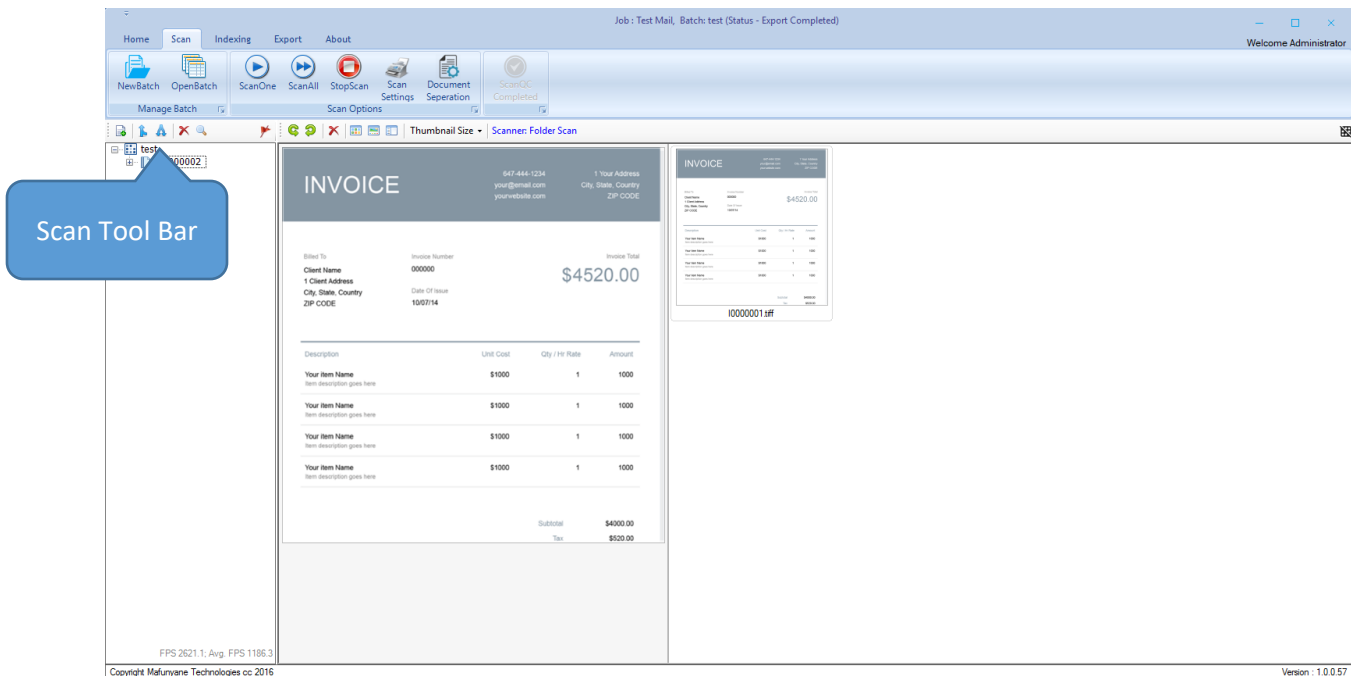
SCANNING MODULE

To start scanning a new batch, select the **Scan** tab and select **New Batch**. Select the **Client** and **Job**. Enter a name for the batch and enter a description if required. Click **Save** to create the batch. You are now ready to start scanning.

You can either scan one page at a time or multi pages. Depending on your scan settings of the job you will be presented by your scanner's interface.

Use the *Scan Settings* menu to set your scanning preferences like Resolution, Color, Rotation etc.

You can also set your document separation settings from the *Document Separation* menu.

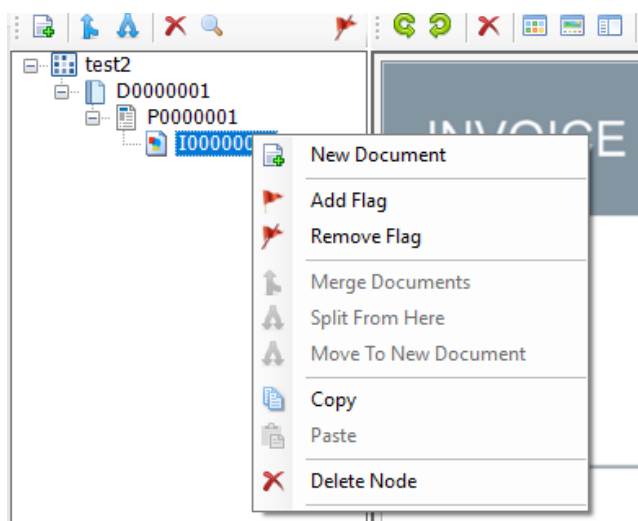


The user can complete the scanning process by clicking the *Scan Completed*. The next step is to do quality control on the scanned images.

On the toolbar, you have several tools that you can use during the Scanning/ Quality Control process:

- Add new document
- Merge documents
- Split documents
- Delete Document, page or image
- Flag document
- Rotate Left/Right

You also have additional tools on the context menu of each document, page or image. You can access the context menu by right clicking on the Document, page or image in the batch tree.



When you are satisfied with your images you can complete the *SCAN QC* process to continue to the indexing process.

INDEXING MODULE

Coming soon!