

Document On

DOCUMENT SCANNING, OFFLINE INDEXING

&

BATCH UPLOADING IN

FINEDOCS SYSTEM

By



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Section I: FineDocs Scanning

Introduction

FineDocs Scanning Interface allows only the authentic users to upload files or scan documents in FineDocs Web Interface. It provides efficient scanning and quality control features to convert paper documents into electronic documents. FineDocs also allow the user to combine up to 1000 images or other files in one single Batch. The Batches are uploaded on the FineDocs Web Interface for document management. A Batch can contain different file formats, such as .pdf and .doc. FineDocs provide scanning facility to scan documents in different image formats, such as .tiff and .jpeg. After scanning, these documents can be stored in a Batch file and the Batch can be uploaded to FineDocs.

The FineDocs Scanning Solution is a combination of two programs; FindocsScanConfiguration.exe and FineDocs Scan.exe. The first Application is used to create a template which is used by the second Application to index and upload document Batches.

Template created using FindocsScanConfiguration.exe can be of two types depending on the Index Type preferred:

Template with Offline as the Indexing Type: Indexing is done for a Batch before uploading it into FineDocs Web.

Template with Online as the Indexing Type: Indexing is done online after uploading a Batch to FineDocs Web.

Note: Batch creation method differs in how an Offline Batch is created and how Online Batch is created. The difference has been discussed further in the following section.

Section II: FineDocs Scanning

FineDocs Scan Interface depends on Template set with FineDocs Configuration application. Interface that opens for template with offline as indexing type is slightly different from what it opens for template with online as the indexing type.

In this section we shall understand uploading a Batch without indexing in case of online indexing and indexing a Batch before uploading it in case of Offline indexing.

We will also understand all other operations required to successfully execute Scanning and Indexing operations.

Chapter 1: Scanning Interface

Scan Interface

Scan interface comprises following to let one create and upload a Batch. Interface that opens for Template with Offline Indexing type is slightly different from Template with Online Indexing type.

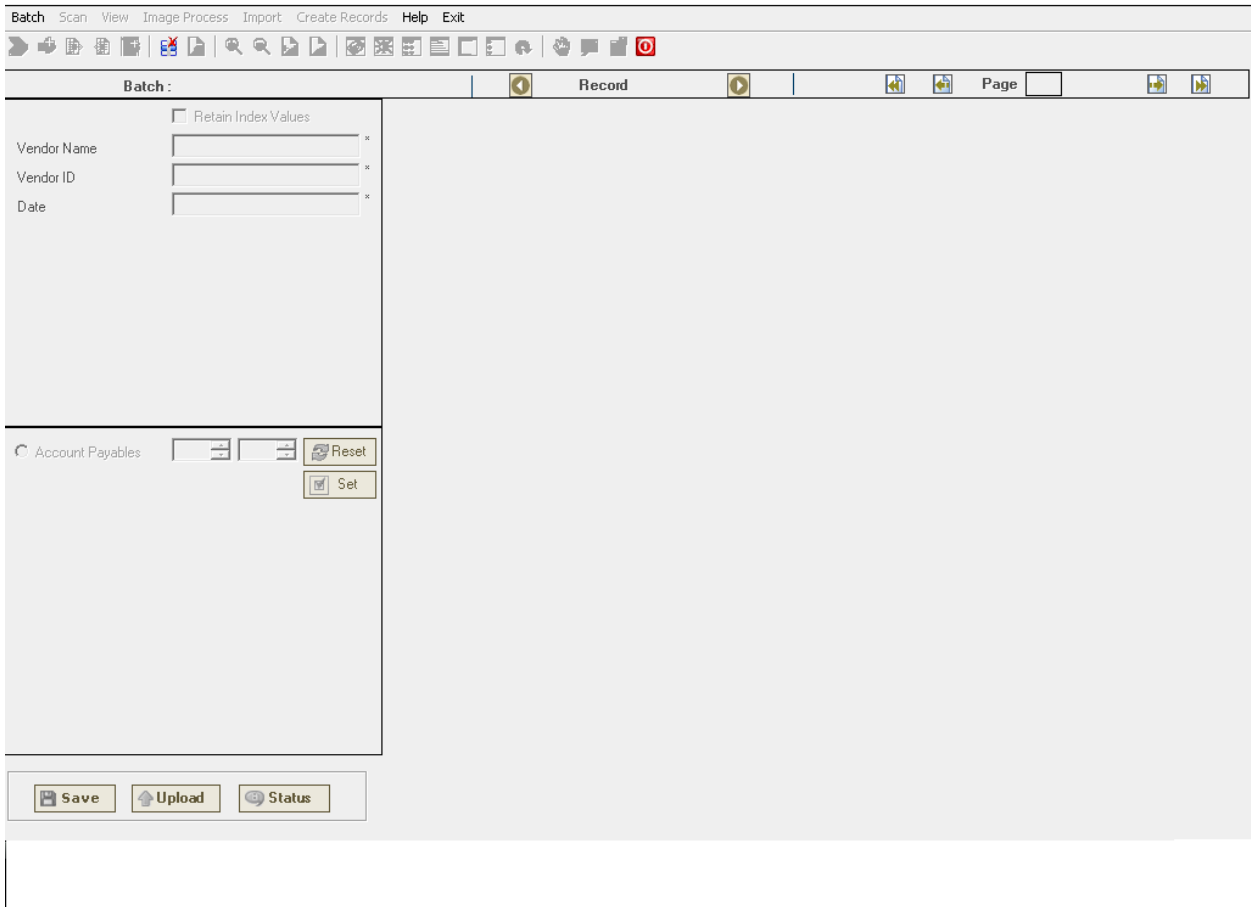
In Template with Offline Indexing Type (Offline Template) interface has two panes to work on a Batch; Left pane is used for Indexing and Right pane for Document View.

In Template with Online indexing type Document view has no left pane options to index the Batch.

Although the Menu and Toolbar option appears common for both; 1. Interface for Offline Indexing type and 2. Interface for Online Indexing Type, there are marked differences in Menu options and Toolbar options.

Manual explains Menu and Toolbar options commonly, however Menu options and Toolbar options unique to the Offline Template or Online Template has been mentioned wherever necessary.

Interface for Template with Offline as the indexing type

The screenshot shows a software application window with a menu bar at the top containing 'Batch', 'Scan', 'View', 'Image Process', 'Import', 'Create Records', 'Help', and 'Exit'. Below the menu is a toolbar with various icons for file operations. The main window is divided into two panes. The left pane, titled 'Batch:', contains a 'Retain Index Values' checkbox and three text input fields labeled 'Vendor Name', 'Vendor ID', and 'Date', each with a small 'x' icon to its right. Below these fields are two buttons: 'Reset' and 'Set'. The right pane is titled 'Record' and contains a 'Page' label and a text input field. At the bottom of the window, there is a 'Save' button, an 'Upload' button, and a 'Status' button.

1. Menu Items
2. Tool Bar Options
3. Left pane Batch options (Upload, Save and Status)
4. Document View window on right

Chapter 2: Menu and Functionalites

Batch Menu

A Batch is collection of document-record scanned together as a single unit. File saved on local machine too can be added / appended to a Batch.

A Batch has auto generated name based on the Template. Template is set through FineDocs Scanning Configuration. A Batch is guided by the attributes of Active Template. Several Template can be configured however only one is set as Active Template.

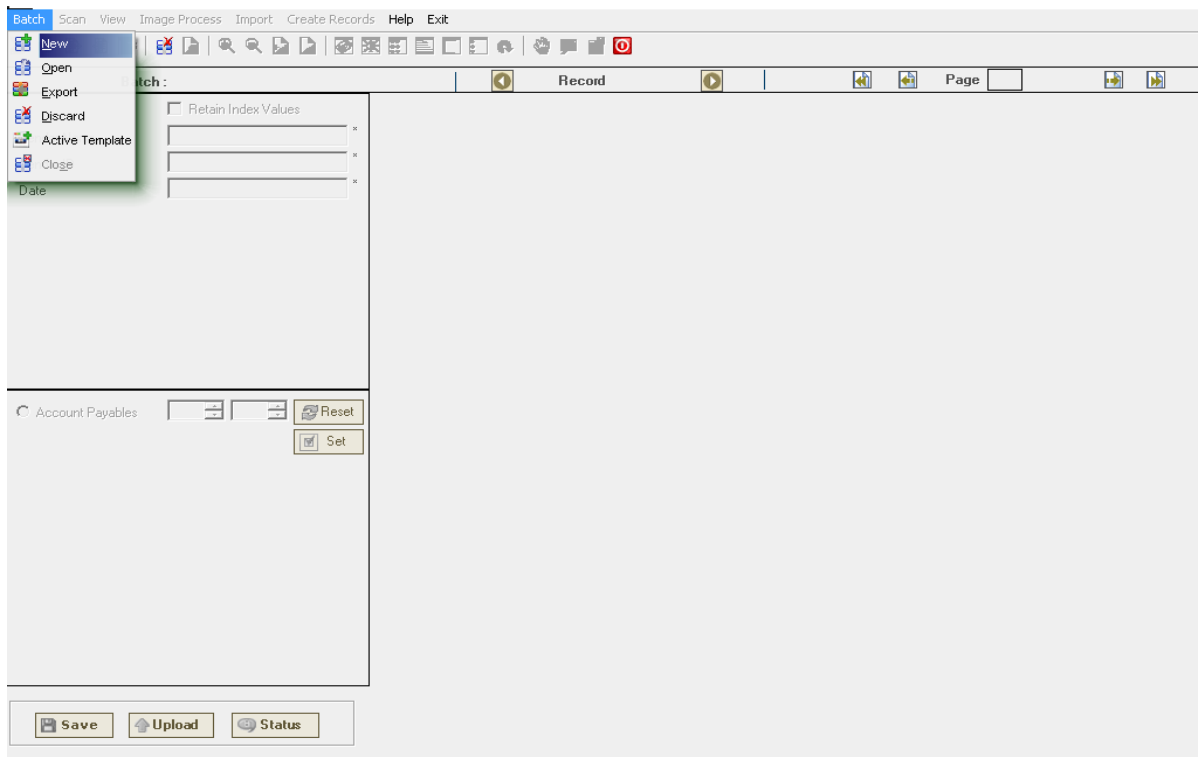
Under the Batch Menu, there are several menus options to perform Batch operations such as creating a new Batch or opening a saved Batch.

Options on Batch menu:

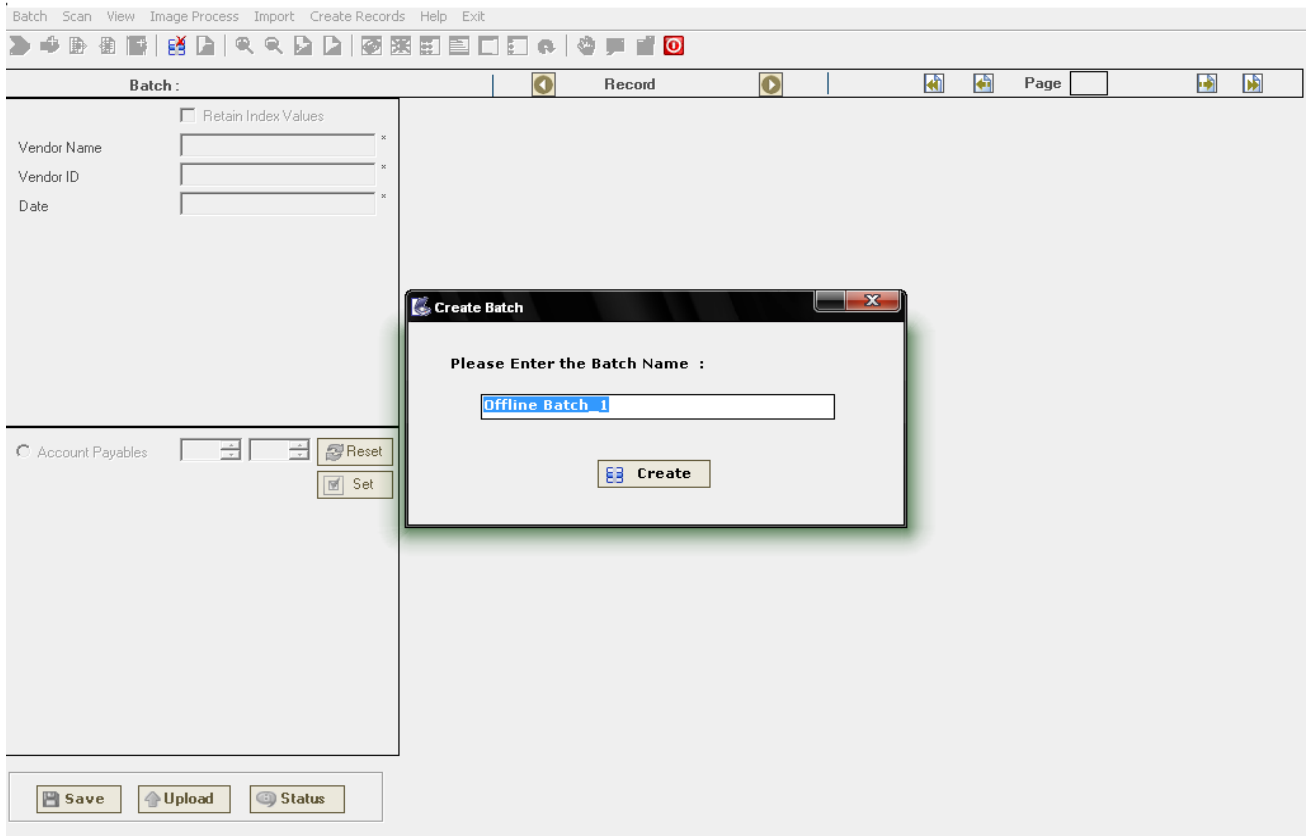
1. New
2. Open
3. Export
4. Discard
5. Commit (Online)
6. Close

New Batch:

A Batch gets a name automatically by itself as per the name set in the template. To overwrite to auto generated Batch name select-highlight the name and overwrite to it.



1. Click New on the Batch menu. A pop-up shows an auto-generated name for the Batch as set under Active Template. To change the auto-generated name delete or type over the current name.
2. Click on Create button. A new Batch is created.



After a Batch is created several indexing options are set for the Batch. The indexing options (Dataclass and Descriptor) are used to index Records under a Batch.

Scan Menu

The Scan menu contains various options that help scan and store the document in a Batch in FineDocs. The Scan menu options are as followed:

1. Select Scanner
2. Append
3. Insert After
4. Insert Before
5. Append From File
6. Exit

Select Scanner

The Select scanner option allows you to select a scanner to scan documents using FineDocs. To select a scanner:

1. Click Select Scanner on Scan menu or press the **Ctrl** and **C** key simultaneously to display the Select Source dialog box, as shown in

Figure:

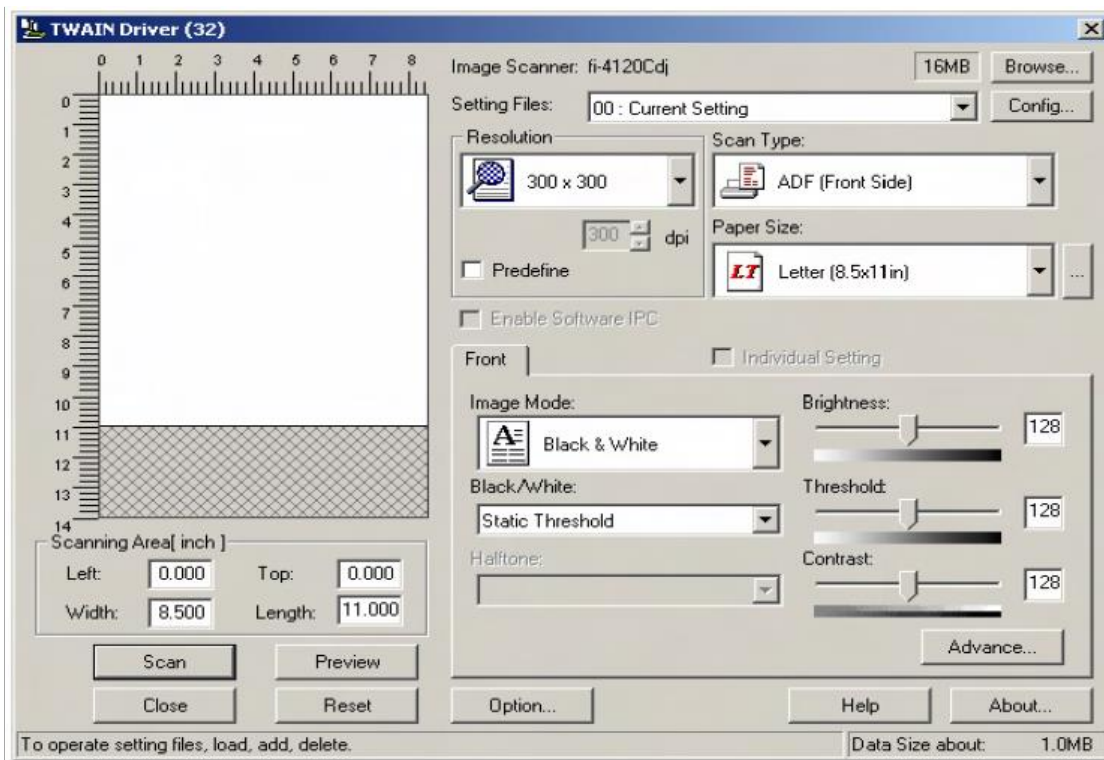


2. Select a scanner from the Sources list box and click the Select button to select scanner for FineDocs Scanning.

Append

The Append option allows you to scan a document and add it to a Record or Batch in FineDocs. To scan document follow the steps:

1. Place the document to be scanned in the scanner.
2. Select Append or click the Append from Scanner button on the toolbar to display the TWAIN Driver (32) dialog box, as shown in Figure:



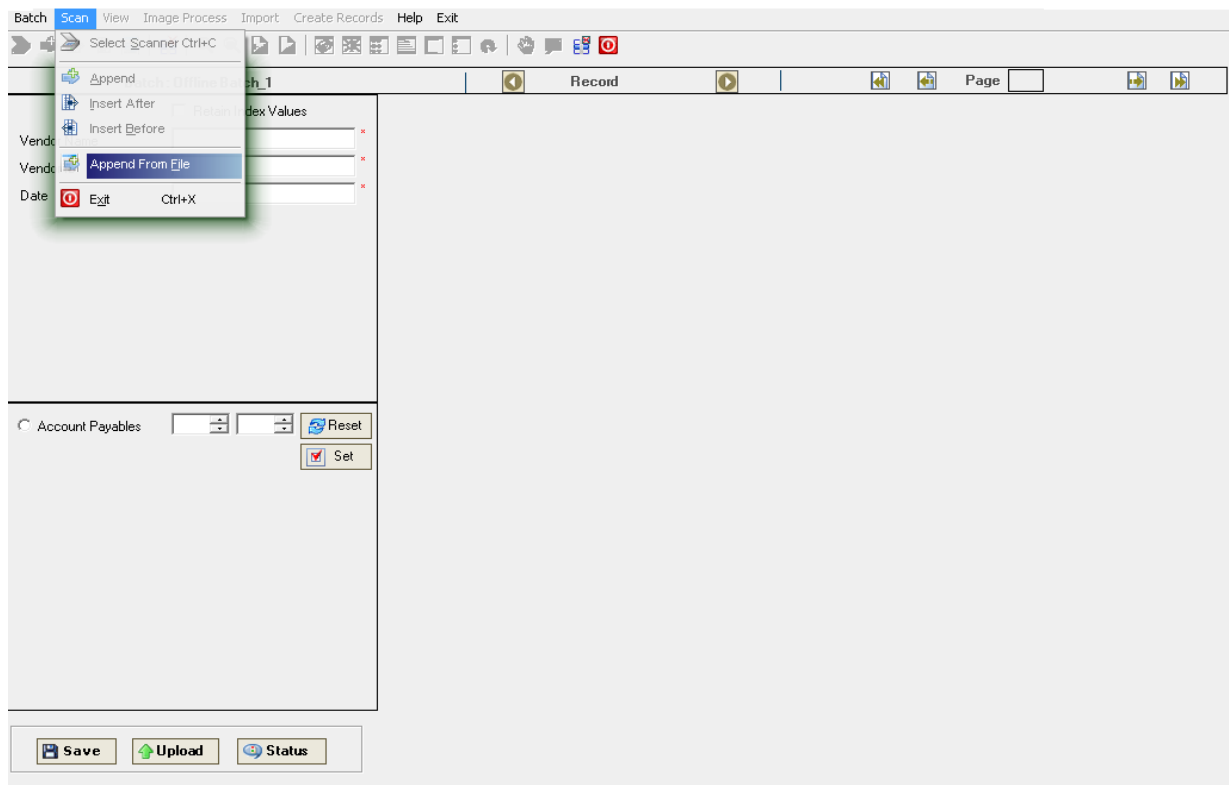
3. You can modify various scanning properties, such as brightness and contrast on the TWAIN Driver (32) dialog box.
4. Click the Scan button to scan and add the document to the Batch.

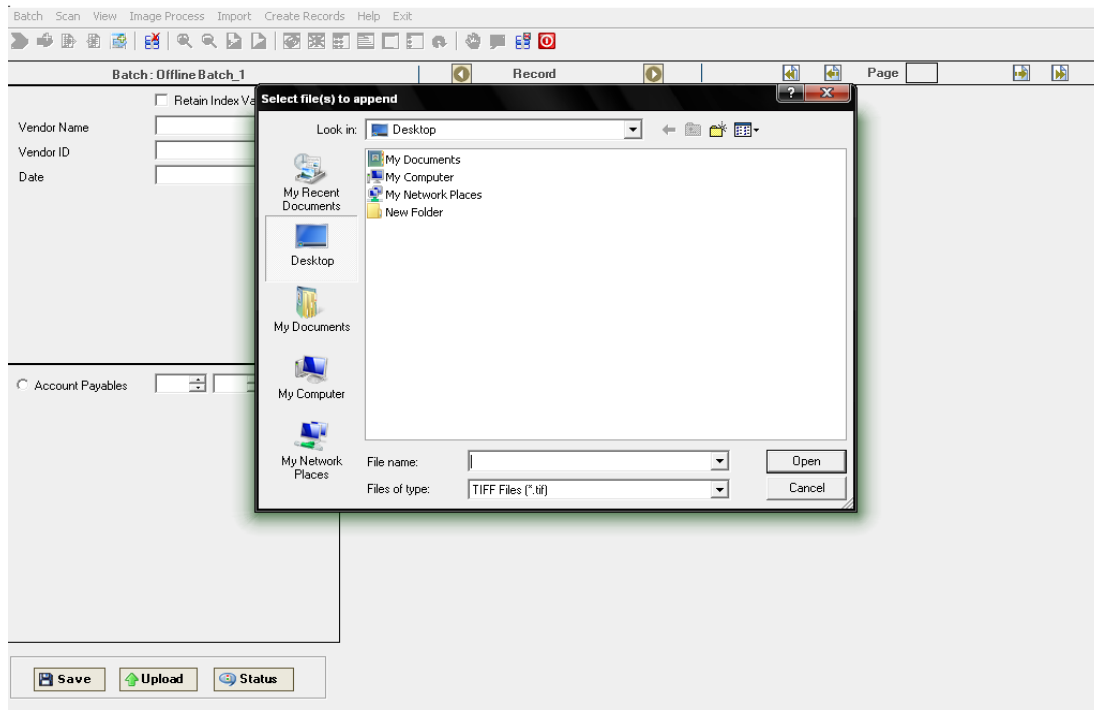
Append From File

The Append from File option allows you to add to a Batch either a scanned documents or an already available file.

To use this option:

1. Select Scan → Append From File or click the Append From File button on the toolbar to display the Select File(s) to append dialog box, as shown in Figure:





2. Specify the path where the files to be inserted are stored, using the Look in drop-down list box and click the Open button to add selected files in the Batch.

Batch: Offline Batch_1 Record: 1 of 1 Page 1 of 3

Vendor Name: Retain Index Values: ☐

Vendor ID:

Date:

☐ Account Payables

Apr 04 07 01 35p Marketing 7707678380 p. 2

MATRIA
HEALTHCARE

March 20, 2007

To Whom It May Concern

Dear Sir / Madam,

We would like to invite Mr. Rajan Bhanot, who is currently working with Pyramid IT Consulting Pvt. Ltd (Pyramid) to visit our office Matria Healthcare Inc., 1850 Parkway Place, Marietta, GA 30067 starting from the week of April 9th, 2007

Pyramid IT Consulting Pvt. Ltd (Pyramid) has its registered Office at 325, Tarun Enclave, Pitampura, Delhi - 110034, India and software development facility at D 26, Sector 63, NOIDA, UP, India

Mr. Rajan Bhanot who is currently part of the team providing services to Matria at Pyramid's offshore center is required to be in the US for a period of 3 months. During his stay, Mr. Rajan Bhanot will be involved in gathering requirements for new applications, be trained on additional applications that we are planning to outsource the maintenance to Pyramid's facility and understand the processes to be followed for subsequently undertaking the development and support from Pyramid's offshore facility in India

During his stay, Mr. Rajan Bhanot will continue on the Indian Payroll of Pyramid at his current salary. Pyramid will provide him with a per diem allowance for food and incidentals, giving him sufficient funds to support himself while in the US. All of his other travel and living expenses including airfare, housing and car rental will be taken care by Pyramid

Do let us know if you have any further questions

The uploaded Documents can be seen on the interface.

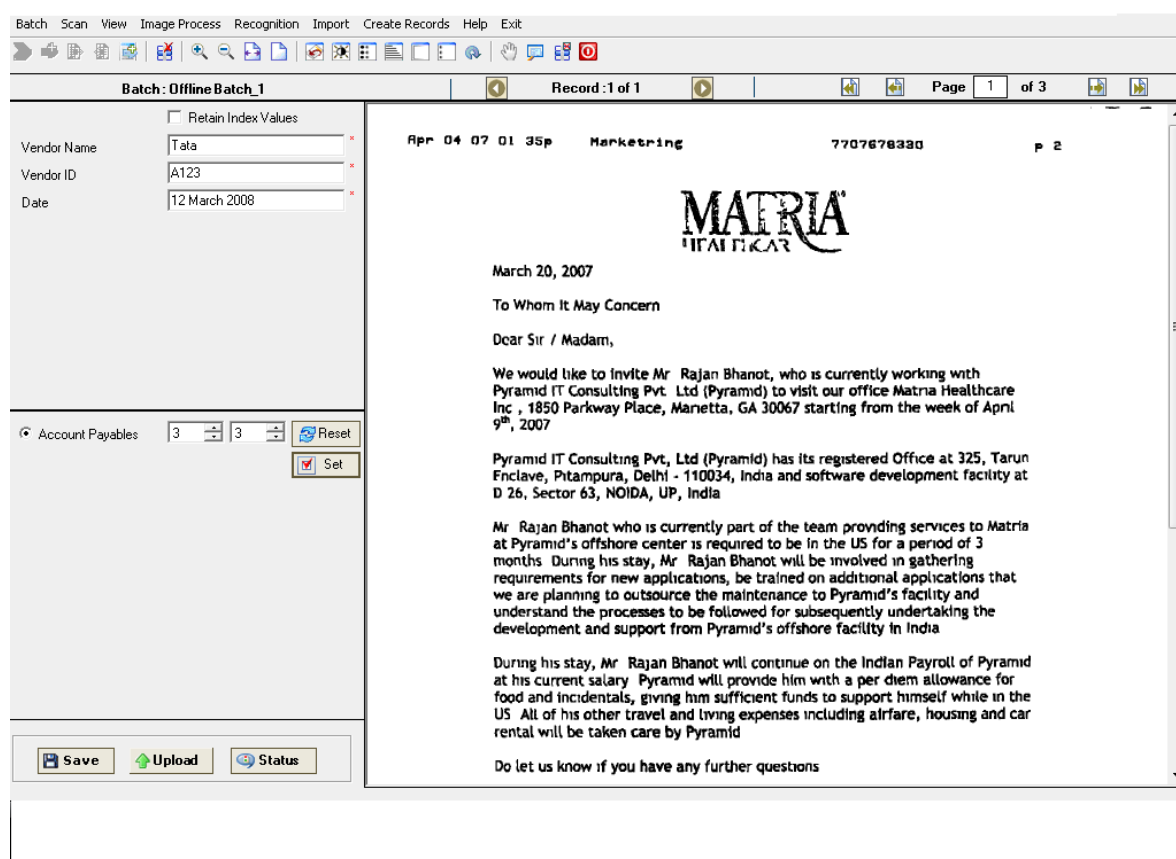
Chapter 3: Indexing Records (Offline Batch)

Indexing Records (Offline Batch)

Indexing of Records using FineDocs Scanning interface is done for Batch which has Offline as the Index Type. In case of Template which has Online as the Indexing Type indexing is done online after the Batch has been uploaded/committed.

The documents in a Batch are divided into logical Records containing pages. Records are formed based on the Separation Type set for the Active Template. If a Batch has say, 100 pages, and a page separator of blank page is inserted after every 4 pages, then the entire Batch of 100 pages is divided into 25 Records.

In Template with Offline Indexing Type (Offline Template) interface has two panes to work on a Batch; Left pane is used for Indexing and Right pan for Document View.



Batch: Offline Batch_1 | Record: 1 of 1 | Page 1 of 3

☐ Retain Index Values

Vendor Name: *

Vendor ID: *

Date: *

☒ Account Payables | | | | ☒ Set

| |

Apr 04 07 01 35p Marketing 7707678330 P 2

MATRIA
HEALTHCARE

March 20, 2007

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We would like to invite Mr. Rajan Bhanot, who is currently working with Pyramid IT Consulting Pvt. Ltd (Pyramid) to visit our office Matna Healthcare Inc., 1850 Parkway Place, Marietta, GA 30067 starting from the week of April 9th, 2007

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Do let us know if you have any further questions

Index Pane as in figure above has two sub-section to index the open Record.

1. Descriptors
2. Dataclass

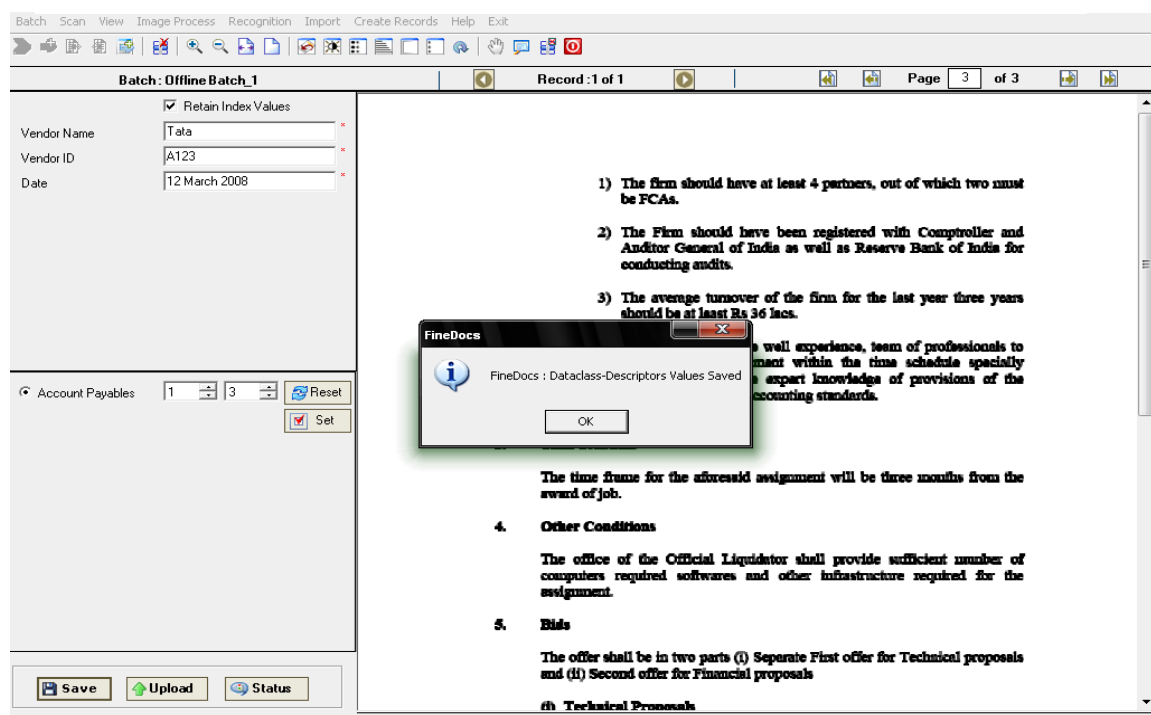
Descriptors

All the descriptors created in the template are listed in the top left panel of the screen.

The descriptors of auto-fill type have a drop down list adjacent to them which is populated with the auto-fill values. These are the possible values which this descriptor can take during indexing.

The descriptors which are not of auto-fill types have a text box adjacent to them.

The descriptors which are of the type "Required" or "mandatory" have an asterisk (*) placed adjacent to their text box or dropdown list. The User has to enter values for these descriptors while indexing.



The screenshot displays the FineDocs software interface. The top menu bar includes options like Batch, Scan, View, Image Process, Recognition, Import, Create Records, Help, and Exit. Below the menu, there's a toolbar with various icons. The main window is titled "Batch: Offline Batch_1" and shows "Record: 1 of 1" and "Page 3 of 3". On the left, there's a panel for "Retain Index Values" with fields for Vendor Name (Tata), Vendor ID (A123), and Date (12 March 2008). Below this, there's a section for "Account Payables" with a dropdown menu set to "1" and a "Reset" button. A "Set" button is also present. The main area displays a list of descriptors for indexing, including:

- 1) The firm should have at least 4 partners, out of which two must be FCAs.
- 2) The Firm should have been registered with Comptroller and Auditor General of India as well as Reserve Bank of India for conducting audits.
- 3) The average turnover of the firm for the last year three years should be at least Rs 36 lacs.

A confirmation dialog box titled "FineDocs" is overlaid on the screen, stating "FineDocs : Dataclass-Descriptors Values Saved" with an "OK" button. The background text continues with:

The time frame for the aforesaid assignment will be three months from the award of job.

4. Other Conditions

The office of the Official Liquidator shall provide sufficient number of computers required softwares and other infrastructure required for the assignment.

5. Bids

The offer shall be in two parts (i) Separate First offer for Technical proposals and (ii) Second offer for Financial proposals

6. Technical Proposals

DataClasses

Document DataClass

The entire document Data Classes created in the template is listed in the bottom left pane of the screen. A specific document Dataclass can be selected by checking the appropriate radio button adjacent to it.

On checking the respective radio button the two "UP" "DOWN" counters adjacent to that data class show the maximum page range of the current record along with the option of setting or re-setting the counters using the set and reset buttons in the same panel. All these Data Classes are internally linked to the descriptors in the top left panel as per the relations defined in the template.

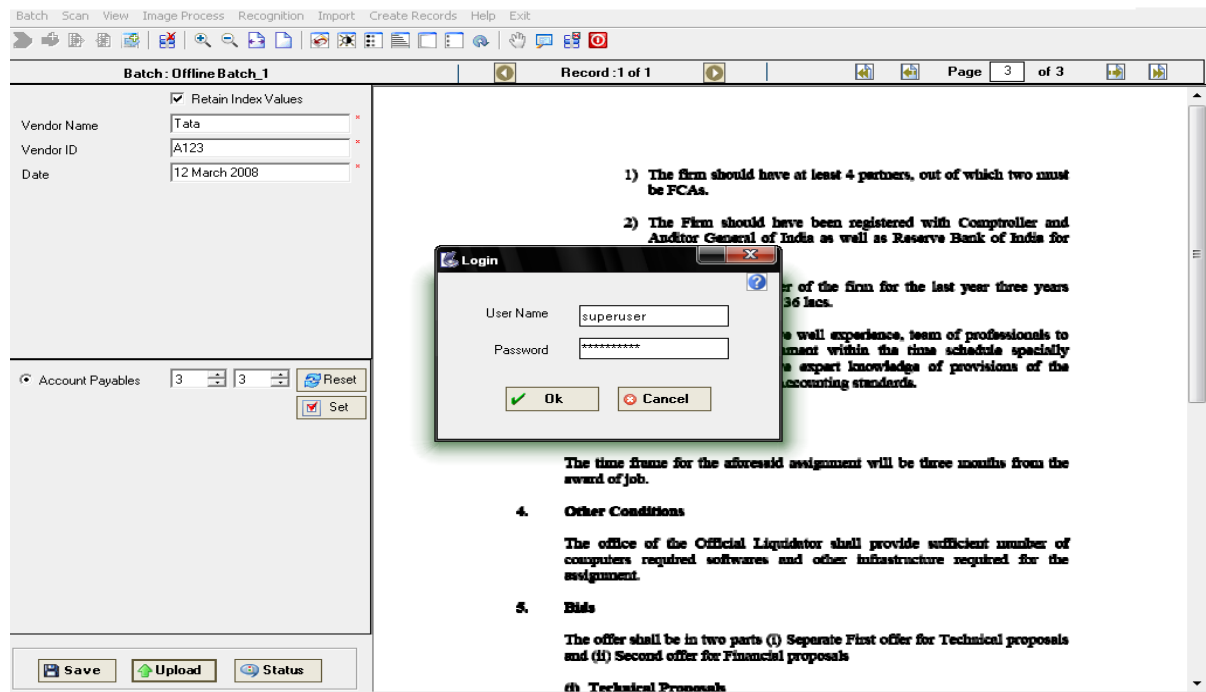
Folder DataClass

The folder data class created in the template (Optional) is not shown in the screen but is internally linked to the appropriate descriptors in the top left panel of the screen. The value given to the descriptor of the folder data class corresponding to the folder name is used to create a folder under the Volume, cabinet and the folder selected in the template. This is the folder where the documents are uploaded.

Note: If no folder Dataclass is selected / created in the template the documents are uploaded directly under the root folder selected in the template.

Uploading the indexed Records to FineDocs Server

Upload button allows the user to upload the Records with its indexing (Dataclass and Folder Dataclass with their Descriptors values) to the FineDocs server.



Batch: Offline Batch_1

Record: 1 of 1

Page 3 of 3

☒ Retain Index Values

Vendor Name: Tata

Vendor ID: A123

Date: 12 March 2008

Account Payables: 3 3

Reset

Set

Save Upload Status

1) The firm should have at least 4 partners, out of which two must be FCAs.

2) The Firm should have been registered with Comptroller and Auditor General of India as well as Reserve Bank of India for...

er of the firm for the last year three years 36 lacs.

e well experience, team of professionals to ment within the time schedule specially e expert knowledge of provisions of the accounting standards.

The time frame for the aforesaid assignment will be three months from the award of job.

4. Other Conditions

The office of the Official Liquidator shall provide sufficient number of computers required softwares and other infrastructure required for the assignment.

5. Bids

The offer shall be in two parts (i) Separate First offer for Technical proposals and (ii) Second offer for Financial proposals

6. Technical Proposals

Note: You will have to log into FineDocs™ when you click on upload button, if you are already logged in the Records are uploaded without prompting you to login.

Batch: Offline Batch_1 Record: 1 of 1 Page 1 of 3

☐ AutoIndex ☒ Retain Index Values

Vendor Name: Tata

Vendor ID: A123

Date: 12 March 2008

Accounts Payable: 1 3 ☒ Set

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MATRIA
HEALTHCARE

March 20, 2007

To Whom It May Concern

Dear Sir / Madam,

FineDocs
FineDocs: Documents Successfully Uploaded

Mr. Rajan Bhanot, who is currently working with Pyramid, is required to visit our office Matna Healthcare 0067 starting from the week of April 2007. Mr. Rajan Bhanot has its registered Office at 325, Tarun and software development facility at

Mr. Rajan Bhanot who is currently part of the team providing services to Matria at Pyramid's offshore center is required to be in the US for a period of 3 months. During his stay, Mr. Rajan Bhanot will be involved in gathering requirements for new applications, be trained on additional applications that we are planning to outsource the maintenance to Pyramid's facility and understand the processes to be followed for subsequently undertaking the development and support from Pyramid's offshore facility in India.

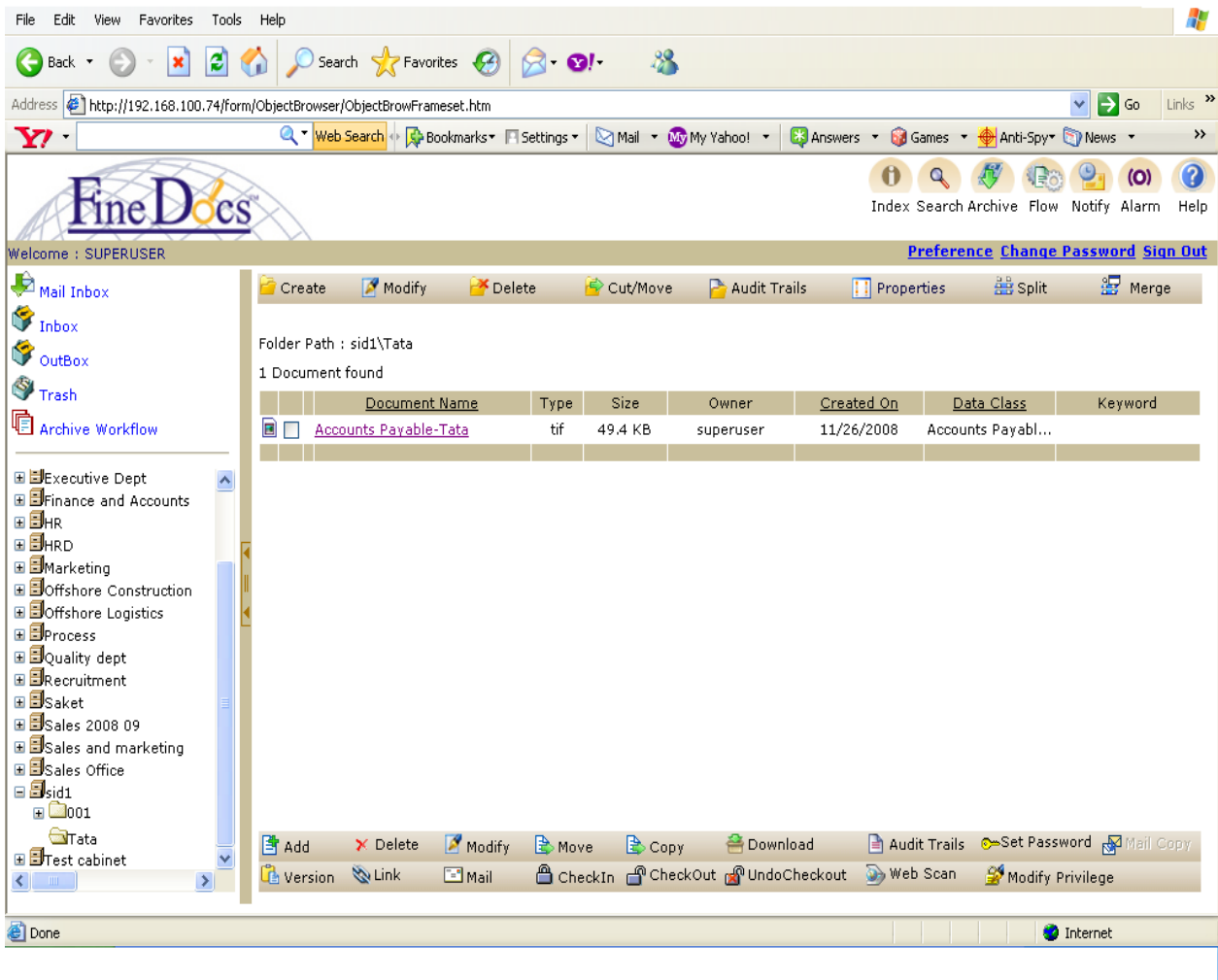
During his stay, Mr. Rajan Bhanot will continue on the Indian Payroll of Pyramid at his current salary. Pyramid will provide him with a per diem allowance for food and incidentals, giving him sufficient funds to support himself while in the US. All of his other travel and living expenses including airfare, housing and car rental will be taken care by Pyramid.

Do let us know if you have any further questions.

Sincerely,

The Record will be uploaded directly into the FineDocs with predefined rules, path & Data class values.

The uploaded Record can be viewed on FineDocs screen as shows in Figure Below.



The screenshot displays the FineDocs web application interface. The address bar shows the URL: `http://192.168.100.74/form/ObjectBrowser/ObjectBrowFrameset.htm`. The interface includes a navigation pane on the left with folders like Mail Inbox, Inbox, OutBox, Trash, and Archive Workflow. The main content area shows the folder path `sid1\Tata` and a list of documents. A table lists the document details:

Document Name	Type	Size	Owner	Created On	Data Class	Keyword
Accounts Payable-Tata	tif	49.4 KB	superuser	11/26/2008	Accounts Payabl...	

The interface also features a top menu bar with options like File, Edit, View, Favorites, Tools, and Help. A bottom status bar shows the connection as 'Done' and 'Internet'.

Section III: Document Search

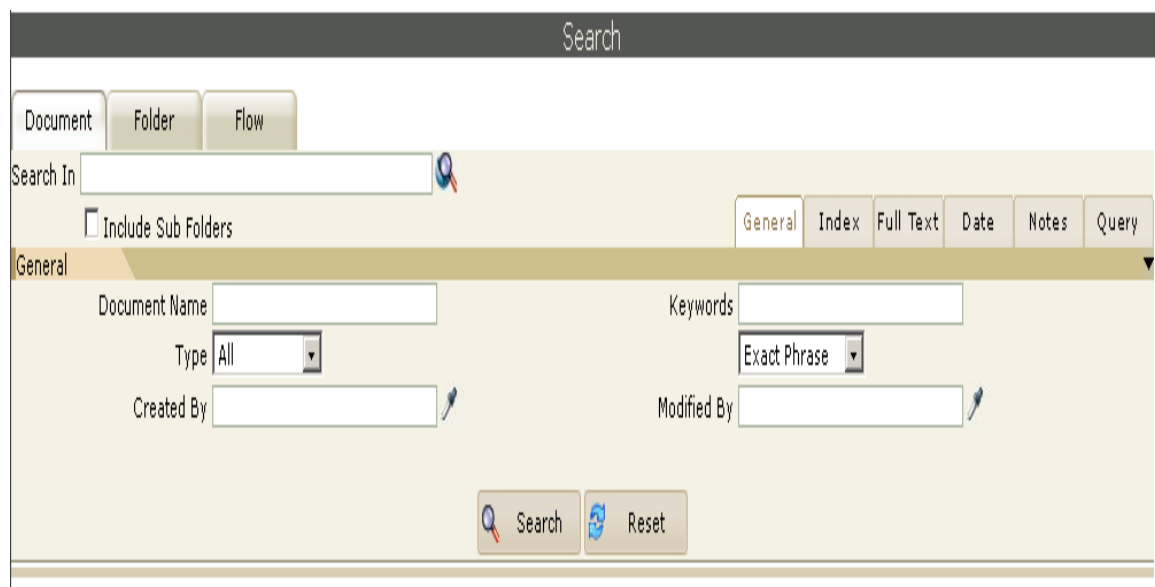
Document Search option allows the User to search for a Document in a particular Folder or its Sub-Folder. A Document can also be searched on the basis of the Name, Creation Date, Modified Date, or the Keywords attached with the Document.

The options available under Document search are:

1. General Search
2. Index Search
3. Full Text Search
4. Searching on Date
5. Searching on Notes
6. Searching on Query






General Search

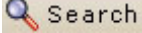
Below is the default search screen which is active when a User enters into the Document Search section.



The screenshot shows the 'Search' interface. At the top, there's a 'Search' header. Below it, there are three tabs: 'Document', 'Folder', and 'Flow'. The 'Document' tab is selected. Under 'Search In', there's a text input field and a magnifying glass icon. Below that, there's a checkbox labeled 'Include Sub Folders'. To the right, there are six tabs: 'General', 'Index', 'Full Text', 'Date', 'Notes', and 'Query'. The 'General' tab is selected. Under the 'General' tab, there are four search criteria: 'Document Name' with a text input field, 'Keywords' with a text input field, 'Type' with a dropdown menu set to 'All', and 'Created By' with a text input field and a magnifying glass icon. There are also 'Exact Phrase' and 'Modified By' fields. At the bottom, there are 'Search' and 'Reset' buttons.

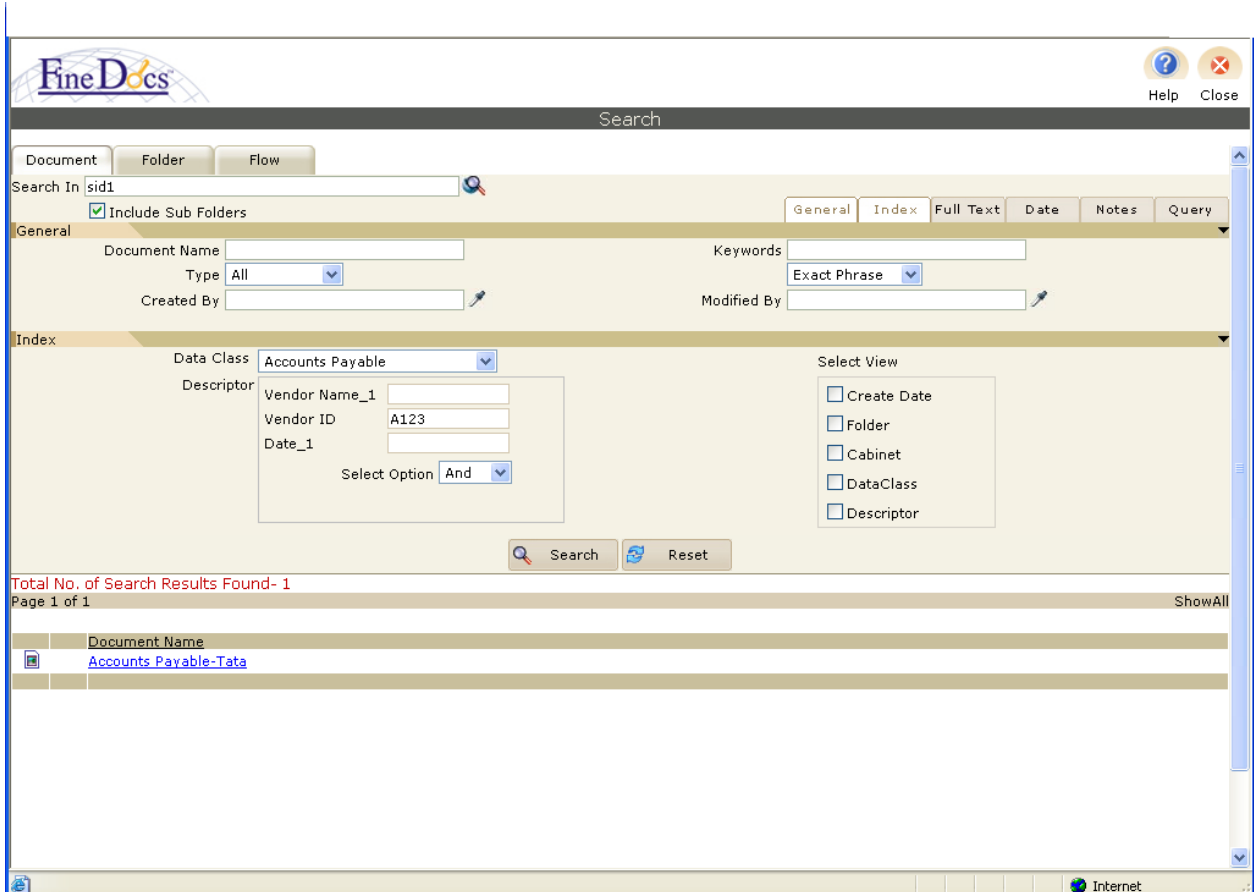
Follow the steps given below to search for a Document using the General Search:

1. To select a Folder click the Browse icon .
2. Click the Check-box  to make search in the sub Folders too.
3. Enter the Document Name and click the Search button  Search to view the result
4. Click the  icon to search on the basis of creator of the Document and click the button to view the result.
5. Click the  icon to search on the basis of modifier of the Document and click the button to view the result

6. To search on keywords enter the keyword and click the  button to view the result retrieved.
7. Click on the Document name to view the Document, its properties like the creation date, Folder/cabinet where the Document is stored, its type, and the notes attached to it.

Index Search


Index search allows the User to search for a particular Document on the basis of their Data Class and Descriptors.

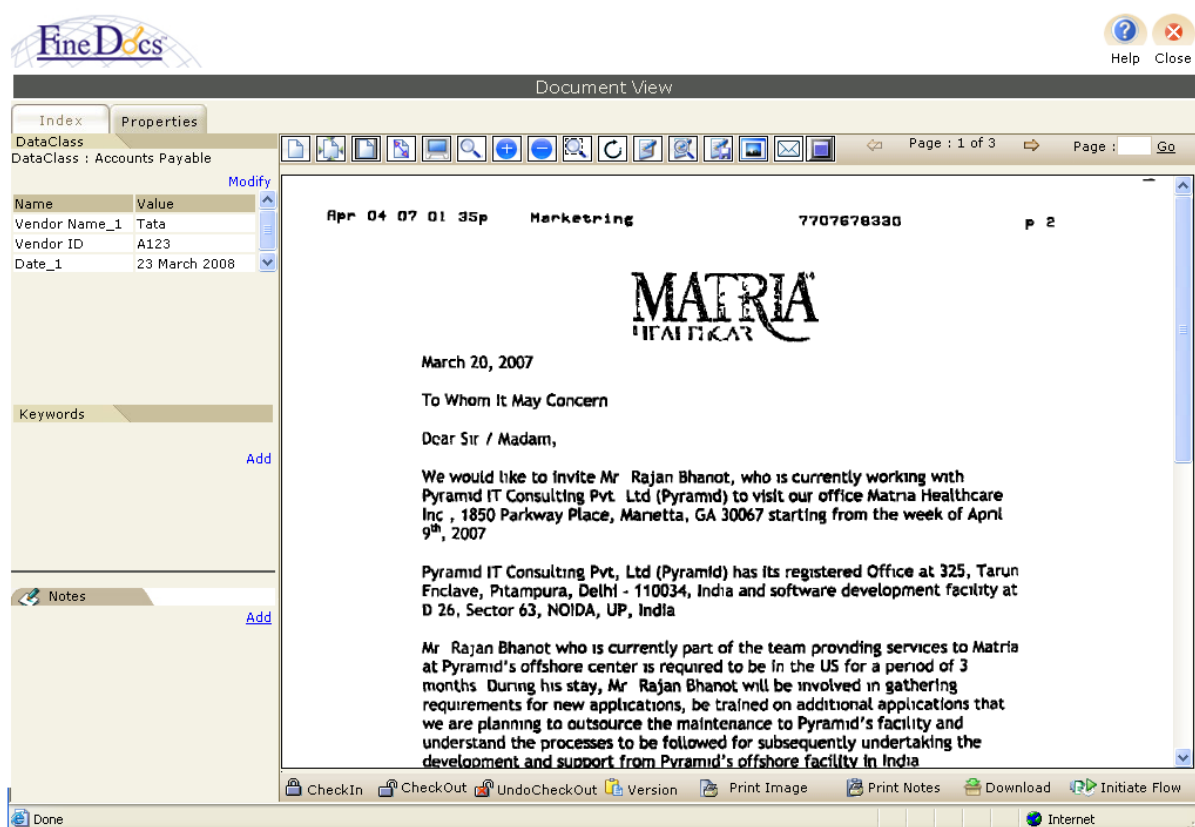


The screenshot shows the 'Fine Docs' application window with the 'Search' tab selected. The 'Index' sub-tab is active, displaying search criteria for 'Accounts Payable'. The 'General' section includes fields for 'Document Name', 'Type' (set to 'All'), 'Created By', 'Keywords', 'Exact Phrase' (selected), and 'Modified By'. The 'Index' section includes 'Data Class' (set to 'Accounts Payable'), 'Descriptor' (with fields for 'Vendor Name_1', 'Vendor ID' (set to 'A123'), and 'Date_1'), and a 'Select View' section with checkboxes for 'Create Date', 'Folder', 'Cabinet', 'DataClass', and 'Descriptor'. The 'Select Option' is set to 'And'. The 'Search' button is highlighted. Below the search criteria, it shows 'Total No. of Search Results Found- 1' and 'Page 1 of 1'. A table lists the search results with the document name 'Accounts Payable-Tata'.

Document Name
Accounts Payable-Tata

To search for a Document using the Search follow the steps given below:

1. Select the Data Class from the Data Class drop-down list as shown in figure
2. Select the Descriptors from the drop-down list and select the AND/OR criteria.
3. Click the  Search button to retrieve the result.
4. View the searched Document by clicking on Document Name.



And the uploaded document / Records can be viewed by using FineDocs viewer.