Eclipse Document Indexer

Release 8.6.3 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.3 (Eterm) Online Help System

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Document Indexer Overview

Eclipse Document Indexer is the Windows portion of the Document Imaging companion product. Document Indexer works with Eclipse Document Imaging to organize, manipulate, and attach documents to Eclipse records.

Click the displayed files in Indexer to view the documents or scanned images, and add annotations as needed. You can perform the following tasks in Document Indexer:

Learn about Document Indexer

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Change Settings

- Change Indexer settings.
- Change annotation properties.
- Change users.

Use Document Indexer

- Use index profiles.
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Installing the Eclipse Document Indexer

Perform this installation for any PC that you will use to access scanned images to attach to Eclipse records. This installation includes the Eclipse software for Windows that is necessary for file attaching and indexing.

Eclipse Document Indexer is Windows software, licensed for image scanning workstations. Use this software to scan and manipulate document images, and index them to your Eclipse records. Also use the Document Indexer to view, copy, print or fax the scanned images.

Minimum requirements for installation:

- A Windows computer with a 166 MHz processor and 32 MB of RAM memory, 200 MHz or faster processor and 128 MB of RAM memory recommended for imaging workstations.
- 40 MB of free hard disk space for program files (100 MB of free hard disk space recommended for caching images).
- Eterm version 4.00 or greater for full use of all the imaging features. Sacrificing some features, Eterm 3.4 is the minimum usable version for Eclipse Document Imaging. Check your version number by starting Eterm, and choosing **About** from its **Help** menu. If you need to update Eterm, you can do so from the Eclipse Document Imaging installation CD-ROM.
- (Optional) VSI-FAX® Gold Series Windows Network Client Interface software for faxing file images.

The Attachment Viewer software, used to view and print image attachments, must be installed separately. Install the Attachment Viewer before or after installing the Document Indexer.

To install the Eclipse Document Indexer:

1. Verify that you have installed the software for your scanner. Consult the documentation with your scanner and install any scanner software necessary. If you are using an ISIS scanner, you normally only need to install the ISIS driver software.
2. Download the current Eclipse software from http://distribution.activant.com/eclipse-support.
3. Select and run the **Eclipse Document Indexer** installation. Use all the default installation options.

   Installation creates a folder on your computer to store images. By default, this storage directory is created on the same hard drive as your Windows system software. The folder's default path and name is C:\InBasket.

See Also:

Document Indexing Overview

Installing the Visioneer Scanner Software

The Eclipse Document Indexer and Document Imaging software must be installed before the scanning software is installed.

To install the Visioneer software:

1. Insert the Visioneer PaperPort CD-ROM.

   The installer program should start automatically, or you can double-click its **Start.exe** icon.

2. Eclipse Document Imaging requires the Deluxe upgrade to the Visioneer software. Use the installer program to purchase this upgrade, by telephone or online. Install this instant upgrade according to the Visioneer directions.

3. Follow the on-screen directions for the **PaperPort Deluxe** install option, and use any default settings. Consult the scanner documentation for assistance. During installation, you are asked for the serial number on the CD-ROM sleeve.

See Also:

Connecting the Visioneer Scanner

Calibrating the Visioneer Scanner

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Connecting the Visioneer Scanner

You can use many different scanner models with Eclipse Document Imaging, so consult your scanner documentation for the complete setup and installation directions. However, as some early Eclipse Document Imaging users still use older Visioneer PaperPort scanners, condensed general instructions for these scanners are provided.

We recommend shutting down your computer before connecting devices such as scanners.

See Also:

Calibrating the Visioneer Scanner

Installing the Visioneer Scanner Software

Document Indexing Overview

Calibrating the Visioneer Scanner

Once the PaperPort Deluxe software is installed, use the supplied calibration page to automatically adjust for the best possible image quality. Insert the wider edge of the calibration page into the scanner. When the calibration is complete in about a minute, withdraw the page and click **OK**. Calibration should take only about a minute.

Notice the button on the scanner. Pressing this opens the scanner's preferences dialog box. Eclipse uses the **Faxing**, **Filing**, or **Copying** scan settings and defaults. The PaperPort scanner has no on/off switch; simply insert a sheet of paper, facing up, to begin scanning. Paper sizes from 2" wide to 30" long may be used in the scanner.

Follow these guidelines when setting scanning option settings for Image Indexing:

- For scans of most business documents, set your scanning software for binary black & white (1 bit) scans at a resolution of 200 dots-per-inch (dpi).
- For scans of barcodes, set your scanner software for binary black and white (1 bit) scans at 600 dots-per-inch (dpi) resolution.
- Scanning at a higher bit-depth or resolution than necessary wastes storage space, and the increased memory demands slow your computer's performance.
- Save images using **tif* (TIFF, or Tagged Image File Format) with *CCITT* Group 4 (Consultative Committee for International Telegraph and Telephone) compression settings if you can specify these settings for the scanner. This format can be faxed.
- Set the default format for new item title to any date format without a comma (Edit / Preferences / **Item Names** tab). For example, 11-19-2002.

See Also:

Installing the Visioneer Scanner Software

Connecting the Visioneer Scanner

Document Indexing Overview

Selecting Users

User preference settings let you save, recall, and apply entire sets of Document Indexer and scanning preferences. This feature is handy if numerous people share a computer, or if the same computer is used for different types of scanning tasks.

You can create a user preference setting named for different users or scanning jobs. For example, the user setting named "Invoices" might set the Document Indexer for **Full Page Layout** display, with a thumbnails display setting of **Optimize**, and scanner settings of 200 dpi in black and white. The user setting named "HR Dept" might be set to make 96 dpi color scans of personnel portraits, use a thumbnail display type of **Normal**, and configure the screen display using the Document Indexer's **Alternate Layout**.

When you select a user, all the preference settings the user last used are immediately applied. The settings that get applied include annotation settings, scanning settings, view and window settings, and so forth.

This page contains the following procedures:

- Creating a new user
- Selecting an existing user
- Deleting a user

To create a new user:

1. In Document Indexer, from the **Tools** menu, select **Switch Users** to display the Select a User or Enter a New Name dialogue box.

   When you create a user, all the current settings for the Document Indexer are used. So if you already have a user preference setting that is similar to the desired settings, start by selecting that existing user. Then with those settings already applied, create a new user and change only the necessary options. Any options changed while a user is selected are automatically saved with that user’s preferences.

2. Enter a name that fully describes the person or the particular scanning task, for example, "Scan Barcodes."
3. Click **OK** to display the new user with the current settings.

To select an existing user:

1. In Document Indexer, from the **Tools** menu, select **Switch Users** to display the **Select a User or Enter a New Name** dialogue box.
2. Click the drop-down menu to select the desired user from the list.
3. Click **OK**.

   All the preference settings for the selected user are immediately applied. Any changes you make while that user is selected are remembered, and reapplied the next time that user is selected.

To delete a user:

1. In Document Indexer, from the **Tools** menu, select **Switch Users** to display the Select a User or Enter a New Name dialogue box.
2. Click the drop-down menu to select the user you want to delete.
3. Click the **Delete User** button.
4. Click **Yes** when asked to confirm that you want to delete the user.

   Note: The **Default User** preferences are chosen if you have not created and selected any other users. You cannot delete the **Default User**.

See Also:

Document Indexer Overview

Using Indexer Menus

Use Document Indexer menu commands to control imaging display, annotation, and other options.

Under the following menus you can perform the following tasks:

- File Menu – Update, attach, and scan images.
- Edit Menu – Select, cut, copy, and paste scanned images.
- Tools Menu – Display a list of scanned barcodes on an image, change user names, or create a new user, and adjust general, scanning, and annotation settings.
- Window – Arrange the Image Indexer window to your preference.
- Help Menu – Display Image Indexer on-line help.

File Menu

- **Open** – Browse for the folder in which you have images stored.
- **Attach** – Attach an image to an Eclipse record.
- **Request Profiles** – Add any new image profiles to the Indexing window's **Select Profiles** list. Profiles are created in Eclipse Document Profile Maintenance and are pulled into Document Indexer when you click the Request Profiles item. You must have a message source selected in Eterm.
- **Exit** – Close the Indexer screen.

Edit Menu

- **Select All** – Activate all images and stacks in the Indexer window.
- **Un-Select All** – Deactivate all images and stacks in the Indexer window. You can also unselect active images by clicking the blank portion of the window.
- **Cut** – Remove the selected image from the Imaging window and places it on the clipboard.
- **Copy (Ctrl+C)** – Copy the selected image to the clipboard.
- **Paste** – Inserts the image from the clipboard in the designated directory.

Tools

- **Show Barcodes (Ctrl+B)** – Display a list of barcodes that have been scanned in from the activated image.
- **Switch Users** – Enter a different user name or create a new user name. Indexer displays the user's default folder of images.

- **Options** – Display the Document Indexer Settings dialogue box, where you set up the following properties:
  - **General** – To set Indexer startup, image viewing, and barcode options, as well as designate stacking and separator page options.
  - **Annotations** – To set the default line color, fill color, back color, and font properties for annotation tools.

Window

- **Tile Horizontally** – Display multiple open Indexer windows horizontally.
- **Cascade** – Display multiple open Indexer windows overlapped in a cascade.

Help Menu

- **Help Topics** – Display Eclipse Document Imaging online help.
- **About Indexer** – Display information about the Eclipse Document Indexer program, including the program's version number.

See Also:

Manually Attaching Scanned Images

Using the Indexer Button Bar

Using Image Tools

User Selection Preferences

Using the Indexer Button Bar

Use the Indexer toolbar buttons to quickly scan, attach, and stack images, adjust the image icon view, and change the Indexer screen content. The Imaging screen contains the following buttons:

- **Attach/Auto Att.** – Attach scanned images to the designated Eclipse records. See Automatically Indexing Scanned Images for more information.
- **Select Profile** – Clicking the drop-down menu displays the image profiles that have been created in Eclipse. Select the profile to display in Indexer. Profiles determine the storage location for the images. See the Eclipse Document Imaging Help for more information about profiles.
- **Use Barcode** – Check this box to automatically read and process images based on their barcodes. See Automatically Indexing Scanned Images for more information.
- **Stack/Unstack** – Combines separate scanned images into a single multi-page image. See Stacking and Unstacking Images for more information.
- **View** – Select from the following list of display options for images in the Imaging window:
  - Large Icons
  - Small Icons
  - List
  - Details
  - Thumbnails

See Also:

Using Indexer Menus

Document Indexer Overview

Using Image Tools

Use the Image toolbar and annotation tools to save and print images, change the image display, and add your own annotations to images.

The following table describes the toolbar buttons and their functions:

Button	Function
	Attaches the highlighted image to an open Eclipse record.
	Saves the changes to the current document.
	Displays a dialog box with printing options.
	Each click rotates the image 90°, clockwise.
	Each click rotates the image 90°, counterclockwise.
	Displays the previous page in a stacked image.
	Displays the next page in a stacked image.

The following table describes the annotation toolbar, where you can change line width, color, and text properties.

Button	Tool Name	Function
	**Selection**	Activates, moves, or resizes a selected annotation item within the scanned image. Click an item to activate it. Resizing handles display in the corners of an active item. Drag a resizing handle to resize the item.
	**Zoom**	Click and drag over the part of the image you want to enlarge.
	**Draw an Arrow**	Click and drag to draw an arrow for pointing out detail on the image. Click positions the arrow's tail, and then release the mouse button where you want the head of the arrow.
	**Draw a Line**	Click and drag to draw an attention-getting line on the image.
	**Draw Freehand**	Click and drag to create freehand pencil drawings. For example, to circle a name or number on the image.

Button	Tool Name	Function
	**Highlight**	Click and drag a highlight over an important area on the image. For example, highlight an invoice line item to make it catch your eye.
	**Draw Redact**	Click and drag a black box over the part of the image you want blocked from view. For example, block part of the image that displays old pricing information.
	**Draw Text**	Click and enter text into an expandable text box on the image. Text boxes can be resized or moved.
	**Draw an Ellipse**	Click and drag an elliptical line around part of the image. For example, circle an item on an image of a spread sheet that you want to stand out.
	**Box**	Click and drag to create a hollow rectangular box to draw attention to an area of the image.
	**Stamp**	Imprint a customized stamp, such as "Paid" or "Approved" on your image. Click on the image to place the stamp on that spot.

See Also:

Attaching Scanned Images

Using Indexer Menus

Document Indexer Overview

Changing General Document Indexer Settings

You can change the Indexer startup, viewing, stacking, and barcoding options.

To change general Document Indexer settings:

1. From the Document Indexer dialog box, select **Tools**, then select **Options** to display the Eclipse Document Indexer Settings dialog box.
2. In the **Indexer Startup** section, check one of the following:
   - **Show user selection screen at startup** – Enter or confirm a user name when you start Image Indexer.
   - **Start Indexer when Windows starts** – Starts Document Indexer when you start Windows.
3. Select one of the following **Startup Modes**:
   - **Start Indexer in manual attachment mode** – Defaults Document Indexer to manual attachment mode.
   - **Start Indexer in auto attachment mode** – Defaults Document Indexer to auto attachment mode.
4. Select one of the following **Image Viewing** options for graphics files, such as .tif:
   - **Use the built-in viewer for images** – Displays images in Document Indexer's Image window, allowing you to use the annotation and attachment tools.
   - **Use the registered file type viewer for images** – Displays images in the default image viewer that comes with your Windows operating system.

   Note: Non-graphics files, such as Word documents (.doc) and Excel (.xls), display in their own programs, regardless of these settings.
5. In the **Barcoding** section, check the box to display the Barcode Selection dialog box each time you attach an image that contains barcodes, allowing you to determine which barcodes to scan.

   Click and move the slider to the right to increase white space around a barcode on an image to as much as 1 inch.
6. In the **Stacking / Separator Page** section, check the preferred stacking options:
   - **Show config screen when stack/unstacking** – To determine a new destination for stacked or unstacked documents, and to determine other stacking configurations.
   - **Delete source images on stack/unstacking** – To delete the individual images from the folder when they are stacked. The images re-display if you unstack the documents. For example, if you have five documents displayed, and you stack four of them, the window displays one stacked document displaying "4 pages" and one

unstacked image. The three images that combined with the first in the stack no longer display.

- **Use Separator Page when unstacking** – To insert the separator page between an unstacked image and the next image to show where the stack ends and the next image begins. For example, if you open a folder containing only stacked images, when you unstack the images, the separator page displays between each unstacked set of images.

See Also:

Stacking and Unstacking Images

Document Indexer Overview

Changing Annotation Properties

You can change the default properties of new annotations. Depending on the type of annotation, you may be able to change its color, width, and font attributes. For example, there is no border width property for a highlight annotation, but there is for a hollow rectangular box.

Use the Annotations menu commands to determine default annotation colors. These capabilities use your system's **Color** dialogue box, in which you can click to select a Windows basic color or a custom color.

This page contains the following instructions:

- Changing default properties for new annotations.
- Changing text tool settings.
- Creating and adding custom colors.

To change the default annotation properties:

1. Display the Annotations Default Settings dialogue box from one of the following paths:
   - From the Indexer screen – Click the **Tools** menu, select **Options** to display the **Eclipse Document Indexer Settings** dialog box, then click the **Annotations** tab.
   - From the Image screen – Click the **Tools** menu, then select **Annotation Options**.

   The Annotations Default Settings dialog box shows the current settings that are applied to all new annotations. Color samples display next to their property names. Larger samples and the designated attribute font display in the Examples area.
2. Click the following buttons to change annotations as needed:
   - **Line Color** – Applied to new straight or freehand lines, as well as the border lines of new hollow rectangular boxes. Select a color from the Color dialogue box, then click **OK**.
   - **Highlight Color** – Applied to fill the inside of new highlight annotations. Select a color from the Color dialogue box, then click **OK**.
   - **Background Color** – Applied to background of new text tool annotations, such as the Stamp Text tool. Select a color from the Color dialogue box, then click **OK**.
   - **Font** – Applied to new text tool annotations, such as the Stamp Text tool. Change the font size and style, effects, and color as desired, then click **OK**.
   - **Line Width** – Applied to new straight or freehand lines, as well as the border line around new hollow rectangular boxes. Click the drop-down menu to select the number of pixels for the line width.
3. When you finish making changes to the default properties for new annotations, click **OK** to exit the Annotations Default Settings dialogue box.

To change text tool settings:

1. In the **Stamp Edit** box on the Annotations Default Settings dialogue box, enter the text to display when you use the Stamp Text tool. For example, "Received" or "Paid."
2. Click the **Add Date** button to include the current date in the stamped text.
3. Click the **Add Time** button to include the time of day in the stamped text.
4. Click the >> button to add the intended text to the Stamp Text tool.
5. When you finish making changes, click **OK** to save the changes and exit the Annotations Default Settings dialogue box.

To create and add custom colors:

1. Click the **Define Custom Colors** button to expand the color dialog box, revealing a color matrix and controls. You can define the colors by entering HSL (Hue, Saturation, Luminance) or RGB (Red, Green, Blue) values, or by using the built-in color picker matrix.
2. The **Color|Solid** preview window shows the current color. If your monitor properties are set to display only 256 colors, the preview window may also display a second dithered preview, which approximates how the color will be displayed using the limited number of colors available.
3. Click the **Add to Custom Colors** button to make the color you defined available as a custom color choice. Click a custom or basic color choice to select that color.

   Note: The **Color** dialog box includes its own online help. For more information about using colors, click the dialog box's **Help** button (the "?" button), then click the area for which you want help.

4. When you finish selecting colors, click **OK** to apply it to the next annotation.

See Also:

Using Document Indexer Menus

Using Document Indexer Tools

Document Indexer Overview

Stacking and Unstacking Images

Stacking combines separate scanned images into a single multi-page image. Stacking is handy for combining invoices with a billing statement, for example.

A stack of thumbnails is identifiable by the page count in the lower right of the stack.

Stacking options are set up on the **General** tab in the **Tools** / **Options** menu.

This page includes the following procedures:

- Stacking images.
- Unstacking images.

To stack images:

1. From the Indexer dialog box, select the images you want to stack.

   A blue border displays around the active images.
2. Do one of the following to select images for stacking:
   - To select all images in this file, select **Edit** and click **Select All**.
   - To select several images in sequence, click and drag a marquee over the images you want to select.
   - To select individual images, press **Ctrl** while you click to select the desired images.
3. Click the **Stack** button to stack the selected items.

   If you have the **Show config screen when stack/unstacking** option checked in **Tools** / **Options**, the Stack Images dialog box displays, allowing you to determine the names and destination of the newly stacked images.
4. Add document annotations after stacking. When you stack documents, annotations are merged along with the documents. This results in color annotations being converted into gray, if the underlying image being stacked is grayscale. However, if you add annotations after stacking, the colors remain.

To unstack images:

1. Click to activate a stack as described above. A blue border displays around the stacked image.
2. Click the **Unstack** button.

   If you have the **Show config screen when stack/unstacking** option checked in **Tools** / **Options**, the Stack Images dialog box displays, allowing you to determine the names and destination of the newly unstacked images.

Using Index Profiles

Use index profiles to automate the indexing process. Index profiles are similar to templates, and let you apply a set of pre-configured index options. For example, a pre-configured profile can speed indexing by populating fields for you, or by eliminating unnecessary screens. When you select a profile in the Document Indexer's **Profiles** list, all the profile's settings are applied to the image, quickly and consistently.

Index profiles not only improve efficiency, they also help you manage your imaging storage locations and security.

Profiles are maintained in Eclipse and have two distinct parts: the document Profile ID, plus its associated Storage ID. The document Profile ID controls the overall index process, while the Storage ID controls the storage location.

Once you understand how to use profiles, you can create your own. For more information, see the Eclipse Document Imaging documentation.

See Also:

Document Indexer Overview

Automatically Indexing Scanned Images

Automate the indexing process by using Auto Attaching. When you enable Auto Attach, the Document Indexer runs in the background, and remains ready to automatically process images to the designated profile each time you scan a document. Automatic indexing is handy for processing large numbers of documents.

You can also automatically index barcoded documents.

To automatically index scanned images:

1. From the Windows Start / Programs / Eclipse menu, select **Document Indexer** to display the Eclipse Document Indexer dialog box.
2. From the **Select Profile** drop-down list select the profile for indexing your images. A profile is required to let the system know how to index and store the image being processed. This profile will be used for all the images during the auto processing session.
3. Enter a directory path in the text box or click the **Browse** button to designate the directory path for the scanned images.
4. Click the **Auto Att.** button.

   All files in the directory use the defined profile to attach to Eclipse records.
5. Scan files as needed. Each file uses the defined profile until you click the **Auto Att.** button to disable auto attachment.

See Also:

Using Indexer Menus

Attaching Scanned Images

Using Index Profiles

Indexing By Barcode

Attaching Scanned Images From Document Indexer

Attach scanned images to Eclipse records to decrease paper filing and secure documents to their related Eclipse records. Keep track of all types of forms:

- Invoices.
- Credit applications.
- Product photos or MSDS.
- Signature captures.
- Pick tickets, and more.

To attach a scanned image:

1. Display the Eclipse record to which you want to attach an image.
2. From the Windows **Start > Programs > Eclipse** menu, select **Document Indexer** to start the Eclipse Document Indexer.
3. Select a user.
4. In the **Select Profiles** box, select the desired document profile. A profile is required to let the system know how to index and store the image being processed.

   For information about adding profiles, see Using the Indexer Button Bar.
5. Select the document or documents you want to attach to the open Eclipse record.
6. Click the **Attach** button to attach the image to the Eclipse record.

   Note: If you have a default profile set up for images and it is set to *prompt on each index*, you can use your Windows file management system, such as Explore, and click and drag the image file to the Eclipse record.

   The Eclipse Attachment Indexing screen displays.
7. In the **Description** field, enter a descriptive name of the image.
8. In the **Index Points** field, enter the following information, if needed. Use the **Multi** hot key to enter multiple items in each field:

In the field...	Enter...
User ID	additional pointers to User Maintenance records.
Entity	additional index pointers to Vendor or Customer Maintenance records.
Ledger	additional index pointers to any ledger records, including Sales Orders, Purchase Orders, and Accounts Payable.
Product	pointers to product descriptions in Web Commerce. First set up a default profile for *WOE-Images*. We recommend naming the folder in the Internet ROOT directory the same as the profile.

In the field...	Enter...
Activity Log	pointers to user and customer trackers.
Product Cat	pointers to Eclipse Web Commerce product categories. This displays an image next to its product category on a web page, for example. For information about using product categories, see the Eclipse Web Commerce documentation.
User Defined	pointers to any custom user defined screens. For example, to index test reports to products, or reviews to employee screens.

9. Use the following hot keys as needed:
   - **Index** – Indexes the file, removing the file from your computer to the storage location.
   - **Index W/O Delete** – Indexes the file, copying the file to the storage location without deleting the original file from your computer.
   - **F12** – Closes the Delete/Edit Indexes screen without saving changes.

   The next time Eclipse displays that record, the record has an Image Indicator (*i*) in the top right corner to let users know an image is attached.

   Note: To permanently delete the attachment, manually remove it or run the Document Copy/Move/Delete Utility.

10. Press **Esc** to exit the Eclipse screen.
11. On the Indexer dialog box, select **File** > **Exit** to exit.

See Also:

Using Indexer Menus

Using Image Tools

Selecting Users

Deleting or Editing Images in the Index

Creating a Custom Indexing Profile

Scanning and Attaching Multiple Images of the Same Type

As you do business, you might find it easier to scan a group of documents into the system together at one time, instead of scanning each document individually. For example, if you are a receiving clerk, you likely receive multiple vendor packing lists in any given day. Using Document Indexer, you can print barcodes of the Eclipse order number either on a cover page or a Zebra label and use those to speed up the process of scanning and attaching the vendor packing lists to orders in the system.

Scanning and Attaching Documents Using Cover Pages

Use the Document Imaging cover page that provides the system the barcode and order number it needs to attach the scanned image with a transaction. For each document you want to scan in a batch of documents, print the cover page from the transaction.

To scan and attach documents using a cover page:

1. From the **System** menu, select **System Programming > User Defined Functions** and then select the menu option that corresponds to the type of document you want to define.
2. Define the cover page form.
3. From the area of the system, such as a Purchase Order, use the **Label** hot key and print the plain paper form defined in step 2.

   For example, if you are scanning a batch of vendor packlists and attaching them to purchase orders, after you mark the purchase order as received, use the **Label** hot key to display the User Defined Document/Label Printing screen and select the cover sheet or plain paper form in the **Doc/Lbl Format** field.

   The system prints the plain form with a barcode and the order number that is specific to that order.
4. Repeat step 3 for any additional documents you want to scan into the system at the same time.
5. After you have cover pages for all the documents you want to scan together, stack and scan the documents in the following order:
   - Cover page for the first document.
   - All pages of the first document.
   - Separator page. You can print separator pages from Document Indexer.
   - Repeat for the other documents in the batch you want to scan.
6. After the image displays in Document Indexer, select it and then click **Unstack** in the menu bar.
7. Select **Use Barcodes** and then click **Auto Process**.

The system separates the documents using the cover pages and separator pages as markers, and automatically attaches the documents to the correct transactions in Eclipse, based on the barcode on the cover page.

Scanning and Attaching Documents Using Zebra Labels

You can also scan and attach a group of documents using labels instead of cover pages. Use the Document Imaging Zebra Label and place it either in the upper left corner of the document you want to scan or on a separate piece of paper. For each document you want to scan in a batch of documents, print the label from the transaction.

If the documents you are scanning contain other barcodes, we recommend that you use a cover page instead of a label.

To scan and attach documents using Zebra Labels:

1. From the **System** menu, select **System Programming > User Defined Functions** and then select the menu option that corresponds to the type of document you want to define.
2. Define the Document Imaging Zebra Label.
3. From the area of the system, such as a Purchase Order, use the **Label** hot key and print the label defined in step 2.

   For example, if you are scanning a batch of vendor packlists and attaching them to purchase orders, after you mark the purchase order as received, use the **Label** hot key to display the User Defined Document/Label Printing screen and select the Zebra label in the **Doc/Lbl Format** field.

   The system prints the label with a barcode and the order number that is specific to that order.
4. Repeat steps 3 for any additional documents you want to scan into the system at the same time.
5. After you have labels for all the documents you want to scan together, do the following to stack and scan the documents in the following order:
   - Attach the Zebra label for the first document to the first page of that document. Attach the label higher on the page than any other barcodes. If the Document Imaging Zebra Label is not the first barcode that Document Indexer reads, you will have to manually attach the documents to the correct transactions after you scan them into Document Indexer.
   - The remaining pages of the first document.
   - Separator page. You can print separator pages from Document Indexer.
   - Repeat for the other documents in the batch you want to scan.

6. After the image displays in Document Indexer, select it and then click **Unstack** in the menu bar.
7. Select **Use Barcodes** and then click **Auto Process**.

   The system separates the documents using the labels and separator pages as markers, and automatically attaches the documents to the correct transactions in Eclipse, based on the information it reads from the Zebra label.

See Also:

Stacking and Unstacking Images

Barcoding Basics

Use the following tips and techniques to improve barcode indexing:

- For the most consistent barcode recognition, pay particular attention to the quality of the barcode printing. Always use a laser printer and good quality paper. Follow recommended printer maintenance; check and replace toner regularly.
- Barcodes are readable horizontally or vertically, but not upside down, and can be placed almost anywhere on your forms. Page numbers or multiple barcodes, such as a second barcode for a description, are acceptable.
- When designing forms for barcodes, tell your graphic designer to plan ahead. Keep barcode areas away from edges or perforations that can tear into barcodes. Leave lots of white space around bar codes. Keep barcode areas well away from signature sections on your business forms. A signature extending onto a barcode can render the barcode useless. Barcode formats 39 or 128 are often best.
- Barcodes are not just for sales orders. You can create barcodes to use with other types of Eclipse records. For example, you can attach product data sheets to product records; start these barcodes with the PN# prefix to index with products. Standardize on using the following Eclipse barcode prefixes: PN# for product, CN# for entity, EL# for activity log, and USR# for user file.
- White paper of good quality works best, as black barcodes stand out best against white. If you must scan colored paper, yellow paper may be better than pink or green papers. When scanning pink or other colors that result in nearly black scans, try photocopying the color documents, then scan the copies.
- If you experience problems with your barcodes not being read, try scanning your documents a bit lighter. Scans that are too dark cause the barcode lines to fill in, making recognition difficult.

  Note: Print to a barcode printer from an open record by pressing **Shift-F12**, and selecting **Print Barcodes**. Select a barcode to print, press **Esc**.

See Also:

Indexing By Barcode

Indexing by Barcode

If you purchased Eclipse's forms barcoding modification, you can further automate indexing by letting the Document Indexer search and index the images using their barcodes.

This page include the following procedures

- Automatically indexing barcodes.
- Manually indexing barcodes.

To automatically index by barcode:

1. In Eclipse, from the **System > System Files > Document Imaging** menu, select **Barcode Image Indexing** to display the Image Indexing with Barcodes screen. This enables automatic indexing input into Eclipse, which continues until you press **Esc** to quit.
2. From the Windows Start / Programs / Eclipse menu, select **Image Indexer** to start the Document Indexer.
3. Select a user.
4. Check **Use Barcode** to derive the index point information from barcodes in your documents.

   When this is enabled, the Document Indexer searches the images for barcodes, which Eclipse uses for auto indexing. Barcoded shipping tickets, for example, could be automatically indexed and input into Eclipse using this option.
5. In the **Select Profile** drop-down list, select a profile to use for all images during the auto processing session.
6. Scan the documents; they are automatically indexed to the designated profile.

   The message "Processing!" displays in the top of the Auto Indexing area during the auto processing session. Click the **Cancel** button to end auto processing. If **Notify After Batch Process (Ctrl+P)** is checked in the **Options** menu, the Image Indexer displays a dialog box when the batch is done processing; click **OK**.
7. Run the Image Invoice Exception Report Image Invoice Exception Report from the Document Imaging program to verify that all documents were indexed properly.
8. Manually index any exceptional documents remaining. See To manually index barcoded images below.

   If the Document Indexer is unable to read any barcodes, usually due to poor quality or obliterated barcodes, the documents remain in the designated directory.

   Note: When scanning batches of images using a scanner with an automatic document feeder, avoid mixing different document sizes. This can cause scanners to randomly stall, forcing you to restart the Document Indexer. We recommend batch scanning similarly sized documents.

To manually index barcode images:

1. From the Indexer window, check **Use Barcode**.
2. Select and open a document.
3. Click the **Attach** button to display the **Barcode Report** window.
4. Enter or correct the barcode information in the box.
5. Click **OK**.
6. Repeat as necessary for other documents.

See Also:

Barcoding Basics

Image File Types

The most practical file types for Eclipse Document Imaging are:

- **TIFF** (*.TIF) – The most practical file type for most imaging uses on a variety of computer platforms including Unix, Windows, and Mac OS. TIFF files permit compression to relatively small file sizes, important when storing numerous images. TIFF files can also be multi-page stacked documents. You can fax TIFF images when saved in a **Binary** format with **CCITT Group 4** compression, or with the less desirable **CCITT Group 3** compression. Because the images are faxable, Eclipse recommends using TIFF settings for imaging most business documents.
- **JPEG** (*.JPG) – The Joint Photographic Experts Group file type is capable of heavy compression, making it popular for Internet and e-mail attachment use or for storing color images. Consider using JPEG files for employee or product photos, or when imaging documents used on a company intranet or the Internet. Choose the 24 bit Color or the 8 bit Gray for black and white photos, formats to maintain a full range of tones, along with small file sizes, at the cost of losing some image data during compression.
- **ADOBE** (*.PDF) – The Portable Document Format, which requires Adobe's free Acrobat Reader program for viewing, is becoming a popular file type for exchanging files among different computer platforms including Unix, Windows, DOS, and Mac OS. If all of your users have Acrobat Reader software installed, you might consider this file type when you need to maintain high-fidelity graphics and text, along with relatively small file sizes. You may also encounter this file type when attaching existing Internet files, vendor materials, and documentation. You can get Acrobat Reader at www.adobe.com.
- **Windows Bitmap** (*.BMP) – Though popular in Windows and DOS graphics applications, this file type creates large file sizes, making it less practical for imaging. BMP file size can be as much as ten times larger than the same image saved as a TIFF, a major consideration when buying storage devices.

  Some other file types are:

- You can specify the CALS Files (*.CALS), FAX (*.DCX), JBIG Files (*.JBG), MO:DCA Files (*.MDA), Paintbrush (*.PCX), Calera (*.PDA), and Plexus TIFF (*.TIF) file types. These file types may be required for specialized graphics applications, but should generally be avoided for document imaging.

  Note: Windows 95 uses a Web browser or graphics program, instead of the Attachment Viewer, to enlarge GIF and some JPEG image types.

- **Portable Network Graphics** (*.PNG) – An emerging graphics format designed for the Internet. At present it is not well supported, and should be avoided for most Eclipse imaging.

See Also:

Scanning Hardware Basics

Scanner Hardware Basics

Some companies use a combination of the following hardware types to meet specific needs. The three common categories of scanner hardware installations are:

- **Individual scanners** – Inexpensive desktop scanners are convenient if you scan single page documents frequently throughout the day, or scan confidential information. Personal scanners can also be practical for infrequent scanning of small stacks of documents. Typical users in this category are managers, and the credit or personnel departments.
- **Dedicated scanning workstations** – Practical when an entire workgroup needs to scan documents, or when there is a frequent need to scan large batches, perhaps 25-50 pages, of documents at a time. If a networked computer with a scanner is dedicated for imaging, users throughout the company can use the workstation to scan as needed.

  If you use a central computer like this, you can set up personal folders on the workstation, and then save scans into these folders. Or instead, you can manually save images to a file server. Upon returning to your desk to index the images, you can access your imaging folders on the workstation or file server. Accessing images this way is even easier if you map a drive letter on your computer to the network computer or folder. Dedicated workstations are often used by Accounts Payable departments.
- **Network scanners** – You can configure a document server to automatically route scanned documents to recipients. This solution requires a Windows NT network with sufficient available bandwidth, along with a device like the AXIS Network Document Server.

  A document server lets a company set up a Small Computer System Interface (SCSI) scanner with an IP (Internet Protocol) address on an Ethernet network. This solution requires that Microsoft Internet Information (IIS) server is running, and File Transfer Protocol (FTP) must be enabled and configured. The server can then be instructed to scan and route images to various folders on the network, or even e-mail images to recipients.

  When scanning a document or batch of documents, use the document server to select the recipients. Once scanning is completed, the documents are routed to the correct destinations, often network folders. This lets users access and index the images from the networked folders, for example. Network scanners are more automatic and convenient than dedicated scanning workstations, but they demand more network resources. Depending on the network's speed and configuration, network constraints may rule out this installation option.

See Also:

Image File Types

Document Indexer Overview

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