



Step-by-Step Guide

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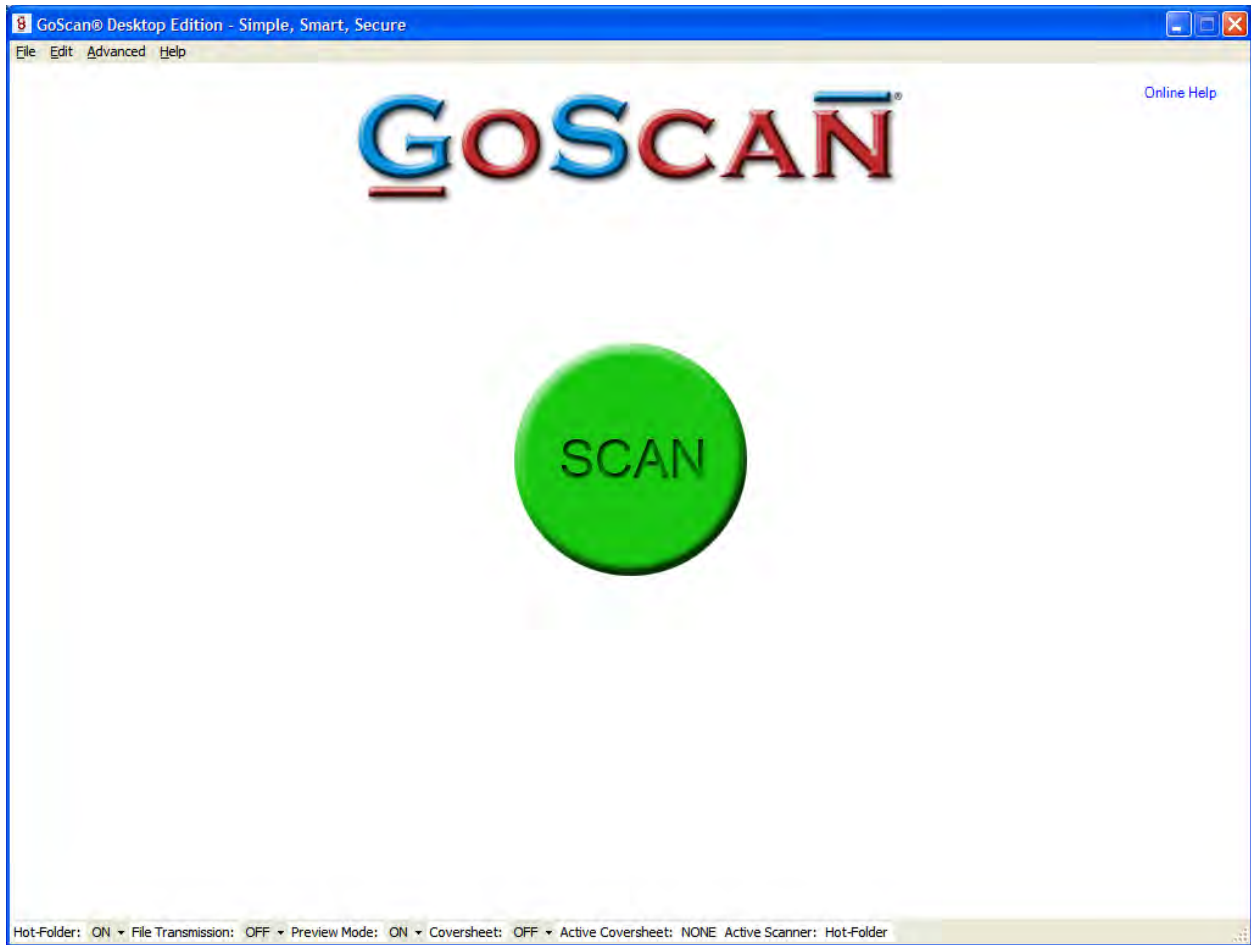
Web Site: www.goscan.com

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Introduction



Simple

GoScan's interface is ultra simple. All you have to do is hit the green button. GoScan reduces the number of choices a scanner operator can make, minimizing errors and increasing productivity.

Smart

GoScan has barcode and full text OCR capability for customers who require simple barcode indexing or full text OCR and search of documents.

Secure

GoScan offers military grade encryption for images for customers who require security when transmitting documents.

Installing GoScan

Minimum System Requirements

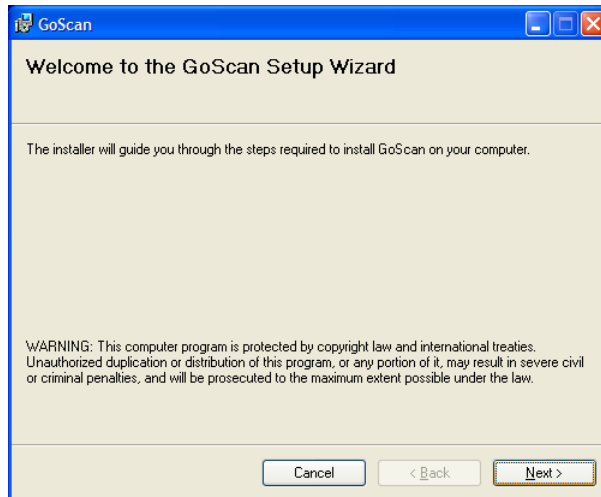
Go to <http://www.goscan.com/requirements.php> for the most up-to-date product requirements.

Scanner Requirements

GoScan® can use any TWAIN compliant scanner. Please refer to your scanner documentation and driver installation to see if your scanner has a TWAIN driver.

The GoScan installation files are distributed in a single, self-extracting executable file. You will need administrative rights to your local system during the installation process.

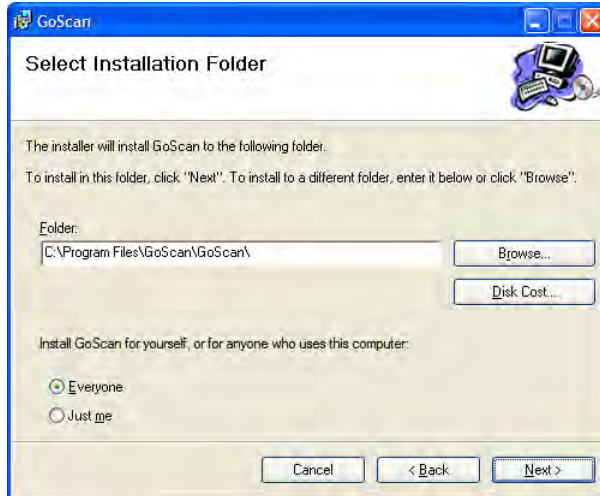
1. Create a new folder on your system and place the self-extracting file into the folder.
2. Double-click on the file.
3. Allow the extraction to place the installation files into the current folder.
4. Click "Install".
5. The installation files will be extracted.
6. Double-click on "setup.exe" and follow the prompts to install GoScan.



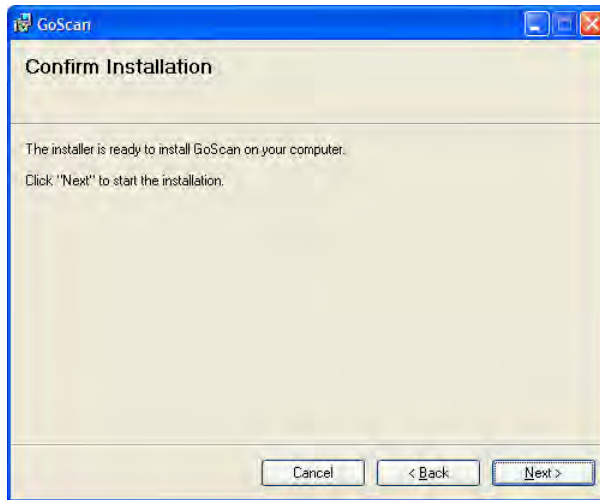
7. Click "Next".
8. Read the License Agreement, select "I Agree" and click "Next".



9. Browse to the folder where you would like to install GoScan and choose whether the application should be available to everyone, or to just the currently logged-in user account, and then click “Next”.



10. Click “Next” again to start the GoScan installation.



Basic Scanning (without indexing)

Select Your Scanner

1. From the main screen, select Edit – Select Source.
2. Select your scanner
 - a. If you don't see your scanner listed, make sure the scanner is turned on, plugged in and that the TWAIN drivers are installed.

Image Directory

1. The default image directory is My Documents\GoScan\Images. To change this directory:
 - a. Select File – Image Directory.
 - b. Browse to the location for the Image Directory and either select the folder you wish to use, or click on the “Make New Folder” button. Click “OK”.

Scan

1. Place your paper into the scanner, and click the green "SCAN" button.



View Images

1. Open the Windows Explorer
2. Browse to the Image directory.
3. Double-click on the image files to view them.

Indexing Options

GoScan provides powerful options for capturing index values from documents and sending the image and index information to a back end repository.

- Scan and index paper documents with cover sheets
- Scan and index paper documents without cover sheets
- Index existing electronic documents

Scan and index paper documents with coversheets

Coversheets (also called separator sheets) have barcode values with information meaningful to your group or organization that are used to automatically break up a batch of paper into meaningful documents.

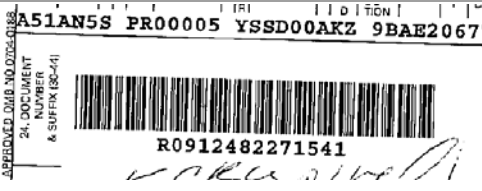

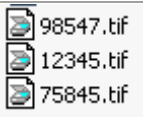
Create 10 bar coded coversheets with Microsoft Word	<p style="text-align: center;">SCANNABLE COVER SHEET</p> <p style="text-align: center;">Customer Number</p> <p style="text-align: center;"></p> <p style="text-align: center;">12345</p>
Insert coversheets into stack of 30 documents	
Scan 40 pages with GoScan	
GoScan automatically creates 10 image files	

With barcoded coversheets, the static (primary) value represents a specific department (e.g. accounting, marketing, etc) and will be used to delineate your documents.

Secondary field values contain other important information that can be used for advanced purposes. Since GoScan can process many types of barcodes (including 2d barcodes such as PDF 417), the secondary variable barcodes can contain a great deal of information.

Scan and index paper documents without coversheets

Some applications call for scanning and indexing documents where the documents themselves contain barcodes with index information. In this case, GoScan uses the barcodes on the documents to index them automatically.

10 pieces of paper with a different barcode on each page	 <p>A51AN5S PR00005 YSSD00AKZ 9BAE2067</p> <p>R0912482271541</p> <p><i>WAKU 2/16/11</i></p>
Scan 10 pages with GoScan	
GoScan automatically creates 10 image files	

Creating Coversheets

There are two types of coversheets:

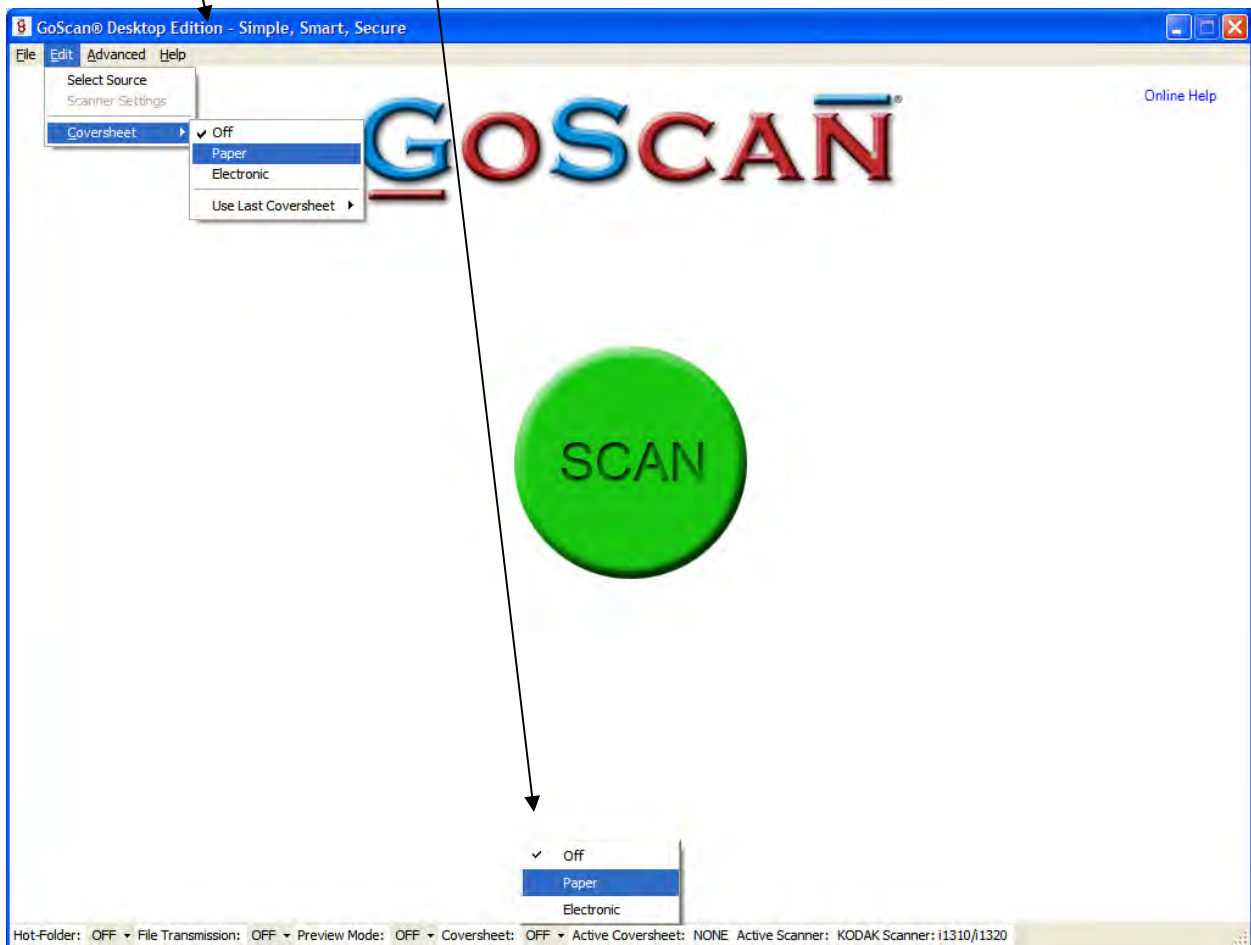
- Paper Coversheets
- Electronic Coversheets

Paper Coversheets

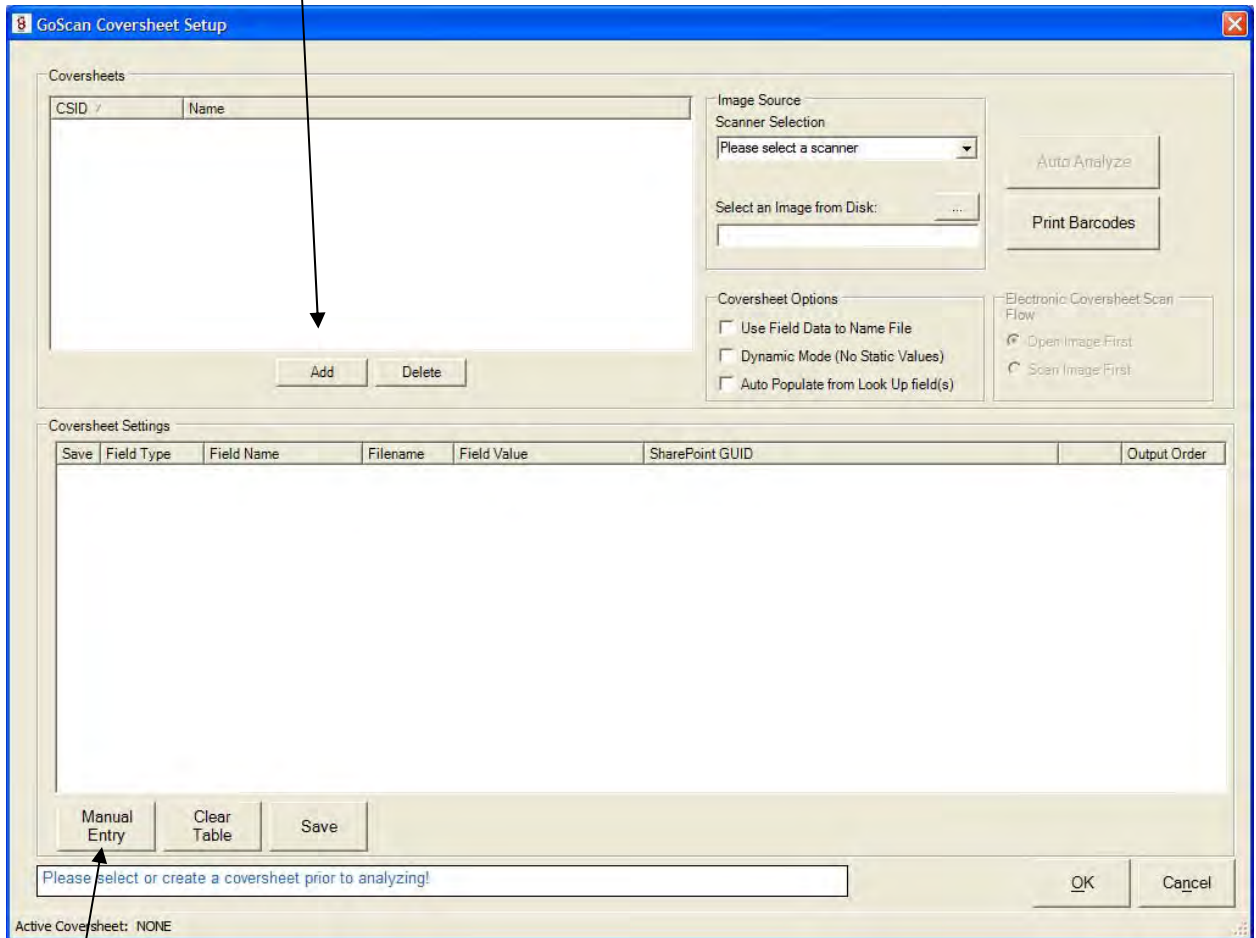
When scanning images or processing images from a Hot Folder, you can use a “Paper” coversheet definition to separate and index the images.

Manually Creating Basic Coversheets

1. Select Edit – Coversheet – Paper, or select the drop-down next to “Coversheet” at the bottom of the screen and select “Paper” to open the coversheet definition dialog.

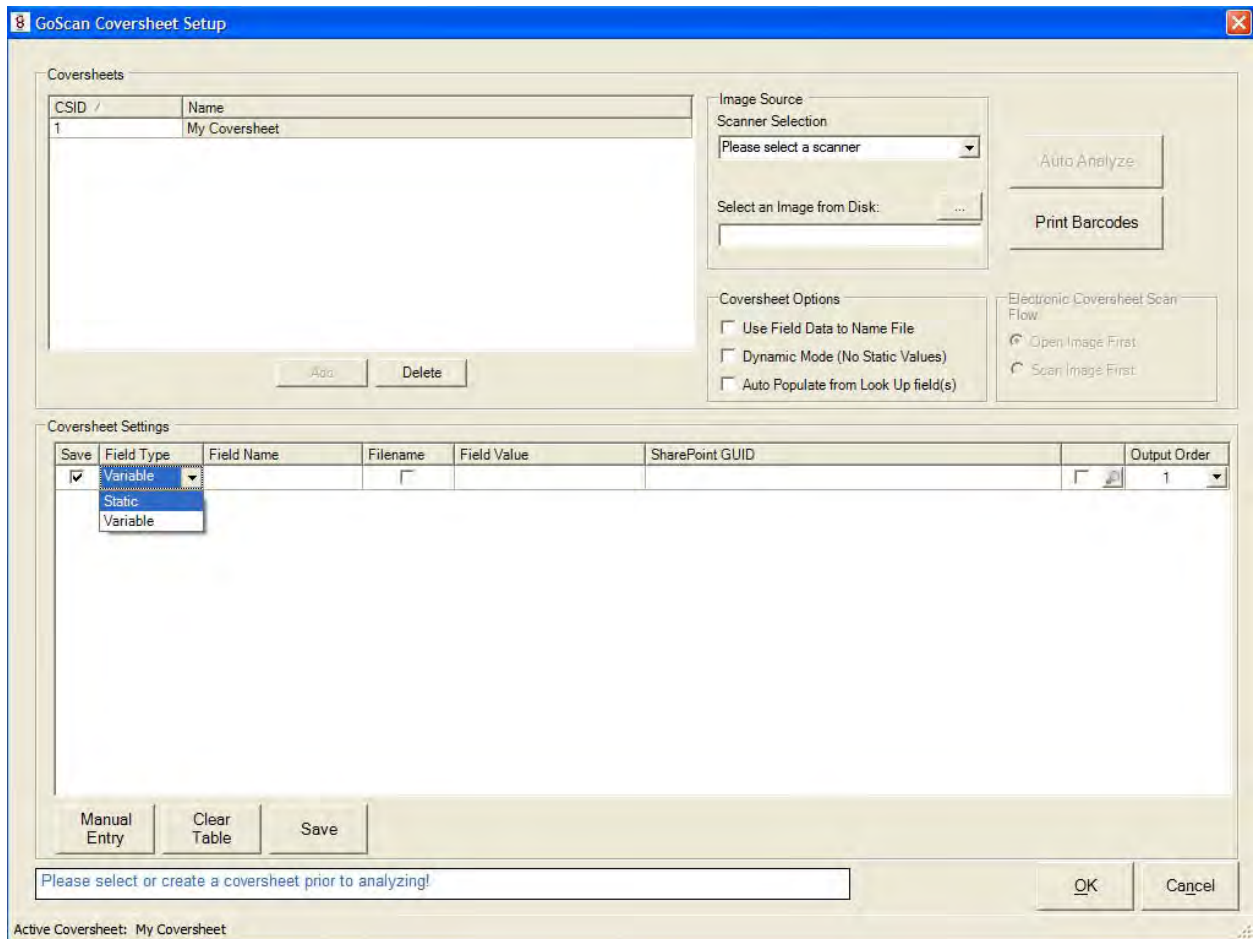


2. Click "Add" to create a new coversheet



3. Enter a coversheet name and hit Enter to insert the new coversheet
4. Hit Enter again to select the coversheet
5. Click "Manual Entry" to start creating fields for the recognized barcode data.

- Start with a Static field. This will be the first barcode found closest to the upper-left corner of your document.



- Enter the name of the field
- Enter the value that this barcode will contain
- Click “Manual Entry” to create the next field. Note: You can only have 1 static field per coversheet.
- When creating a Variable field type, enter the name of the field, but leave the Field Value empty.
- Continue creating Variable fields until you have created one field for each barcode on your document or coversheet.
- Once you have completed creating the fields for processing your coversheet, click “OK” to save and exit the coversheet setup dialog.

Creating a Coversheet by Scanning

- Follow steps 1-4 above
- Place the coversheet into the scanner
- Select your scanner in the “Image Source” drop-down list
- Click “Auto Analyze Coversheet”
- The page will be scanned and the barcodes evaluated.
- Click “OK” to save and exit the coversheet setup dialog.

Creating a Coversheet by Selecting an Image

1. Follow steps 1-4 in the “Manually Creating Basic Coversheets” section.
2. Click the “...” button next to “Select an Image from Disk”
3. Browse to the location of the coversheet image
4. Select the file
5. Click “Open”

Defining Fields to be Used to Name Stored Images

Select the option “Use Field Data to Name File”. While creating the fields for your coversheet, place a checkmark in the box under “Filename” to indicate that the data from this barcode should be used as the filename. Note: More than one field can be selected for file naming. A hyphen will be placed between the data for each field in the filename.

Defining Coversheets Without a Static Field

You may have coversheets that will not have a static value. These coversheets will need to be defined as Dynamic Coversheets and NOT contain a Static Field defined.

1. Before adding fields to your coversheet, select the option “Dynamic Mode (No Static Values)”
2. Create the coversheet as desired however; the field types will all be defined as “Variable”.

Electronic Coversheets


When defining Electronic Coversheets, all of the steps outlined for Paper Coversheets are used, except Electronic Coversheets do not use “Static” fields. All of the fields in an Electronic Coversheet are defined as “Variable”.

SharePoint GUID

The purpose of the SharePoint GUID field in the paper or electronic coversheet definition setup is to map a field from GoScan to SharePoint or another repository (e.g. SQL Server, Web Server) through an upload web service method hosted on the target computer. This requires that the GUID and its related field are defined on the server and the upload web service method uses the function prototype (arguments) as prescribed by GoScan. The GUID is exported from GoScan only when using the SharePoint XML layout from the File – Export – XML Layout menu option.

Index existing electronic documents

GoScan can be used to index existing electronic documents. For example, if you receive an email with an attachment, you can save the attachment and then use GoScan to index that attachment into your electronic document repository.

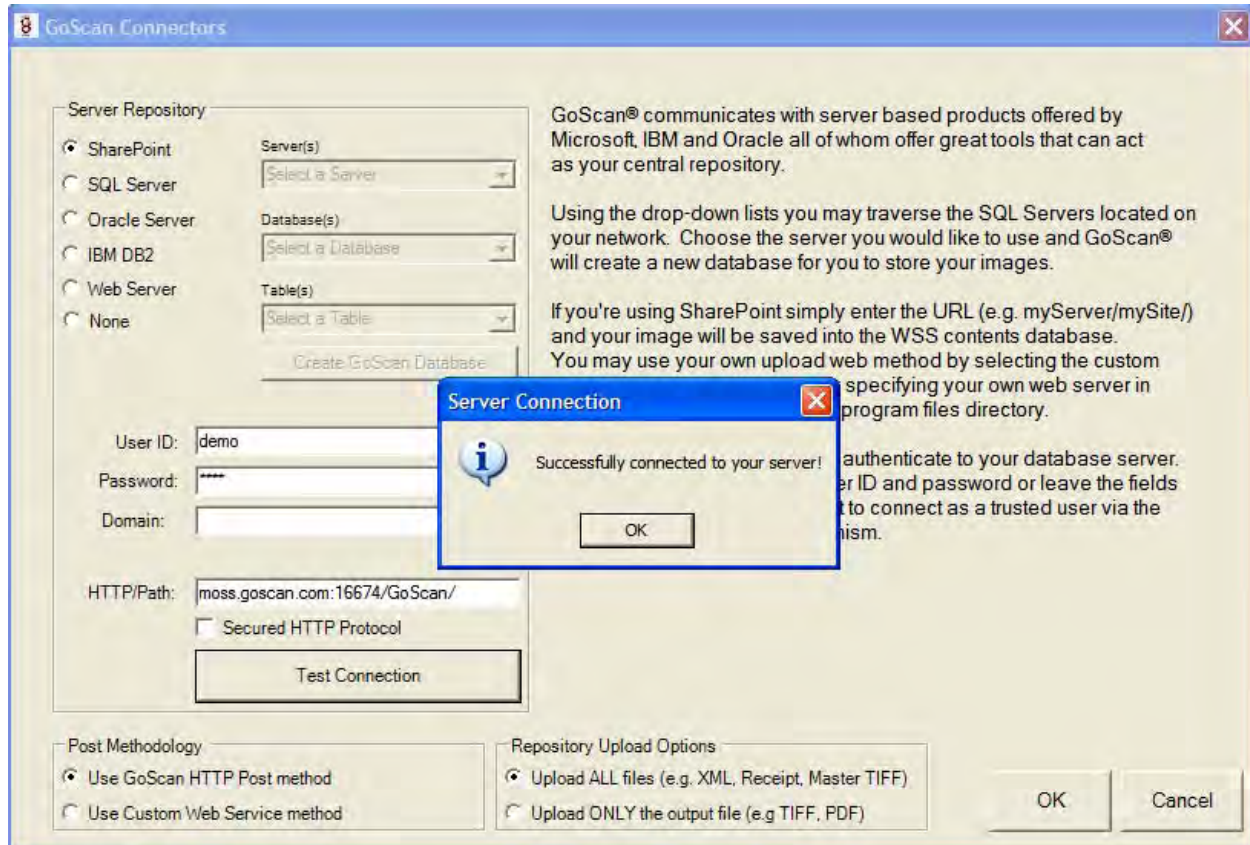
Save electronic document							
Click open with GoScan	<div style="border: 1px solid black; padding: 5px;"> <p>Images</p> <p style="text-align: center;">Open</p> <p style="text-align: center;">Save</p> </div>						
Type in index values	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Field Name</th> <th style="text-align: left;">Value</th> </tr> </thead> <tbody> <tr> <td>MemberID</td> <td>12345</td> </tr> <tr> <td>DocumentCategory</td> <td>Labs</td> </tr> </tbody> </table>	Field Name	Value	MemberID	12345	DocumentCategory	Labs
Field Name	Value						
MemberID	12345						
DocumentCategory	Labs						
Click to clear previously entered data	Clear Values						
If the coversheet was defined with database lookups, click this button to perform a detailed lookup	Detailed Search						
GoScan automatically sends indexed document into the desired repository	<ul style="list-style-type: none"> <input type="radio"/> SharePoint <input type="radio"/> SQL Server <input type="radio"/> Oracle Server <input type="radio"/> IBM DB2 <input type="radio"/> Web Server 						

GoScan also has a database lookup feature which makes indexing fast and accurate. For example, if you enter a person's social security number, GoScan can look into a database and pick up their name, address and other information automatically so this can be added into the index information.

Connecting to Microsoft SharePoint

Connecting to an MS SharePoint MOSS server is simple and straight-forward.

1. Open GoScan Desktop and select File – Export – Connectors
2. In the dialog box that opens, select SharePoint, enter the name of the server, forward slash, site name, and a trailing slash, and then click “Test Connection”.
3. Click “OK”
4. Scan your images.



Indexing and Lookup Features

GoScan® users require a fast, accurate, and easy way to index documents into an electronic document repository such as SharePoint or other similar systems. Users typically have diverse needs for capturing and filing their documents.

- Automatic indexing
 - Scan paper with barcodes
 - Scan with barcode coversheets
- Manual indexing
 - Scan with electronic coversheets
 - File existing electronic documents with an electronic coversheet

The goal for users and IT professionals is to make indexing fast, accurate, and easy. Fast generally means automatic indexing or manually keying only a few fields. Accurate is assumed with automatic indexing and barcodes but indexing via manual data entry can introduce errors unless well planned.

Indexing must be easy enough for users of differing computer skills to use every day to index various documents. From a user perspective, indexing has to take place in as few steps as possible. For example, key in one field and hit the tab key. The other index fields are automatically populated. Then hit scan and verify that the scanned image matches the data on the screen. Then hit save. In just a few seconds, the user can scan and index a stack of documents.

One of the ways to improve indexing operations in all the above cases is to utilize known data. In other words, a lookup. For example, if you know a person's social security number, you can access a database where you can retrieve their name. This gives you more data about the document than you started with, ensures accuracy by checking against a live database and reduces the number of barcodes required on a document or reduces the number of fields a user has to key in.

GoScan provides sophisticated lookup capability that gives the IT professional the tools to ensure accuracy but makes it fast and easy for users to do their jobs.



Field Name	Value
MemberID	12345
DocumentCategory	Labs

Lookup Features

The following is a list of the technical lookup features important to the IT professional in GoScan®:

- ✓ A robust look-up grid that:
 - Allows the user to easily search through thousands of records.
 - Visually gives the user immediate feedback by pairing down the list when searching.
 - Supports large and growing databases.
 - Delineates data that contains multiple occurrences of any given field data (e.g. first names that match “Jose” or last names that who are “Smith”).
 - Dynamically reads the underlying database schema and is not fixed to any specific set of fields to provide flexibility as needs change.
- ✓ A powerful Look-Up Definition Screen:
 - An “exclusive” look-up that instructs the application to query for data independent of any other look-up defined.
 - Operates autonomously of all other look-up and does not populate nor overwrite other data previously queried.



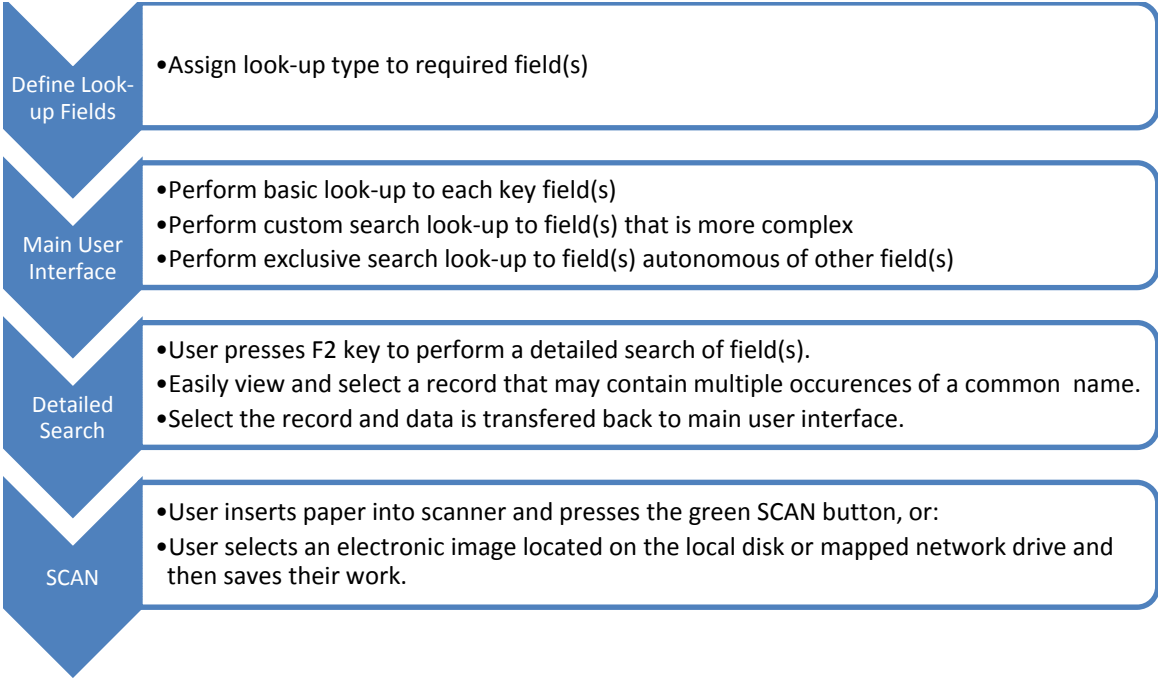
Use-Case Scenario

The goal of lookups with GoScan is to make it simple for the end-user to define look-up fields that populate data values in the main user interface. These data values may be used as a base to perform sub-lookups that will populate other fields that are interrelated. This feature makes it convenient for the end-user to search throughout a large database only having to know subsets of data which form their criteria. Fields of data may also be autonomous or unrelated to other fields within the collective. As more occurrences of common data are encountered a detailed search screen is provided so the user may quickly traverse the database in search for the person they're looking for.

For more details on the sub-functions which comprise this use-case please refer to the subsequent sections of this document for more details. A glossary is provided in

Appendix D - Glossary for definitions of commonly used terms used herein.

A typical use-case scenario to guide the user's workflow consists of:



Coversheet Setup and Definitions

The GoScan® coversheet setup screen allows the IT professional or power user to specify fields that will be derived from a database, data entry or barcodes. GoScan® is very flexible because it can dynamically populate the grid on the main user interface with the field names defined on this screen. Additionally, GoScan® can reference the specific fields that are defined as look-up enabled and aggregate the data of each field into the main screen without knowledge or dependence on any field names within this set of data.

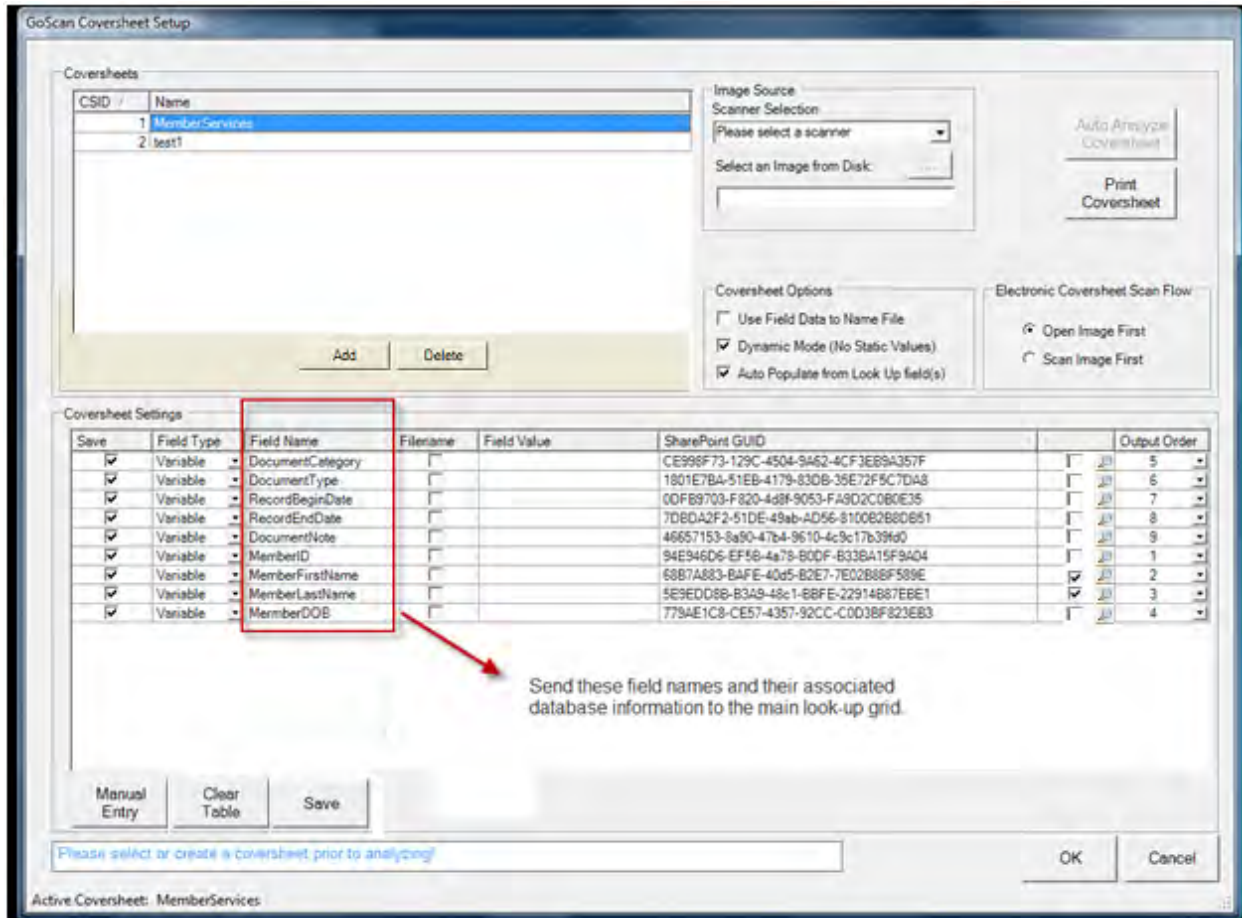


Figure 1 - Coversheet Setup

Look-Up Definition

If the record is selected GoScan® will present the user the opportunity to define the source of data for each look-up item. Each individual item that is looked-up has within their context a database server and associated table, field, and primary key. It is this relationship that renders the ability to have completely discrete data sources that exist anywhere in the user environment.

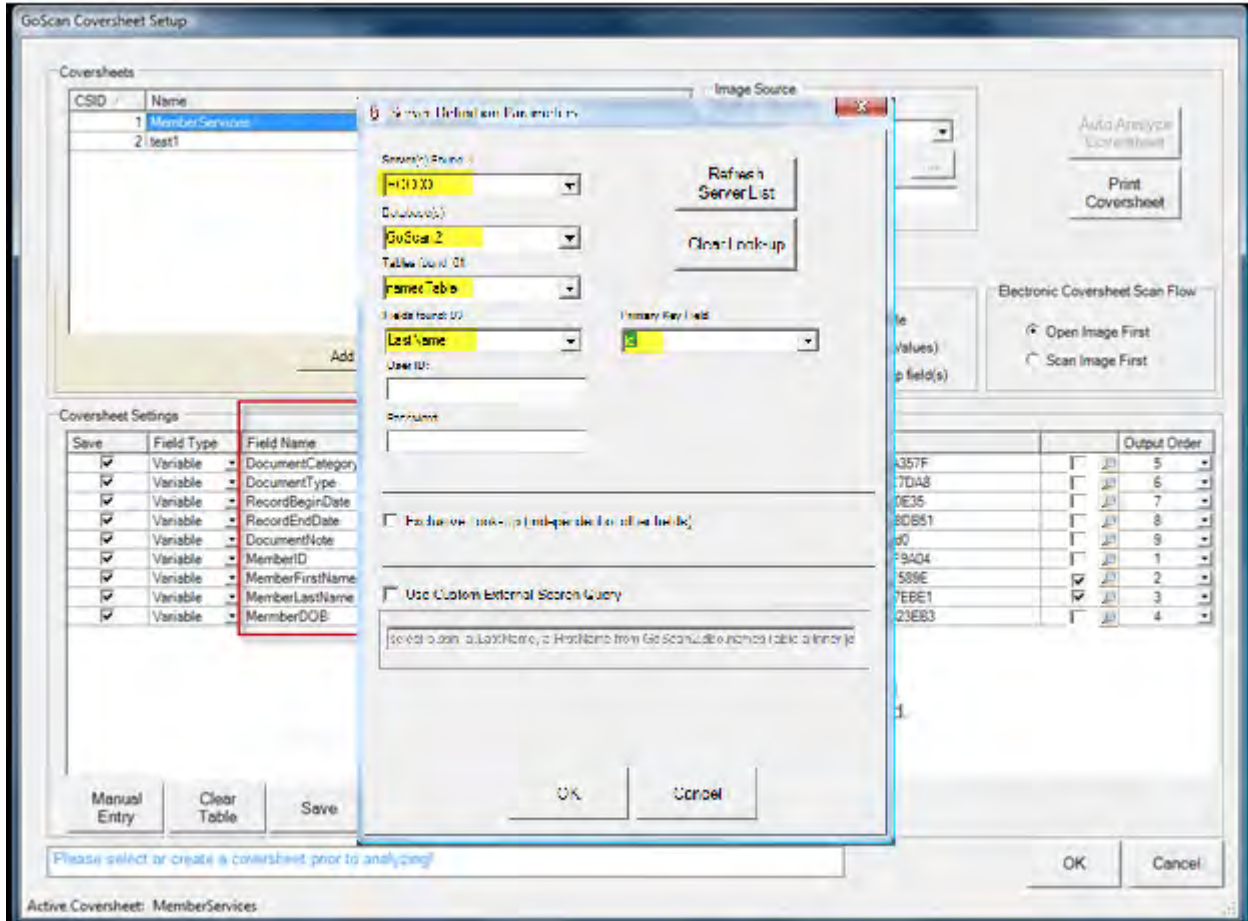


Figure 2 - Look-Up Definition Screen

Main Look-Up Grid

The main look-up grid is where users can enter and lookup data to produce a full set of metadata for storing the images.



Figure 3 - Look-Up Main Interface

If the user needs to search for a field value that has multiple occurrences (e.g. a member whose first name is Steve or located in the city of Anaheim) a new screen appears, as illustrated in Figure 4 – Detailed Search Screen (F2) which can be utilized to view all records meeting certain criteria. This screen is invoked by selecting the F2 function key or clicking on the Detailed Search command button.

GoScan® offers a number of features central to robust lookups:

- ✓ Database schema detection populates grid dynamically at runtime.
- ✓ Dynamically built selection sets of SQL statements aggregate datum by detecting data elements from same sources (e.g. relating data elements at runtime and synchronizing record-set results).
- ✓ Connecting data selected by the user passed back to the main UI container.
- ✓ Awareness of fields and their attributes – deducing what is inclusive and autonomous data.

Example Grid with Search Capability

In order to view and delineate the data of multiple records representing member's with same first names, for example, a horizontal view of the record-set enables one to visually preview the data quickly. All fields are searchable and the user may type information into any search-column as depicted in row one of the search grid. Once the correct record is identified the user simply selects the record by

clicking on any column of the particular row. If the user clicks on the OK command button program execution is transferred back to the main UI; otherwise, if the CANCEL command button is selected the search is aborted.

Users may traverse thousands of records at any given moment so it is critical to not introduce redundant network traffic. GoScan® packetizes the network request before broadcasting its request to the database server, issues the call, and then disconnects to conserve memory and connection resources.

GoScan® provides the user a way to key in a search string, or portion thereof, and visually pair down the records presented in the grid as each keystroke is introduced – this feedback will give the user immediate results when performing their detailed search.

GoScan® is architected with an optimized network packet and established algorithms¹ database containing 290,000 records transmitting over a 100mbit/s switched Ethernet segment which is loaded into transient memory in less than 2 seconds, disconnects its connection, and traversed in sub-second time².

Additional features:

- ✓ An optimized load routine that invokes ADO.NET in a disconnected fashion in order to minimize connection time on the data source.
- ✓ A pre-allocated portion of memory to store a container object for quick manipulation.
- ✓ A method capable of taking any column in the grid and search for substrings within the entire column's data.
- ✓ Visually presents the data as it is sub-searched (e.g. pared down) into its smaller aggregate group.

¹ Dr. Donald E. Knuth. The Art of Computer Programming Volume 3: Sorting and Searching. Menlo Park, California: Addison-Wesley Publishing Company, 1973.

² Paul Smietan and Pradeesh Gupta. Microsoft WebCast: ADO.NET Optimizations and Futures. Redmond, Washington: Microsoft Internal Discussions, 2002.

As depicted in this figure multiple members named “Steve” are pared down by typing the value “Steve” in the first row of the grid which is used to search on any of the fields presented. The user may select any row in the grid as their choice of “Steve” as a member.

Once the screen is closed **the data will be transferred to the main user interface** at runtime.

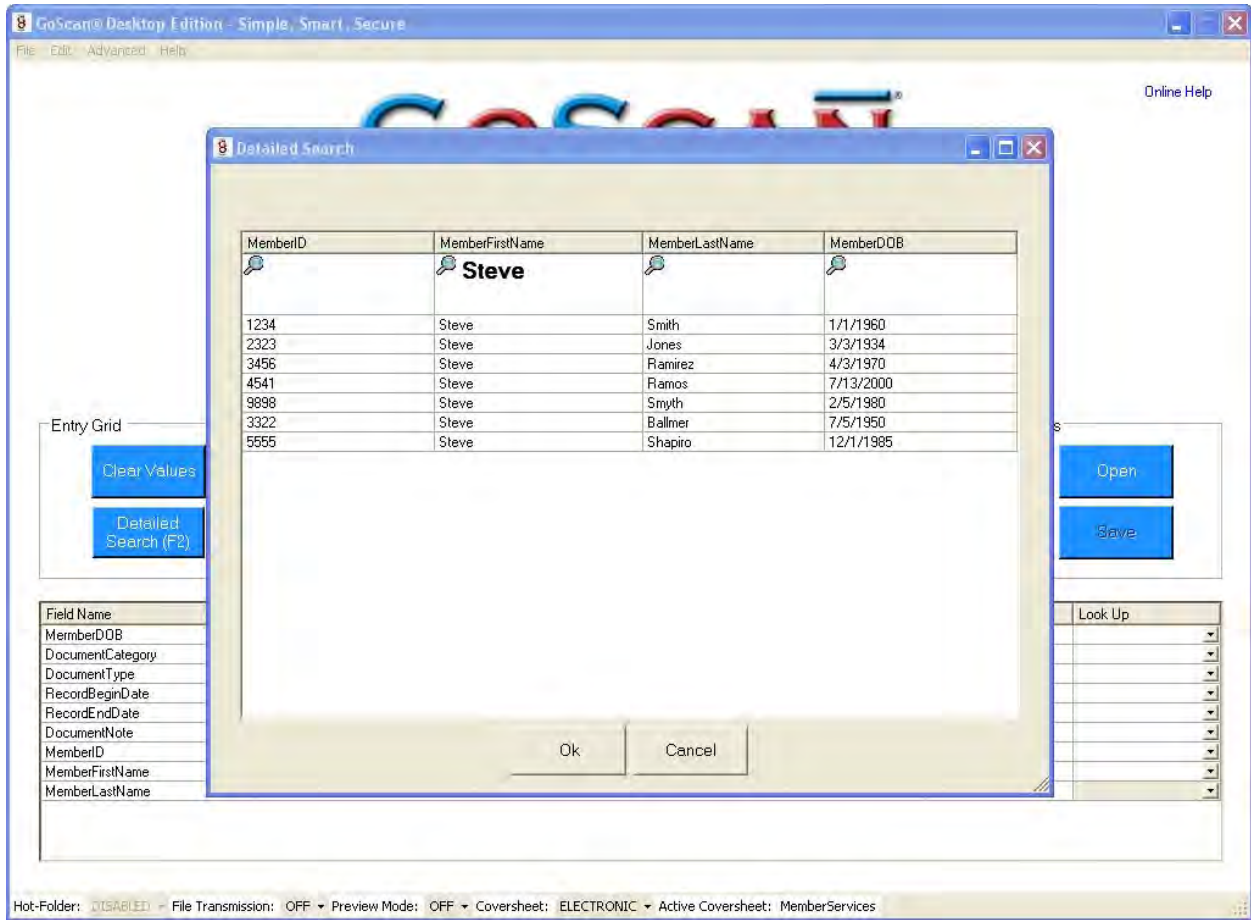


Figure 4 – Detailed Search Screen (F2)

Exclusive Look-Up Attribute

An exclusive look-up is comprised of the following functions:

- Queries a database for a specific set of data.
- Populated its own field and does not overwrite the data of others.

GoScan® offers:

- ✓ A checkbox control to act as a flag for this attribute.
- ✓ Flag-checks in the main user interface to alert the user of other fields that are look-up types.

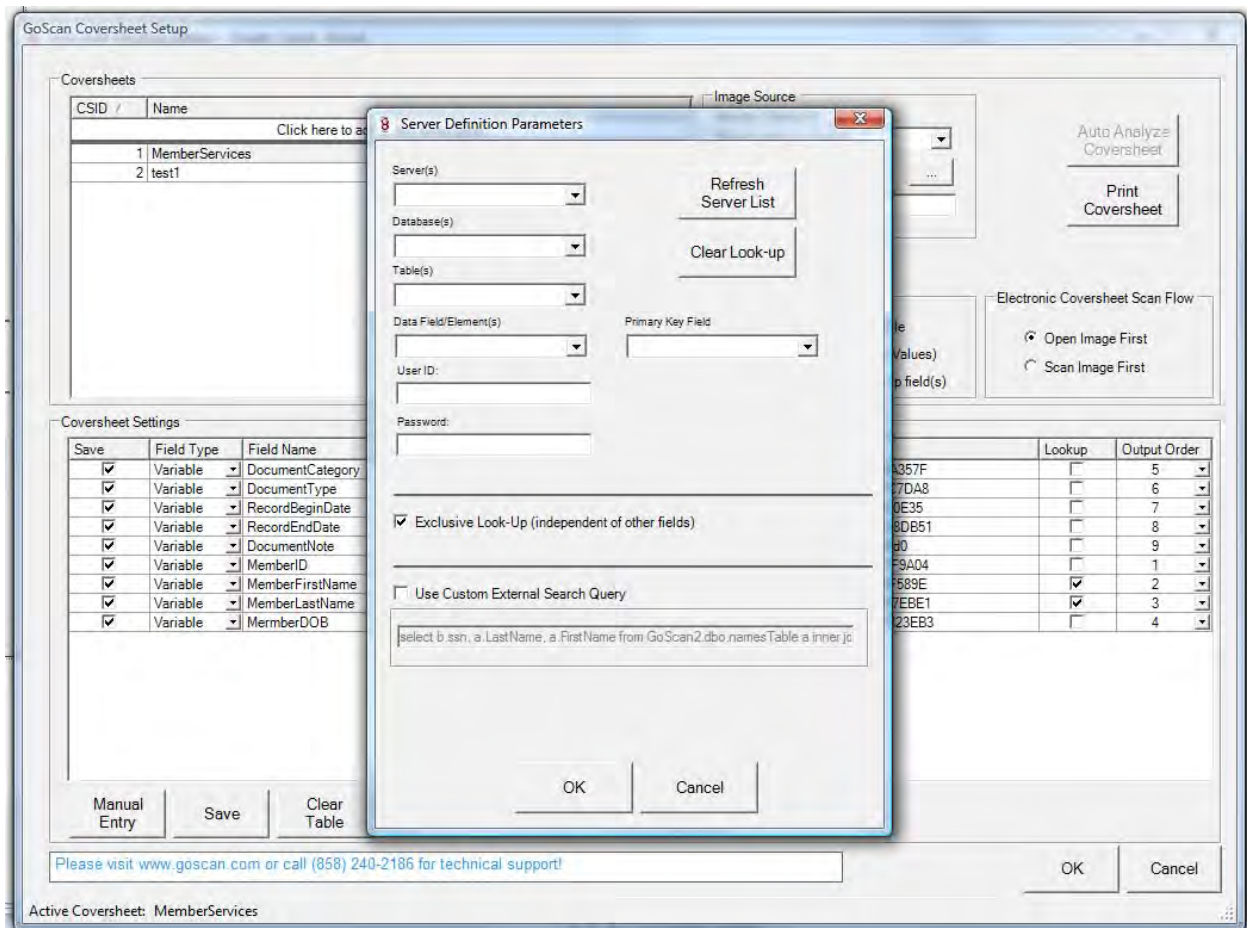


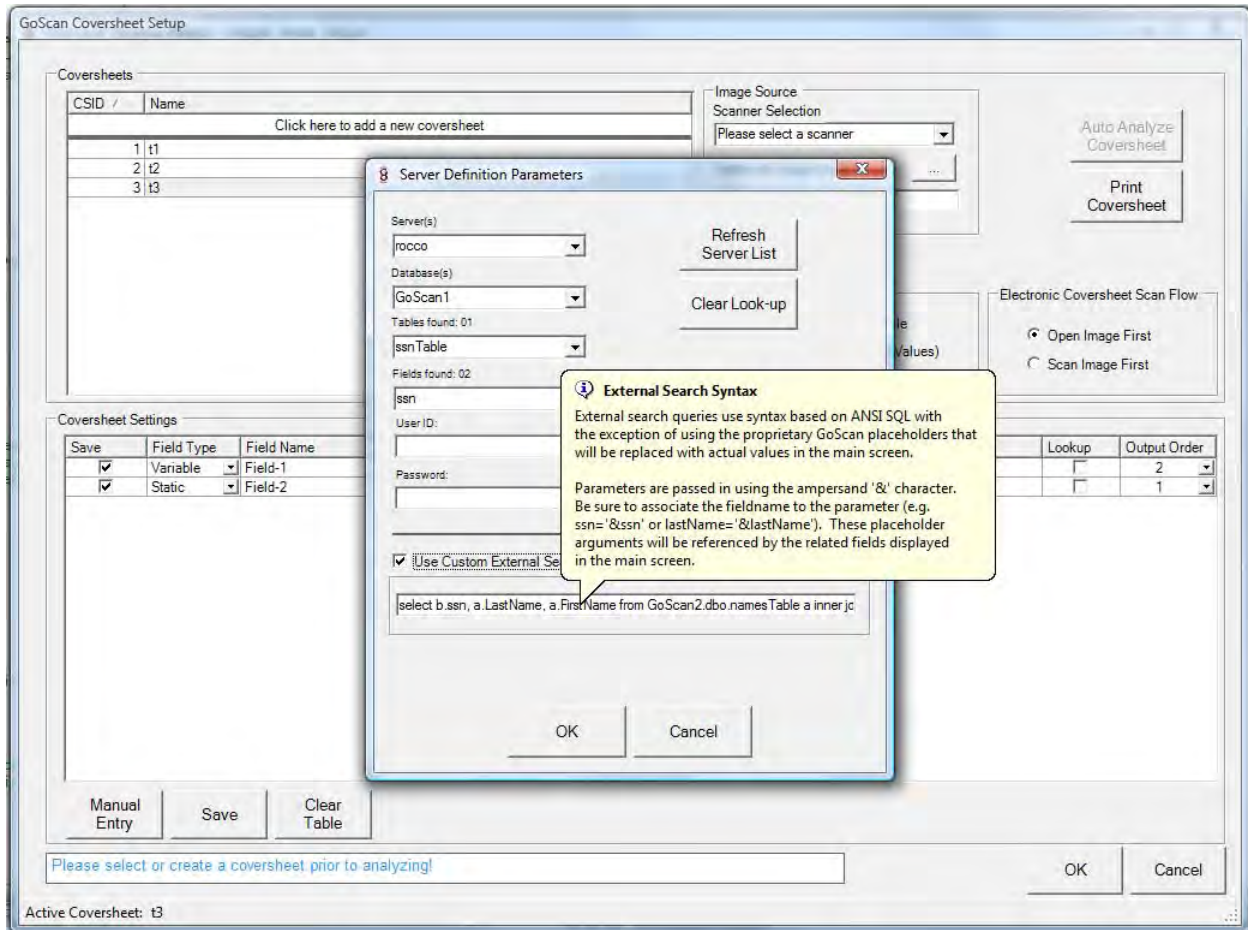
Figure 5 - Exclusive Look-Up Attribute

External Search

This type of search plays an important role in the look-up strategy where a specific field may execute a SQL command that aggregates a value from multiple tables or performs a complex calculation related to this field.

GoScan® is capable of:

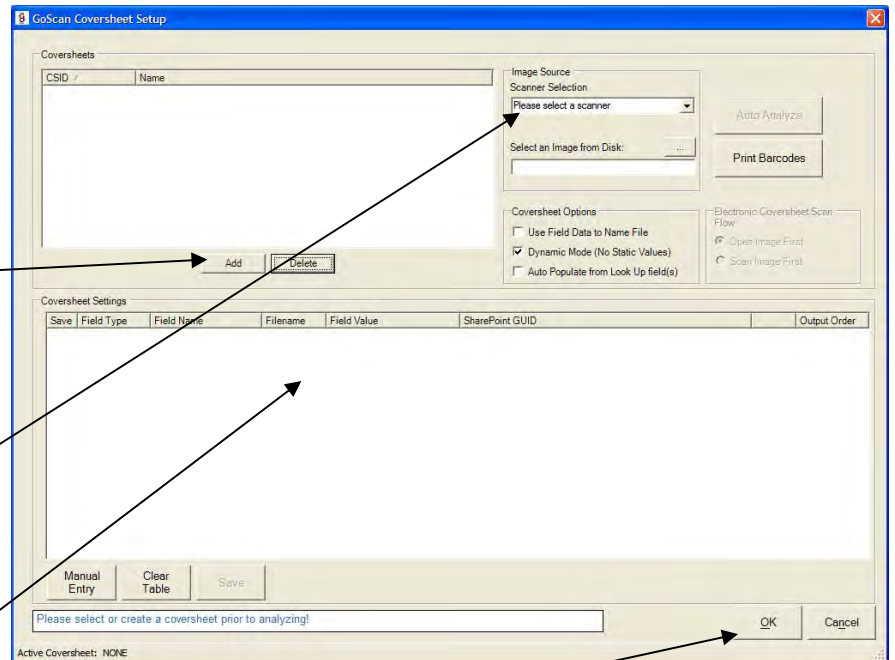
- ✓ Detecting SQL injections.
- ✓ Preventing errant DROP commands that would delete tables of data.
- ✓ Checking the security level of SQL users and authenticating against the database server.



Tutorial - scan and index paper documents with coversheet

Creating the coversheet

1. Print the Demonstration Coversheet 1 from the end of this document.
2. Select Edit – Coversheet
3. Click “Add” to create a new coversheet”.
4. Give the new coversheet a name
5. Place the printed Demonstration Coversheet into your scanner
6. Select your scanner
7. Click on “Auto Analyze”
8. After GoScan has analyzed the barcodes, the fields will be created.
9. Click “Save”
10. Click “OK” to exit the Coversheet Setup.



Scanning Coversheets with GoScan

1. Place the printed Demonstration Coversheet on top of the Sample Attachment 1 found at the end of this document.
2. Place the pages into the scanner.
3. Make sure that the Coversheet processing is turned on.
4. Click the green “SCAN” button

Post Scanning

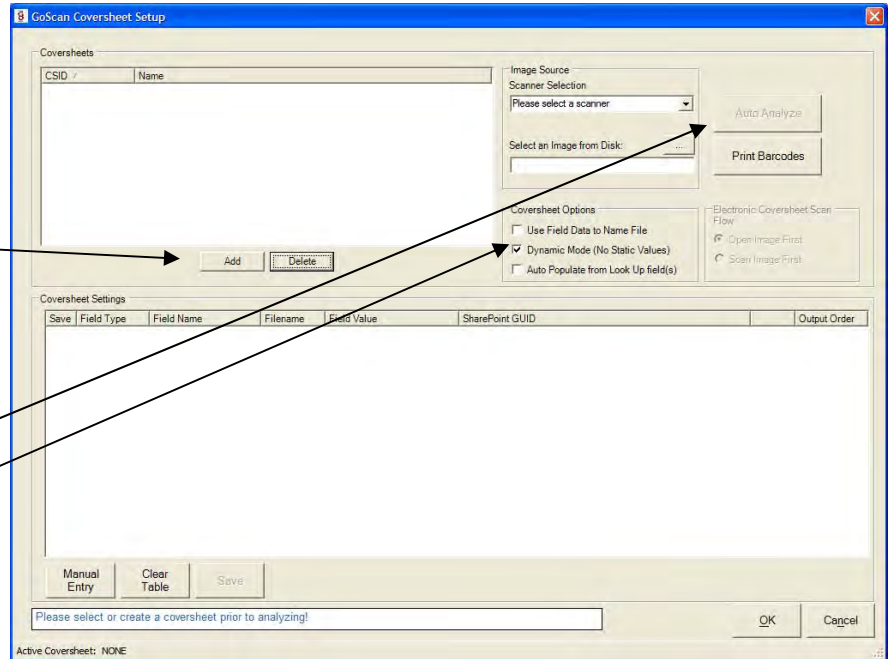
1. GoScan will then process the images and sort them by the coversheet(s) within the stack.
2. The images and XML data will be exported to the stored image folder.
3. If you configured the FTP Server and turned on FTP Transmission, the images and XML data will also be on the FTP server.



Tutorial - scan and index paper documents without coversheet

Creating the coversheet

1. Print the Sample Document 1 from the end of this document.
2. Select Edit – Coversheet
3. Click “Add” to create a new coversheet”.
4. Give the new coversheet a name
5. Select your scanner
6. Place the printed Sample Document 1 into your scanner
7. Click on “Auto Analyze”
8. After GoScan has analyzed the barcodes, the fields will be created.
9. Click on “use field data to name file”
10. Click on “Dynamic Mode (No Static Values)”
11. Click on “Filename” for all rows.
12. Click “Save”
13. Click “OK” to exit the Coversheet Setup.



Scanning Coversheets with GoScan

1. Place the printed Sample Document 1 in the scanner
2. Make sure that the Coversheet processing is turned on.
3. Click the green “SCAN” button

Post Scanning

1. GoScan will then scan the image and name it according to the barcodes on the document.
2. The images and XML data will be exported to the stored image folder.
3. If you configured the FTP Server and turned on FTP Transmission, the images and XML data will also be on the FTP server.

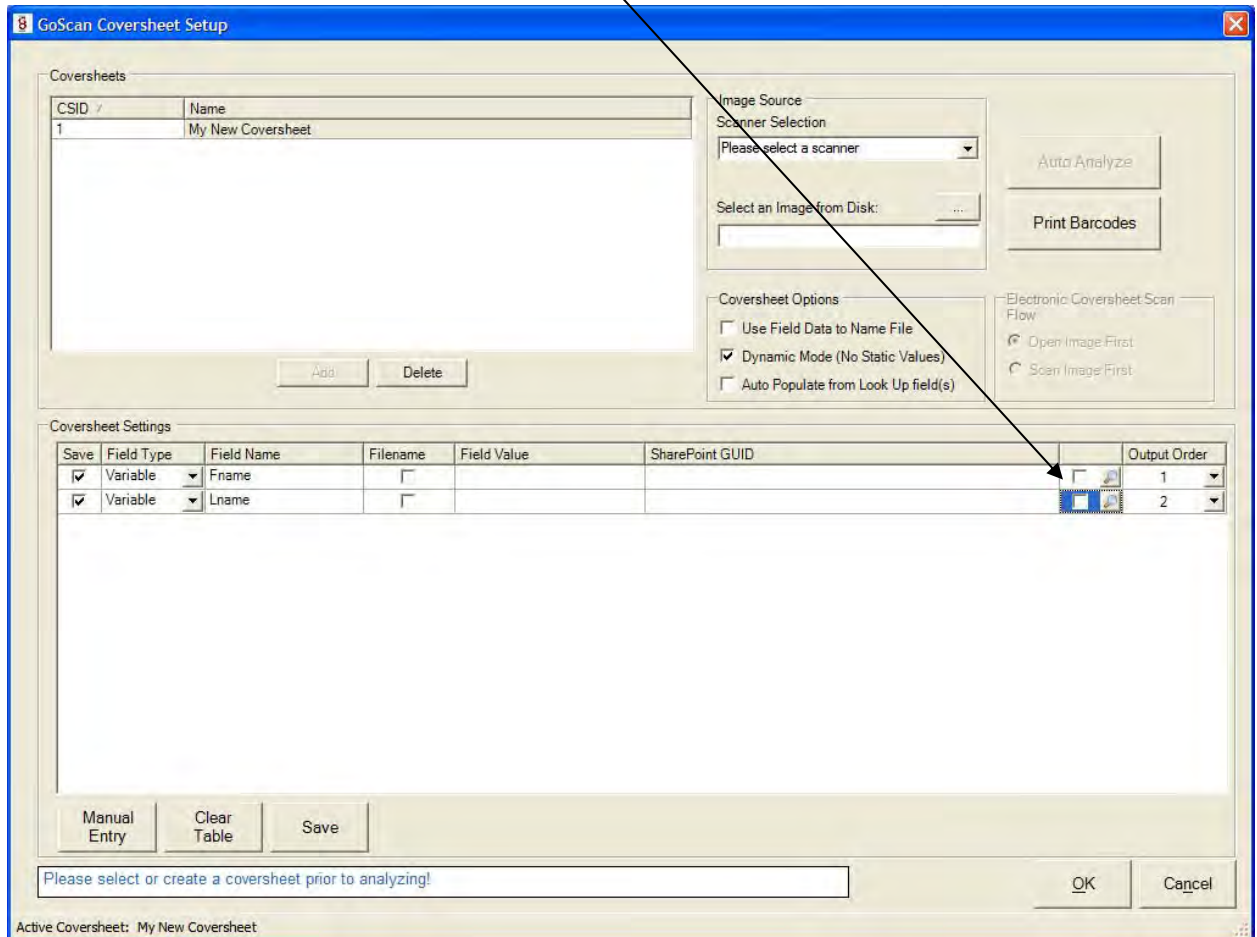


Tutorial – processing electronic coversheets with database lookup

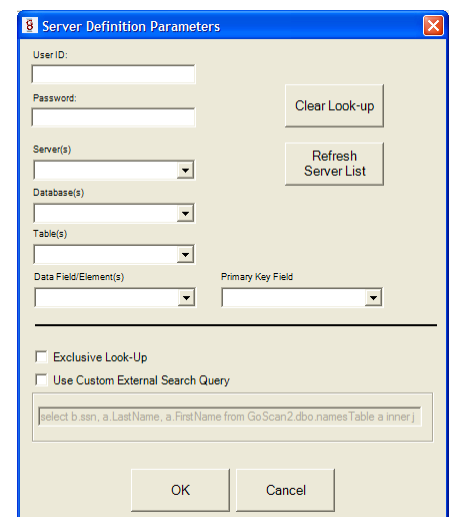
GoScan Desktop Edition is capable of processing data from images already on your system, and exporting index data.

Creating the coversheet

1. Select Edit – Coversheet – Electronic
2. Choose an existing coversheet, or create a new one
3. Select the field type as Variable
4. Click the magnifying glass icon for Database Lookup

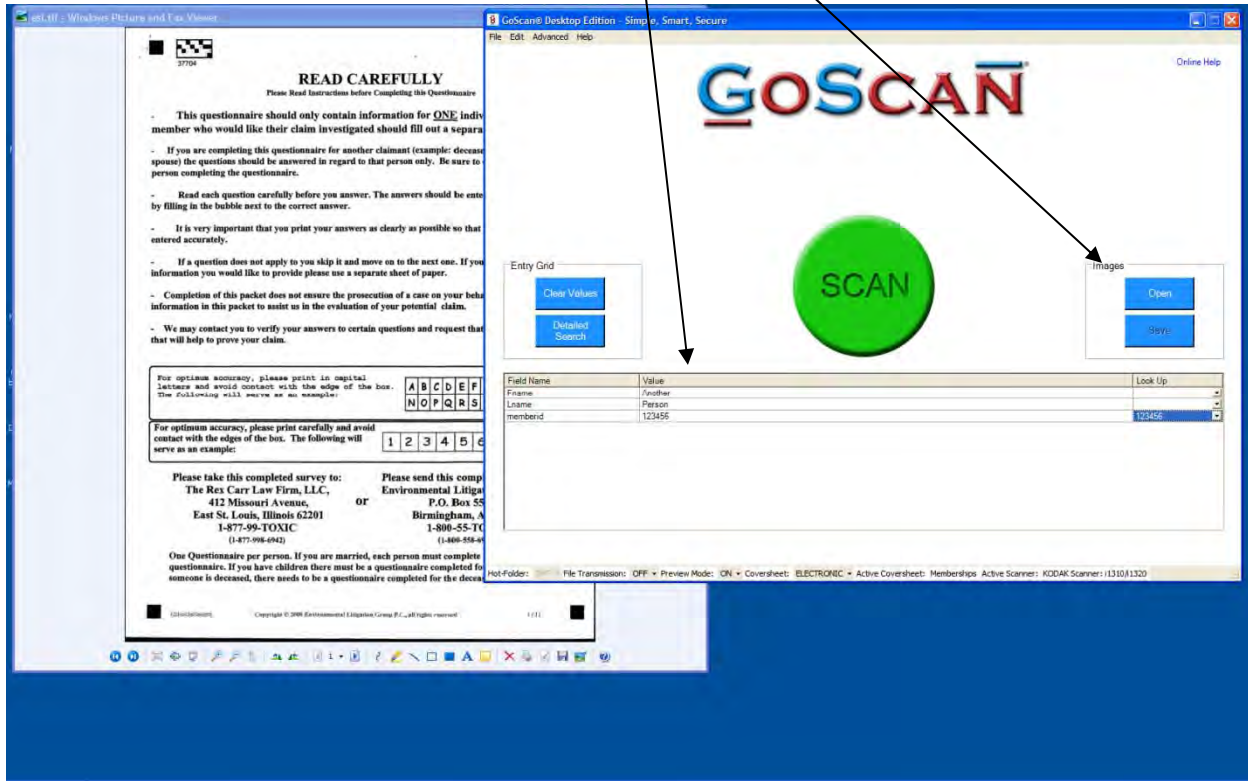


5. Select the server, database, table and finally the column to associate with this field.
6. If necessary, enter the username and password.
7. Create new fields and associate them to the proper database columns.
8. When all of the fields have been created, click OK to save the changes and return to the main GoScan window.



To process Electronic Coversheets:

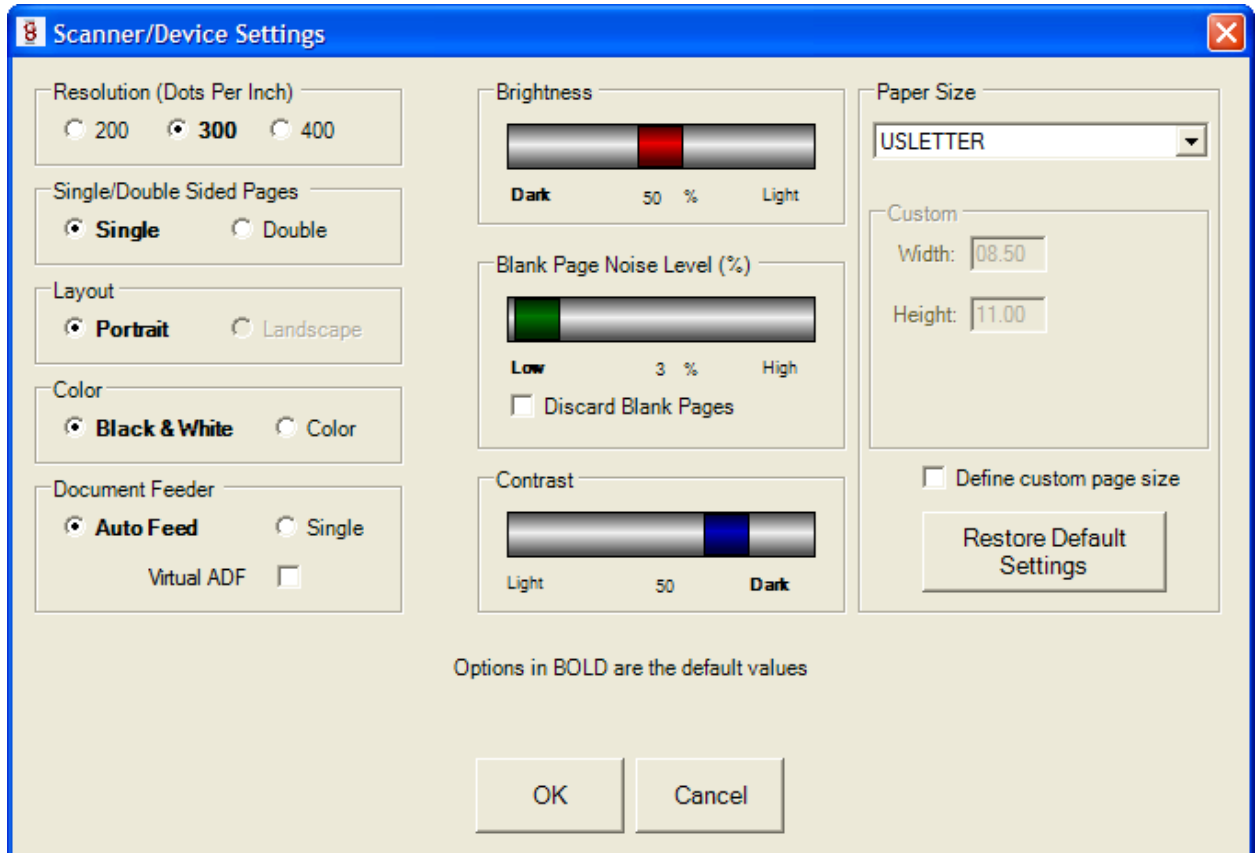
1. Select "Electronic" from the coversheet selector at the bottom of the GoScan dialog.
2. Select the coversheet you wish to use.
3. Click "OK"
4. Open an image from your file system
5. Enter data from the image into the fields list.
6. Click Save



Appendix A - Changing Scanner Settings

For most scanners and scanning needs, the default settings are correct. However, if you are scanning at a different resolution setting, you will need to change the configuration in this window.

1. Select “Edit” from the menu bar and choose “Scanner Settings”.
2. Select the image DPI, color or Black and White, Duplex or Simplex, darkness, contrast etc.
3. Click Save.



Appendix B – Sending scanned images to an FTP server

The FTP Server option can be configured for transmission of images and data to an FTP server by IP Address or FTP Server Name. Your FTP Server should be configured with a specific username and password to insure file security.

1. Select File – FTP Server.
2. Enter the FTP Server name (i.e. ftp.goscan.com) or by IP address (i.e. [ftp.192.168.1.125](ftp://192.168.1.125)),
3. Enter the user login name, password, and FTP Path.
4. Click “Test Connection” to test. If the test is successful, the settings are saved. If the test fails, the new settings are NOT saved. You must fix the problem and retest in order for the settings to be saved and used by GoScan.
5. Click OK to save the settings.

You can configure GoScan to store images locally, as well as transmit through FTP at the same time.

Select File Transmission – On from the control bar at the bottom of the screen to turn on the Hot Folder function.

Appendix C – Hot Folder

GoScan has the capability not only to drive a scanner connected to a computer but also to read images in a directory that were generated by an imaging device not connected to the computer that GoScan is running on. There are many examples of this requirement.

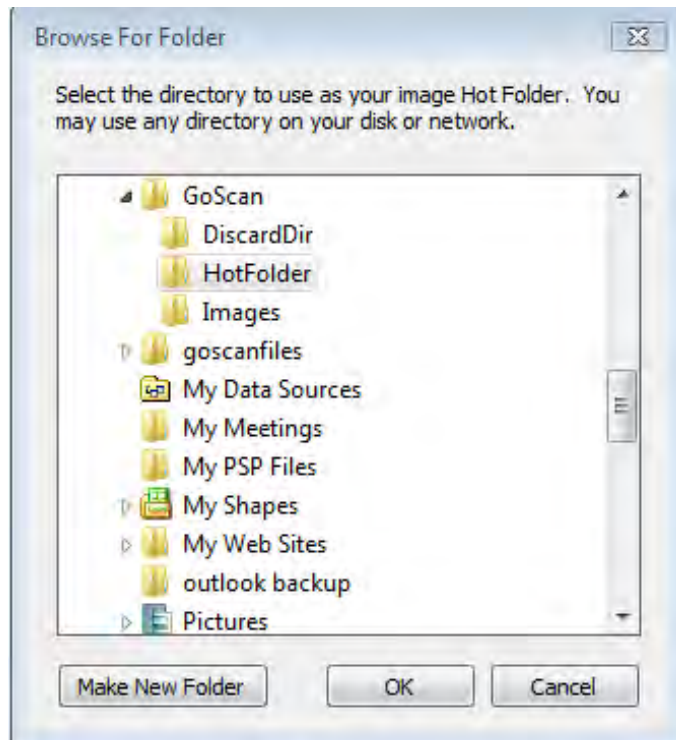
- Copiers with network scanning capability
- “Digital sender” scanners
- Network attached scanners
- Fax servers
- Emailed images

The GoScan Hot Folder can be any folder on the local system or on the network where you can drop images for GoScan to process. In GoScan:

1. Click Edit, Select Source, Hot Folder.
2. Select File – Hot Folder to configure the location for the Hot Folder.
3. Browse to the location for the Hot Folder and either select the folder you wish to use, or click on the “Make New Folder” button.
4. Click “OK”.
5. Select Hot Folder – On from the control bar at the bottom of the screen to turn on the Hot Folder function.

Note: Once the Hot Folder option has been set to “On”, all image files will be immediately processed.

Once the images have been picked up by GoScan, they can be classified and exported. For example, documents can be separated by barcodes, OCR can be used to create searchable PDF documents and all the documents can be exported to SharePoint or some other repository.



Appendix D - Glossary

Look-Up: The ability to query a database for a given data element. Look-up items are composed of scalar items such as first-name, city, or membership ID. Once an item is looked-up the resultant is used to populate other look-up fields to ease the burden of field population.

Custom Search: A custom search is a user-defined database query that uses the SQL notation to gather data. The level of complexity is completely open to the design of the creator – it is recommended that this query be developed using a T-SQL based tool (e.g. SQL Management Studio, ISQL.EXE or SQLCMD.EXE) and debugged prior to pasting the command into the textbox.

Exclusive Search: If a search is flagged to be exclusive its resultant will not have an effect on the other fields that are defined as look-up queries. This exclusivity provides a specific field(s) to have complete autonomy from other fields, will not be written upon or write upon others, and in effect will be “read-only” to all other fields.

Detailed Search: Invoked by pressing the F2 function key, this screen will allow the user to traverse an entire record set of the database and search for the record that reflects the member most accurately.

Technical Support

Providing World-Class Support

Thank you for your business. We are looking forward to providing you with world-class support. A quick phone call to a knowledgeable support person can save you hours of frustration. Our staff of experienced professionals is dedicated to helping you with your hardware or software challenges.

Support Contact Information

Email: support@goscan.com

Phone: (858) 240-2186

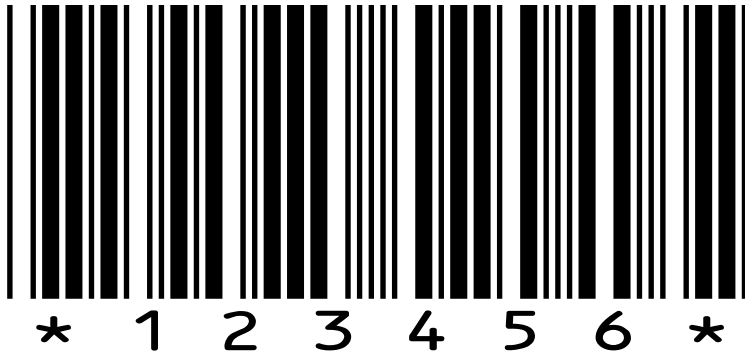
Hours: 7 am to 5 pm Pacific Standard Time

Top 3 Support Questions	
Question	Answer
What barcode fonts can I use?	Supported fonts include Code 11, 39, 128, 2of5, Codabar, EAN 8/13, UPC A/E, Add 2/5, PDF417, and Data Matrix.
Where can I get free bar code fonts?	Free barcode font downloads are available on the GoScan Web Site (www.goscan.com) by clicking on the links found on the Support page. The following fonts are available: code39wide , code39extended , code39
Can I use a network enabled copier to scan into GoScan?	Yes, you can use the hot folder feature to scan from your copier into GoScan.

GOSCAN

Demonstration Coversheet 1

This is the Static Index barcode:



This is a secondary field:



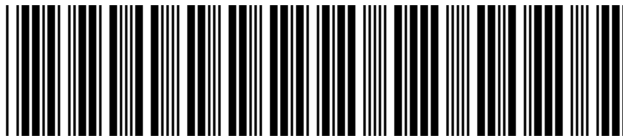
GOSCAN

Sample Document 1



* R 0 9 1 2 4 8 1 2 0 4 4 5 4 *

R0912481204454



* 1 5 6 0 0 0 8 3 4 3 0 2 3 *

1560008343023



* A Q 5 E A 0 0 0 0 1 A 9 B 1 0 3 0 0 6 9 *

AQ5EA00001A9B1030069



* C 2 H Z 9 3 V *

C2HZ93V