

QCFlow™ 2

User Guide

Digitech Systems, Inc.



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QCFlow Product Support

Digitech Systems, Inc. is committed to providing the best possible technical support for QCFlow and all of our products. In order to get you the fastest, most complete, and most accurate support, please register your software. Registration ensures that you are eligible for the benefits available to registered users such as special offers, updates, and exclusive QCFlow information.

Technical support is offered on an annual service contract basis. You can reach Digitech Systems, Inc. toll-free technical support by calling (877)DSI-FLOW (374-3569) between the hours of 8:00 AM and 5:00 PM Central Time or by e-mailing your request to support@dsiflow.com.

Chapter 1 – Installation

Overview

This chapter explains how to install QCFlow on your computer using the SETUP program.

System Requirements

- PC running Microsoft Windows 95/98/NT 4.0 (SP3 or higher)/2000
- 32 MB memory minimum (64 recommended)
- 40 MB available disk space for installation of program files
- VGA or higher resolution monitor
- CD-ROM drive

Running Setup

Follow these instructions to run a full installation of QCFlow:

1. **Insert the QCFlow CD-ROM into a CD-ROM drive.**
2. **Run SETUP.EXE from the CD-ROM.**

The Welcome screen appears.



Figure 1-1: Installation Welcome

3. Click *Next* to continue.

The End-User License Agreement is displayed.

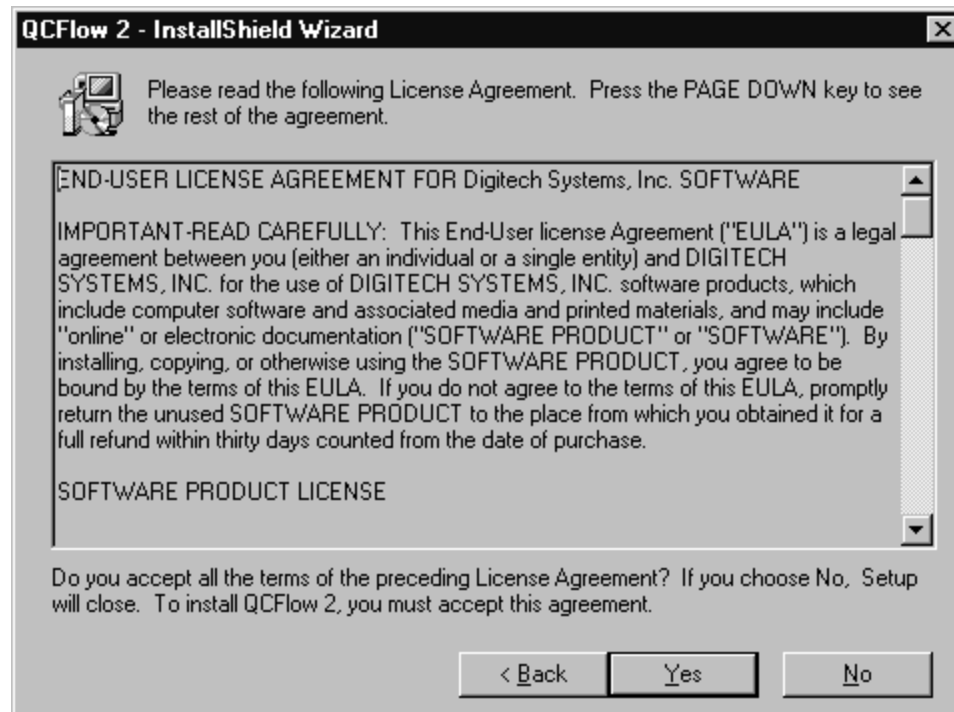


Figure 1-2: End-User License Agreement

4. Click *Yes* if you accept the terms of the license agreement.

The Choose Destination screen appears.



Figure 1-3: Choose Destination

5. Select where you want to install QCFlow, then select *Next*.

The Select Program Folder screen appears.

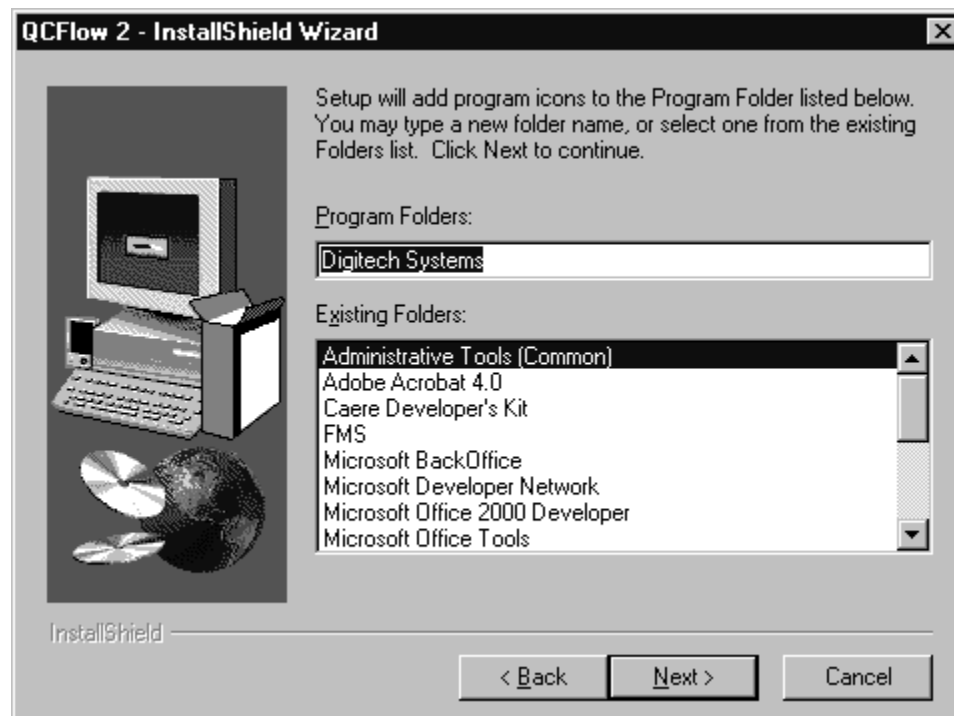


Figure 1-4: Select Program Folder

6. Select the Program Folder to install to, then select *Next*.

The program will finish the installation of all necessary files and prompt you when the setup is completed. Finally, you will be prompted to reboot your computer.



Figure 1-5: Setup Complete

7. It is highly recommended that you restart your computer now. Select *Finish*.

After your computer has restarted, connect your QCFlow dongle key to the parallel port (printer port) of your computer. You can still use a printer as normal when plugged into the QCFlow dongle key. Your QCFlow system is now ready.

Uninstalling QCFlow

Uninstalling QCFlow is a very simple process. Every installation of QCFlow comes with an Uninstall program.

- 1. Open the Windows Control Panel**
- 2. Select the *Add/Remove Programs* applet.**
- 3. Select QCFlow and click *Add/Remove*.**

The uninstall operation will remove QCFlow from the system. However, any user generated data (processed files, databases, images, etc.) will be left intact for safety purposes.

Chapter 2 – Starting to use QCFlow

Overview

This chapter explains the basic procedures that you must know in order to start and exit QCFlow. In this chapter, you will learn:

- How QCFlow Operates
- How to start and exit QCFlow
- How to use the Data Group Manager
- Accessing On-Line Help
- Launching PaperFlow and OCRFlow from within QCFlow

How QCFlow Operates

QCFlow allows both automated and manual image manipulation and quality control operations on both images and indexes contained in data groups that were created with PaperFlow. QCFlow operations can be divided into three subsets:

- **Automated Image QC:** Performs automated functions such as file size detection, image size detection, and document page count.
- **Index QC:** Performs functions such as index field verification, numeric sequence verification, insert/remove leading zeros, strip leading/trailing characters, and search and replace.
- **Manual Image QC:** Allows an operator to manually QC images, performing functions such as full-page/thumbnail image viewing, rotation, deletion, document break insertion/removal, page/document tags, and moving pages.

These operations can be executed in any order. QC operations are generally performed in full after a data group has been scanned and indexed. However, you can perform the operations on a partial basis, and pick up where you left off.

Starting QCFlow

To start QCFlow:

1. **From the QCFlow program group, click the QCFlow icon.**

If this is the first time QCFlow has been run on this computer, you will be prompted for a Central Project database location. Your Central Project databases are a central location on your network for holding all customer and project information that will be configured later. If you are using multiple computer systems, use the same location for all of your systems to eliminate copying customer and project information between those systems.

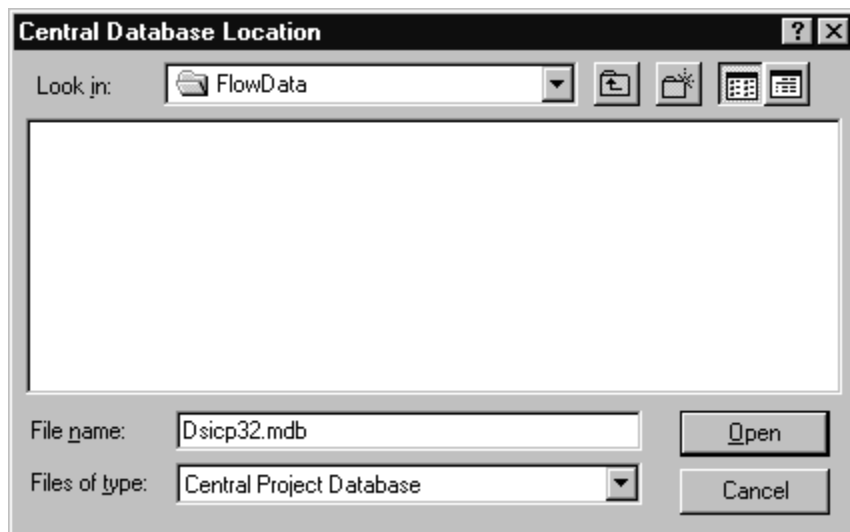


Figure 2-1: Select Central Database Location

2. **Select the database location where a database already exists or where you would like to create a new Central Project database.**

After a database location has been selected, if QCFlow cannot locate an existing database, you will be prompted to create a new one. After the database has been created, the Login prompt will be displayed.

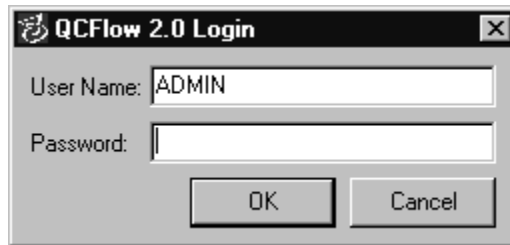


Figure 2-2: QCFlow Login

3. **Enter your User Name and Password and select *OK*.**

Note: If this is the first time you have run QCFlow or created new Central Project databases, the default User Name is “ADMIN” and the password is also “ADMIN”. It will be important to change these in the future to ensure strict security measures. Passwords are case-sensitive.

Every time QCFlow is started, the Data Group Manager is displayed, showing a list of data groups that are available to be opened.

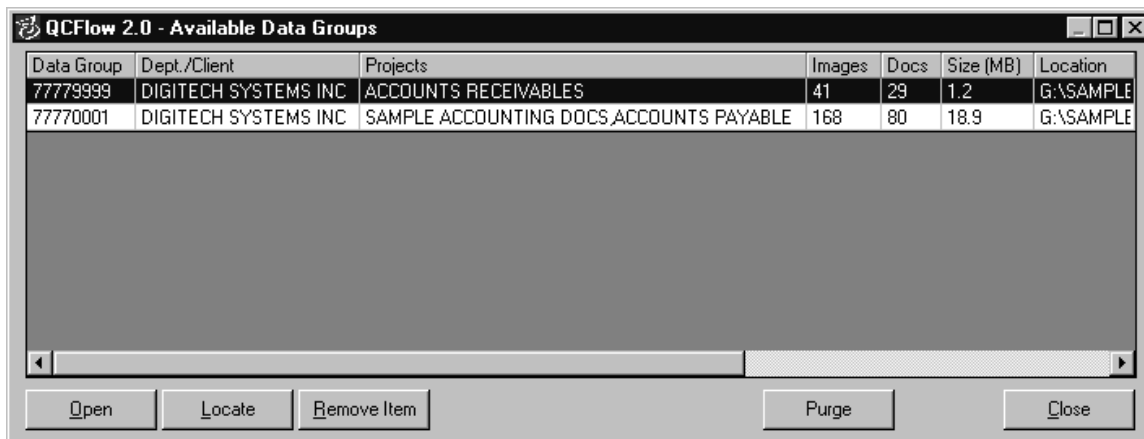


Figure 2-3: Data Group Manager

4. **Select the desired data group, or simply select *Close* if you do not wish to open a data group at this time.**

Using the Data Group Manager

Whenever a new data group is created in PaperFlow (DSI's document capture software) or an unlisted data group is opened, the item will be added to the Data Group Manager. You can open the data group manager by selecting *Open Data Group* from the *Data Group* menu of the main screen. When the Data Group Manager is opened, it automatically queries all of the data groups that exist in its database to ensure that they still exist. In other words, the Data Group Manager only shows a list of valid data groups. The Data Group Manager offers the functions of opening a data group, adding an existing data group to the list ("Locate"), or permanently deleting a data group and all of its images and databases from the system ("Purge").

Opening a Data Group

To open a listed data group:

- 1. Highlight the desired data group by selecting the item with your mouse or using the up and down arrow keys on your keyboard.**

2. Select *Open*.

Or

Highlight the desired data group by selecting the item with your mouse or using the up and down arrow keys on your keyboard. Then, hit the space bar on your keyboard.

Or

Double-click on the desired data group.

If the data group has only one project, that project will automatically be opened. However, if more than one project exists in the data group, you will be prompted to select the project that you wish to work in.



Figure 2-4: Project Selection

3. Select the desired project to open by highlighting the project with your mouse and clicking on *Select* (or by double-clicking the project).

QCFlow will open the project, reading in all of the project settings, and will display the first page of the first document (if any documents exist).

Locating a Data Group

You can add an existing data group (whether it resides on your computer or on another computer on the network) to your data group list by locating it. To locate a data group:

1. **From the Data Group Manager, select *Locate*.**

The Locate Data Group screen is displayed.

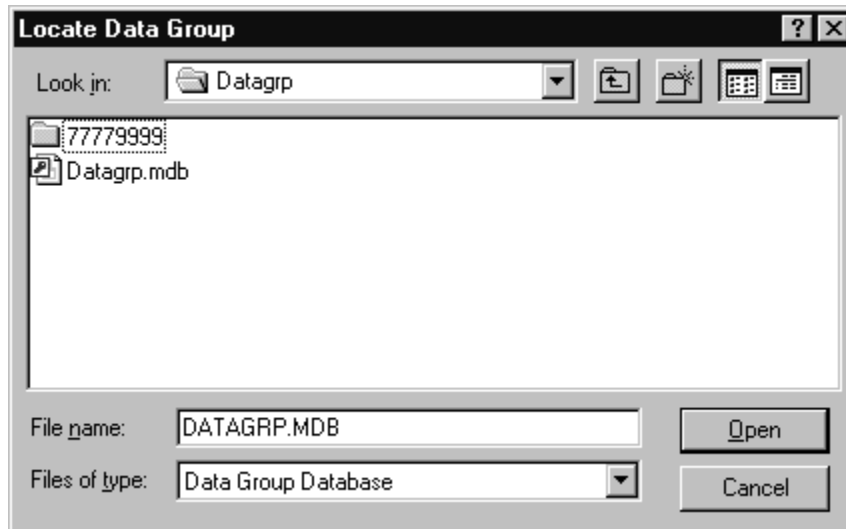


Figure 2-5: Locate Data Group

2. **Select the DATAGRP.MDB database file for the data group that you wish to have added to your list and select *OK*.**

The data group will be added to the list.

Removing an Item from the List

Data Groups can be removed from the data group list. This is often done to prevent operators from opening the incorrect data group. Removing a data group from the list does NOT delete any information from the system. The data group can later be re-located to add it back to the list. To remove a data group from the list:

1. **Using your mouse or the up and down arrow keys, select the data group you wish to remove.**
2. **Select *Remove Item*.**

QCFlow will prompt you to ensure that you wish to remove the data group from the list.

Purging a Data Group

Data Groups and their associated images and databases can be permanently removed from your system (or the network) by using the purge operation. Once the information is purged, it cannot be recovered unless you have a backup of the information residing elsewhere. Because of this data destruction capability, only administrators have the option of purging data groups.

When a data group is purged, it automatically saves both the data group's Productivity report and the Summary report. These reports can be located at C:\Program Files\Digitech Systems\Common Files\Reports after the data group is purged.

To purge a data group:

- 1. Using your mouse or the up and down arrow keys, select the data group you wish to purge from the Data Group Manager.**
- 2. Select *Purge*.**

You will be prompted twice to ensure that you are absolutely sure that you wish to delete the information.

- 3. Select *Yes* twice to permanently delete the data group.**

Once the data group has been purged, it will also be removed from the data group list in the Data Group Manager.

QCFlow 2.0 77770001: DIGITECH SYSTEM-ACCOUNTS PAYABLE

Data Group Edit View Administration Help

Digital Storage
marketing & logistics specialists

CUSTOMER

REMIT TO: DIGITAL STORAGE INC.
P O BOX 676
BELLEVILLE, OH 43015
(614)348-7179

INVOICE NUMBER: 42107401
ACCOUNT NUMBER: D00903B
INVOICE DATE: 12/17/97
PAGE NUMBER: 1

TRACKING ID: 06387676505
MAIL: MAIL

*** INVOICE ***

BOLD TO: DIGITECH SYSTEMS INC
6911 VAN DOWN STREET #3
LINCOLN, NE 68506

SHIP TO: DIGITECH SYSTEMS INC
6911 VAN DOWN STREET #3
ATTN: PQ# 12-17-97-01
LINCOLN, NE 68506

OUR ORDER#: 421074 CFB
ORDER DATE: 12/17/97 15:40:35
PICK DATE: 12/17/97
SHIP DATE: 12/17/97
SHIP VIA: AIRBORNE PROGRAM
F.O.B.: Origin, Prepay & Add

YOUR P/O#: 12-17-97-01
PLACED BY: SCOTT MATTHEWS
CONTRACT#: J006/NAME:
SALES REP: FCB
TERMS: Net 30 days
SNA #:

** THANK YOU FOR YOUR ORDER !!!

ORDERED	SHIPPED	BACKORD	UNIT	ITEM#/DESCRIPTION	PRICE	DISC%	AMOUNT
300	300		Ea	KODAK 74MIN JC NO KSP 650MB	1.60	.00	480.00
				CD, WRITE 74MIN JC NO KSP 650MB			
				25/CTN			
**** SUBTOTAL ****							480.00
Freight Charge							12.67
CUSTOMER FREE FREIGHT PROGRAM							12.67
**** INVOICE TOTAL ****							480.25
Pay due by 01/16/98							

pd 12/29/97
cto 1046

492.67 +
167.67 +
480.25 +
214.35 +
492.67 +
1,847.61 *

Page 1 of 5 Doc. ID 3 - DIGITAL STORAGE DEC 17, 1997 \$1,847.61 1046

Figure 2-6: QCFlow Main Screen

On-Line Documentation

You can access QCFlow's on-line documentation, by selecting *On-Line Documentation* from the *Help* menu. This documentation is provided in Adobe PDF format and requires a PDF viewer. If you do not have the Adobe PDF viewer installed, you can install it from the QCFlow installation CD-ROM.

Launching PaperFlow and OCRFlow

You can launch PaperFlow and OCRFlow directly from within QCFlow if the applications have been installed on your computer. This can be accomplished by simply selecting *Launch PaperFlow* or *Launch OCRFlow* from the *Data Group* menu. If a data group is currently opened in QCFlow, it will automatically be opened in PaperFlow or OCRFlow.

Exiting QCFlow

As with any Windows-based software, it is extremely important to properly exit QCFlow. Properly exiting ensures that files are kept intact and that system settings are properly saved. Never power off your system while Windows is running as it may cause system corruption. To properly exit QCFlow:

1. From the *Data Group* menu, select *Exit* (or press **Alt + F4**).

Upon exiting, QCFlow will save the system settings and close the data group images and databases that are being accessed.

Chapter 3 – Performing Automated Image QC

Overview

QCFlow offers automated QC operations that can greatly increase QC accuracy and productivity. When the automated process is run, the following functions are performed on each document:

1. Ensure that at least one page exists in the document. If no pages exist, the document is tagged for access within PaperFlow.
2. Ensure the image file for page 1 of the document can be located.
3. Verify that the image file size for page 1 falls within the specified parameters.
4. Ensure that the image file for page 1 can be opened (verifying that the image is good).
5. Verify that the image for page 1 falls within the specified height and width (in pixels) parameters for any *Image Size Verification Rules* that encompass the page.
6. Repeat steps 2 through 5 for any remaining pages within the document.
7. Ensure that at least one page exists in the document (as done in step 1). This is in case pages were deleted during steps 2 to 6.
8. Verify that the number of pages within the document falls within the specified Document Page Count parameters.

Configuring Automated Image QC

Configuring automated image process is easily achieved. All processing settings are automatically saved on a Customer/Project level. In other words, when you open another data group for the same customer, with the same project, the settings will be restored.

Run Automated Image Processes

Statistics
 Documents in Project: 40
 # of Documents Processed: 0
 Reset Status

☒ **Image File Size**
 Minimum (KB): 25 Maximum (KB): 100
☐ Delete Pages Automatically

☒ **Document Page Count**
 Minimum: 5 Maximum: 10

Image Size Verification Rules

Min. Height	Max. Height	Min. Width	Max. Width	Start Page	End Page
350	1200	0	0	1	1
0	100	0	0	1	999999

Add Remove

☐ Delete Pages Automatically

Start Close

Figure 3-1: Run Automated Image Processes

Image File Size

Checks the actual image files (i.e. 00000001.TIF) to ensure that the size of the file falls within the specified parameters. *Minimum* specifies the minimum acceptable file size in Kbytes. *Maximum* specifies the maximum acceptable file size in Kbytes. If the *Delete Pages Automatically* option is selected, any images that do not fall within the specified parameters will automatically be permanently deleted from the document. If this option is not selected, the pages will be tagged for review within PaperFlow.

Document Page Count

Checks to ensure that the document contains the correct number of pages. *Minimum* and *Maximum* specify the acceptable range for number of pages within a document. Any document whose page count falls outside of this range will be tagged for review within PaperFlow.

Image Size Verification Rules

Provides a list of rules that specify the minimum and maximum acceptable height and width of any pages within the document. Multiple rules can be created. This is particularly useful if page 1 of a document contains a unique sized piece of paper, with uniform sized pages behind it. The image sizes are specified in terms of Pixels. You can view the height and width of an image in Pixels from the *Image Information* option under the *View* menu or by viewing the properties of the file from the Windows® Explorer. You can also calculate the approximate width or height of an image by multiplying the original size of the sheet (in inches) times the resolution that the image was scanned in at. For example, for an 8 ½ by 11 piece of paper scanned at 200 DPI:

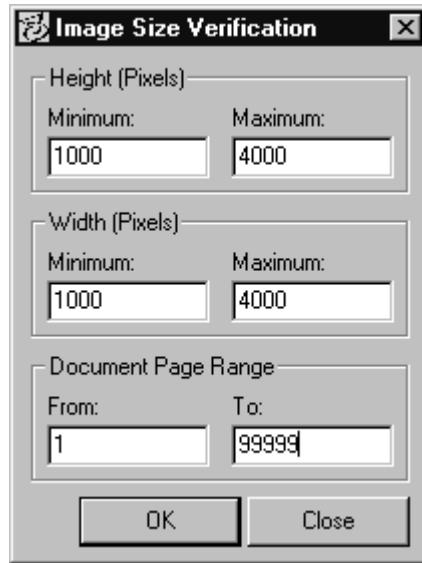
$$8.5 \times 200 = 1700 \text{ pixels wide} \qquad 11 \times 200 = 2200 \text{ pixels high}$$

If the *Delete Pages Automatically* option is selected, any images that do not fall within the specified parameters will automatically be permanently deleted from the document. If this option is not selected, the pages will be tagged for review within PaperFlow.

To create an image size verification rule:

1. From the Run Automated Image Processes screen, select the **Add** button under *Image Size Verification Rules*.

The Image Size Verification screen is displayed.

The image shows a dialog box titled "Image Size Verification". It contains three sections: "Height (Pixels)" with "Minimum:" and "Maximum:" labels and input fields containing "1000" and "4000" respectively; "Width (Pixels)" with "Minimum:" and "Maximum:" labels and input fields containing "1000" and "4000" respectively; and "Document Page Range" with "From:" and "To:" labels and input fields containing "1" and "99999" respectively. At the bottom are "OK" and "Close" buttons.

3-2: Image Size Verification Screen

2. Enter the desired rule criteria. Leaving a value of zero for a setting will cause that portion of the rule not to be verified (i.e. setting Minimum and Maximum Width to zero will cause the width not to be checked).
3. Select the **OK** button.

The new rule will be listed in the *Image Size Verification Rules* list.

Reset Status

As QCFlow performs automated image processing, it tags each document as having been processed. Then when QCFlow starts processing again, it only processes documents that have not been processed. This option allows you to “un-tag” those documents so they will be re-processed.

Starting the Automated Image QC Process

To start the Automated Image QC Process:

1. From the *Data Group* menu, select *Automated Image QC*.

The Run Automated Image Processes Screen is displayed.

2. Enter any processing criteria that you wish to have applied to the documents.

3. Select the *Start* button.

The QC Processing screen will be displayed, showing the status of the processes as they are run.

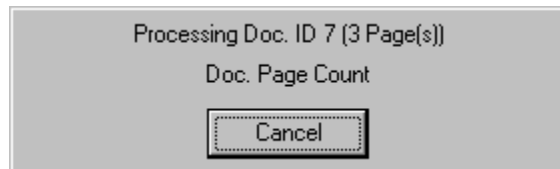


Figure 3-3: QC Processing

After the automated process is complete, an error log is created listing all of the processing errors that occurred. You can view the actual processing errors in the processing logs described in *Chapter 7 – System Logs*.

Chapter 4 – Index QC

Overview

QCFlow's Index QC operations allow operators to perform operations that allow for index field value quality control. Index QC also allows users to search for and display lists of documents.

Index QC Operations

Index QC operations perform a specified function on a specified field across all of the documents within the project.

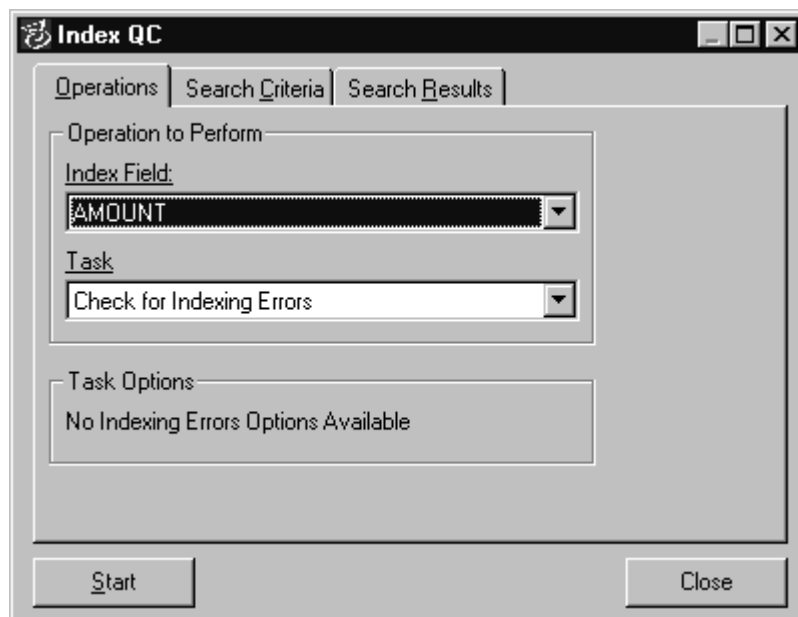


Figure 4-1: Index QC Operations

Check for Indexing Errors

Checks the specified field for any indexing errors that may have occurred (i.e. blank fields, invalid dates or numbers, values that don't meet the specified field mask, etc). The same checks that are performed when saving index values within PaperFlow are performed during this operation. Any indexing errors are automatically tagged for review within PaperFlow.

As an added bonus, all values are automatically reformatted to meet the field format and field mask criteria. This is particularly useful if you indexed all of the documents with “mmm dd, yyyy” as the date format and later decided to change it to “mm/dd/yyyy”. By running the *Check for Indexing Errors* operation, the field format will automatically be changed for all documents.

Check Numeric Sequence

This operation will look for the smallest and largest values for the specified field. It will then query the database to ensure that each value between the largest and smallest values exists. Any values that cannot be found will automatically be written out to the log files. Information on viewing these log files can be found in *Chapter 7 – System Logs*.

Insert/Remove Leading Zeros

This will either pad the index values with leading zeros to create index values of a specified length, or remove all of the leading zeros from the index values.

Search and Replace Characters

This allows you to search for a specific value within an index field value and replace it with specific text. The search operation automatically searches for any portion of the value containing the specified text. Searching for “123” will replace “123” in index values “123ABC”, “A123BC”, and “ABC123” with the specified replacement text. Both the *Search For* and *Replace With* values can be left blank. If the *Search For* value is left blank, any index fields that are unindexed (i.e. left blank), will be replaced with the specified replacement text. If the *Replace With* value is left blank, any occurrences of the *Search For* text will simply be removed from the index field. Also, if the *Search For* text is specified as an asterisk (“*”), ALL VALUES, regardless of whether they are indexed or blank, will be replaced with the replacement text.

Strip Leading/Trailing Characters

This will remove the specified number of leading characters and the specified number of trailing characters from each index value.

Running Index QC

To perform an Index QC Operation:

1. **From the QCFlow Main Screen, select *Index QC* in the *Data Group* menu.**

The Index QC Operations Screen is displayed.

2. **Select the index field that you wish to process.**
3. **Select the Task that you wish to run.**
4. **Enter any Task-Specific settings.**
5. **Select the *Start* button to begin the process.**

After the process has been run, QCFlow will display a message showing what was updated.

Searching for Documents

There may be times when it is necessary to locate a document based on its index values or to view a list of document index values. This is done through the Index QC Search Criteria screen.

You can navigate through the list of documents in your search results by selecting a document from the Search Results screen. Then, when you move forward and backwards through documents, you will actually be moving forward and backwards through the list of documents that met your search criteria. If you wish to cancel that navigation and return to navigating the entire project in the data group, you can simply close the search results screen without opening a document.

The screenshot shows the 'Index QC' application window with the 'Search Criteria' tab selected. The interface includes a list of search fields on the left and corresponding input boxes on the right. The 'Sort By' dropdown is set to 'COMPANY NAME' and the 'Search Type' dropdown is set to 'And'. The 'Search' button is highlighted.

Figure 4-2: Index QC Search Criteria

Finding a Document

To find a document:

1. **From the QCFlow Main screen, select *Index QC* from the *Data Group* menu.**

The Index QC Operations screen will be displayed.

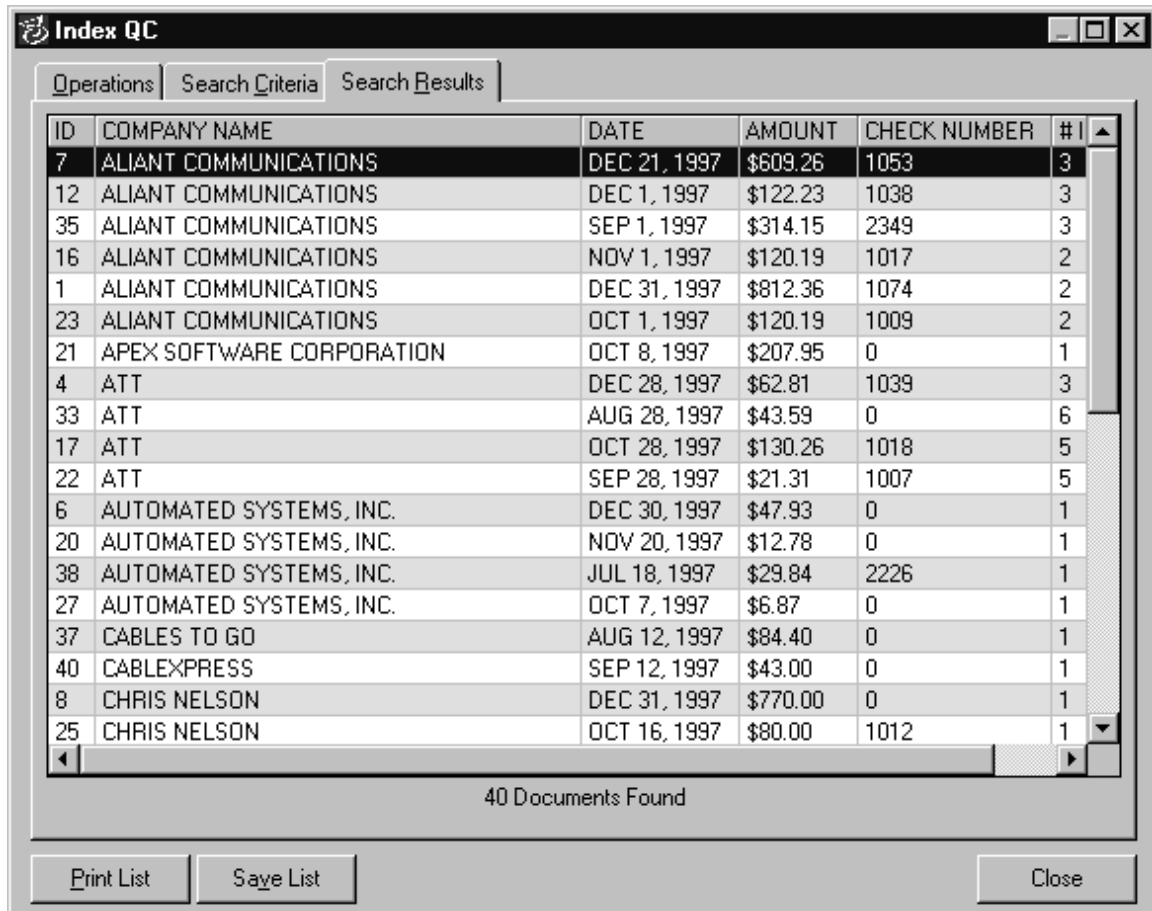
2. **Select the *Search Criteria* tab.**

The Index QC Search Criteria screen will be displayed.

3. **Enter the search criteria for each field in the Search Value field. You can enter values in multiple fields and select a Search Type of “And” (if you want the criteria to be met for all filled in fields), or “Or” (if you want the criteria to be met for any of the filled in fields). You can use the wildcard character “*” (asterisk) to represent any length of multiple characters, or enter “[BLANK]” to search for blank values. For instance if you wish to find all documents beginning with a 5 and ending with a 9, you could simply enter 5*9 to locate the documents.**
4. **Select the field that you wish to have the results sorted by in the Sort By field.**

5. Hit Enter to perform the search or select *Search* with your mouse.

QCFlow will search the database and display the Index QC Search Results screen, listing the documents that meet the criteria.



ID	COMPANY NAME	DATE	AMOUNT	CHECK NUMBER	#
7	ALIAN COMMUNICATIONS	DEC 21, 1997	\$609.26	1053	3
12	ALIAN COMMUNICATIONS	DEC 1, 1997	\$122.23	1038	3
35	ALIAN COMMUNICATIONS	SEP 1, 1997	\$314.15	2349	3
16	ALIAN COMMUNICATIONS	NOV 1, 1997	\$120.19	1017	2
1	ALIAN COMMUNICATIONS	DEC 31, 1997	\$812.36	1074	2
23	ALIAN COMMUNICATIONS	OCT 1, 1997	\$120.19	1009	2
21	APEX SOFTWARE CORPORATION	OCT 8, 1997	\$207.95	0	1
4	ATT	DEC 28, 1997	\$62.81	1039	3
33	ATT	AUG 28, 1997	\$43.59	0	6
17	ATT	OCT 28, 1997	\$130.26	1018	5
22	ATT	SEP 28, 1997	\$21.31	1007	5
6	AUTOMATED SYSTEMS, INC.	DEC 30, 1997	\$47.93	0	1
20	AUTOMATED SYSTEMS, INC.	NOV 20, 1997	\$12.78	0	1
38	AUTOMATED SYSTEMS, INC.	JUL 18, 1997	\$29.84	2226	1
27	AUTOMATED SYSTEMS, INC.	OCT 7, 1997	\$6.87	0	1
37	CABLES TO GO	AUG 12, 1997	\$84.40	0	1
40	CABLEXPRESS	SEP 12, 1997	\$43.00	0	1
8	CHRIS NELSON	DEC 31, 1997	\$770.00	0	1
25	CHRIS NELSON	OCT 16, 1997	\$80.00	1012	1

40 Documents Found

Print List Save List Close

Figure 4-3: Index QC Search Results

6. Select the document you wish to display by double clicking on the item with your mouse, or by using the up and down arrow keys, and pressing Enter (or the Spacebar).

The first page of the selected document will be displayed in the QCFlow main screen.

Clearing the Search Criteria

You can quickly clear the search criteria by selecting *Clear* in the Search Criteria screen, rather than moving between fields and deleting the text.

Printing a List of Search Results

You can print a list of selected search results. To print the results list:

1. **Perform a search (as previously described in *Finding a Document*) that will display a list of documents including documents that you wish to print a listing for.**
2. **While holding down the Ctrl or Shift key, left-click on the items in the list that you wish to print.**
3. **When all desired items are selected, choose *Print List*.**

QCFlow will prompt you for the appropriate printer.

4. **Select the printer and choose *OK*.**

The selected list items will be printed.

Saving a List of Search Results

You can save a list of selected search results. To save the results list:

1. **Perform a search (as previously described in *Finding a Document*) that will display a list of documents including documents that you wish to save a listing of.**
2. **While holding down the Ctrl or Shift key, left-click on the items in the list that you wish to save.**
3. **When all desired items are selected, choose *Save List*.**

QCFlow will prompt you for the file name.

4. **Select the file and choose *Save*.**

The selected list items will be saved.

Chapter 5 – Manual QC Operations

Overview

QCFlow offers extensive functionality to allow you to move between documents and pages, manipulate documents and pages, and tag items for cleanup within PaperFlow. Most of these operations can be performed in either full-page mode or in thumbnail mode.

QCFlow 2.0 77770001: DIGITECH SYSTEM-ACCOUNTS PAYABLE

Data Group Edit View Administration Help

Digital Storage
marketing & logistics specialists

CUSTOMER

REMIT TO:

DIGITAL STORAGE INC.
P O BOX 676
DELAWARE, OH 43015
(614) 548-7179

INVOICE NUMBER: 42107401
ACCOUNT NUMBER: D00902B
INVOICE DATE: 12/17/97
PAGE NUMBER: 1

TRACKING ID: 06387676595
MAIL: MAIL

*** INVOICE ***

BOLD TO:

DIGITECH SYSTEMS INC
6911 VAN DORN STREET #3
LINCOLN, NE 68506

SHIP TO:

DIGITECH SYSTEMS INC
6911 VAN DORN STREET #3
ATTN: PO# 12-17-97-01
LINCOLN, NE 68506

OUR ORDER#: 421074 CFB
ORDER DATE: 12/17/97 15:40:35
PICK DATE: 12/17/97
SHIP DATE: 12/17/97
SHIP VIA: AIRBORNE PROGRAM
F.O.B.: Origin, Prepay & Add

YOUR P/O#: 12-17-97-01
PLACED BY: SCOTT MATTHEWS
CONTRACT#: JDDH/NAHE
SALES REP: FCB
TERMS: Net 30 days
RNA #

** THANK YOU FOR YOUR ORDER !!!
** ATTN: ABRN!!!!

ORDERED	SHIPPED	BACKORD	UNIT	ITEM#/DESCRIPTION	PRICE	DISC%	AMOUNT
300	300		EA	KODAK	1.00	.00	480.00
				CD, WRITE 74MIN JC NO KSP 650MB			
				25/CTN			
**** SUBTOTAL ****							480.00
Freight Charge							12.67
CUSTOMER FREE FREIGHT PROGRAM							12.42-
**** INVOICE TOTAL ****							480.25

Pat due by 01/16/98

492.67 +
167.67 +
480.25 +
214.35 +
492.67 +
1,847.61 *

Page 1 of 5

Doc. ID 3 - DIGITAL STORAGE DEC 17, 1997 \$1,847.61 1046

Figure 5-1: Full-Page Mode

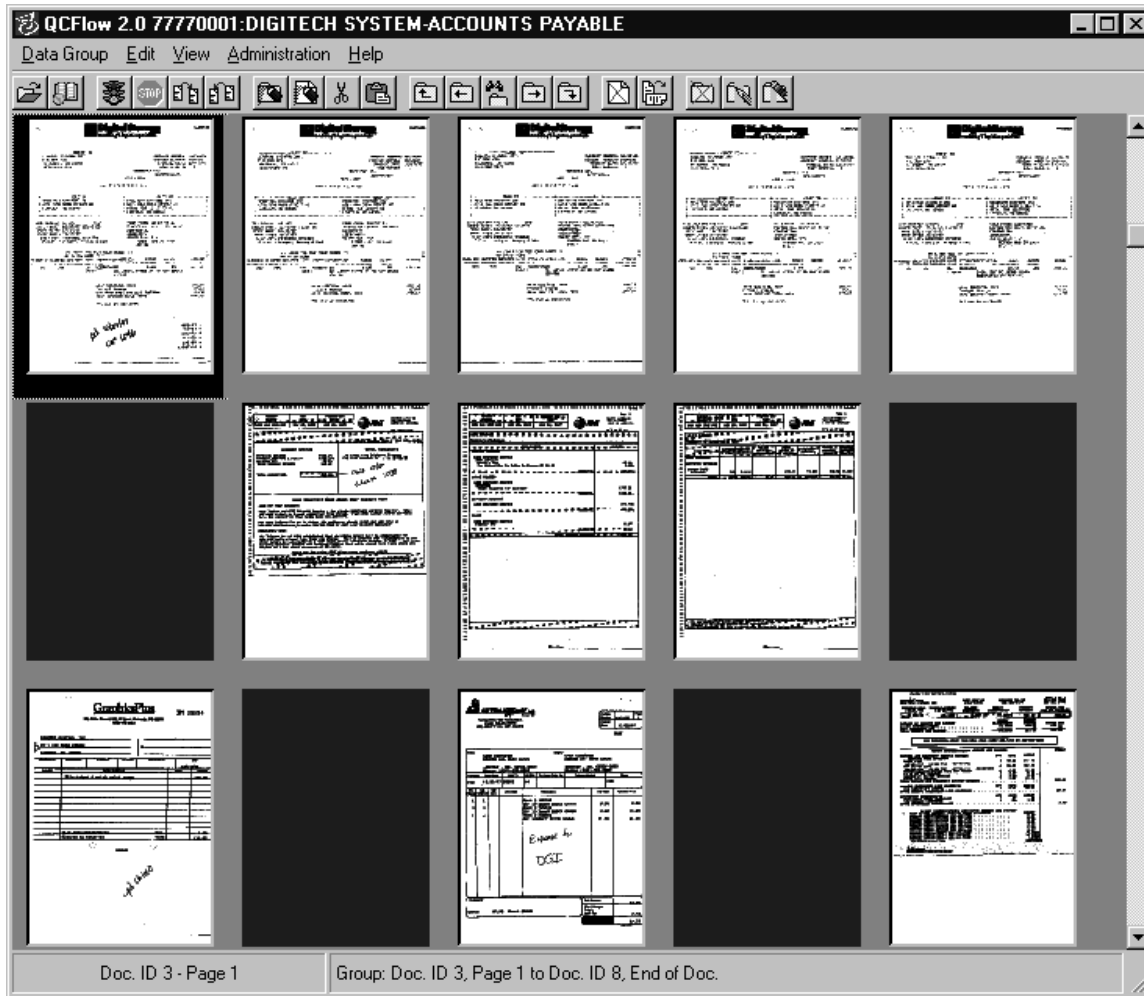


Figure 5-2: Thumbnail Mode

Note that when in thumbnail mode, blue markers indicate document breaks, red markers indicate missing images, and white markers with an “X” through them indicate unreadable images.

You can switch between Full-Page and Thumbnail mode by double-clicking on an image or by selecting the mode from the *View – Image View* menu item.

Moving Between Documents and Pages

Document and page navigation capabilities are available through hotkeys, menu selections, and toolbar buttons.

Advance Forward

Use: Displays the next page (or thumbnail view of pages) that would be displayed if using the Auto-Display feature.

Accessible From: *Data Group* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Enter

Toolbar Icon: 

Reverse Backwards

Use: Displays the previous page (or thumbnail view of pages) that was previously displayed.

Accessible From: *Data Group* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+Enter

Toolbar Icon: 

First Document

Use: Displays the first page of the first document in the current project.

Accessible From: *View-Document* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+Home

Toolbar Icon: 

Previous Document

Use: Displays the first page of the previous document in the current project.

Accessible From: *View-Document* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+Page Up

Toolbar Icon: 

Jump to Document

Use: Allows you to jump to a specific document within the current project.

Accessible From: *View-Document* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+J

Toolbar Icon: 

Next Document

Use: Displays the first page of the next document in the current project.

Accessible From: *View-Document* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+Page Down

Toolbar Icon: 

Last Document

Use: Displays the first page of the last document in the current project.

Accessible From: *View-Document* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+End

Toolbar Icon: 

First Page

Use: Displays the first page of the current document.

Accessible From: *View-Page* menu

Display Mode Availability: Full-Page Only

Hotkey: Home

Toolbar Icon: 

Previous Page

Use: Displays the previous page of the current document.

Accessible From: *View-Page* menu

Display Mode Availability: Full-Page Only

Hotkey: Page Up

Toolbar Icon: 

Jump to Page

Use: Allows you to specify the page number within the current document that you wish to display.

Accessible From: *View-Page* menu

Display Mode Availability: Full-Page Only

Hotkey: J

Toolbar Icon: 

Next Page

Use: Displays the next page of the current document.

Accessible From: *View-Page* menu

Display Mode Availability: Full-Page Only

Hotkey: Page Down

Toolbar Icon: 

Last Page

Use: Displays the last page of the current document.

Accessible From: *View-Page* menu

Display Mode Availability: Full-Page Only

Hotkey: End

Toolbar Icon: 

Image Information

Use: Displays the full path of the currently displayed image, as well as the size of the file.

Accessible From: *View* menu

Display Mode Availability: Full-Page Only

Hotkey: I

Toolbar Icon: None

Image Viewing

Zooming on Images

QCFlow offers an intuitive method of zooming on images. While in Full-Page mode, use your left mouse button to draw a box around the region that you wish to zoom in on and release the mouse button. QCFlow will zoom in on the exact region that you designated.

Scale to Height

Use: Scales the image to the height of the QCFlow main screen.

Accessible From: *View* menu

Display Mode Availability: Full-Page Only

Hotkey: H

Toolbar Icon: 

Scale to Width

Use: Scales the image to the width of the QCFlow main screen.

Accessible From: *View* menu

Display Mode Availability: Full-Page Only

Hotkey: W

Toolbar Icon: 

Scale to Window

Use: Selects the best method (scale to height vs. scale to width) to fit the entire image within the QCFlow main screen.

Accessible From: *View* menu

Display Mode Availability: Full-Page Only

Hotkey: None

Toolbar Icon: 

Rotate

Use: Rotates the image in 90 degree increments for viewing purposes only. The rotation is not saved until the image is resaved.

Accessible From: *View* menu

Display Mode Availability: Full-Page Only

Hotkey: R

Toolbar Icon: 

Full-Size Image

Use: Displays a full-size image of the selected thumbnail.

Accessible From: *View* menu

Display Mode Availability: Thumbnail Only

Hotkey: Spacebar

Toolbar Icon: None

Page Manipulation**Delete Pages**

Use: Deletes the current displayed page in Full-Page mode or all selected pages in Thumbnail mode.

Accessible From: *Edit* menu

Display Mode Availability: Full Page and Thumbnail

Hotkey: Delete

Toolbar Icon: 

Resave Page

Use: Resaves the current page with the current rotation.

Accessible From: *Edit* menu

Display Mode Availability: Full-Page Only

Hotkey: V

Toolbar Icon: 

Rotate and Save Pages

Use: Rotates the selected pages and automatically resaves them.

Accessible From: *Edit* menu

Display Mode Availability: Thumbnail Only

Hotkey: R

Toolbar Icon: 

Document Manipulation

Delete Documents

Use: Deletes the current displayed document in Full-Page mode or all selected documents in Thumbnail mode.

Accessible From: *Edit* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+Delete

Toolbar Icon: 

Insert Break

Use: Inserts a document break prior to the current selected page, making the current page the first page of a new document.

Accessible From: *Edit* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+Insert

Toolbar Icon: 

Remove Break

Use: In Full-Page mode, this merges the current document's pages with those of the previous document. In Thumbnail mode, this removes the selected document break (blue indicator), merging the two documents together.

Accessible From: *Edit* menu

Display Mode Availability: Full-Page and Thumbnail

Hotkey: Ctrl+R


Toolbar Icon: 

Moving Pages Between Documents

QCFlow offers the ability to move pages between documents. These pages can be selected from multiple documents and moved to a single document. Pages are never removed from their original documents until they are actually pasted to their destination document.

Moving Pages in Thumbnail Mode

To move pages in thumbnail mode:

1. While in thumbnail mode, hold down the **Ctrl** key and click on the pages you wish to move (or use the **Shift** key to select a range of pages).
2. Chose *Select Pages for Move* from the *Edit* menu, click the  icon on the toolbar, or hit **Ctrl+C** on your keyboard.

If pages have already been tagged, but haven't been pasted, QCFlow will prompt you to either replace or add to the current list of selected pages as shown below.

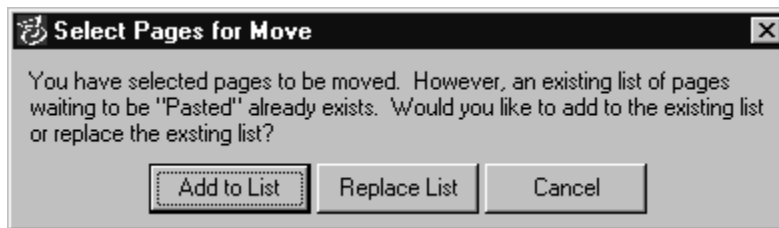




Figure 5-3: Select Pages for Move

3. Select *Add to List* to add the pages to the current list, *Replace List* to remove all pages from the list and only add the current selected pages, or *Cancel* to cancel the operation.
4. Repeat steps 1 to 3 for any remaining pages that you wish to move.
5. Locate the document that you wish to paste the pages into and select the page before which the selected images should be inserted.
6. Select *Paste Selected Pages* from the *Edit* menu, click the  icon on the toolbar, or hit **Ctrl+V** on your keyboard.
QCFlow will prompt you to ensure this is where you wish to paste the selected pages.
7. Select *Yes* to paste the pages.

Moving Pages in Full-Page Mode


To move pages in full-page mode:

1. While in full-page mode, locate a page that you would like to move.
2. Chose *Select Pages for Move* from the *Edit* menu, click the  icon on the toolbar, or hit Ctrl+C on your keyboard.

If pages have already been tagged, but haven't been pasted, QCFlow will prompt you to either replace or add to the current list of selected pages as shown below.





Figure 5-4: Select Pages for Move

3. Select *Add to List* to add the page to the current list, *Replace List* to remove all pages from the list and only add the current selected page, or *Cancel* to cancel the operation.
4. Repeat steps 1 to 3 for any remaining pages that you wish to move.
5. Locate the document that you wish to paste the pages into and find the page before which the selected images should be inserted.
6. Select *Paste Selected Pages* from the *Edit* menu, click the  icon on the toolbar, or hit Ctrl+V on your keyboard.
QCFlow will prompt you to ensure this is where you wish to paste the selected pages.
7. Select *Yes* to paste the pages.

Using Auto-Display

QCFlow offers an auto-display function that allows operators to visually verify documents without touching the keyboard or mouse. Once started, this process will automatically display each page of the document (full-page mode) or thumbnail view of pages (thumbnail mode) for a specified number of seconds. As described in **Chapter 6 – System Options**, you can alter the system options to specify how many (if any) pages should be skipped and how long each page should be displayed for.

Auto-Display can be started by selecting *Start Auto-Display* from the *Data Group* menu, clicking on the  toolbar icon, or pressing F5 on your keyboard. Once started, Auto-Display can be paused by selecting *Stop Auto-Display* from the *Data Group* menu, clicking on the  toolbar icon, or pressing Esc on your keyboard.



Tagging Pages and Documents

QCFlow allows operators to manually tag pages and documents with custom tags. This is useful if an operator needs to visually inspect pages and tag pages for rescan in PaperFlow. Tagging can be done in either full-page or thumbnail mode.

Tagging Pages and Documents in Thumbnail Mode

To tag pages or documents in thumbnail mode:

1. **While in thumbnail mode, hold down the Ctrl key and click on the pages (or pages within the documents) you wish to tag (or use the Shift key to select a range of pages).**

2. Select *Tag Pages* (or *Tag Documents*) from the *Edit* menu, click the  (or ) toolbar icon, or hit your “T” (or “Ctrl+T”) key on your keyboard to tag the selected pages (or documents).

QCFlow will display a cumulative list of current tags for all of the selected pages (or documents).

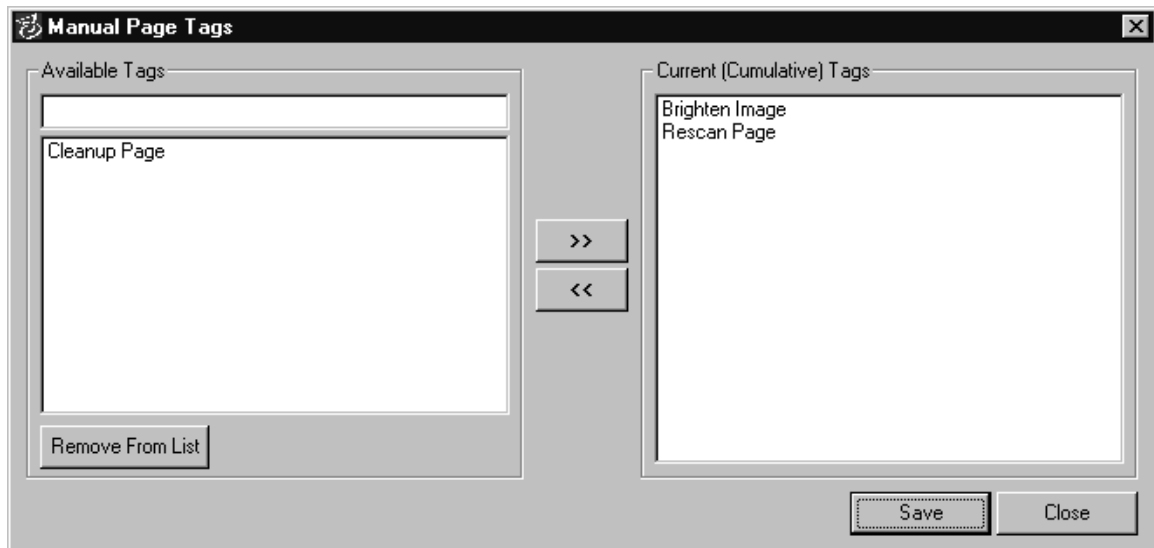




Figure 5-5: Tag Pages

3. Select the tags that you wish to have applied and choose the “>>” button. If you type a new tag in and add it, it will automatically be saved for future use to tag other pages (or documents).
4. Select Save to apply all of the tags listed in the *Current (Cumulative) Tags* to every page (or document) that has been selected.

Tagging Pages and Documents in Full-Page Mode

To tag pages or documents in full-page mode:

1. While in full-page mode locate the page (or a page within the document) you wish to tag.
2. Select *Tag Pages* (or *Tag Documents*) from the *Edit* menu, click the  (or ) toolbar icon, or hit your “T” (or “Ctrl+T”) key on your keyboard to tag the selected pages (or documents).

QCFlow will display a list of current tags for the selected page (or document).

3. Select the tags that you wish to have applied and choose the “>>” button. If you type a new tag in and add it, it will automatically be saved for future use to tag other pages (or documents).
4. Select Save to apply all of the tags listed in the *Current (Cumulative) Tags* to the page (or document) that has been selected.

Chapter 6 – System Options

Overview

QCFlow's system options allow you to specify information about how the system displays thumbnails and performs its Auto-Display functions.

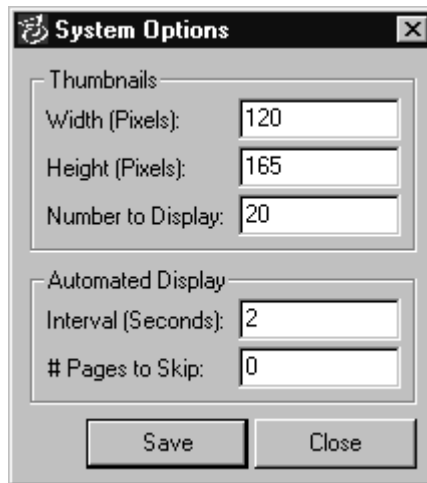


Figure 6-1: System Options

Thumbnail Options

Width: Specifies the width of each thumbnail (in Pixels).

Height: Specifies the height of each thumbnail (in Pixels).

Number to Display: Specifies the number of thumbnails to load at once.

Automated Display Options

Interval: Specifies the number of seconds before displaying the next image or the next thumbnail group.

Pages to Skip: Specifies the number of pages to skip between displayed pages. For instance, a value of "1" would display every other page. A value of "0" will display every page.


Chapter 7 – System Logs

Overview

Whenever QCFlow executes an automated process, it automatically saves a log of the process in the C:\QCFlow\QC Job Logs directory. A new log is created each day for each project within a data group.

Viewing System Logs

To view the system logs:

1. From the QCFlow Main Screen, with a data group open, select *View Logs* from the *Data Group* menu or click on the  toolbar icon.

QCFlow will prompt you for the type of logs that you wish to view.

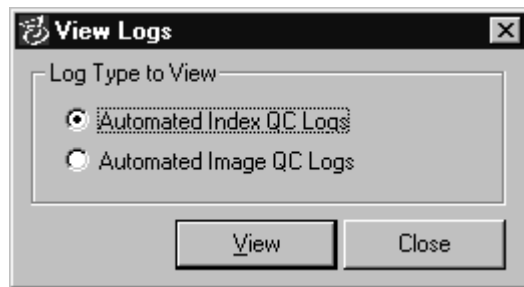


Figure 7-1: View Logs

2. Select the type of log that you wish to open and select the *View* button.
QCFlow will open a text editor to display the appropriate log file.

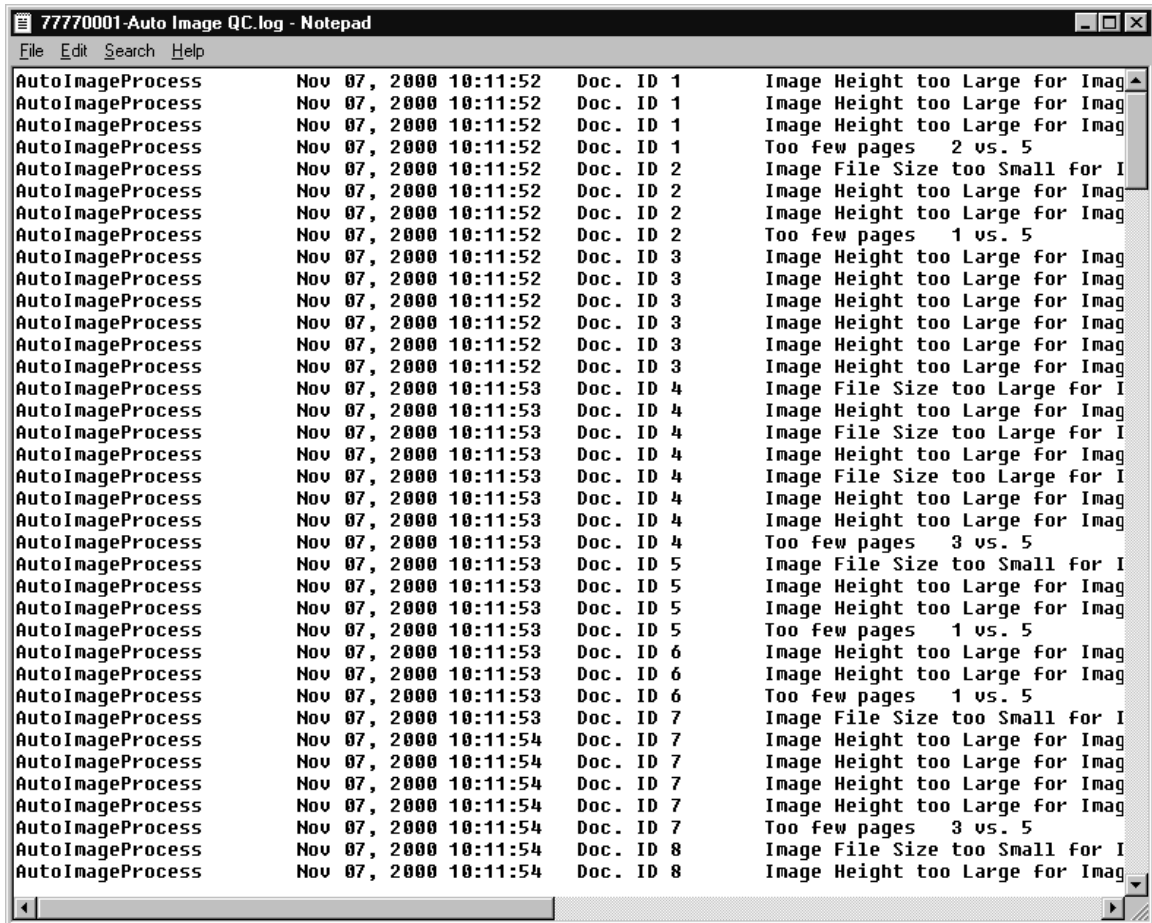


Figure 7-2: Sample Log File

Chapter 8 – Security

Overview

QCFlow uses user/group level security that integrates with PaperFlow (DSI's document capture software) to limit access to system functionality on a per-project basis. In other words, you can create user accounts and rather than assign each of those users rights to a project, you can add those users to a group and assign the group rights to a project. Persons changing security options must be logged in as an administrator.

Working with Users

Users represent each individual user of the QCFlow system. Although you can assign project rights to groups, you can also assign project rights to individual users as well.

Creating a User

To create a user:

1. **While logged in as an administrator, select *Security* from the *Administration* menu.**

The User/Group Security screen is displayed.

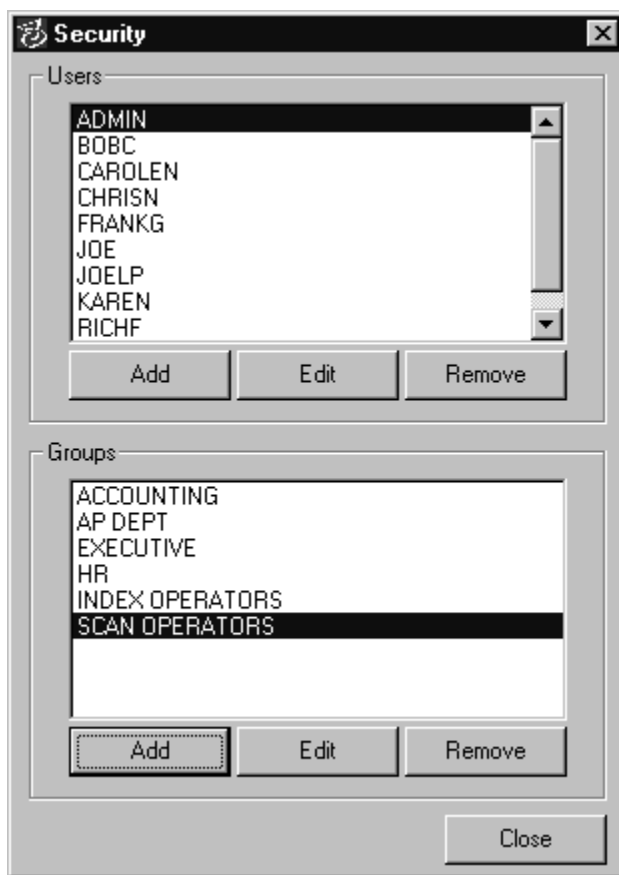


Figure 8-1: User/Group Security

2. Select the *Add* button under the User list.

The User Information screen is displayed.

The image shows a 'User Information' dialog box with a title bar containing a small icon and a close button. The dialog has a 'User Information' section with three text input fields: 'User Name:', 'Password:', and 'Confirm Password:'. The password fields are masked with asterisks. Below these fields are four unchecked checkboxes: 'Administrator', 'All Rights on All Projects', 'Allow Password Changes', and 'Allow Project Setup Changes'. A 'User Rights' button is located below the checkboxes. At the bottom of the dialog are 'Save' and 'Close' buttons.

Figure 8-2: User Information

3. Enter the name of the new user.
4. If desired, enter the password of the new user, then re-enter the password to confirm that you have typed it correctly. Note that the password will be hidden by the "*" character as you type. Passwords are case-sensitive.
5. If the user is to be a system administrator (i.e. a user that can configure and purge any part of the system), select the *Administrator* checkbox.
6. If the user is to have full access rights to all projects, select the *All Rights on All Projects* checkbox.
7. If the user is to be able to change their own password, select *Allow Password Changes*.
8. If the user is to be allowed to make modifications to project setups, select *Allow Project Setup Changes*.

9. Select *Save* to create the new user.

The new user will be added to the User list.

Editing an Existing User

To edit an existing user:

1. While logged in as an administrator, select *Security* from the *Administration* menu.

The User/Group Security screen is displayed.

2. Select the user you wish to edit and choose the *Edit* button under the User list.

The User Information screen is displayed showing the selected user's information.

3. Change the desired user information.

4. Select *Save* to save the changes.

Deleting an Existing User

To delete an existing user:

1. While logged in as an administrator, select *Security* from the *Administration* menu.

The User/Group Security screen is displayed.

2. Select the user you wish to delete and choose the *Remove* button under the User list.

QCFlow will confirm that you wish to remove the user from the system.

3. Select *Yes* to remove the user or *No* to cancel the operation.

The user will be removed from the system.

Working with Groups

Groups allow you to select similar users and assign rights to those users all at once.

Creating a Group

To create a group:

1. **While logged in as an administrator, select *Security* from the *Administration* menu.**

The User/Group Security screen is displayed.

2. **Select the *Add* button under the Group list.**

The Group Information screen is displayed.

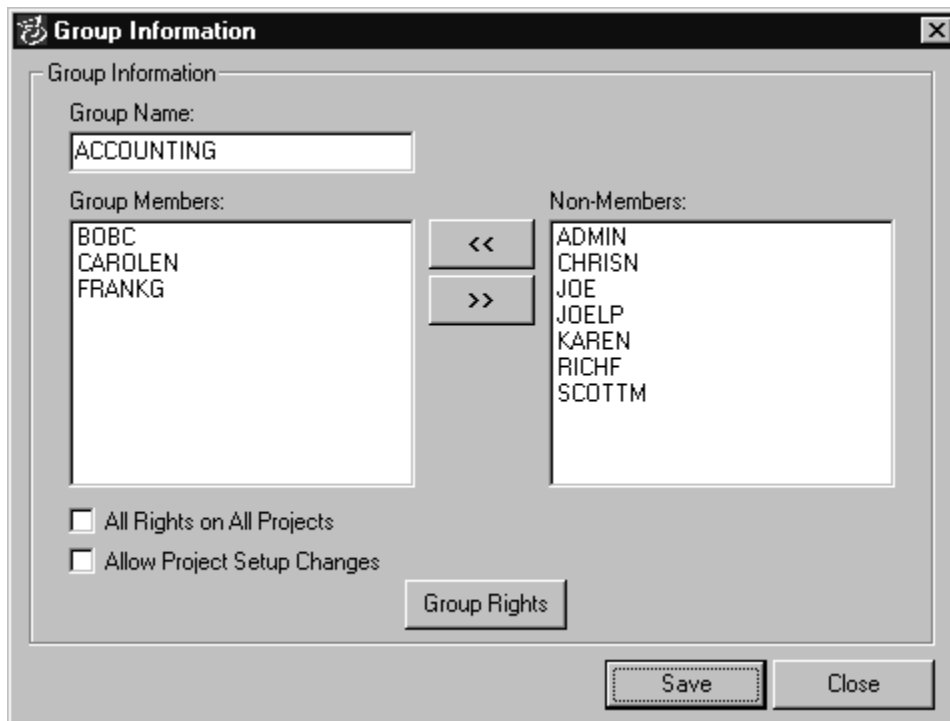


Figure 8-3: Group Information Screen

3. **Enter the name of the new group.**
4. **Select the users in the Non-Member list that you wish to have in the group and select the << button to add them to the Group Members list. You can also select the users in the Group Members list and choose the >> button to remove them from the group.**

5. If the members of the group are to have full access rights to all projects, select the *All Rights on All Projects* checkbox.
6. If the members of the group are to be allowed to make modifications to project setups, select *Allow Project Setup Changes*.
7. Select *Save* to create the new group.

The new group will be added to the Group list.

Editing an Existing Group

To edit an existing group:

1. While logged in as an administrator, select *Security* from the *Administration* menu.

The User/Group Security screen is displayed.

2. Select the group you wish to edit and choose the *Edit* button under the Group list.

The Group Information screen is displayed.

3. Update the group information as desired.
4. Select *Save* to save the changes.

Deleting an Existing Group

Deleting a group will only delete the group rights. The individual users will continue to exist, but without any of the rights assigned to them in the group.

To delete an existing group:

1. While logged in as an administrator, select *Security* from the *Administration* menu.

The User/Group Security screen is displayed.

2. Select the group you wish to delete and choose the *Remove* button under the Group list.

QCFlow will confirm that you wish to remove the group from the system.

3. Select *Yes* to remove the group or *No* to cancel the operation.

The group will be removed from the system.

Assigning Rights

QCFlow offers the ability to limit access to the different functionality within a project. Although you can assign rights to users, making a user an administrator automatically grants that user all rights to all projects. Always keep in mind that rights are accumulative - you accumulate individual rights, as well as all rights assigned to any group of which you are a member.



Figure 8-4: User Rights

View Documents: Grants the ability to view images within the project.

Scan Documents: Grants the ability to scan additional images into the project (PaperFlow).

Print Images: Grants the ability to print images within the project (PaperFlow).

Export Documents: Grants the ability to export documents within the project (PaperFlow).

QC Documents: Grants the ability to access quality control operations within QCFlow.

Alter Images: Grants the ability to perform any image altering operations such as re-save, invert image, etc. within the project.

Index Documents: Grants the ability to perform indexing operations within the project.

Import Documents: Grants the ability to import images (in any fashion) within the project (PaperFlow).

Post-Processing: Grants the ability to begin the post-process within the project (PaperFlow).

Full-Page OCR: Grants the ability to process documents through OCRFlow™, a full-text indexing engine.

Note: Only system administrators may purge data groups.

To assign or change rights for a user or group:

1. **While logged in as an administrator, select *Security* from the *Administration* menu.**

The User/Group Security screen is displayed.

2. **Select the user or group you wish to assign rights to and select the *Edit* button.**

The User or Group Information screen is displayed.

3. **If assigning rights to a group, select the *Group Rights* button in the *Group Information* screen. If assigning rights to a user, select the *User Rights* button in the *User Information*.**

The User Rights screen is displayed.

4. **Select the department/client whose project you are changing the rights for in the *Department / Client* list.**

A list of projects for the selected client will be filled in the *Project* list.

5. **Select the project you wish to change the rights for.**

The current rights for that project will be displayed.

6. **Select the rights you wish to grant to the user or group.**

7. **Select the *Save* button to save the new settings.**

8. **Repeat steps 4 through 7 for any remaining projects you wish to grant rights to.**

Appendix A – System Hotkeys

Scan/Index Functions		View Functions	
<u>Hotkey</u>	<u>Function</u>	<u>Hotkey</u>	<u>Function</u>
Left Arrow	Selects previous thumbnail	Right Arrow	Selects next thumbnail
F5	Start Auto-Display	Escape	Stop Auto-Display
Enter	Advance Forwards	Ctrl+Enter	Reverse Backwards
Delete	Delete Page	Ctrl+Delete	Delete Document
R	Rotate/Rotate and Resave	V	Resave Page
Ctrl+Insert	Insert Document Break	Ctrl+R	Remove Document Break
T	Tag Page(s)	Ctrl+T	Tag Document(s)
Ctrl+C	Select Pages for Move	Ctrl+V	Paste Selected Pages
Home	First Page	Ctrl+Home	First Document
Page Up	Previous Page	Ctrl+Page Up	Previous Document
J	Jump to Page	Ctrl+J	Jump to Document ID
Page Down	Next Page	Ctrl+Page Down	Next Document
End	Last Page	Ctrl+End	Last Document
W	Scale to Width	H	Scale to Height
I	Image Information	Ctrl+I	Perform Index QC
Space	Toggle Image/Thumbnail View		

Appendix B – Command Line Options

Overview

QCFlow offers a command line interface that allows an external application to launch QCFlow, log into the system, and open the appropriate data group. A sample command line may look like the following:

```
C:\Program Files\Digitech Systems\QCFlow\QCFlow.exe /USER:ADMIN /PASSWORD:t2Year  
/DGPATH:G:\DATAGRP\DATAGRP.MDB /DGPROJID:2
```

Command Line Options

USER: Specifies the user to log in as. (Required)

PASSWORD: Specifies the password to use to log into the system.
(Required)

DGPATH: Full Path to the data group database to be opened. (Required)

DGPROJID: If the data group contains more than one project, this specifies which project to open (Optional).