

ImageRamp PDF Composer



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Introduction

General Information

ImageRamp Software is a family of data capture and document automation products from DocuFi. ImageRamp **PDF Composer** provides a simple and intuitive tool for everyday document needs. Easily import PDF, Image, and Word documents into an easy-to-use environment to securely annotate, redact, encrypt, index, name and arrange your documents. File separation and naming based on barcodes or text extraction adds additional automation of your needed tasks. Desktop or mobile platform implementations in network and cloud environments are available. These products are referred to as ImageRamp collectively in this information. Every attempt has been made to clarify the differences between the editions or products as to features and functions when appropriate. “Composer” is used in this manual often and represents the full product name of ImageRamp PDF Composer

Supported File Formats

- **Input:** Monochrome (black and white), color or greyscale TIF files; Adobe® Acrobat files; black and white, color, or greyscale PDF; color or greyscale JPG files; and Microsoft Word DOCX and RTF files are supported as input files.
- **Output:** The processed or output files can be created as monochrome, greyscale or color PDF, searchable PDF.



CAUTION: Please test all file types in your environment.

CAUTION: Composer is not intended to be a heavy duty image manipulation application. High resolution image files are *rendered with lower resolution* when added to a Composer project.

System Requirements

Composer supports viewing and manipulation with:

- Windows 10/8/7, and Windows 2008 Server and newer platforms
- Microsoft .NET Framework 4.6.1
- 75 MB of free disk space

Conventions Used in this Documentation

These are the conventions and type-styles used in this manual:

- Items presented in ***Italics***:
 - Screen, field, checkbox, menu and tile names.
 - Terms and concepts when first introduced in the text.
 - Variables, file names and numeric values.
 - Special notes and important messages.
- **[RETURN]** indicates the action of pressing the ‘Enter’ or ‘Return’ key.

- Keyboard entries to be typed and buttons/icons to be clicked are printed in lower case **Arial bold font**.
- Clicking refers to a left mouse click unless otherwise noted as a “right-mouse click”

Trial Version Limitations

A full version of this product is valid for 30 days, after which all export functions (email, print, save, split) are disabled. A trial installation can be activated with a valid license file.

Getting Help

Need help with this product? There are number of ways to get the help you need.

Help and Documentation - This help documentation includes details on commands, features and functions of the software.

DocuFi Website – The DocuFi website has ordering information and more. Visit DocuFi.com and ImageRamp.com.

Getting Help by E-Mail - Send your questions or comments to us: support@docufi.com. A Customer Service Representative can provide technical support or answer your inquiry by e-mail.

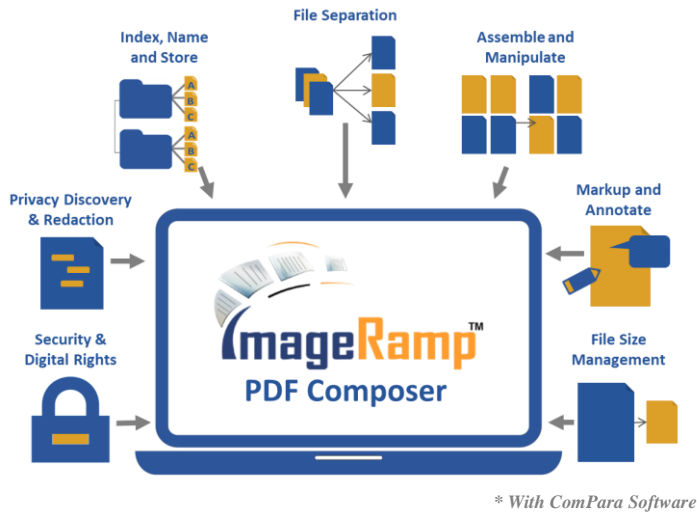
Field Code Changed

Included Software

ImageRamp PDF Composer

ImageRamp PDF Composer is a PDF assembly/manipulation, encryption and privacy redaction tool intended to modify and produce a single or split PDF file(s) from various inputs including MS Word. It supports many of the features in ImageRamp Batch but not as a watched or batch folder processing tool. It includes important redaction, markup/annotate and file size manage tools.

Illustration: ImageRamp Composer functions.



ImageRamp Scan Separator

ImageRamp Scan Separator is a tool to create barcode separation sheets that can be used during scanning processing to route, index, split and name your documents.

ImageRamp ComPara

ComPara is a fast and efficient tool to compare and publish the differences in your multipage PDF and scanned TIFF image and drawing files. The comparison is based on image overlay comparison and not word or text-based comparisons.

Installation, Opening/Closing the Application and Help

Installing ImageRamp Batch

Install the application:

1. Launch the ImageRamp installer file. This program will install ImageRamp Batch, ImageRamp PDF Composer and support components into the "Program files (x86)\ImageRamp8" folder. It will also install the ImageRamp Scan Separator which creates barcode separation pages and ImageRamp ComPara. These may be launched from the desktop icons.
2. Follow the standard prompts and instructions.

This will install the ImageRamp product family which will function in trial mode until it is licensed. To fully activate the program it must be authorized with a license key.

Opening and Closing the Application

Start the application with the icon placed on the desktop or by selecting the program through Windows program menu. To exit the application, select the **Exit** icon in the upper right corner of the application home screen or the "X".

Authorizing ImageRamp Composer

To activate the product once it has been installed, the license must be authorized with a license key. Email or call DocuFi if you have not automatically received your key in an email after purchase. To access the application in trial mode, simply enter your email and click on the **Free Trial** button.

Illustration: ImageRamp Registration Screen displayed on installation.



If you have received your license key, simply enter your email address and the **License Key** on the **Product Registration** screen. Simply click the **Register** button that appears to complete the registration.

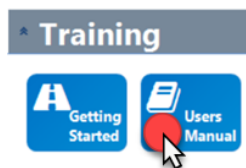


NOTE: The trial version of Composer is valid for 30 days. Contact your representative for a full product online demonstration.

Accessing Application Training

Access the application training by selecting the appropriate tile from the *Training* panel of the *Main* screen.

Illustration: Access the User's Manual through the Training panel of the dashboard.

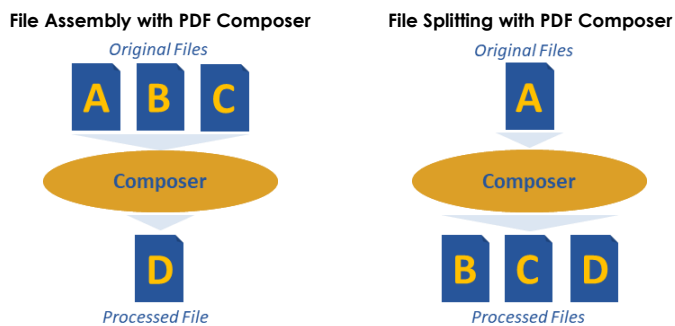


Overview of the Composer Interface and Page Assembly Process

Overview of Working with Composer

With Composer, users select files or folders of files for easy page assembly and manipulation. Composer can be used to merge several files into one file or conversely, break a single file into multiple files.

Illustration: ImageRamp Overview of the Process



Some of the key uses for Composer include:

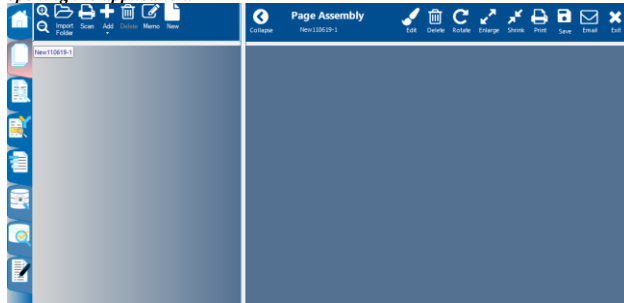
- File splitting and naming
- Privacy information identification and redaction
- Converting file formats
- Encrypting PDF files
- Indexing
- Database search

The Composer Interface and Settings

The Composer interface is designed to provide a simple user experience and shortened the learning curve, allowing for immediate use and benefits.

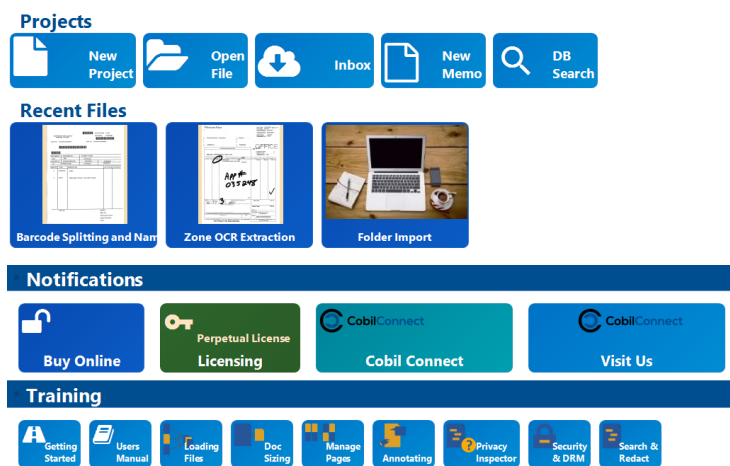
When the application is started the **Project Interface** is presented and **Page Assembly** tab is activated. This screen is the main interface and presents the functional tabs on the left panel and viewing and specific manipulations in the right panel.

Illustration: ImageRamp Composer Project Interface with the Page Assembly Screen activated upon opening the application.



Clicking the Navigate to the Home Dashboard Screen present the dashboard where recent projects, notifications and training information is available.

Illustration: ImageRamp Composer Home Dashboard Screen.



The **Home Dashboard** interface provides access to primary functions to work with your documents. The **Projects** tile selections allow for creating a project from scratch, opening an existing file, or importing from a designated scanning folder. **Recent Files** provides a simple interface to recall your most recent documents. Built-in **Notifications** and **Training** panels keep you informed and provide simple one click access to information.

Creating a new project presents the project screen where settings and actions can be edited and processing initiated.

More advanced and future functionality within the application is enabled or disabled depending on your license key. Some of the license controlled aspects of the product include:

- Privacy inspection and redaction
- Privacy Auditor and networked application management
- Cloud-based AI services

Getting Started

Starting Point - Project Interface

A Composer *Project* can be created when you click on the *New Project* tile from the *Home Dashboard* or from within the *Project Interface* screen. Tabs on the left of this screen are used to present settings and actions for different functions. First, select the tab for the desired function from the left pane. The available tabs are:

Illustration: PDF Composer Project Screen.

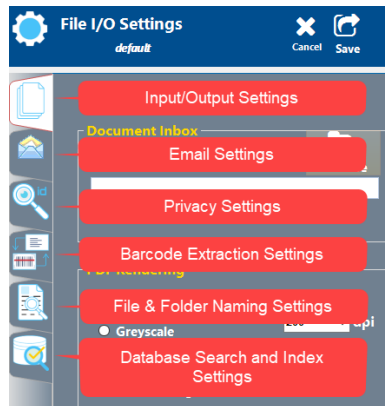


NOTE: The *Project Interface* is presented with a blue background as opposed to the *Settings* interface which is distinguished with a gray background.

Starting Point - Settings Interface

Most of the functions available through Composer may require new or edited entries in the associated settings. To access the settings, click on the *Settings* icon in the bottom left of the *Project Interface*. This presents a new interface with a gray background. Clicking on the tabs presents the specific settings for each function. Under some conditions in the *Project Interface*, the *Settings* can be accessed and displayed in the right panel. Changes made to the *Settings* must be saved by clicking the **Save** icon. To access the Project Interface from the *Settings*, click the **Cancel** icon.

Illustration: PDF Composer Settings Screen.

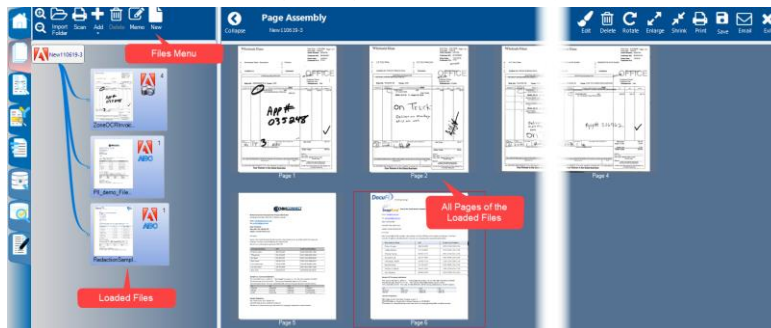


NOTE: The *Project Interface* is presented with a blue background as opposed to the *Settings* interface which is distinguished with a gray background.

Loading a File or Files into the Project Interface

All of the Composer functions except Database Search require you to load a file or folder of files to process. You may add files to a project by selecting them individually with the **Add** icon or multiple files can be added with the **Import Folder** icon. These icons present a standard file browse window to select the file or folder. Additionally, files can be added directly from a scanner with the **Scan** icon. If multiple files are loaded, the **Add** icon pulldown allows you to place the designated file before or after the selected document. Loaded files are represented with thumbnails in the left file tree pane and the file pages are displayed in the right pane.

Illustration: Files loaded in the Project Interface's Document Assembly Screen.



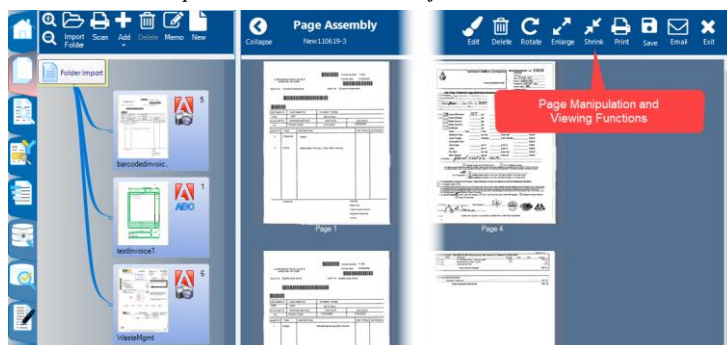
Files can be deleted from the project list by selecting them and clicking the **Delete** icon. Also, a new project can be started and the project file tree cleared by clicking the **New** icon.

Document Assembly and Editing

The Document Assembly Interface

Once a file or files are loaded into a project, the files are represented with thumbnails in the left panel and all pages in the files are displayed in the right panel.

Illustration: PDF Composer Document Structure Interface



Options to manipulate and view these pages in the right panel are shown in the top right. These include:

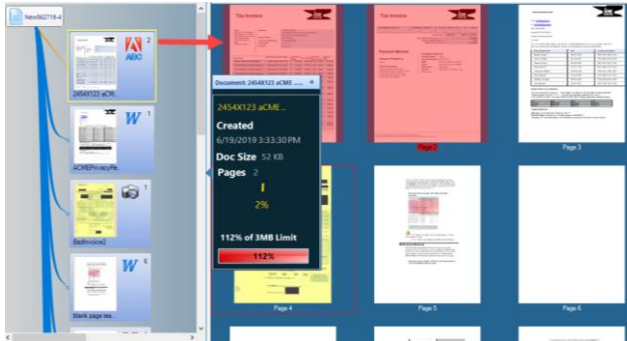
- **Edit** “edit this page”
- **Delete** “delete selected pages”
- **Rotate** “rotate selected pages”
- **Enlarge** “make the thumbnails larger”
- **Shrink** “make the thumbnails smaller”
- **Print** “print selected pages or the entire document”
- **Save** “save selected pages or the entire document”
- **Email** “email the current document”

Single pages in the right panel can be selected by clicking on the thumbnails and multiple files can be selected with the standard **CTRL** and **Shift** keys functions.

The right panel can be expanded to show more page thumbnails by selecting the **Collapse** icon in the top menu. To display the left panel with file thumbnails again simply select the **Expand** icon or click on the **Document Structure View** tab.






Selecting a file thumbnail in the right panel highlights its pages in the left panel with a pink background and displays its file size information in a collapsible popup. Learn about file sizing [here](#).

Illustration: Selected files show the associated pages highlighted in pink and the file size popup.



File Types

The file types of the files loaded in the project are represented with icons in the file thumbnails in the left panel. The numbers in the upper right of these icons indicate how many pages are in the file.

 1	A JPG, PNG or TIF image file. Please see the Caution below.
 2	A Microsoft Word docx or RTF file
 2	A PDF file with text but no detected large images.
 2	A PDF file with both an image file and searchable text. Sometimes referred to as a Searchable PDF which is typically produced by OCR tools.
 1	A PDF file with an image but no text. These are sometimes referred to as PDFImage Files created by scanning to PDF without OCR.



CAUTION: Composer is not intended to be a heavy duty image manipulation application. High resolution image files are **rendered with lower resolution** when added to a Composer project.

Reordering Pages and Files in the Page Assembly Panel

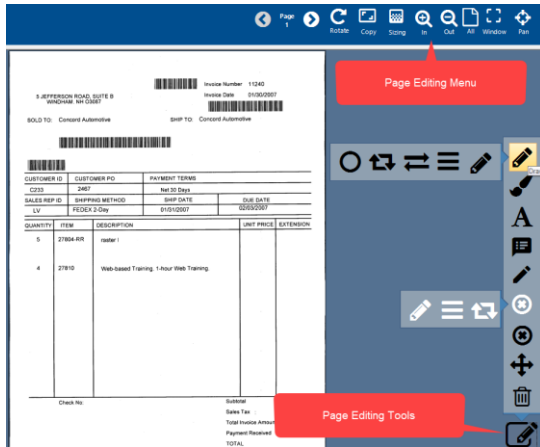
In the **Page Assembly Panel**, pages can be reordered by selecting them and drag-and-dropping them on the thumbnail of another page. The selected pages will replace the page that they were “dropped” upon.

Page Editing

Double click on an individual page in the **Page Assembly** window to initiate editing it in the **Page Editing** window. Mouse over the **Edit** icon in the lower right corner to display the page editing

tools. These include such functions as sketch, highlight, add text, whiteout, blackout, watermark, and more.

Illustration: *The Page Editing window presents tools and commands to markup and edit pages.*



Use the **Copy Text** icon on the **Page Edit** menu to extract paragraphs or selected text from image-based or text-based files by using the application's OCR capture technology on the top right **Page Editing** menu. Simply select the tool and drag-and-drop a rectangular region around the area of interest. The resulting OCR text can then be pasted from your clipboard into various applications.

Use the **Rotate** command to rotate the page.

See [Optimizing File Size](#) for details on manipulating the file size.

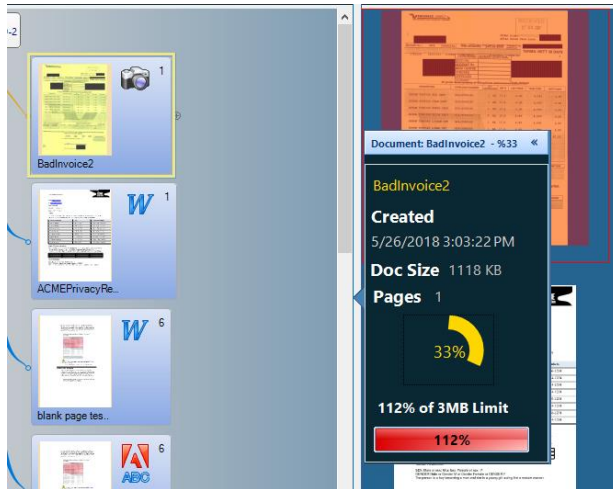
The **In**, **Out**, **All**, **Window**, and **Pan** icons all provide easy ways to change the page viewport or magnification.

Upon exiting the **Page Editing** screen, you will be prompted to save any changes you've made. This occurs when you apply annotations onto the page such as lines, text, blackouts, etc.

Optimizing File Size

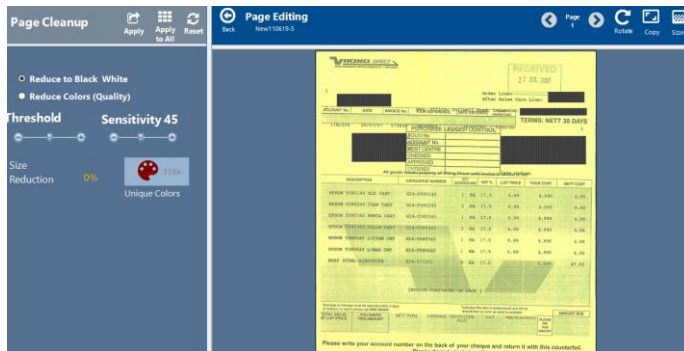
As documents are added in the application, the file size can be managed. As you select documents in the **Document Tree**, it will display the estimated size impact on the newly assembled document and your size limit fit in a popup window. The popup can be closed by clicking on the double arrow **Collapse** icon on the popup. You can set your size limit as part of the settings interface. See the [File Size Limits](#) in **Document Settings**. **Please note the caution that Composer is not intended to be a heavy-duty image manipulation application. Large, high-resolution images are automatically resized when added to the application.**

Illustration: Selected file presents the expandable and collapsible File Size window.



Color and greyscale images can be resized to alter the overall size of the document. Simply select a desired page to display the [Page Editing](#) functions and select the **Sizing** button to resize the page by reducing the number of colors, or converting it to pure black and white (Binarization or Thresholding).

Illustration: Selecting the Sizing setting within Page Editing displays settings to lower the file size.



As you adjust the **Sensitivity** or **Threshold** sliders, the image will convert to the black and white image. You'll notice that by increasing the sensitivity, it will accommodate more neighboring pixels to help determine the resulting image black and white content. **Apply** or **Apply to All** any desired changes or select the **Reset**. Note that once **Apply** has been selected, it cannot be undone. Read more about [Adaptive Thresholding Technology and Composer](#).

Illustration: Changing the Sensitivity and Threshold settings within Page Editing displays the altered page.

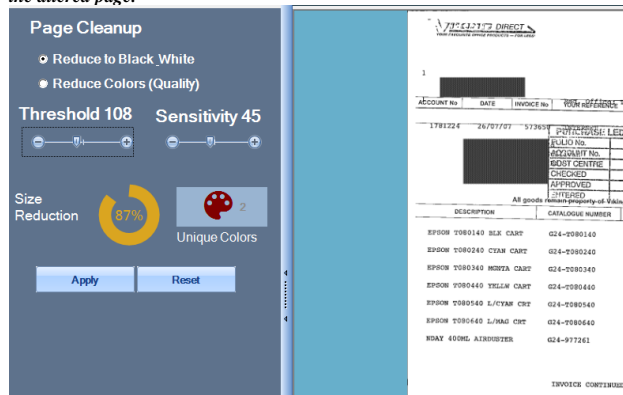
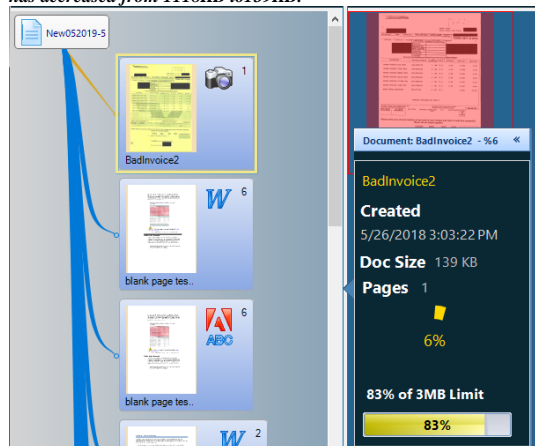


Illustration: Sensitivity and Threshold changes applied result in a lower file size. This file has decreased from 1118KB to 139KB.



CAUTION: Composer is not intended to be a heavy-duty image manipulation application. High resolution image files are *rendered with lower resolution* when added to a Composer project.

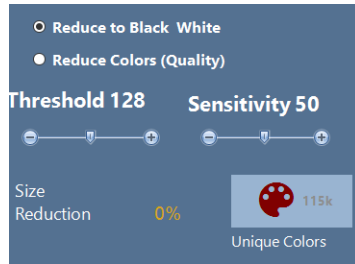
CAUTION: Once the **Apply** icon has been clicked, you cannot undo your changes with the **Reset** icon

Adaptive Thresholding Technology and Composer

Adaptive thresholding assists in cleaning “dirty” documents or documents that have a colored background which interferes with the foreground data. This can be especially helpful in cleaning forms to improve OCR accuracy. Thresholding converts a color or grayscale image to bitonal. Most

scanner and capture software can apply basic thresholding technology. ImageRamp uses Adaptive Thresholding with advanced algorithms and sensitivity settings allowing you to optimize the thresholding for your documents. ImageRamp offers adaptive thresholding with the following controls when the **Sizing** icon is clicked in the *Page Editing* screen.

Illustration: Adaptive Thresholding submenu with applicable settings.



When working with difficult images, it is best to test your documents with various settings. The **Threshold** value should be set between 0 and 256. Higher values cause the resulting bitonal image to be darker. The exact value necessary depends on the paper, ink, and scanner brightness setting. The **Threshold** default value is 128. The **Sensitivity** value should be in the range 0 to 100. High values bring out small fonts, but also increases the number or specks or noise in the image. The default sensitivity value is 50.

Change the settings by using the slider bars for the **Threshold** and **Sensitivity** for **Reduce to Black/White** and **Quality** for **Reduce Colors**. If you are not happy with the results use the slider bars again or hit the **Reset** icon to return the page to its original form. The changes to the document do not apply automatically; you must click the **Apply** or **Apply to All** icon. Note that once the **Apply** or **Apply to All** icon has been clicked, you cannot undo your changes with the **Reset** icon. The Reset icon resets the Threshold and Sensitivity settings to what was di



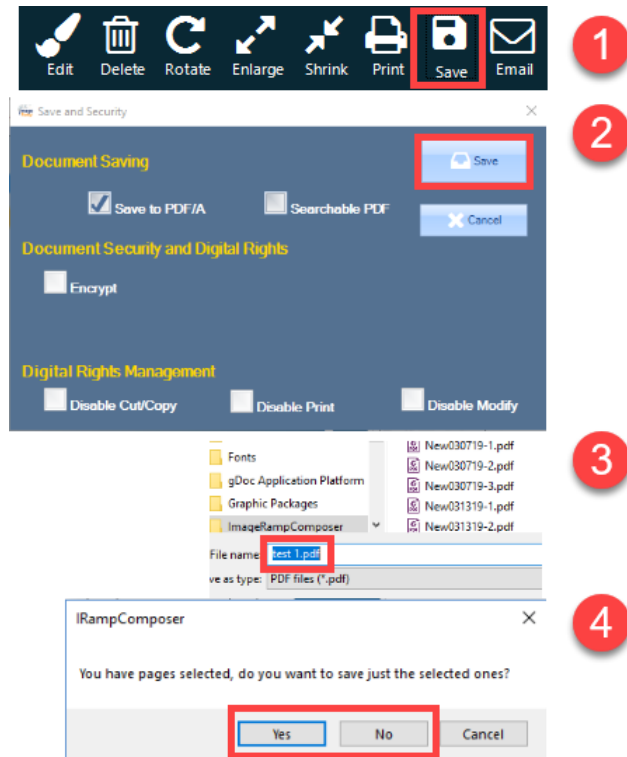
CAUTION: Once the **Apply** icon has been clicked, you cannot undo your changes with the **Reset** icon.

Saving Files

To save your file with the *Page Assembly* changes simply click the **Save** icon and make your selections in the resulting popup windows. Remember to save the files with a different name if you do not want to overwrite the original. Refer to [Naming Files and Folders with Barcodes](#) for more on automatically mining barcodes for naming purposes and [Saving and Emailing Files with Security and Encryption](#) for more details on the save settings.

1. Click the **Save** icon
2. Select your desired file options such as type of PDF file, encryption and digital rights in the **Save and Security** popup and click the **Save** icon.
3. Name the new file in the popup file browsing window.
4. Select whether to save the selected pages or all pages in the popup window. Clicking **Yes** saves the selected pages and **No** saves all the pages.

Illustration: Saving changes made in the Page Assembly process.



CAUTION: Use a different file name if you do not want to overwrite an original file.

Privacy Inspector and Redaction

Privacy Inspector and Single Pattern Search Overview

A note about PDF Composer's *Privacy Inspector* vs. *Single Pattern Search* functions, both functions allow you to locate potentially sensitive information in your documents, verify the selections, and then apply redaction.

The only difference is *Privacy Inspector* allows you to select multiple search patterns in the *Settings* section and locate them in your documents in a single search. The *Single Pattern Search* function allows you to select a single search pattern from a pulldown menu and locate that pattern in the document(s).



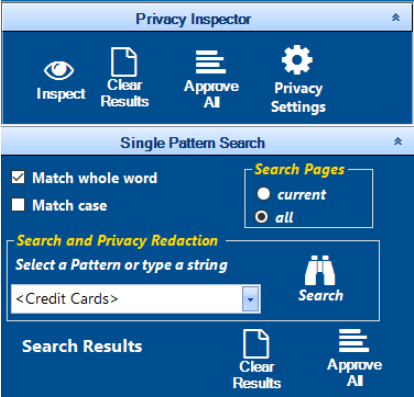
	Privacy Inspector	Single Pattern Search
Icon		
Locates Sensitive Data	✓	✓
Redacts Located Data	✓	✓
Searches Multiple Search Strings in a Single Search	✓	✗

Illustration: Composer's Privacy Inspector and Single Pattern Search screen.



Privacy Inspector Overview

Identifying the existence of sensitive data and personal identity on your documents has grown increasingly important.

From the **Settings** icon, select the **Privacy Settings** tab from the left pane. This displays the available search patterns and the setting for how redactions are to be treated (Whiteout/Blackout/Highlighted). Select your desired privacy search patterns. A number of pre-existing scripts using regular expressions (regex) are supported and built in. This provides common word matching patterns for Social Security Numbers, Credit Card Numbers, Email Addresses, IP Addresses, Gender, Cost and others. You may also access this settings screen with the **Privacy Settings** icon from the **Search and Privacy Redaction** tab. See [Creating your Own Search Patterns](#) to learn how to create and name your own regex patterns to add to the **Privacy Inspector** list.

See [Text vs. Image-Based File Redactions](#) to understand how file type effects redactions.

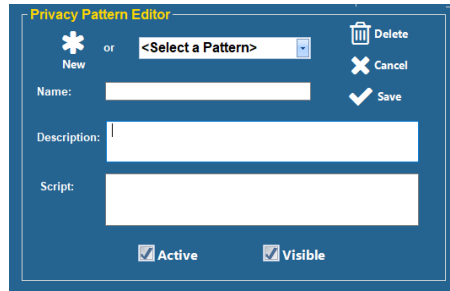
Illustration: Composer's Privacy Inspector Settings screen.



Creating your Own Search Patterns

You can create your own search patterns that are automatically added to the **Privacy Inspector Settings** list and the **Single Pattern Search** pulldown list. Click the **Edit** icon from the **Setting's Privacy Inspector** screen to create your own regex search patterns in the **Privacy Pattern Editor**. Simply select the **New** icon and enter the appropriate information. When completed, select the **Save** icon or **Cancel** icon to return to the previous screen. To edit an existing pattern, select the **Edit** icon and select the pattern from the pulldown, make your changes and click on the **Update** icon.

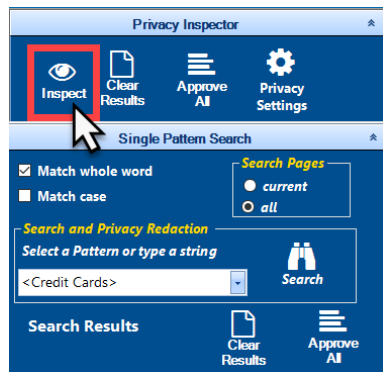
Illustration: Create your own search strings with regex.

The Privacy Pattern Editor dialog box is shown. It has a title bar "Privacy Pattern Editor". Inside, there's a "New" button with a star icon, followed by "or" and a dropdown menu labeled "<Select a Pattern>". To the right are "Delete", "Cancel", and "Save" buttons. Below these are input fields for "Name:", "Description:", and "Script:". At the bottom, there are two checkboxes: "Active" and "Visible", both of which are checked.

Initiating a Privacy Inspector Search

Select the **Search and Privacy Redaction** tab and click on the **Inspect** icon in the left panel. **Privacy Inspector** will cycle through your selected document set, regardless of the source, and identify suspected keywords or text strings that match your identity settings. Each “hit” is captured and provided in a tree called the **Redaction List** in the left panel.

Illustration: Initiate a Privacy Inspector search with the Inspect icon.

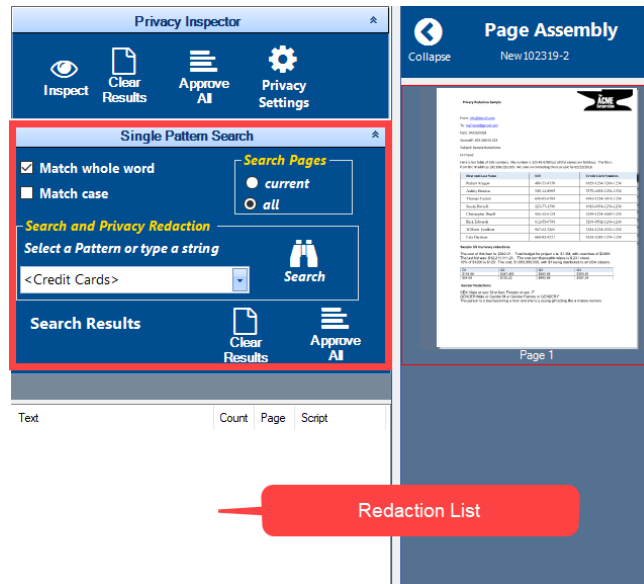


The hits can be viewed, cleared (**Clear Results** icon) or redacted (**Approve All** icon) using the icons in the **Privacy Inspector** area of this screen. They can also be exported to an external file. See [Working with the Search Results List](#) to learn how to view and delete items in the **Search Results List**. Also see [Text vs. Image-Based File Redactions](#) to understand how file type effects redactions.

Single Pattern Search Overview

Using the **Single Pattern Search** function works basically the same as the **Privacy Inspector** detailed above. The main difference is **Single Pattern Search** searches a single search string available from a pull-down menu using the provided scripts (such as Social Security Numbers, Credit Card Numbers, Email Addresses, IP Addresses, Gender, and Currency) or your own typed text. See [Privacy Inspector and Single Pattern Search Overview](#).

Illustration: The Single Pattern Search screen.



See [Text vs. Image-Based File Redactions](#) to see redaction differences in file types.

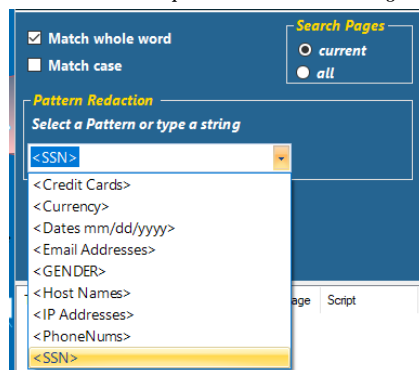
Initiating a Single Pattern Search

Select the **Search and Privacy Redaction** tab to load the **Search & Redact** screen. Use the pull-down menu to select the pattern to search and redact in the **Single Pattern Search** section of this screen. Optionally, you can type your own text string.

Select **Search Pages** options and whether to match whole words and/or match letter case.

Click the **Search** icon to find matching patterns which are then highlighted in the document and summarized in the **Redaction List**.

Illustration: Use the pull-down list to select a single search pattern.

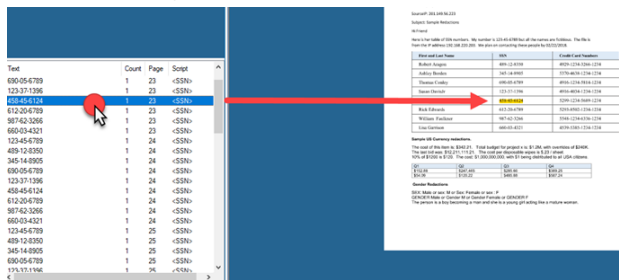


The hits can be viewed, cleared (**Clear Results** icon) or redacted (**Approve All** icon) using the icons in the **Privacy Inspector** area of this screen. They can also be exported to an external file. See [Working with the Search Results List](#) to learn how to view and delete items in the **Search Results List**. Also see [Text vs. Image-Based File Redactions](#) to understand how file type effects redactions.

Working with the Search Results List

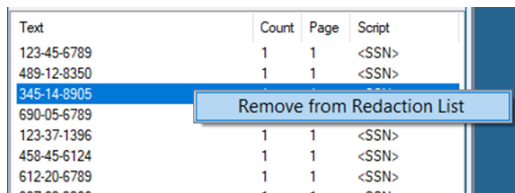
Select any hit in the **Search Results List** (also known as the **Redaction List**) and the page is presented with the search string highlighted in the **Page View**.

Illustration: Selecting a “hit” in the Search Results list to view it in the Page View.



To remove an item from the **Search Results List**, right click to bring up the “**Remove from Redaction List**” selection and click it.

Illustration: Results can be removed from the list by right-clicking and selecting the “Remove from Redaction List.”



See [Text vs. Image-Based File Redactions](#) to see redaction differences in file types.

Text vs. Image-Based File Redactions

Files that are pure text-based PDFs will behave differently than image-based files in how the data is redacted. Text-based files have text replaced with dots “.....” representing the number of characters replaced from the identified search pattern.

Illustration: Text-based files are shown in this example with highlighting and then redaction.

Gender Redactions

SEX<pvt> or sex<pvt> or Sex: <pvt> or sex : <pvt>

GENDER <pvt> or Gender <pvt> or Gender <pvt> or GENDER <pvt>

The person is a <pvt> becoming a <pvt> and <pvt> is a young <pvt> acting like a mature <pvt>.

Gender Redactions

SEX: **Male** or sex: **M** or Sex: **Female** or sex : **F**
GENDER **Male** or Gender **M** or Gender **Female** or GENDER **F**
The person is a **boy** becoming a **man** and **she** is a young **girl** acting like a mature **woman**.

Images are redacted with a whiteout or blackout area as they are scanned image files that are OCR processed first. This selection is found in the **Settings' Privacy Inspector** screen.

Illustration: Text-based files are shown in this example with highlighting and then redaction.



Image-based files need searchable text in order to perform the redaction process. OCR capabilities are built into Composer and are intended to provide accurate text of the underlying image.

Illustration: Composer OCR's image files to capture text for privacy searches.

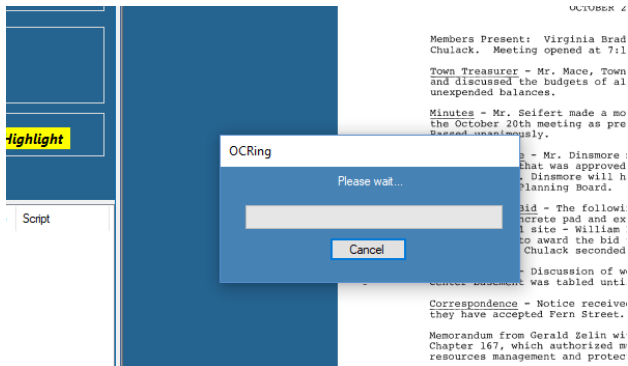


Illustration: Redaction is applied to image-based files as specified in the Setting's Privacy Inspector.



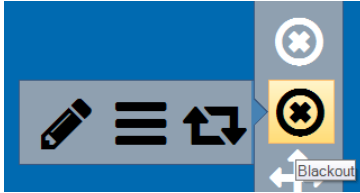
For advanced users, PDF Composer has settings that users can manipulate to improve OCR accuracy. Access the **Settings** tab's **OCR** icon to present the **OCR Settings** screen. See [OCR Settings](#) for more on fine-tuning OCR results.

Redaction via Page Annotation Tools (Annotation Redactions)

USE CAUTION

Files can also have manual redactions applied using the whiteout or blackout annotation tool. A sketch, line, or rectangular region is available to draw overlaying the text or image data.

Illustration: Manual annotation redactions can be applied to image-based or text-based files using the whiteout or blackout icon tools.



Manual annotation redactions will place a markup annotation overlaying the image or underlying text. If the original source page was an image, future OCR attempts will not capture any underlying text. If the page was OCR'd before, PDF Composer will remove all OCR data on pages that contain manual annotations.

Pages that were originally text-based files (Word, RTF or PDF Text), the underlying text is still remaining on the document. See the Caution below.

Illustration: An example of an annotation blackout redaction added to an image file.

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CAUTION: Underlying text is still remaining on the document for files that were originally text-based files (Word, RTF or PDF Text etc.). Therefore, the marked-up text can be recovered. To truly integrate any editing or redaction made via page markup tools, the files must be saved as image files.

Working with Barcode Extraction Settings

Barcode Settings Screen

Several settings can be configured to define the barcode mining within the application. Click on the **Settings** icon and then the **Barcode** icon to access the *Barcode Settings* screen.

Use these settings to define the type of barcode you are looking for, the barcode search order, and image enhancement techniques to use on the barcodes. Additionally, define the PDF output and separation page instructions. Define the barcodes to use for file and folder naming in the *Mining Settings*. See [Naming Files and Folders with Barcodes](#).

Illustration: The Barcode Settings screen provides selections to manage how barcodes are identified, improved, and used.

The screenshot displays the 'Barcode Settings' interface with a blue background and white text. It is organized into several sections:

- Page Separation:** Includes checkboxes for 'Remove Separator Pages', 'Split on Common Barcodes', and 'Split if contains:' followed by a text input field.
- Filters:** Contains input fields for 'Minimal Length' (set to 3), 'Maximum Length' (set to 250), and 'Confidence (1-5)' (set to 4). There is also a checkbox for 'Barcode Is Numeric'.
- Search Order:** Features three radio button options: 'Top to Bottom', 'Left to Right', and 'Right to Left'.
- 1D Barcodes:** Includes checkboxes for 'Code 39', 'Code 128', 'Patch Codes', 'Code 25', 'Codabar', 'Expect Start/Stop char (*)', and 'Extended Code39'. A barcode image is shown next to the 'UPC (EAN8/13)' label.
- 2D Barcodes:** Includes checkboxes for 'PDF 417', 'QR Codes', and 'Data Matrix'. Small images of each barcode type are displayed.
- PDF Output:** Contains a checkbox for 'Save as Black and White'.
- Image Enhancements:** Includes sliders for 'Noise Reduction' (set to 0), 'Skew Tolerance' (set to 1), and 'Line Jump' (set to 1). There are also checkboxes for 'Median Filter' and 'Use Over Sampling'.

Selecting Options to Identify and Filter Barcodes

From the *Barcode Settings* screen set:

- Which barcode standards to detect
- Which barcode enhancements should be applied
- What search order to look for barcodes
- How should image enhancements be applied to increase barcode accuracy

Selecting Barcode Types

Illustration: The Barcode Type settings

1D Barcodes

☒ Code 39

☒ Expect Start/Stop char (*)

☒ Code 128


☒ Extended Code39

☐ Patch Codes

☐ UPC (EAN8/13)

☐ Code 25

☐ Codabar






2D Barcodes

☒ PDF 417

☒ QR Codes

☐ Data Matrix



Composer recognizes many different barcode standards, including Barcode 39 and 128 linear barcodes and PDF-417, QR Codes and Data Matrix 2D barcodes. To select which barcode types Composer should detect, simply check the box next to the barcode type. Multiple selections can be made. To avoid false reads of data, only select the desired barcode types found in your documents.

Selecting Barcode Enhancements

Several image enhancement functions are available. They are provided here for advanced users' reference.

Illustration: The Barcode Enhancements and Filters to improve barcode recognition.

Image Enhancements

Noise Reduction: 0

Skew Tolerance: 1

Line Jump: 1

☐ Median Filter

☐ Use Over Sampling

Filters

Minimal Length 3

Maximum Length 250

Confidence (1-5) 4

☐ Barcode Is Numeric

Noise Reduction runs an image through a noise reduction filter before scanning for barcodes. The filter removes marks from an image that are unlikely to be part of a barcode. A larger value will remove larger marks from the image. This increases the chances of finding a barcode in a poor-quality image but also increases the time taken to process an image. A typical value for this option is 10.

Skew Tolerance in the **Image Enhancements** settings controls the maximum angle from the horizontal or vertical at which a barcode will be recognized. The table below shows the possible values for this property along with the approximate maximum angles:

- 0 = up to 5 degrees
- 1 = 13 degrees
- 2 = 21 degrees
- 3 = 29 degrees
- 4 = 37 degrees
- 5 = 45 degrees

When Composer scans an image for a barcode string it does not scan every line of the image. The **Line Jump** setting controls how many scan lines are missed between checks for a barcode. A

Line Jump value of 1 means that every scan line in the image will be checked. A lower value for Line Jump will impact the performance of the application but may be useful for poor quality images.

When the **Median Filter** box is selected, ImageRamp will apply a median filter to the image before checking for barcodes. This is a useful option for high resolution images that contain speckles of black and white. It is not recommended for images where the black bars or white spaces are less than 2 pixels wide.

When the **Use Over Sampling** box is enabled, the barcode reader samples 3 lines at a time (skipping 2 lines between each sample) and takes the average pixel value. This is useful for images containing both black and white speckles.

Use the **Minimal and Maximum Barcode Length** settings to help eliminate unwanted barcodes from the output stream.

See [Working with Barcodes That Aren't Recognized](#) for more hints on increasing the readability of your barcodes.

Page Separation Settings

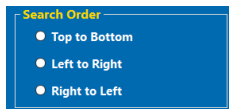
When splitting files on specified barcodes, a new file is created every time a page is detected with a valid barcode of any of the **Barcode Types** selected in the **Barcode Type** area. You may choose to select the **Remove Separator Pages**, **Split on Common Barcodes**, and **Split if Contains** options. These easily allow you to use separator pages and easily delete them. **Split on Common Barcodes** allows users to save files using the same separation page barcode. This works best when the resulting file name includes a time stamp %time.

If the **Remove Barcode Separator Pages** option is selected, separator pages are used for splitting and renaming but are not included in the output files. If a keyword like "invoices" is entered as the **Split if Barcode Contains** field and you use separator pages with the word "invoices" in the barcode, ImageRamp will split the scanned stack into separate files every time it detects a barcode with "invoices." For more information see [Working with Separator Pages](#), [Selecting Options to Identify Barcodes](#), and [Renaming Files and Creating Folders](#).

Barcode Search Order

When opting to split files based on barcodes, users must indicate what order the application should use to search for barcodes on a scanned page: **Top to Bottom**, **Left to Right** and **Right to Left**.

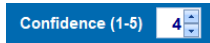
Illustration: Barcode Search Order options.

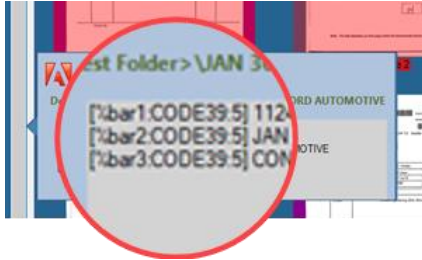


Barcode Confidence

Composer uses a confidence ranking of (1-5) for each unique barcode found. The higher the confidence setting, the more confident the software must be to capture a barcode value. See [Splitting Files with Barcodes](#) to see an example of when the confidence level is displayed.

Illustration: Barcode Confidence setting options and results showing barcode 1, 2, and 3 were code 39 barcodes with confidence rankings of 5.





Barcode Minimum and Maximum Length

You can also control the barcode results by setting a minimum and maximum character length. Any barcodes found that are within this range are kept as valid barcodes. Others are ignored.

Illustration: Barcode Length settings.

Minimal Length	5
Maximum Length	255

Selecting Only Numeric Barcodes

Select the *Barcode is Numeric* checkbox to only locate numeric barcodes during barcode mining.

Illustration: Only Numeric Barcodes settings.

<input checked="" type="checkbox"/> Barcode Is Numeric
--

Working with Barcodes That Aren't Recognized

Barcodes can be a bit finicky to work with. The quality of the original print as well as the settings of the scanner can have a significant impact on the ability to read barcode data.

The first step in diagnosing barcode problems is to visually inspect the barcodes in the original document. Look for bars that may be touching or full of dots. Below are examples of good and bad images from the same barcode. The good one is the original document before printing it out or scanning. The bad one is the result of a poor quality printout or scan. It is always a good idea to zoom in or magnify a barcode to see what the bars actually look like.

Illustration: Barcode quality examples.

Good Image:



oaseparator

Bad Image:



oaseparator

Hints for Creating High Quality Barcode Scans

1. Print barcode page with a laser printer set to at least 300 dpi.
2. Increase the DPI of your scan device. Try going 300 dpi or higher.

3. Try scanning in color or greyscale. This will automatically improve the resolution of the image. If you want to convert the output files back to black and white as color images can be quite large, check the **Save as Black and White** box in the **PDF Options** screen.

Illustration: Save as Black and White option.



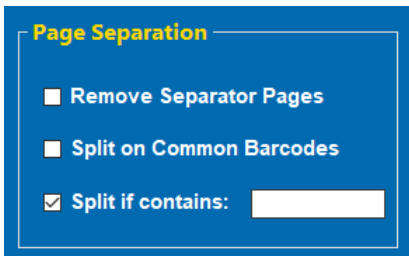
See [Selecting Barcode Enhancements](#) for settings which affect the readability of barcodes.

Working with Separator Pages and Using Specific Barcode Values

The **Remove Separator Pages** option in the **Page Separation** area of the **Barcode Settings** screen applies to situations where scans are made with barcode separator pages. These pages usually only contain barcodes which identify the following data pages in a stack of multiple documents for scanning. The barcode information can be used to name the files and then the separator pages can be removed.

If your documents do not have barcodes, you can create your own with DocuFi's ImageRamp Scan Separator included with your Composer license.

Illustration: The Add Sep icon adds a barcode to the selected pages and names the barcode as defined in the Separator Script field of the Barcode Settings.



CAUTION: As checking the **Remove Separator Pages** checkbox removes **all** pages on which it detects a barcode. It should only be used in situations where there are no barcodes on the data pages.

To remove separator pages, simply select the **Remove Separator Pages** checkbox and every page with a barcode will be removed when a split action is initiated. The files will be named as directed on the **File** and **Folder** naming sections of the **Mining Settings** screen. See [Using Keywords in File Names and Folders](#) to understand how to name the files based on the barcodes if desired. Learn about the free separator page creator software, [Scan Separator](#), included with your Composer license.

Selecting **Split if Contains** field allows you to enter your own barcode text string to prompt a file split. If you enter a string here, splits will only occur on barcodes that contain that string. A practical application of this option would be entering "invoice" as the split string. If your scanning stack contains many multipage invoices which are barcoded with the invoice number such as "invoice xxx" on the first page of every invoice, ImageRamp would easily split the stack into multiple files at the first page of every invoice.



CAUTION: As checking the **Remove Separator Pages** checkbox removes all pages on which it detects a barcode, it should only be used in situations where there are no barcodes on the data pages.

CAUTION: The image quality of barcodes can significantly impact their readability. We recommend a minimum of 300 dpi scanning and using [Barcode Enhancement](#) options.

Illustration: Using the Remove Separator Pages option and renaming the file based on Barcode1

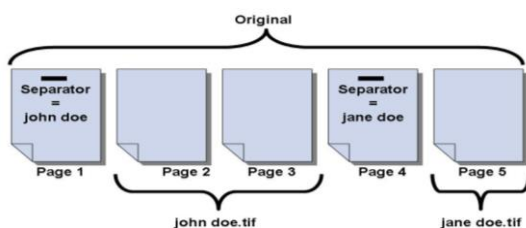
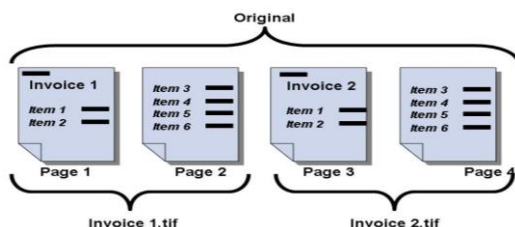


Illustration: Using the Split if Contains option with a value of “invoice” and renaming the file based on Barcode 1, barcode search order top to bottom.



CAUTION: If you select **Process Splits** and ImageRamp does not find any valid barcodes in a file, a pop-up warning is displayed asking you to set proper barcode settings.

CAUTION: If a file contains multiple occurrences of the same barcode and **File Name** is set to the barcode name, the file will overwrite itself. To prevent this, use the barcode name with a time stamp for the file name or page designator (%time or %page).

Specifying Barcodes for File and Folder Naming

Barcodes can be used to name files and folders. To learn more, see [Naming Files and Folders with Extracted Text or Barcodes](#) to learn about the related settings.

Specifying Barcodes for File Splitting

Barcodes can be used to split files. To learn more, see [Splitting Files with Barcodes](#) to learn about the related settings.

Splitting Files with Barcodes

To split files based on barcodes, confirm the selections in the **Barcode Settings**. See [Working with Barcode Extraction Settings](#). To use the barcodes for file or folder naming, see [Naming Files and Folders with Extracted Text or Barcodes](#).

Select the **File Splitting** tab and load a folder or individual files. Once a project is populated with a file or files, select the **File Splitting** tab again. The pages of the files are displayed in the right panel **Page Assembly** screen where they can be viewed using the viewing tools in the top right menu. The following menu items are available in the **File Splitting** menu.






 Process Splits	Select this icon to begin the splitting process. Note that PDF files are temporarily converted for TIF for barcode recognition.
 Save Splits	Save the split files after confirming the splits in the right panel Page Assembly window. Pages with identified splits are shown highlighted with a purple background.
 Settings	Click to go directly to the Barcode Settings screen.
 	Enlarge or reduce the thumbnails of the files in the left panel with these icons.

Illustration: The Split Files tab interface.

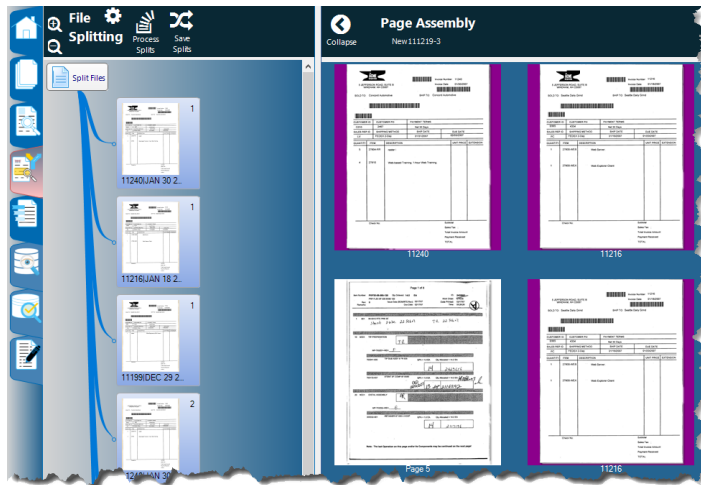
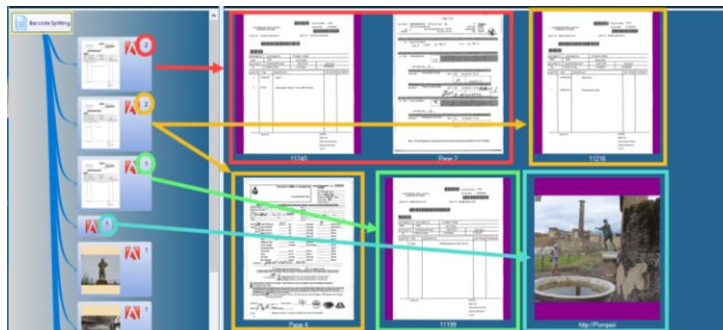
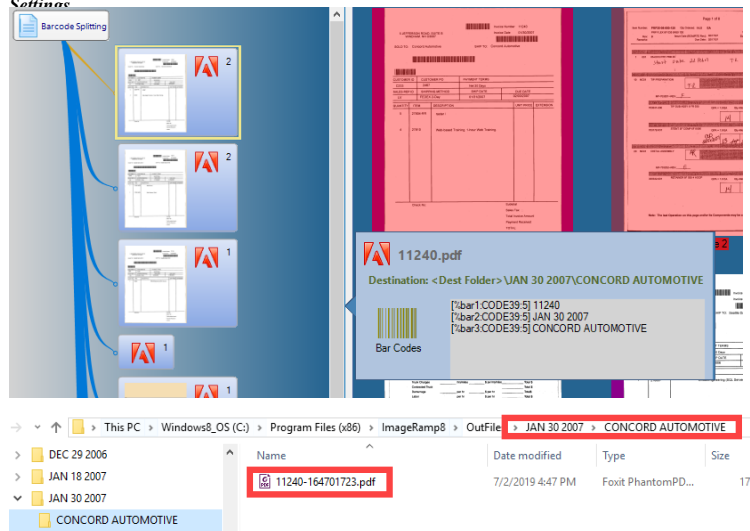


Illustration: Split locations are shown by highlighting the page with a purple background and the proposed new file breakdown is displayed in the file panel on the left with the number of pages in the file noted in the top right of the file's thumbnail.



Note you can click on one of the file thumbnails in the right panel to display the detected barcodes and the proposed file name and destination path.

Illustration: Clicking on the file thumbnail displays a popup with detect barcodes and proposed file names and destination paths as designated in the Extraction and Barcode Settings



Save the Splits

If you are happy with the splits, save the new files by selecting the **Save** icon in the *Page Assembly* pane.

Naming Files and Folders with Extracted Text or Barcodes

Naming files and “routing” (creating folders) based on barcodes or extracted text allows you to scan a number of pages of documents and easily name and route them to newly created folders based on the content.

With Composer, you can define how files are named and folders created in the **Settings** icon’s **Extraction Settings** screen, accessed by clicking on the **FileNaming** tab. See [Using Keywords in File Names and Folders](#) to learn how the barcode keywords can be created.

Illustration: The naming settings provide for file naming and folder creation based on barcodes or zone text extraction.



Working with Document Types and Setting up Extraction Zones (Zone OCR)

Composer provides a flexible environment allowing users to set up various templates or configurations identified as “document types”. These customizable, reusable document profiles help capture critical document properties and content for use in naming and routing files.

To set up a document type and identify the extraction information, open a project and select the **Settings** icon and then the **FileNaming** tab.

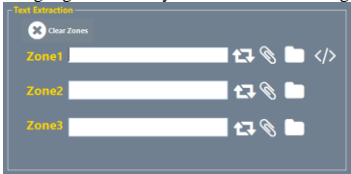
This presents the **File Naming Settings** screen in the right pane and **Document Types** management in the left pane. Use the **Create** and **Delete** icons or click on a document type in the tree to manage the Document Types.





To create or edit an existing or create a document type:

1. Click the **New** icon and enter a name for a new document type. To edit an existing document type, select it from the tree on the left panel.

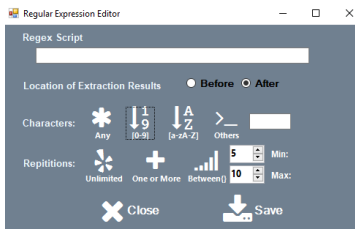


2. Load a sample document with the **Browse for Sample File** icon for a new document type. For existing document types, a sample file should be displayed already. Use this sample file to:
 - Establish OCR zones for text extraction for naming files and folders
 - Identify barcodes using keyword codes for file and folder naming
 - Identify date/time, sequence keyword codes for file and folder naming
3. Select whether you want to use extracted text and/or barcodes with the **Text Extraction** or **Barcode Extraction** checkboxes.
4. For text extraction, set the zones to identify what text to extract. Click on a **Zone** field and then use the **Selection** icon and select the area on the sample document. Click on the **Paper Clip** or **Folder** icons, to copy the information into the file or folder name fields below. See the table below for identification of the actions available. See [Traditional Fixed Zone Text Extraction vs Freeform Text Extraction](#) to learn more about using regex to identify text extraction in a large zone.

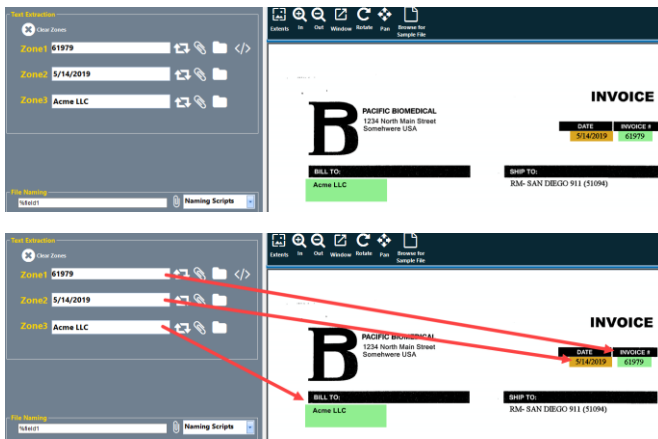


	Set a OCR Zone for exact or regex based extraction
	Paste the zone for use as the file name
	Paste the zone for use as the folder name
	Set up the regular expression

Or, click the **Arrow** icons to load the regex editor to create a regex pattern.



Note that the Zone field results in the sample document are color coded based on the OCR confidence of the extraction with green being very confident, yellow for confident, red for somewhat confident.



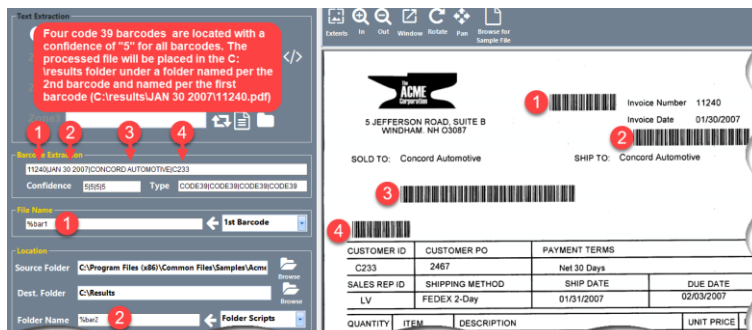
See [Traditional Fixed Zone Text Extraction vs Freeform Text Extraction](#) for more on using text extraction.

5. If the Barcode Extraction checkbox is selected, barcodes are located as per settings in the **Barcode Extraction** settings screen, as accessed through the appropriate settings tab. The barcode confidence rating provides a rating from 1-5 with 5 being the highest confidence that the barcode has been interpreted correctly. Barcode type names the type of barcodes located.

Barcode Extraction

Confidence

Type



6. Set the folder information. The Destination Folder names a location where processed files are placed.

Source Folder	You may name a <i>Source Folder</i> in the <i>Location</i> section of the settings. The contents of this folder will be automatically loaded when this document type is selected for processing in the <i>File and Folder Renaming</i> tab. If no folder is named, you may browse and load a folder with the Load Folder icon on that screen.
Destination Folder	The <i>Destination Folder</i> names a location where processed files are placed. This is a required field. If the folder named is not already existing, Composer will create this folder.
Folder Name	Subfolders can be named in the <i>Folder Name</i> field based on the barcode or extracted zones. You may also enter your own text in this field for Composer to create new folders.

7. Composer also provides the opportunity to capture the extracted text or barcode information in CSV or XML format to use to feed an indexing scheme into a database or document management system. Checking either of these boxes creates an indexing file in the *Destination Folder* under the specified format for each of the documents.
8. Once the Document Type is created or edited as required, click the **Save** or **Update DocType** icons. Return to the main interface by clicking the **Cancel** icon. See [Processing Documents Through the File Naming and Renaming Function](#) to learn how to implement the settings on a folder of documents.

Traditional Fixed Zone Text Extraction vs Freeform Text Extraction

Composer allows you to select specific areas of documents to use for naming purposes. It also allows you to use regex search scripts to define unique patterns to locate anywhere on the document in larger identified zones.

Fixed Zone Text Extraction

In the example in step No. 5 of [Working with Document Types and Setting up Extraction Zones \(Zone OCR\)](#) identifying and using zone extraction is detailed for narrow, exact zone extraction. This demonstrates using zone extraction where information is contained in fixed, specific areas the documents. Please refer to that information for further details.

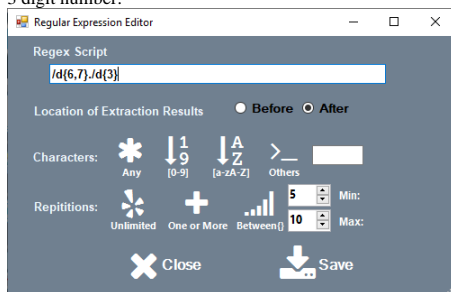
Freeform text extraction

Zone extraction can also be used with regex scripts in a larger area of interest. These regular expressions are used to define a unique pattern to extract from the document. To initiate this process:

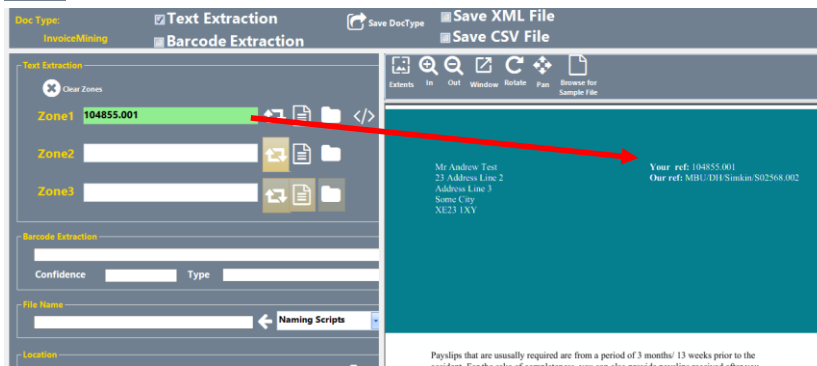
1. First browse to a file to use as a sample document to set up the extraction regions.
2. Now define the regular expression pattern you want to find. Click on the **Regex Editor** icon to bring up the regex editing screen.



In this example we will look for a 6-7 digit number followed by a “.”, and then followed by a 3 digit number.



3. Next select the top section of the document as our region of interest using the zone selection tool. Since the text we want can appear anywhere in the top section, this is the best method. Once the region is drawn, the regex pattern is applied to the resulting OCR text and the appropriate text is extracted.

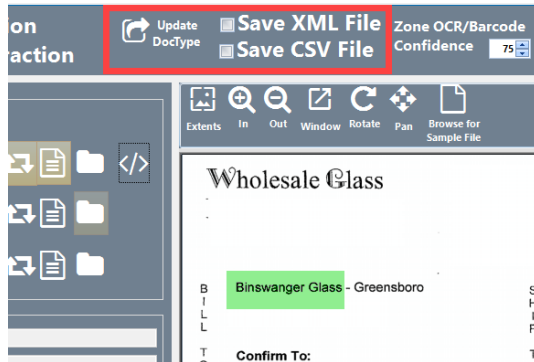


4. When done, be sure to **Save** your Document Type.

Saving CSV and XML data

You can also decide to save XML or CSV data with the information extracted, by selecting the checkboxes as shown below. Be sure to **Save** or **Update** your document type when completed.

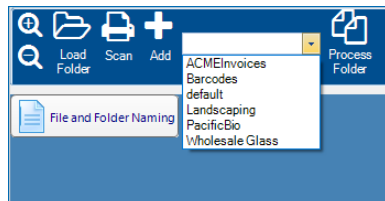
Illustration: Elect to save the extracted text to an XML or CSV file.



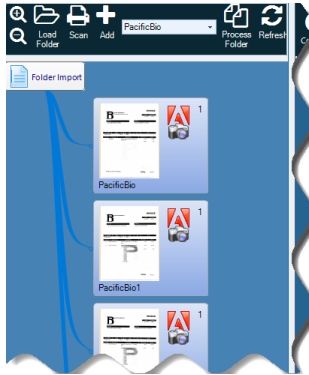
Processing Documents Through the File Naming and Renaming Function

To process documents with the file and folder renaming function:

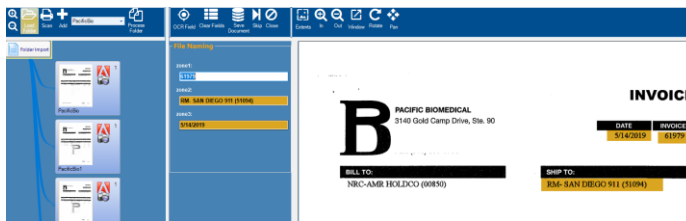
1. Click on the **File and Folder Renaming** tab.
2. Select the document type to use with the pull-down menu.



3. If a **Source Folder** is named on the document type, the named folder of documents will automatically be loaded if a Source Folder is not named in the settings, click on the **Load Folder** icon to browse to your desired folder. You may also add files with the **Scan** icon or the **Add** file icon. The files appear in a tree format in the left pane.

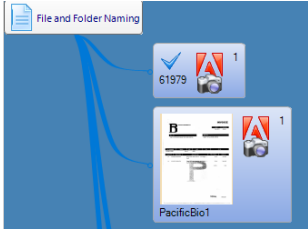
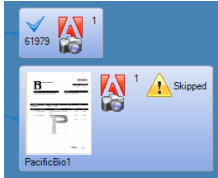


4. Select the **Process Folder** icon to initiate the file and folder naming. This presents the first document with the detected text displayed.



5. Review the detected text in the fields presented. The results are color coded to represent the confidence of the extraction with green being very confident, yellow for confident, red for somewhat confident. You have the option of Clear Fields, OCR Fields, Save Document, Skip and Close. The field information may be edited at this time by clicking on the field and entering the appropriate text.

Clear Fields	This clears the detected text from the fields. The fields may be typed in by clicking on the fields or using OCR capture with the OCR Field icon.
OCR Field	To edit a field with OCR captured text, click on the desired field, click the OCR Field icon and then select the appropriate area on the document. Composer will enter its detected text into the field.
Save Document	Once the document is reviewed for correctness, click the Save Document icon to save the document. The next file is presented and the document's icon in the document tree on the left now is minimized and displays a checkmark.

	
Skip	<p>Clicking the Skip icon skips the document and does not process it. This is noted in the file's icon in the document tree on the left. The next document is now presented.</p> 
Close	<p>The Close icon closes the documents window and any unprocessed files in the document tree are not processed.</p>

Searching Indexed Databases

Setting up Database Search Functions

Composer provides a search window into specified indexed databases with its Database Search function. To setup Database searches, select the **Settings** icon and then the *Database Search* tab. This presents the *Database Search and Index Settings* screen.

Illustration: The Database Search and Index Settings screen.

Naming the Target Database

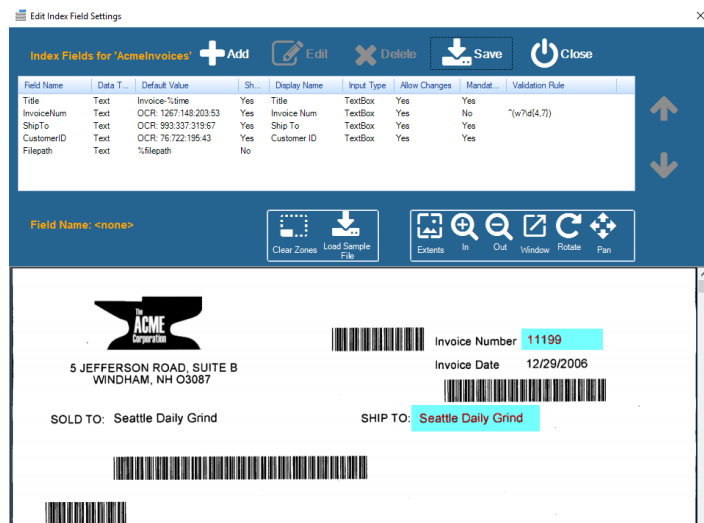
This screen identifies *Index Profiles* that detail index fields and specifications of the desired database named in the *Target Database* area. Access and SQL Server databases are supported.

Illustration: Access and SQL Server databases are supported.

Managing/Creating Index Profiles

Index Profiles must be created to map the Composer fields to the fields in the database that are to be used for searching. New profiles are created with the **Create Profile** icon and existing profiles can be deleted with the **Delete** icon. Existing profiles are accessed with the pull-down menu. To edit a profile, select the profile from the pull down and click **Edit Index Settings**. This presents the *Edit Index Field Settings Screen*.

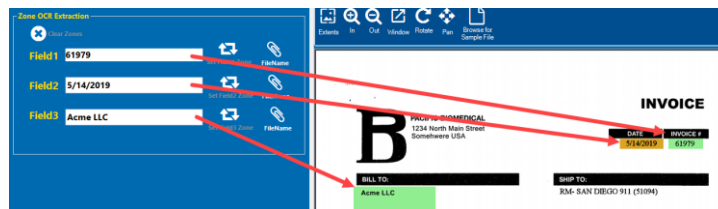
Illustration: The Edit Index Field Settings.



With this screen identify the database Field Name, Data Type, Default Value, Show, Display Name, Input Type, Allow Changes, Mandatory and Validation Rule. Composer allows the user to identify a sample document to aid in identifying the fields through Zone OCR. The default value can be entered or identified via regex or zone capture using the sample document.

Once the fields have been named and identified, using the **Add** or **Edit** icons, Save the additions or changes with the **Save** icon.

Visit [Using Keyword Codes](#) to learn more about the codes used to identify barcodes, date, time, etc.



Using the Database Search Tool

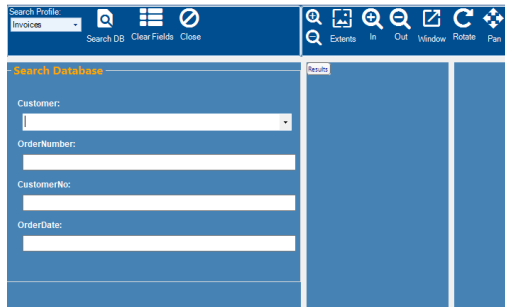
Once the Index Profile and other settings have been selected and saved, the profile is ready for use in locating documents in the databased. Composer provides this simple database lookup function to provide users with quick access to a document in a database.

Initiating a Search

After first establishing the appropriate settings in **Index Profiles** in the Database Search Settings (see [Setting up Database Search Functions](#)), select the **Database Search** tab or you may access

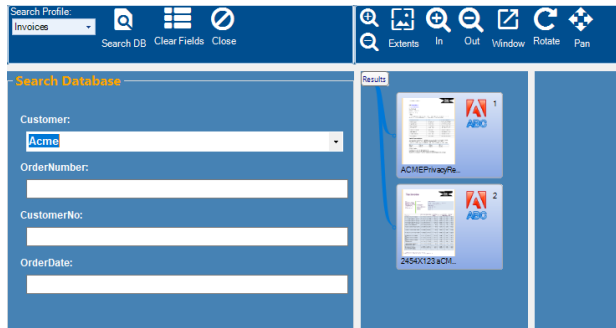
the search screen by selecting the **DB Search** tile from the main tile screen. Select the desired **Index Profile** from the pulldown. In the example below, the “Invoices” profile is selected.

Illustration: Selecting the Index Profile for Database searching.



This presents the fields as identified in the profile where you can select a field and enter the search criteria and click the **Search DB** icon to initiate the search. In the following example, “Acme” is entered as Customer in the search criteria which located two documents shown in the **Results** pane.

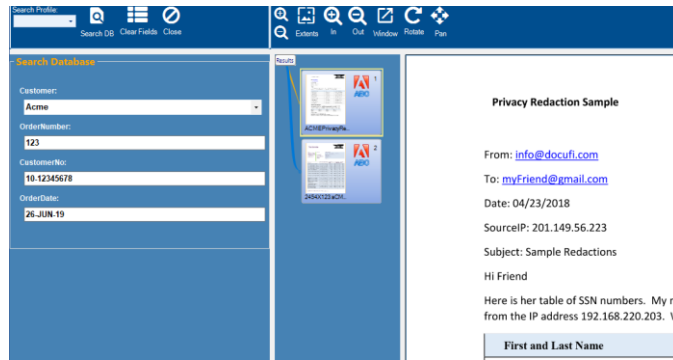
Illustration: Selecting the Index Profile for Database searching.



Clicking on the thumbnail of a located document displays the document in the **Document Viewing** pane on the right.

The index information is presented.

Illustration: Viewing a located document in the Document pane.



Editing the Index Information from the Search Results

Once a document is located and the index information is presented, users can edit the index information by selecting the index field, entering the new information, and clicking **[ENTER]**. This returns a message that the file was saved.

Bookmarking PDF Files

Settings to Insert Bookmarks Based on Barcodes

Composer allows the user to create bookmarks based on barcodes contained in a project's documents. Two settings screens contain instructions for bookmarking based on barcodes.

Access the *Barcode Extraction Settings* screen with the *Barcode Extraction* tab to identify the type of barcode, set filters and search order and select image enhancements.

Illustration: The Barcode Settings screen with the PDF Bookmarks settings to identify barcodes.

The screenshot displays the 'Barcode Settings' interface, which is organized into several sections:

- Page Separation:** Includes checkboxes for 'Remove Separator Pages', 'Split on Common Barcodes', and 'Split if contains:' with a text input field containing 'dw'.
- Filters:** Contains input fields for 'Minimal Length' (set to 3), 'Maximum Length' (set to 250), and 'Confidence (1-5)' (set to 4). There is also a checkbox for 'Barcode Is Numeric'.
- Search Order:** Features three radio button options: 'Top to Bottom', 'Left to Right', and 'Right to Left'.
- 1D Barcodes:** Includes checkboxes for 'Code 39', 'Code 128', 'Patch Codes', 'Code 25', 'Codabar', 'Expect Start/Stop char (*)', 'Extended Code39', and 'UPC (EAN8/13)'. A barcode image is shown below these options.
- 2D Barcodes:** Includes checkboxes for 'PDF 417', 'QR Codes', and 'Data Matrix'. Three corresponding barcode images are displayed.
- PDF Output:** Contains a checkbox for 'Save as Black and White'.
- Image Enhancements:** Includes sliders for 'Noise Reduction' (set to 0), 'Skew Tolerance' (set to 1), and 'Line Jump' (set to 1). There are also checkboxes for 'Median Filter' and 'Use Over Sampling'.

Access the *Input/Output Settings* screen with the **Settings** icon to set bookmarks on pages according to the identified barcode. Entering the desired barcode key in the *Bookmark Layout* field of the *PDF Bookmarks* section of the *Barcode Settings* screen identifies the barcodes to use for the addition of bookmarks. **Save** your changes.

See the [Barcode Options Screen](#) for more details on this screen and [Using Keywords and Text to Create File Names, Folders and Bookmarks](#) to learn about keyword codes

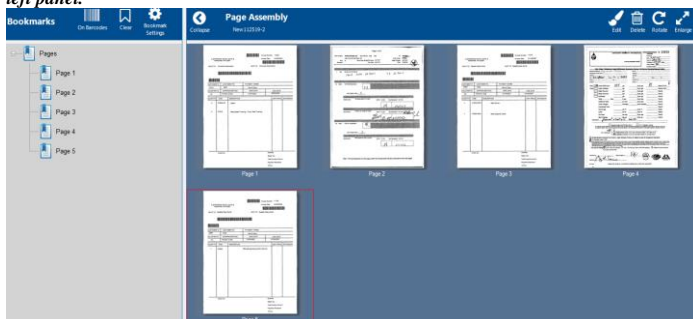
Illustration: The Barcode Settings screen with the PDF Bookmarks settings highlighted

The screenshot shows the 'Barcode Settings' interface. The 'PDF Bookmarks' section is highlighted with a red rectangle. It contains a 'Bookmark Layout' field with the value '%bar1'. Other sections include 'Input' (Document Inbox), 'Page Behavior' (Mouse Trackball, Zoom In/Out), 'PDF Rendering' (Black and White, Greyscale, Color, Extract Images), 'File Sizing' (Limit Size, 3 MB), 'Twain Scanning' (Scanner, Duplex, Scan Resolution, Color, Greyscale, Black and White), and 'Security' (Encryption Method, 256 Bit AES).

Inserting Bookmarks on Your Documents

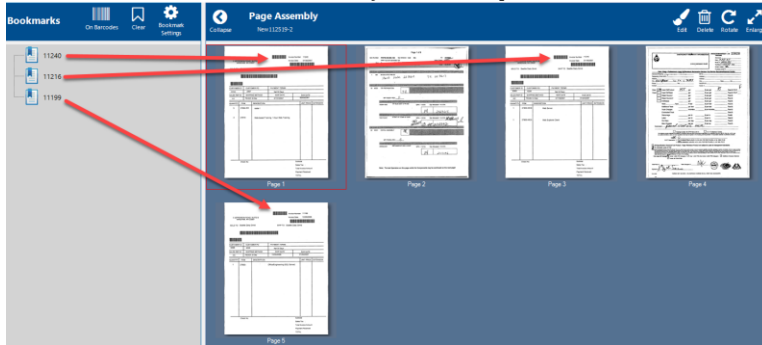
Once the barcode settings are identified and saved, return to the main interface and select the **Document Bookmarks** tab and import your folder or files.

Illustration: Before processing, the Bookmarks tab shows all pages have a bookmark in the left panel.



To set the bookmarks based on the barcodes as identified in the **Barcode Extractions Settings**, simply click on the **On Barcodes** icon. Composer will flash up a few messages about reading the file and identifying the barcodes. When the file has been processed, three bookmarks are identified now in our example illustrated below. You may view the pages in the **Page Assembly** to confirm the selections if desired and the **Clear** icon deletes the bookmarks. If you'd like to save the bookmarks, click on the **Save** icon in the **Page Assembly** panel and select your save options.

Illustration: Three bookmarks have been identified in our example.



CAUTION: Remember to save the file with the bookmarks after confirming them in the right panel *Page Assembly* window.

Using Keywords and Text to Create File Names, Folders and Bookmarks

Renaming Using Keyword Codes

Keyword codes are used in the *Separation Output* section of the *Document Settings* screen and the *PDF Bookmarks* section of the *Barcode Settings* to create the file and folder names and bookmarks based on the barcode data, date, time, and page number. ImageRamp can detect multiple barcodes and reads the document from top to bottom, right to left or left to right. The brackets surrounding the keyword name are required and keyword codes are not case sensitive.

Illustration: The File Naming Settings lets you use keywords to name files and folders. The PDF Bookmark section of the Barcode Extraction Settings can contain keywords.

File Name

%bar1 - %bar2 - %date

Naming Scripts

Location

Source Folder

Dest. Folder

C:\results

Folder Name

%bar3

Folder Scripts

PDF Bookmarks

Bookmark Layout:

%bar1

Keywords:


%date	Produces today's date using the format: MMDDYYYY. For example, if today's date is July 14, 2010, the resulting value would be 07142010 <i>%Date = 07142010</i>
%fieldn	%field1, %field2, %field3 align with the three zone fields of the text extraction settings
%zonen	%zone1, %zone2, %zone3 align with the three zone fields of the text extraction settings
%page	Produces the page number.
%hour	Returns the current hour of day
%minute	Returns the current Minutes of day
%seq	Returns a sequential number starting at 1
%time	Produces Military formatted time using hours, minutes, seconds and milliseconds. If the time is 2:12 p.m. with 10 seconds and 432 1000's of a second is %Time = 141210432
%barn or %barcoden	Produces the barcode designated in the name. Barcode1 through Barcode10 can be used. <i>See Samples below.</i>

When there are multiple barcodes on a page, you may create the name based on any combination of the barcodes by using the Barcoden keyword. Remember that you must select the barcode search direction in the *Barcode Extraction Settings* screen. ImageRamp can use up to ten barcodes for file naming.


Illustration: Sample barcode used in chart below

CASA - MA CASE Index Assist Document


202




Case Number: M999999 AB



Case Last Name: TESTLAST



Case First Name: TESTFIRST



Case Middle Initial: T

Samples: Keyword codes with examples using the scanned page with barcodes above in top to bottom order:

%barn or %barcoden	Produces the barcode designated in the name. Barcode1 through Barcode10 can be used. %bar1 = 202 %bar1-%bar2 = 202-M999999 AB %date-%bar4 = 07142010-TESTFIRST with a date of July 14, 2010
--------------------	--

Combining Keywords

Users often find it convenient to combine multiple keywords when naming files. For example, they may want to rename to the first detected barcode and add the date and time. Keywords maybe combined in any order. To use multiple keywords simply enter the codes in the same entry field (either *File Name*, or *Create Sub Folder*)

Renaming with Free Form Text

To name files or folders with your own free form text, simply enter the text string in the *File Name* or *Create Sub Folder* fields on the *Separation Output* section of the *Barcode Settings* screen. For example if the word “invoice” is entered for the file name, all documents will be named as “invoice” followed by sequential numbers.

Illustration: Name File with text “invoice”. Resulting in files named invoice_1.pdf, invoice_2.pdf, invoice_3.pdf etc.

FileName

invoice

Free form text entries can also be used in combination with keyword codes. See [Renaming Using Keyword Codes](#) and [Combining Keywords](#).

Illustration: File name with Date keyword and text “invoice”. Resulting in files named 08272015 - invoice_1.pdf, 08272015 – invoice_2.pdf, 08272015 - invoice_3.pdfetc.

FileName

%date - invoice

Saving and Emailing Files with Security and Encryption

Saving Files and the Save and Security Window

With Composer, users select files or folders of files for easy page assembly and manipulation. Composer can be used to merge several files into one file or conversely, break a single file or set of files into multiple files based on barcodes. If you have loaded multiple files and not elected to split them, a **Save** action in the *Page Assembly* screen will combine all the pages in all the files into one new file—a file merge function. You are presented with a Window dialog box to name the new file.

If you have elected to split a file or set of files based on barcodes, clicking a **Save Splits** in the *File Splitting* screen saves the files as instructed in the *File Name* field and *Locations* in the *File Naming Settings*.

To save your file or files from within the *Page Assembly* right panel, simply click the **Save** icon as appropriate and make your selections in the resulting *Save and Security* popup window and the Windows popup presented. Refer to [Naming Files and Folders with Barcodes](#) for more on automatically mining barcodes for naming purposes.

The following options are available on the *Save and Security* Screen that appears when you select a save action.

- **Save to PDF/A** (often used for archival file storage)
- **Save to Searchable PDF** (usually used to make an image-based file searchable through an OCR process).
- **Encrypt**. Selecting this checkbox to apply Security and Digital Rights to your document. An owner and user password will then be required.
 - **Disable Cut/Copy**
 - **Disable Print**
 - **Disable Modify**

Adding Digital Rights to PDF Output Files

Users have the option of protecting their output files by applying password security and other digital rights to the document. Digital Rights Management is applied to outbound PDF files to restrict how users access the documents. You can elect to disable printing, modification or text extraction through the cut/paste mechanism. To limit the permissions of the output PDF file, simply use the checkboxes on the bottom of the *Save and Security* screen.

To encrypt files with passwords, select the **Encrypt** checkbox. In addition to a password, you can also choose from any of the Digital Rights available.

Files that are saved to PDF/A are not eligible for encryption or DRM rights and will disable if the option is chose.

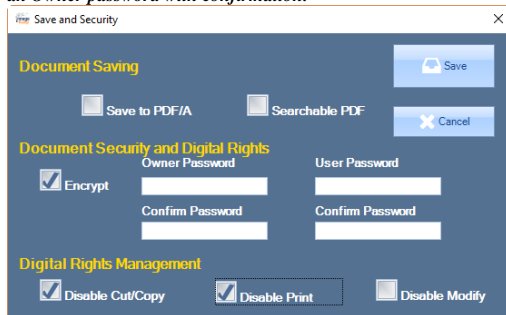
Illustration: The Save and Security popup offers settings to determine how the file should be saved.



Illustration: The Save with Encryption option displays input boxes for the user to create an owner password with confirmation.



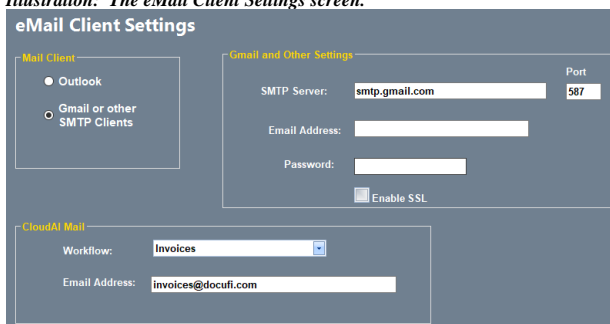
Illustration: Enabling any Digital Rights options will require a User password as well as an Owner password with confirmation.



Emailing Files and the Send Mail Window

With Composer, users select files or whole folders of files for easy page assembly and manipulation. Composer can be used to merge several files into one file or conversely, break a single file or set of files into multiple files based on barcodes. After you have performed these actions, you may choose to email the results. To begin emailing files, click on the *Settings* tab and then the **Email** icon to access the *eMail Client Settings*. On this screen designate what kind of *Mail Client* to use and enter the credentials necessary to access the client. These settings are necessary to allow you to email documents directly from Composer.

Illustration: The eMail Client Settings screen.



The **eMail Client Settings** window is divided into three main sections. The top-left section, titled **Mail Client**, contains two radio buttons: **Outlook** (selected) and **Gmail or other SMTP Clients**. The top-right section, titled **Gmail and Other Settings**, includes fields for **SMTP Server:** (smtp.gmail.com), **Port:** (587), **Email Address:**, and **Password:**, along with an **Enable SSL** checkbox. The bottom section, titled **CloudAI Mail**, features a **Workflow:** dropdown menu set to **Invoices** and an **Email Address:** field containing **invoices@docufi.com**.

Once the *Email* settings have been established, clicking on the **Email** icon in the *Page Assembly* panel to present the *Send Email* popup with similar options as *the Page Assembly's Save* icon presents. Check the desired checkboxes and click the **Send** button.

Illustration: The eMail Client Settings screen.



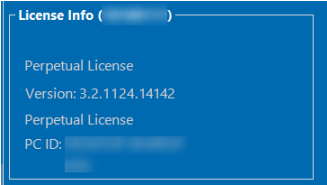
The **Send Mail** window is a modal dialog with a title bar. It contains a **Send** button with an envelope icon in the top right. Below this are two checkboxes: **Save to PDF/A** and **Searchable PDF**. A section titled **Document Security and Digital Rights** includes an **Encrypt** checkbox. Another section titled **Digital Rights Management** includes three checkboxes: **Disable Cut/Copy**, **Disable Print**, and **Disable Modify**.

About

Licensing and Version Information

Clicking the **About** icon from the *Home Dashboard* screen presents information about your license and product version information.

Illustration: The Composer licensing screen.

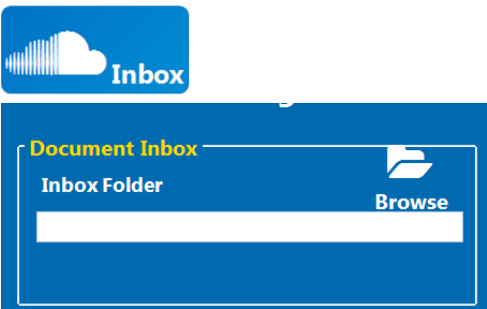


Clicking the **Renew License** icon in this panel allows you to delete your license key and enter a new license key.

Scanner Integration and Document Inbox

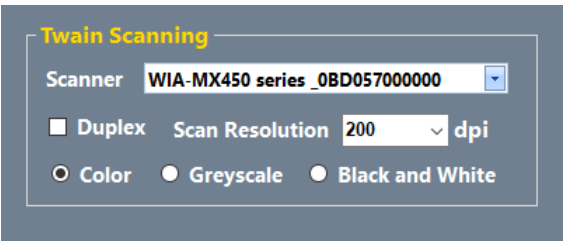
The *Inbox* tile in the *Home Dashboard* screen is directly linked to your *Inbox Folder*. This is accessed by selecting the *Settings* icon and then the *Input/Output* tab. This function is used to easily point to the folder where your scanned or working files are located.

Illustration: The Input/Output Settings defines a folder to browse when the Inbox tile is selected.



The *Page Assembly* and *File and Folder Renaming* screens provide the opportunity to directly control the scanner and capture documents via the named scanner. The settings to control the scanner are located in the *Input/Output Settings* Screen.

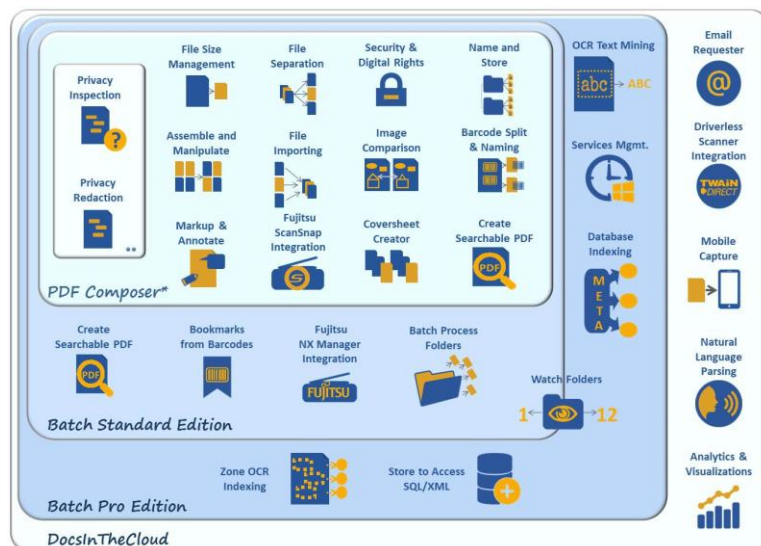
Illustration: The Input/Output Settings allow you to identify a connected scanner.



The ImageRamp Family

The ImageRamp family of document process automation tools help automate your document workflows with ease. Complex tasks are made simple to intuitively secure and accelerate your documents throughout your organization.

Illustration: The ImageRamp family of document capture and automated management products.



Composer

Easily import PDF, Image, and Word documents into an easy-to-use environment to securely annotate, redact, encrypt and assemble your documents. Composer's Privacy Inspector detects potential document content that may require privacy data redaction. File Naming and Separation based on barcodes adds additional automation of document tasks with the Pro edition. Seamlessly integrate with desktop scanning applications like Fujitsu ScanSnap Manager. Includes free image comparison tool.

Batch

ImageRamp Batch is a simple-to-use folder processing tool to automate your file naming and storage, indexing, and document capture into various EMR/EDR, document management or other secure storage environments. Whether you are extracting metadata for file naming, splitting or routing, ImageRamp Batch easily integrates this information into your environment. Use Batch with your existing MFP copiers, scanners, or even preexisting PDF files by assigning Profiles or tasks to specific folders for unattended document processing. With ImageRamp, work in a network or cloud environment. Process a folder of documents on demand or set them to be "watched" for automatic processing. ImageRamp Batch delivers stress-free document processing

automation. ImageRamp Batch adds intelligence and efficiency to maximize your investment in the scanning process.

Using the Scan Separator

The ImageRamp Scan Separator, is a free tool to create barcode separation sheets that can be used during batch processing to route, index, split and name your documents. Scan Separator is launched from the *Scan Separator* icon on your desktop or by accessing the .exe file which is normally placed in the *C:\Program Files (x86)\ImageRamp8* directory. Sample cover sheets are also provided in the *CoverSheets* subdirectory.

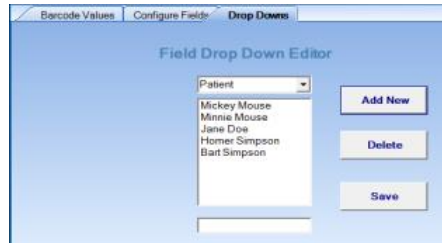
Setting up Scan Separator

To set up the application for the first time, just label the barcode fields and create drop-down values if desired in the **Configure Field** and **Drop Downs** tabs.

Step 1: Create the Barcode Labels



Step 2: Create Drop-Down Values



Creating Separation Sheet PDF Files

Now you can create your own separator sheets using the **Barcode Value** tab by typing the values or clicking on the down arrow to select from the pre-entered values. Click **Create** and your sheet is available as a PDF file to print and/or save.

Illustration: Entering desired information to create barcodes in the Barcode Value tab.

Illustration: The barcode results as entered in the example above

DocuFi Separation Page

Patient Medical Record



JOHN DOE



DONALD DUCK MEDICAL CENTER



111-22-3333



Saving Coversheets for Reuse

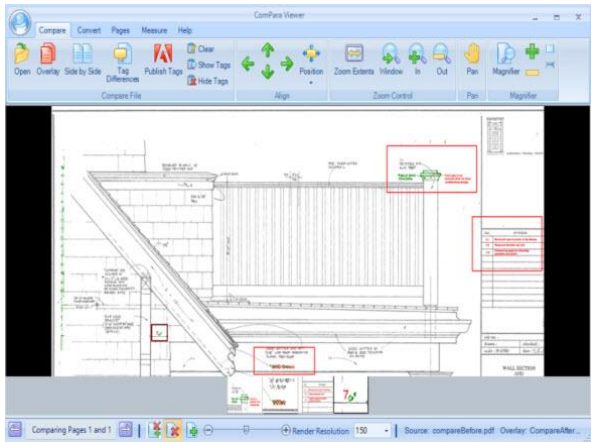
All pages created are saved using the first barcode value into the CoverSheets sub folder located within the installation folder.

ComPara Software

Simple Drawing Comparison

Simplify your image and drawing review and conversion needs with ComPara, a fast and efficient tool to compare and publish the differences in your multipage PDF and scanned TIFF image and drawing files. ComPara provides a tool to compare multipage drawing sets, identify or tag the differences, and publish them for easy communications with your teams and suppliers. Easily convert files to PDF, TIFF or JPG. ComPara is included at no charge with our ImageRamp PDF Composer tool. Visit [ComPara](#) for more information.

Illustration: Using ComPara to compare changes made to drawings.



Purchasing ImageRamp PDF Composer

DocuFi provides ordering by phone or e-mail.

Order by phone: 1-480-616-1190

Order by email: <mailto:sales@docufi.com>

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