

# Imaging for Windows®



## Getting Started Guide



Imaging for Windows®

## Getting Started Guide

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# About This Guide

This guide introduces eiStream Imaging for Windows<sup>®</sup> and shows you how to get started by performing some common tasks.

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## Purpose

This document is written for users of the Imaging for Windows application. It provides general information about imaging concepts, describes the features of Imaging for Windows, explains how to install the software, and shows you how to perform several imaging tasks.

This guide is not intended to provide instructions for any operating systems, programming languages, Web server, or database products. For information about these products, refer to the documentation provided with the product.

## Prerequisites

To use this product, you need to be familiar with the Microsoft® Windows environment. If you are using a printer, a scanner, or a TWAIN-compliant device, you should also know how to connect and operate it.

If you plan to access documents residing on a WMS Imaging Server (1.x) or in a WMS Imaging and Workflow (WMS) environment, you should be familiar with navigating document databases in those environments.

## Related Information

For information about the application and how to perform additional tasks, refer to the online help.

The Release Notes (Readme.txt) provide important information including last-minute changes to the documentation.

For updated product information and general information about Imaging for Windows, visit our Web site at:

[www.eiStream.com](http://www.eiStream.com)

Proceed to WMS|Kofile or eiStream WMS. Under products, select eiStream Imaging for Windows.

## Support

Should you have questions regarding Imaging for Windows, or problems with your system after installation, consult your customer support representative.

For technical support, visit our Web site at:

[www.eiStream.com](http://www.eiStream.com)

Proceed to WMS|Kofile or eiStream WMS. Under products, select eiStream Imaging for Windows, and then click the Support link.

The Support area includes technical bulletins, current documentation, and other relevant information. To request a patch, send an e-mail to Technical Support.



# Introducing Imaging for Windows®

This chapter discusses basic imaging concepts and describes the functions available with Imaging for Windows.

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## Basic Imaging Concepts

The following section discusses some basic concepts and terminology to help you better understand Imaging for Windows.

### What is Imaging?

Imaging can be described as using computer software to create, modify, and process electronic images. Typical imaging operations include:

- Scanning text, photographs, or drawings and saving the results in an image file.
- Displaying images using techniques such as thumbnail representations, magnification, rotation, and size to fit.
- Sending image documents by e-mail or fax.
- Adding annotations to images.
- Performing electronic “cleanup” of images to make them easier to view.

### Types of Images

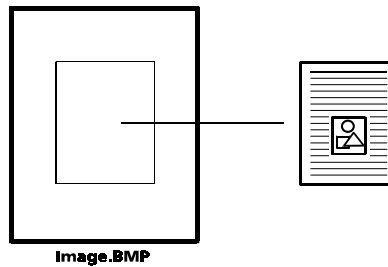
An image is an electronic representation of a text document, a photograph, a line drawing, or other graphical entity. You can create an image by scanning a printed page, a photograph, or drawing; by saving a fax; or by creating an image with a drawing or graphic-design program.

After a page of text is scanned and saved, it takes on the properties of an image file, and can no longer be opened with a word processor or text editor.

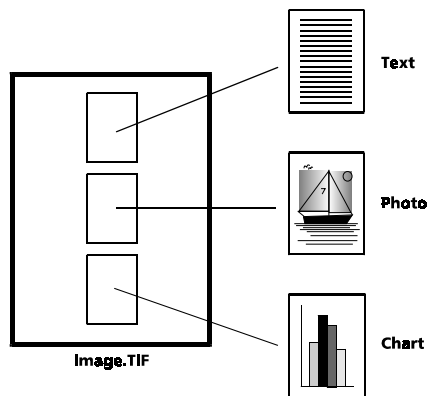
## Image File Formats

Images are saved as image files, which use file name extensions such as .tif, .bmp, and .jpg. The extension indicates the format used to store the image.

Some formats, such as BMP and JFIF (commonly referred to as JPG), contain just one image per file.



Other formats, such as TIFF, are similar to a book; they contain one or more pages, and each page holds a single image.

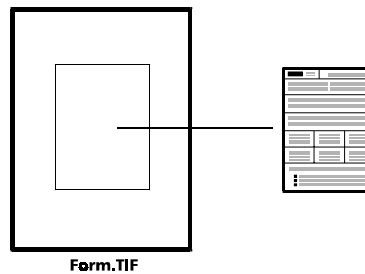


Because image files are standard Windows files, you can use Windows commands to perform operations such as:

- Organizing files into folders
- Attaching an image file to an e-mail message
- Copying, renaming, or deleting files
- Printing or faxing files

## Image Documents

An image document is a collection of one or more images that are logically related. A simple image document might be a blank form, scanned and saved in an image file format.



Another image document could be a collection of faxes, memos, and photographs that are scanned to a multi-page image file.

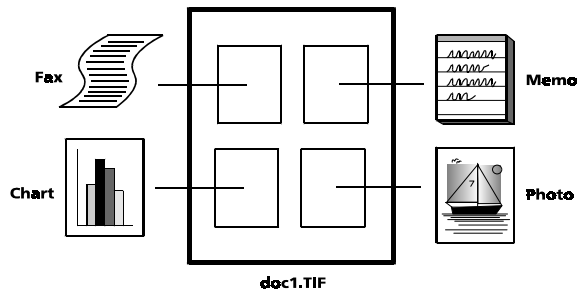
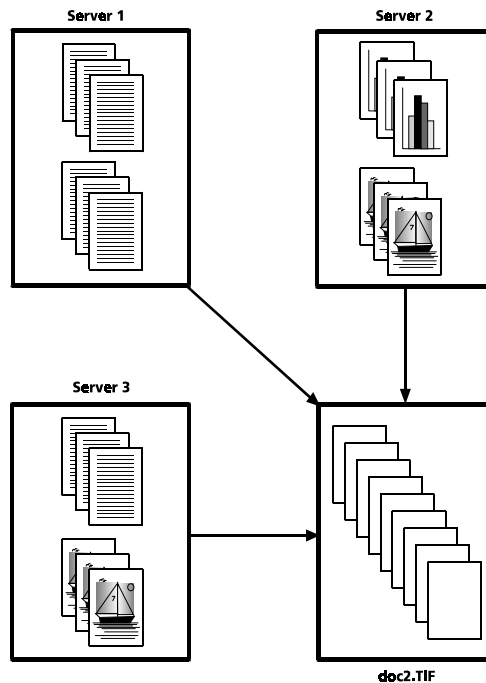


Image documents can also be found in WMS Imaging Server (1.x) and WMS Imaging and Workflow installations. In these environments, an image document can be a collection of images stored in different multi-page image files, and located on different servers. The links to different image files/servers and the mechanism for retrieving the images are invisible to the user, who sees only a single image document.



## Imaging for Windows

With Imaging for Windows, you can perform a variety of imaging operations by making selections from menus or by clicking on tool buttons.

Many options present dialog boxes. If you are not sure about which values or properties to set, accept the default values. These values were chosen to give satisfactory results in a variety of situations. As you experiment with the different options and property settings, you can create results that suit your preferences.



Developers can use Imaging's ActiveX controls and COM object to write custom applications.

Imaging for Windows consists of the Imaging application, the Preview applet, ActiveX controls, and a COM object. The Imaging application is described in the following section.

### Imaging Application



This section briefly describes what you can do with the Imaging application. For more detailed information, including how to perform specific tasks, refer to the on-line Help while you are using the application.

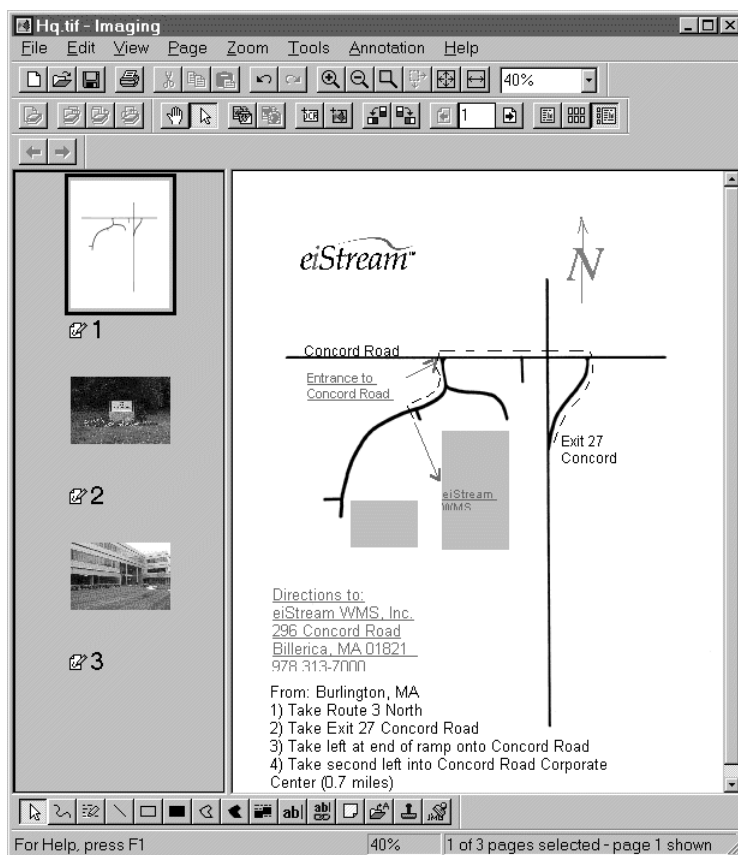
### Display Images

The Imaging application reads and displays the following types of image files:

Image File Type	Extension
TIFF files	.tif, .tiff, .jfx
Bitmap Image	.bmp
GIF file	.gif
Image Bookmark File	.ibk
JPG-JFIF file	.jpg, .jpe, .jpeg

Image File Type	Extension
PCX/DCX Document	.pcx, .dcx
WIFF Document	.wif
XIF Document	.xif

You can display a single image in the window, display thumbnail views of the images contained in a multi-page image document, or display an image page and thumbnails together.





You can save server documents to a local or redirected drive, in TIFF format.

## Imaging Server Documents

You can view documents residing on a WMS Imaging Server (1.x) or in a WMS Imaging and Workflow environment. To do so, you must configure server access during installation. Dialog boxes help you navigate between servers and databases, and provide various search options to find documents.

## Convert Image Files

Using Imaging for Windows, you can save a displayed image in one of the following formats:

- TIFF
- BMP
- JPG-JFIF

In some cases, converting from one image format to another causes the original image to permanently lose certain attributes. For example, saving an LZW compressed image in a JPG-JFIF file subjects it to JPEG compression, which may degrade the image quality.

## Change Image Display

You can change the image display by zooming to increase or decrease the size of the image, by sizing the image for best fit, or sizing it to fit the height or width of a window. You can also rotate an image left, right, or 180 degrees. Rotating an image is useful if you scanned landscape images using a scanner's sheet feeder, or if you fed a stack of documents into the scanner's document feeder backwards (180 degrees from the desired orientation).

Thumbnail images can be made larger to display more detail, or smaller to fit more of them in the window. You can also drag and drop thumbnails to change the order of pages in the image document.



For best results, save scanned documents in TIFF format.

## Scan Images

You can create image documents by scanning forms, memos, pictures, or other paper documents to an image file.

Imaging for Windows supports TWAIN-compatible devices such as scanners and digital cameras.

## Annotate Images

You can add a variety of markups to an image by using annotation features, and save the annotations with the image. Some types of annotations are:

- Freehand or straight-line markings
- Highlighter
- Hollow and filled rectangles
- Hollow, filled, and auto polygons
- Attach-a-note text
- Text or Text from a file
- Image to text (OCR)
- Customizable rubber stamps such as “Received” or an image such as your company logo
- Hyperlinks
- Initials

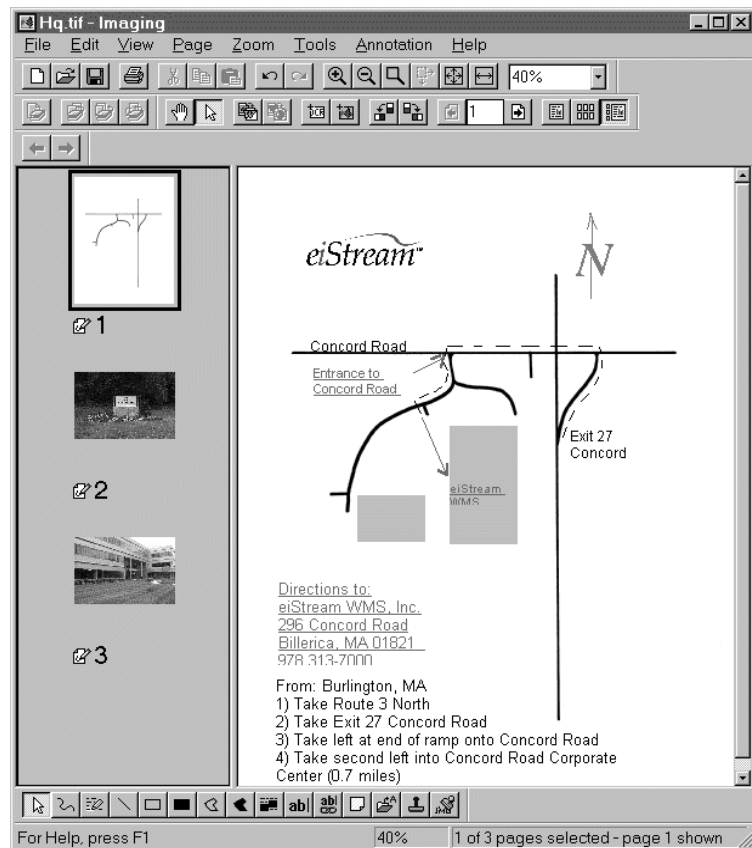
Several of these annotations have properties that you can set, such as color, line width, and font.

A hyperlink is a special type of annotation that you can link to a file, a URL (Uniform Resource Locator) on the World Wide Web, or to a page in an image document.

The document `Hq.tif` is included in the `Samples` folder of this product. This example of an annotated document page includes hyperlinks to other pages within the document. Click on text within the rectangles drawn on the map to jump to the photographs on pages 2 and 3 of the document. Click on the designated area of the street address on the map to jump to the eiStream home page on the World Wide Web.

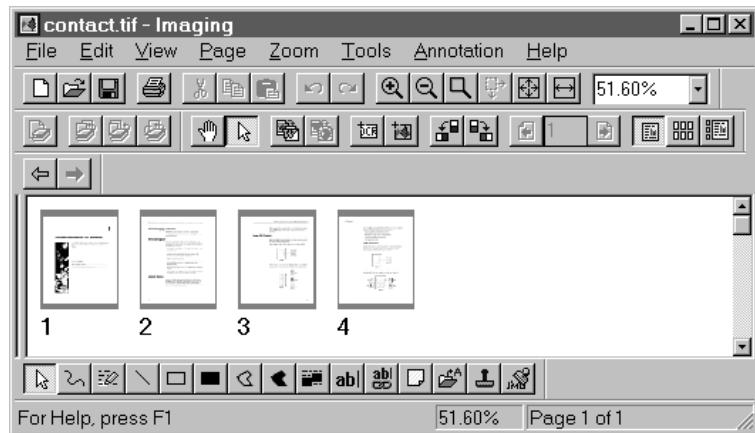


When the annotation icon appears next to a thumbnail's page number, it means the page contains one or more annotations.



## Create a Contact Sheet

You can create a contact sheet that contains a thumbnail rendition of each page of an image document, similar to a photographic contact sheet that displays images of each negative on a roll of film. Before you create the contact sheet, you can globally set the thumbnail size — larger to display more detail, or smaller, to fit more thumbnails onto the contact sheet. Each thumbnail contains a hyperlink to its source file and page.



## Image Processing

During scanning and faxing, documents can pick up small speckles of dust that degrade the image. The Remove Speckles option electronically processes the document to remove these.

Using the Straighten Page option, you can straighten an image that is crooked in relation to the background page. After you draw a reference line on the displayed document, the application rotates the image to the correct orientation.

You can specify a portion of the image to crop or let the program automatically crop the edges of a displayed image for you.

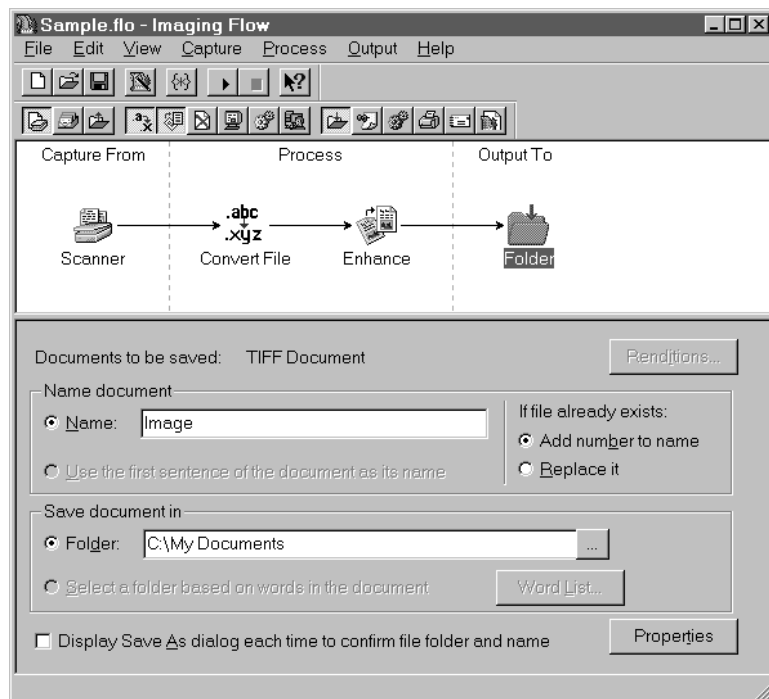
## Flow



Flow is a component of Imaging for Windows. It is designed to automatically capture, process, and output information while you perform other tasks.

A flow is a set of directions for processing images. You create a flow interactively, adding tools to the flow one at a time. When you add a tool, you can define settings and choose options for it. When you finish building a flow, you save it as a file with a `.flo` extension.

You can run the same `.flo` file repeatedly, for predictable results, or modify it with the Flow Editor. You can also save a flow to run on another PC with Imaging for Windows installed.



## Capture

Flow's tools can capture:

- Images scanned to your system — you can select the type of document to scan, or you can define scanner parameters such as resolution, paper size, and color.
- Fax messages received via a MAPI (Microsoft's Message Application Program Interface) inbox — you define which faxes to process, and specify what to do with the fax after it is read.
- Image files from folders on local or redirected drives — Flow captures new documents that appear in designated folders. This is useful if you have a fax application that places incoming faxes into a particular folder, or if you are using WMS Imaging Scan Station to create documents in a designated folder.

## Process

Flow tools can perform various processes on your captured documents:

- Convert images to TIFF, BMP, or JPG-JFIF (\*.jpg) file formats
- Apply compression to image files
- Invoke a user-defined program
- Perform image enhancement such as Despeckle, Straighten Page, Crop, Rotate, and Invert
- Delete pages from a document
- Display the image, image thumbnails, or both
- Prompt a user for input
- Convert images to text (OCR)

You can define or modify settings and options for these processes when you click on a tool in the Flow interface.

## Output

You can define or modify settings and options for each output tool when you click on the tool in the Flow interface. Flow's output tools let you send documents to several destinations:

- A specified folder name and location
- An outbound fax or e-mail, using a MAPI-compliant mailbox
- WMS Imaging (1.x) or WMS Imaging and Workflow (WMS) servers
- Microsoft Exchange folders
- A printer

You can also open a predefined application, or invoke another flow as an output task.

Flow routes your documents to a location you specify. Optionally, you can have Flow automatically route your documents to a destination, based on words found in the document. To use this feature, you must first create a word list that associates certain words with folders, locations, or recipients, depending on the output tool you are using.

**Note:** The automatic routing feature is not available for the Run Program or Printer output tools.

# Installing the Software

This chapter specifies system requirements and describes how to install and remove Imaging for Windows®.

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## System Requirements

Before you install Imaging for Windows, check to see if your system configuration and software meet the following requirements.

### Hardware

- Personal Computer based on an Intel Pentium® or equivalent processor, 166 Mhz or faster
- 32 MB of RAM or more for Windows 98  
64 MB or more for Windows XP, Windows 2000 and Windows NT 4.0
- A minimum of 30 MB of hard disk space above what is required by the operating system that Imaging for Windows is being installed on
- VGA or SVGA monitor
- VGA controller with 1 MB or more of memory
- CD ROM drive (to install the software)
- TWAIN-compliant device (optional)
- Fax/modem card (optional)

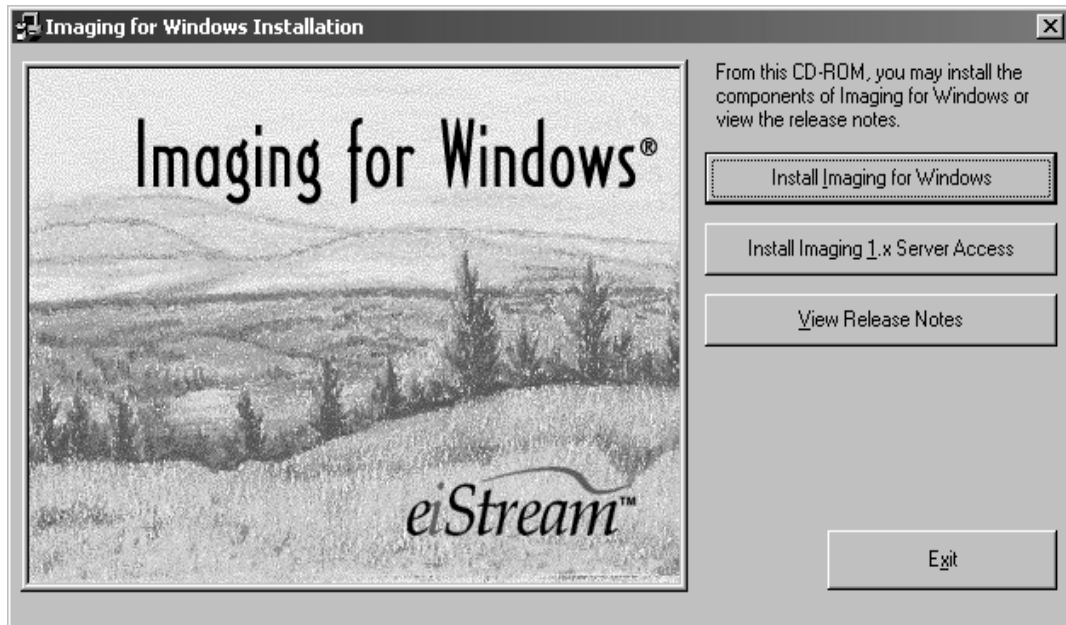
### Software

- Microsoft Windows XP  
*Or:*
- Microsoft Windows 2000  
*Or:*
- Microsoft Windows NT 4.0 (with Service Pack 6a or greater)  
*Or:*
- Microsoft Windows 98 Second Edition

## Installation Overview

When you insert the Installation CD into your computer's CD-ROM drive, the installation program starts automatically and displays the Imaging for Windows Installation window.

**Note:** If the installation program does not start automatically, click the Start button and then click Run. On the Run dialog box, enter the drive letter of your CD-ROM drive, a colon and backslash, and then `install.exe`. For example, if your CD-ROM drive letter is E, enter `E:\install.exe`.



You can select from the following options:

**Install Imaging for Windows** — Installs Imaging for Windows. Refer to the section “Installing Imaging for Windows” for instructions.

**Install Imaging 1.x Server Access**— Installs the components required to access documents residing on a WMS Imaging Server (1.x). Refer to the section “Installing Imaging 1.x Server Access” for instructions.

**View Release Notes** — Opens the `Readme.txt` file, which contains the latest information about Imaging for Windows. It is important that you read this file before you install the software.

After you select an installation option, and the software has been copied to your system, the Imaging for Windows Installation screen reappears. You can select another option or exit the installation program.

## Installing Imaging for Windows

This section describes how to install Imaging for Windows. If you are installing this application under Windows XP, Windows 2000 or Windows NT, you must be logged on as an administrator.

**Note:** If you install a later version of your operating system, you must reinstall Imaging for Windows.

- 1 Click **Install Imaging for Windows**. After a brief initialization, the Welcome screen appears.
- 2 Click **Next**. The Software License Agreement screen appears.
- 3 Read the license agreement. If you agree to the terms, click **Yes** to continue. The Choose Destination Location dialog box appears. Otherwise, click **No** to exit the installation procedure.
- 4 In the Choose Destination Location dialog box, accept the default location displayed under Destination Folder and click **Next**.

*Or:*

Click **Browse** to display the Choose Folder dialog box. Select a folder from the list or type in a new name and then click **OK**. Alternatively, click **Network** in the Choose Folder dialog box to display a list of shared network folders. Select a folder and then click **OK**.

If you typed the name of a folder that does not exist, a confirmation dialog box appears. Click **Yes** to create the folder.

The Select Program Folder dialog box appears.

- 5 Designate a folder where the program icons will be installed. Accept the default name (Imaging) or enter the name of a different folder.
- 6 Click **Next**. The setup program begins copying files to your system while a message box displays the progress.  
The Setup Complete dialog box appears.
- 7 Click **Finish** to complete the installation and return to the Imaging for Windows Installation screen.

## Installing Imaging 1.x Server Access

This section describes how to configure access to WMS Imaging Server (1.x). Before you continue, obtain the IP address and port number of your image domain name server.

- 1 From the Imaging for Windows Installation screen, click **Install Imaging 1.x Server Access**. After a brief initialization, the Welcome screen appears.
- 2 Click **Next**. The Imaging 1.x Server Configuration dialog box appears.
- 3 Type the IP address and port number of the image domain name server. Use the format:  
`nnn.nnn.nnn.nnn/pppp`  
where `nnn` represents numbers in the IP address of the server and `pppp` is the port number (default is 4010).
- 4 Click **Next**. After the software is copied to your system, the Setup Complete dialog box appears.
- 5 Click **Finish**. The Imaging for Windows Installation screen reappears.

**Note:** If you cannot see any image databases when you search for documents on WMS Imaging Server (1.x), check to see if your configuration information is correct. Then, verify that a server volume configuration file resides on your Imaging server, and that it contains the correct entries. The name of this file is typically `oix.vols` for UNIX installations, and `vols.dat` for NT installations.

## Uninstalling Imaging Components

You can remove most components of Imaging for Windows in the same manner as you remove other applications. In Windows XP, Windows 2000 and Windows NT 4.0 environments, you must log on as an administrator to uninstall the software.

- 1 Open the Windows Control Panel by clicking on the **Start** button, and then pointing to Settings, Control Panel.
- 2 Double-click the Add/Remove Programs icon. The Add/Remove Programs Properties dialog box appears.
- 3 Click on the Install/Uninstall tab in Windows NT 4.0 or Windows 98 to display a list of currently installed software.
- 4 Select the Imaging component you want to remove.
  - Imaging for Windows — removes Imaging for Windows. If you remove this component, Imaging Server Access will not work.
  - Imaging for Windows Server Access — removes Imaging Server Access.
- 5 Click **Add/Remove** in Windows NT 4.0 or Windows 98, or **Change/Remove** in Windows 2000 or Windows XP. The Confirm File Deletion dialog box appears.
- 6 Click **Yes** to confirm that you want to remove the program.

**Note:** On Windows 2000 systems, the uninstall program will attempt to reinstall the version of Imaging for Windows that came with the operating system. You may see the prompt asking for the location of the software. Mount your Windows 2000 CD to continue the installation, or press Cancel to terminate the process. If you terminate the installation, you may be left without an image viewer.



# Using the Imaging Application

This chapter guides you through some basic operations with the Imaging application. For additional information, refer to the on-line Help.

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## Before You Begin



Before you perform the following exercises, start Imaging for Windows:

- Click the **Start** button, and then point to Programs, Imaging, and Imaging.

Although some operations can modify the sample image files installed with this program, the original versions of these files are available on your installation CD.

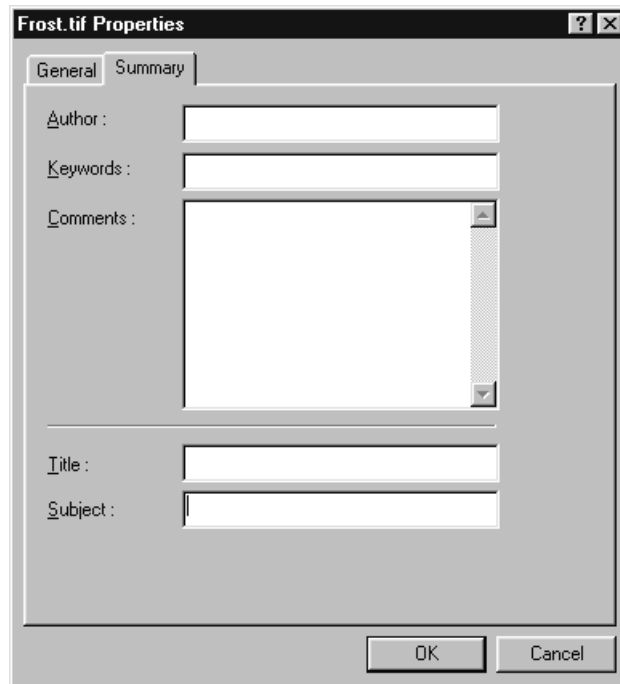
## Finding an Image Document

You can assign properties — such as Author, Keywords, Comments, Title, and Subject — to image documents in TIFF format. When you want to find documents on local or redirected drives, specify one or more of these properties as search criteria. For information about finding documents on Imaging servers, refer to Chapter 4.

## Setting Properties

Perform the following steps to assign a property to an image document.

- 1 On the File menu, click Open.
- 2 Navigate to the folder where you installed Imaging for Windows. The default location is:  
C:\Program Files\Imaging
- 3 Open the Samples folder.
- 4 Select the document `Frost.tif` and then click **Open**.
- 5 On the File menu, click Properties. A tabbed dialog box appears.
- 6 Click the Summary tab. The Property fields are displayed (they should be blank).



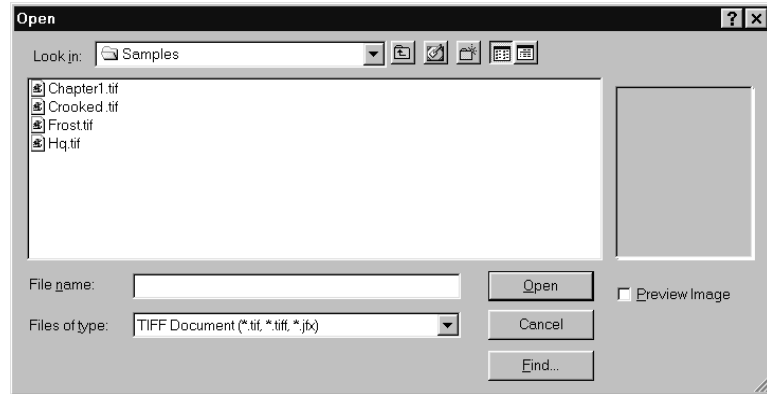
This is where you type property values for your image documents. You may wish to standardize the values you enter so that your documents are organized in a more useful way. For example, descriptive Keyword entries could be “Invoices”, “Deposits”, “Inventory”, and so on. For this exercise, you will type an arbitrary value just to see how the procedure works.

- 7 In the Subject field, type **Sample image** and then click **OK**. (These fields are not case sensitive; be sure to include the space between the two words, however.)
- 8 On the File menu, click **Save** to add the property value to the document.
- 9 On the File menu, click **Close** to close the document.

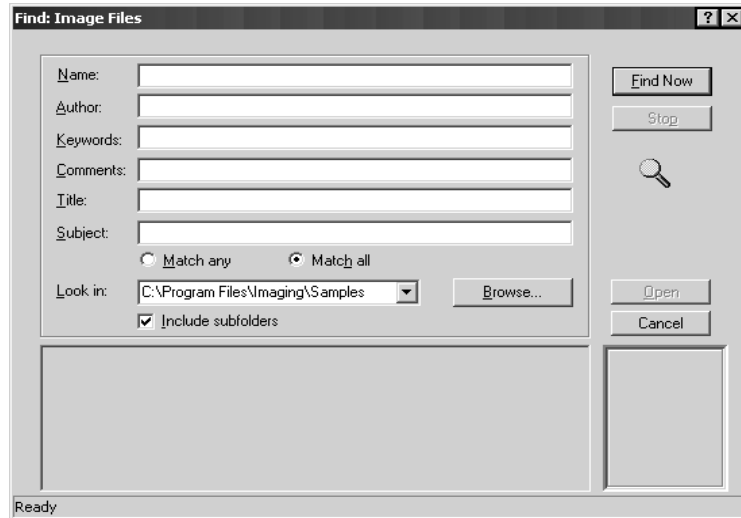
## Finding Specified Properties

The following steps describe how to find image documents that have the property value you specified.

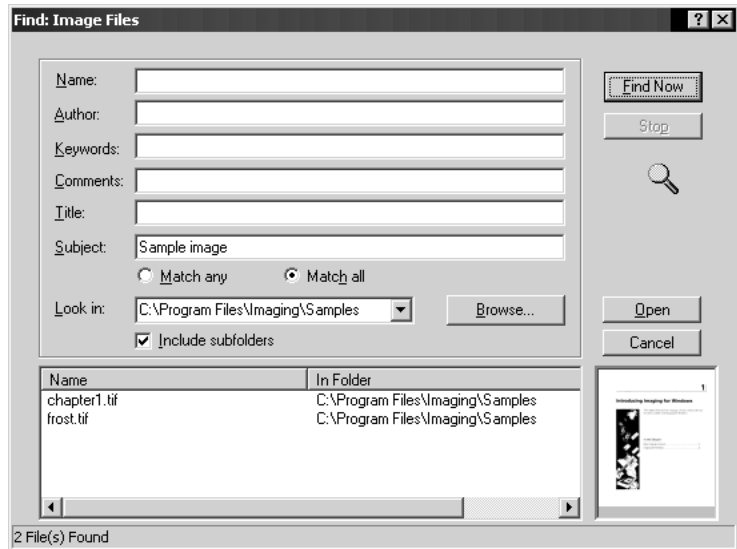
- 1 On the File menu, click Open. The Open dialog box appears.



- 2 Click the **Find** button. The Find: Image Files dialog box appears.



- 3 In the Subject field, type **Sample image**.
- 4 Type the path to your Imaging folder, and select the Include subfolders box.
- 5 Click **Find Now**. The lower pane of the dialog box displays the names of documents with the Subject property value “Sample image.”



Notice that two documents met the search criteria — the document whose Subject property you set, and another sample document.

## Displaying an Image Document

This section describes how to open an image document, change the display attributes, display and resize thumbnails, and create a contact sheet.

### Opening the Document

- 1 On the File menu, click Open. The Open dialog box appears.
- 2 Navigate to the folder where you installed Imaging for Windows. The default location is:  
C:\Program Files\Imaging
- 3 Open the Samples folder.
- 4 Select Chapter1.tif and then click **Open**. The image of a text document appears.

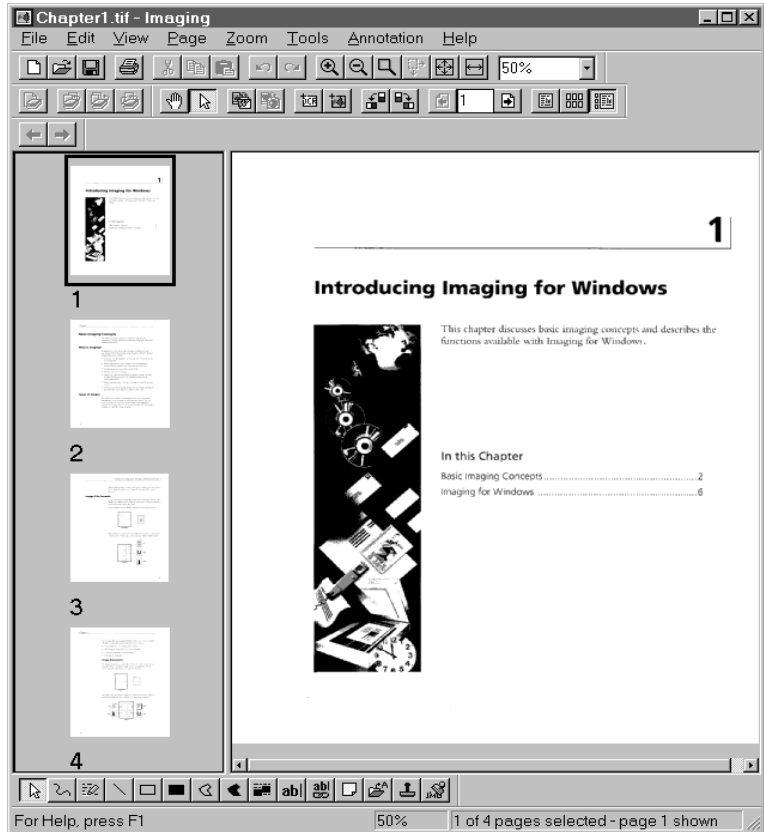
### Changing the Display



On the Tools menu, click Magnifier if you want to enlarge only a portion of the document page.

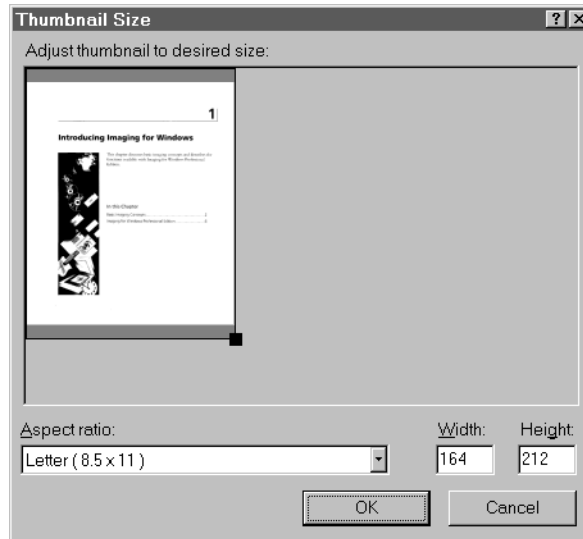
- 1 Change the size of the display window in the vertical and horizontal directions to suit your preference.
- 2 On the Zoom menu, choose different options to resize the document to fit in the display window. When you change the size of the document, its height to width ratio is maintained.
  - a Click Fit to Height to view the full height of the document page.
  - b Click Fit to Width to display the full width of the page.
  - c Click Best Fit. This is often the optimum setting because it displays the entire image in the window.
  - d Click Pixel to Pixel. If the entire page does not fit into the display window, scroll bars appear along the right side and/or bottom.
- 3 On the View menu, click Page and Thumbnails. Thumbnails of pages in the document are displayed in a window next to the page view. The selected thumbnail has a border around it.

- 4 Position the pointer over the splitter bar separating the Thumbnail and Page windows and picture. When the pointer changes shape, hold down the left mouse button and then drag the bar left or right to resize each window.




## Displaying and Changing Thumbnails

- 1 On the View menu, click Thumbnails. Only the thumbnails are displayed.
- 2 On the Tools menu, click Options, Thumbnail Size. The Thumbnail Size dialog box appears.



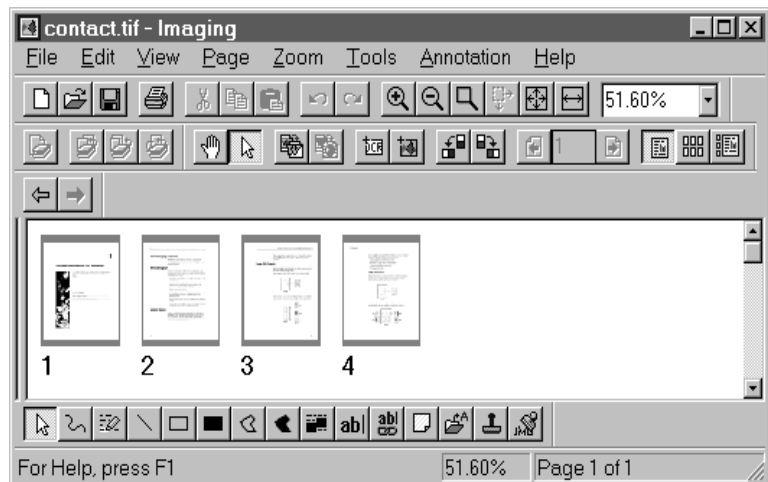
- 3 Place the pointer over the handle in the lower right corner of the thumbnail, hold down the left mouse button, and then drag the handle diagonally to increase or decrease the size of the thumbnail.
- 4 Click **OK** to apply the new size to the displayed thumbnails.

## Creating a Contact Sheet

- 1 On the File menu, click Open. The Open dialog box appears.
- 2 Navigate to the folder where you installed Imaging for Windows. The default location is:  
C:\Program Files\Imaging
- 3 Open the Samples folder.
- 4 Select Chapter1.tif and then click **Open**. The image of a text document appears.
- 5 On the Tools menu, click Create Contact Sheet. The Create Contact Sheet dialog box appears.
- 6 Type a filename (**contact**) and location (**Samples** folder) to create the file, and then click **Save**.
- 7 On the File menu, click Open, and then double-click on contact.tif to view the file you created. Click on a thumbnail to view the original page.
- 8 Click the Back button  to return to the contact sheet.



You can choose to have your contact sheet automatically open after you create it. On the Tools menu, click Options, and then Contact Sheet. On the dialog box, select the *Open contact sheet after saving* box.



## Annotating a Document

This section describes how to add annotations to a document, change annotation properties, and save the annotated document.

### Applying a Rubber Stamp

- 1 On the File menu, click Open.
- 2 Navigate to the folder where you installed Imaging for Windows. The default location is:  
C:\Program Files\Imaging
- 3 Click the Samples folder.
- 4 Select the image document *Frost.tif* and then click **Open**.  
The image document appears.
- 5 On the Annotation menu, click Rubber Stamps. The Rubber Stamp Properties dialog box appears.



Instead of selecting from the menu, you can click on a tool in the Annotation toolbar.



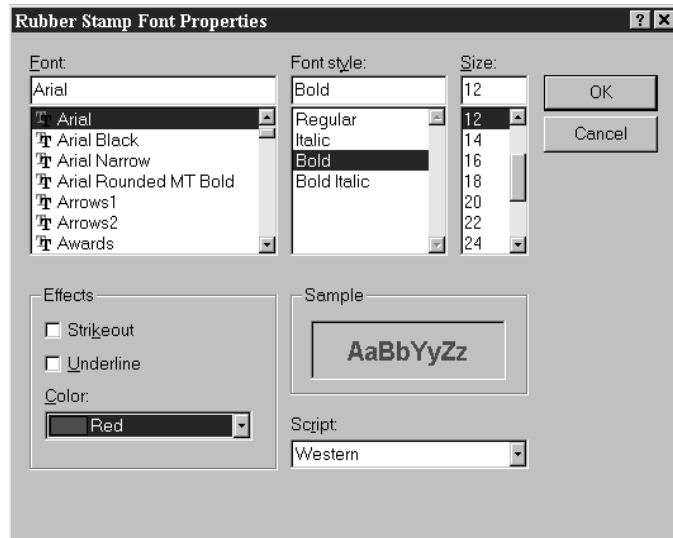
Rubber Stamp



- 6 In the Stamps list, click Received, and then click the **Edit** button. The Edit Text Rubber Stamp Properties dialog box appears.



- 7 Click the **Font** button. The Rubber Stamp Font Properties dialog box appears.



- 8 In the Color list, click Red and then click **OK** three times to close each dialog box. The pointer changes to a rubber stamp icon.

- 9 Position the rubber stamp at the top of the document, and then press the left mouse button once. The stamp annotation is applied to the document. You can move the stamp by placing the pointer inside the dotted outline, holding down the left mouse button, and dragging the stamp to a different location.
- 10 Click outside of the dotted outline to anchor the stamp.

## Adding a Highlight



Highlighter

Keep the document `Frost.tif` open to apply a highlight annotation.

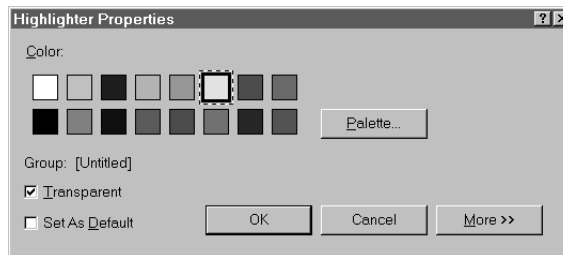
- 1 On the Annotation menu, click Highlighter. The pointer changes to a marker and crosshair.
- 2 Position the crosshair slightly above and to the left of a paragraph you want to highlight. Hold the left mouse button down and drag the pointer across and down to the end of the paragraph. Release the button to apply the highlight.

## Changing Highlight Properties



To change the default properties for an annotation, right click on the tool in the Annotation toolbar or check the Set As Default pick in the Annotation Properties dialog box.

- 1 Place the pointer on the highlight and press the right mouse button. The shortcut menu appears.
- 2 Click Properties. The Highlighter Properties dialog box appears.



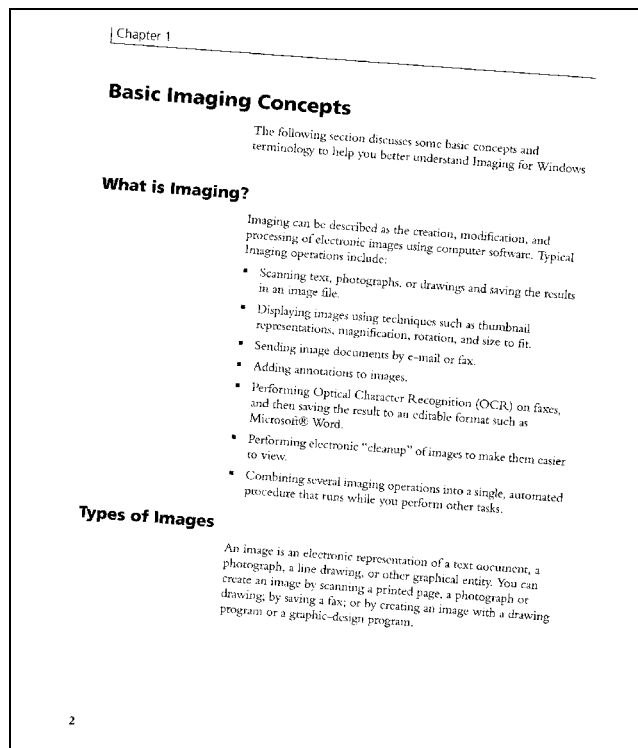
- 3 Choose a color, such as light blue, that allows the text to show through. Click **OK** to apply the new color.

## Enhancing a Document

This section shows how to enhance a document page by despeckling and straightening it.

### Removing Speckles From a Document

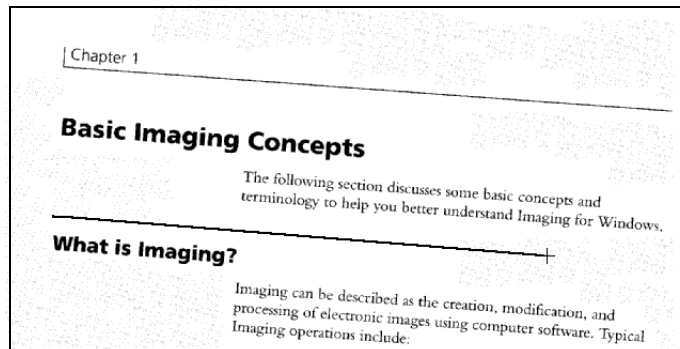
- 1 On the File menu, click Open.
- 2 Navigate to the folder where you installed Imaging for Windows (C:\Program Files\Imaging) and then click the Samples folder.
- 3 Select the document Crooked.tif and then click **Open**. The image document appears.



- 4 On the Zoom menu, click Best Fit.
  - 5 On the Tools menu, click Remove Speckles. The application removes small speckles introduced during the scanning or faxing process.
- Keep this document open to perform the next task.

## Straightening the Page

- 1 On the Tools menu, click Straighten Page. The Straighten Page dialog box appears.
- 2 Move the dialog box to the side or bottom of the page, so you can draw a reference line in the top portion of the page.
- 3 Create a reference line that is slanted in exactly the same way as the text. To do so, position the pointer between two lines of text and press the left mouse button. While holding the button down, drag the pointer to the right, parallel to the text above and below the line. Release the mouse button when the reference line you have drawn is positioned correctly. Refer to the following screen shot.



- 4 Click **OK** in the Straighten Page dialog box. The page rotates until the reference line you drew is parallel with the top and bottom edges of the window.

# Finding Imaging Server Documents

This chapter describes how to find documents residing on WMS Imaging Server (1.x) or a WMS Imaging and Workflow server.

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## Finding Server Documents



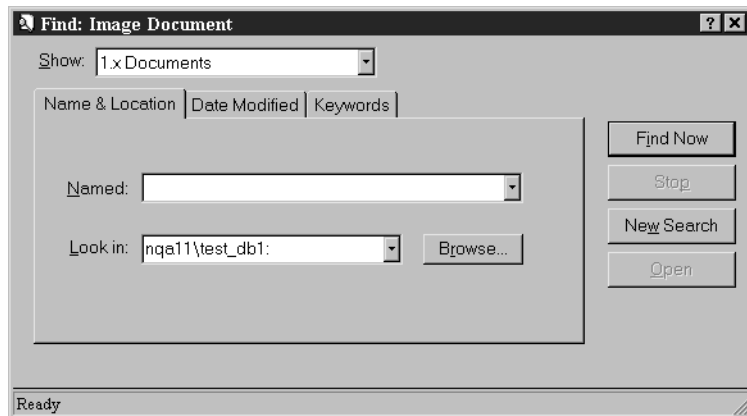
Before you begin your document search, start Imaging for Windows:

- Click the **Start** button, and then point to Programs, Imaging, and Imaging.

Perform the following steps to access a document residing on a WMS Imaging Server (1.x) or in a WMS Imaging and Workflow environment.

- 1 On the File menu, click Find Imaging Server Documents. The Find dialog box appears.

**Note:** Depending on your configuration, you may already be logged on to a server, or will be prompted to do so before proceeding with a search.



- 2 From the Show list box, select either 1.x Documents or WMS Imaging Documents.

**Note:** The tabs displayed in the Find Image Document dialog box are different for 1.x Documents and WMS Imaging Documents.

- 3 Refer to the sections *1.x Documents* or *WMS Imaging Documents*, depending on the type of document you chose.

## 1.x Documents

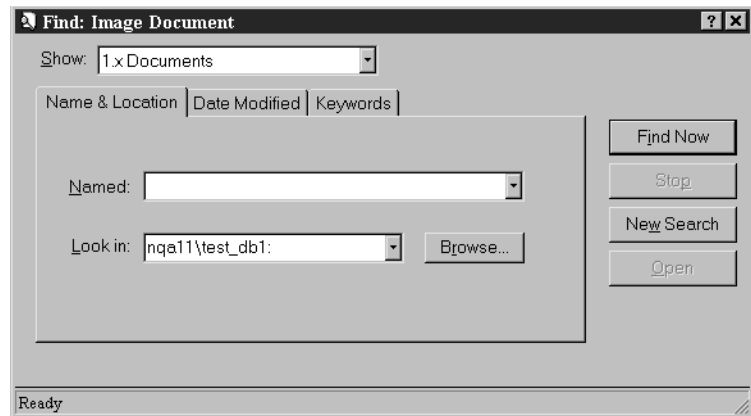


You can browse for 1.x Documents.  
On the File menu, click Open. In the Look for list, click 1.x Files and Documents.

You can search for 1.x Documents by using the options provided on the Name & Location, Date Modified, and Keywords tabs. The following procedures describe how to use these options.

### Name and Location Tab

This tab contains server and database information.



Use wildcard characters to identify a range of documents, or when you cannot remember the exact document name.

- An asterisk (\*) represents a group of characters.
- A question mark (?) represents one character in a specified position.

- 1 In the Named text box, type a full or partial document name. Use wildcard characters if you wish.  
*Or:*  
Leave the text box blank to retrieve all documents.

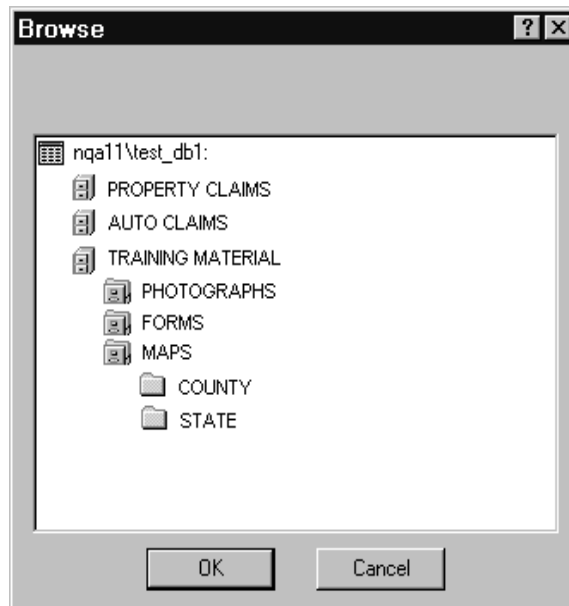
- 2 From the Look in list, select a database.

Or:

Type a database name string. The string must include the name of the server and the database (refer to sample entry in the Find: Image dialog box).

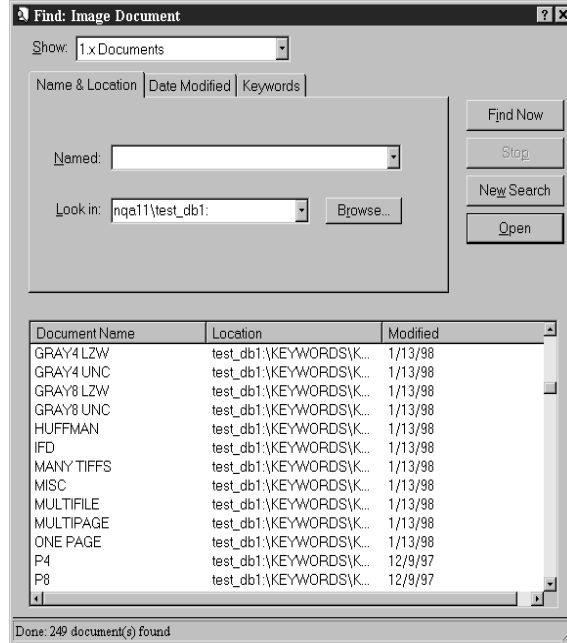
Or:

Click **Browse** to open the Browse dialog box, and then navigate to a database.



If the search is taking too long, click Stop to end the operation. The documents found up to this point are displayed.

- 3 Click **Find Now** to initiate the search. A list of documents matching your search criteria is displayed in the lower portion of the Find Image Document dialog box.

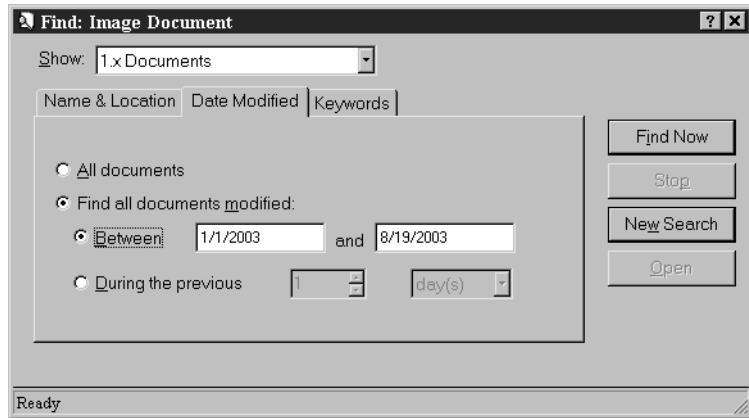


To sort a column of data in ascending or descending order, alternately click on the column heading.

**Note:** Although your search returns a list of all documents that meet the specified criteria, you cannot open them unless you have access rights.

## Date Modified Tab

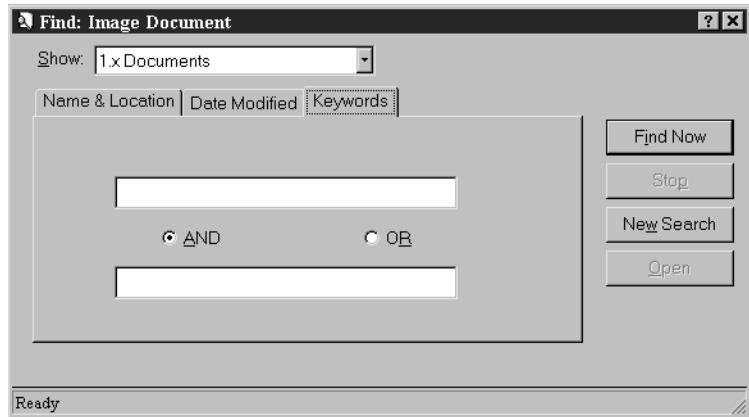
This tab enables you to specify date modified criteria for your document search.



- 1 Click All Documents and then click **Find Now**.  
Or:  
Click Find All Documents Modified and then follow the remaining steps.
- 2 Click Between, and then specify a range of dates in which a document was modified.  
Or:  
Click During the Previous, and specify the number of days or months to search back.
- 3 Click **Find Now** to initiate the search. A list of documents matching your search criteria is returned.

## Keywords Tab

This tab enables you to search for documents using keywords that were previously associated with the document.



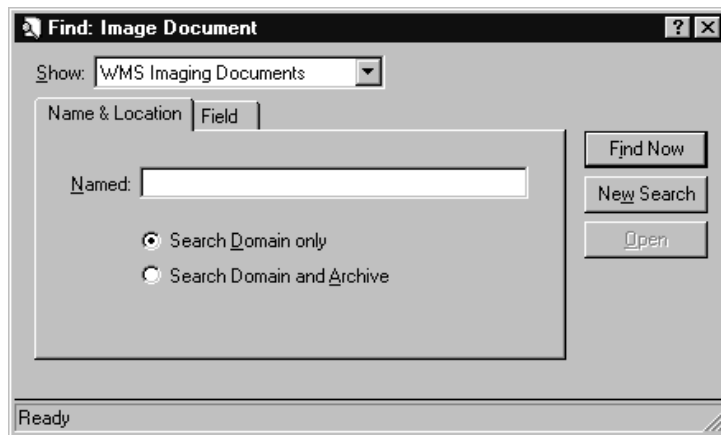
- 1 Type a single keyword into either text box. You can use wildcard characters if you wish.  
Or:  
Type a single keyword into each text box and then choose AND or OR.
  - AND returns documents with *both* specified keywords.
  - OR returns documents with *either* specified keyword.
- 2 Click **Find Now** to initiate the search. A list of documents matching your search criteria is returned.

## WMS Imaging Documents

You can search for WMS Imaging Documents using options provided on the Name & Location and Field tabs. The following procedures describe how to use these options.

### Name and Location Tab

This tab contains a text box for document name and options to specify where to search.



Use the percent (%) wildcard character to represent an unspecified group of characters, and the underscore ( \_ ) to replace one character in a specified position.

- 1 In the Named text box, type a full or partial document name. Use wildcard characters if you wish.  
*Or:*  
Leave the text box blank to retrieve all documents.
- 2 Select either option:
  - Search Domain Only
  - Search Domain and Archive
- 3 Click **Find Now** to initiate the search. A list of documents matching your search criteria is returned.

## Field Tab

This tab enables you to search by specifying Class and Index field values.

**Find: Image Document**

Show: WMS Imaging Documents

Name & Location | **Field**

Class: INVOICE2

Index Field	Field Value
ID_CODE	
INVOICE_NO	
TERMS	

Find Now  
New Search  
Open

Ready

- 1 In the Class list box, select the class of documents you wish to search.

Or:

Select All Classes.

- 2 In the Field Value field, adjacent to an entry in the Index Field, type a value. You can specify a complete value or a partial value combined with wildcard values (% or \_).
- 3 Click **Find Now** to initiate the search. A list of documents matching your search criteria is returned.



To sort a column of data in ascending or descending order, alternately click on the column heading.



## Creating a Flow

You can create a flow by using the Flow Wizard or the Flow Editor. This chapter walks you through each method. For more information about running a flow, performing Flow tasks, choosing options, and setting properties, refer to the online Help.

### In this Chapter

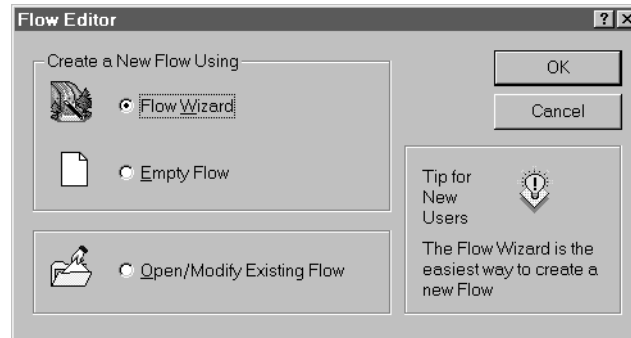
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## Before You Begin



Before you perform the following exercises, start Flow:

- Click the **Start** button, and then point to Programs, Imaging, and Flow. The Flow Editor dialog box appears.

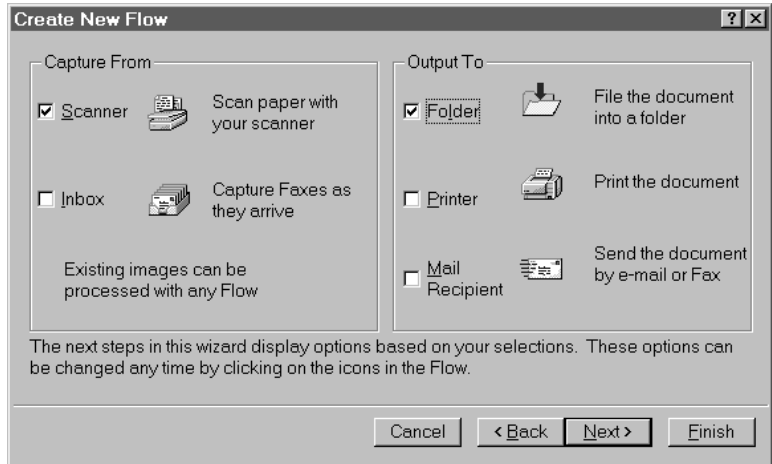


## Using the Flow Wizard

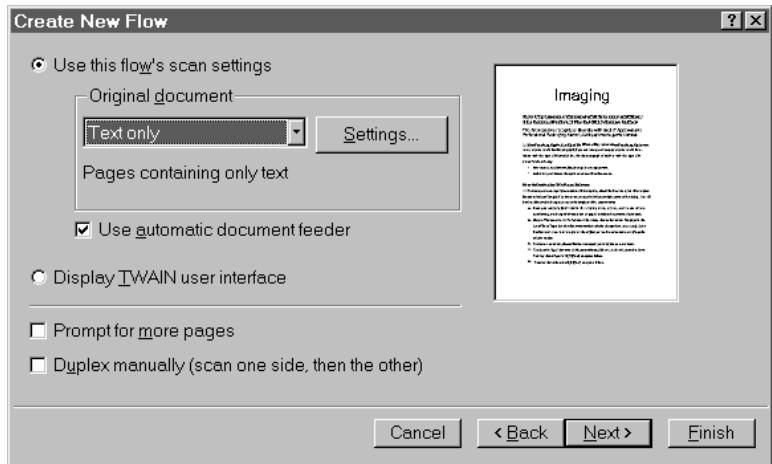
The easiest way to create a flow is by using the Flow Wizard. After you provide some basic information in a few dialog boxes, the Wizard adds one or more process options, provides default values, and creates a flow.

The following procedure describes how to create a flow that scans and processes a document, and then saves it to a folder.

- 1 In the Flow Editor dialog box, click Flow Wizard and then click **OK**. The Create New Flow dialog box appears and describes what you can do with the Flow Wizard.
- 2 Click **Next** to continue. The Create New Flow dialog box displays Capture From and Output To options.

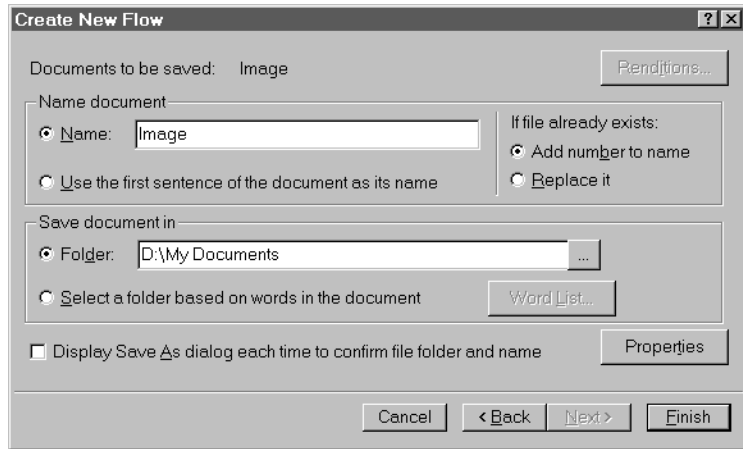


3 Under Capture From, click Scanner; under Output To, click Folder. Click **Next** to proceed. The Create New Flow dialog box now displays Scan Settings and Options.



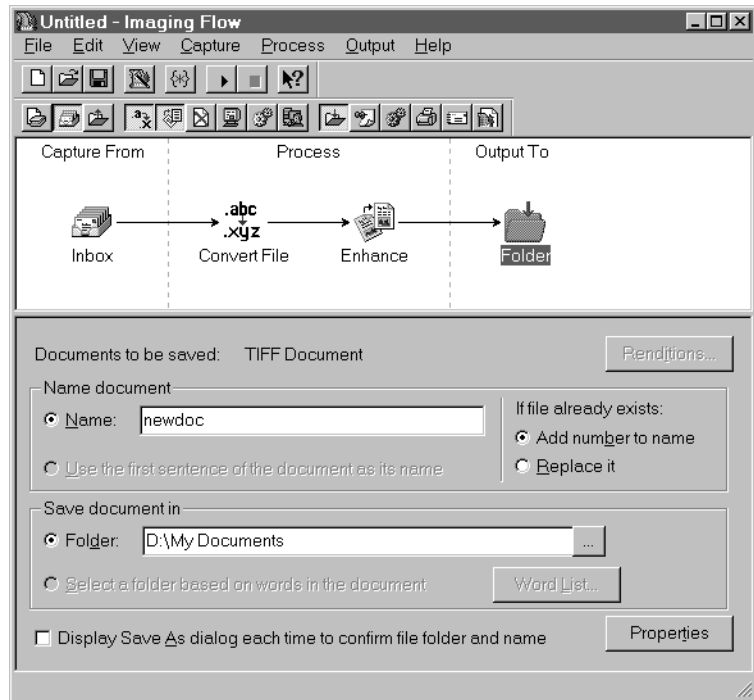
If you have a flatbed scanner, and are scanning more than one page, select the *Prompt for more pages* box.

- 4 Under Scan Settings, click Text only from the Original Document box, and then select the check box if your scanner has an automatic document feeder (ADF).
- 5 Click **Next**. The Create New Flow dialog box is updated and displays document name and location options.



- 6 Under Name document, click Name and then type **newdoc**.
- 7 Under Save document in, click Folder to accept the default location for the new file. Click **Finish** to create the flow.

The Flow Editor main window appears, and displays a graphical representation of the flow you just created. Notice that the Wizard added the processes — Convert File and Enhance — that are appropriate to your input and output selections.



8 From the File menu, click Save. The Save As dialog box appears. Type a name and location for the flow file.

9 To test your flow, click Run Now on the File menu, and send a fax to your inbox.

You can change the behavior of your flow by stopping the Flow and using the Flow Editor to change settings.

## Using the Flow Editor

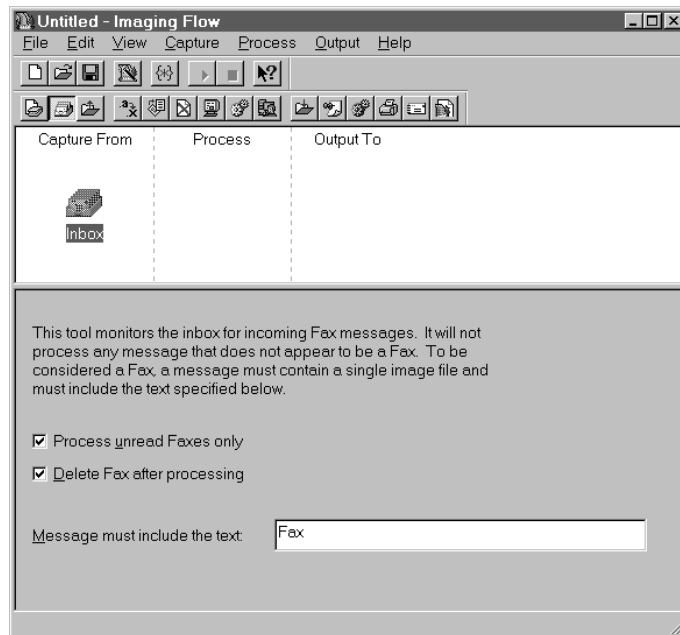


Use the sample flows, included in the Flows folder of this application, as a starting point for creating your own flows.

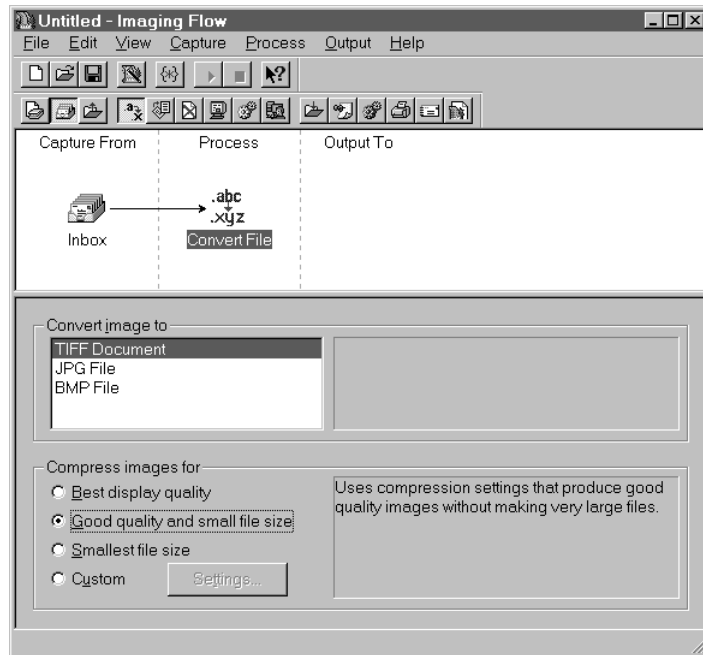
The Flow Editor gives you more flexibility than the Flow Wizard. You create a flow interactively by choosing tools from the Capture, Process, and Output menus. As you select each tool, the Flow Editor creates a diagram in the upper pane (called the Chart pane) of the Flow Editor main window. The lower pane (called the Options pane) displays settings for options.

The following example creates a flow that captures an unread fax from your mailbox, converts and enhances the image, and then prints it.

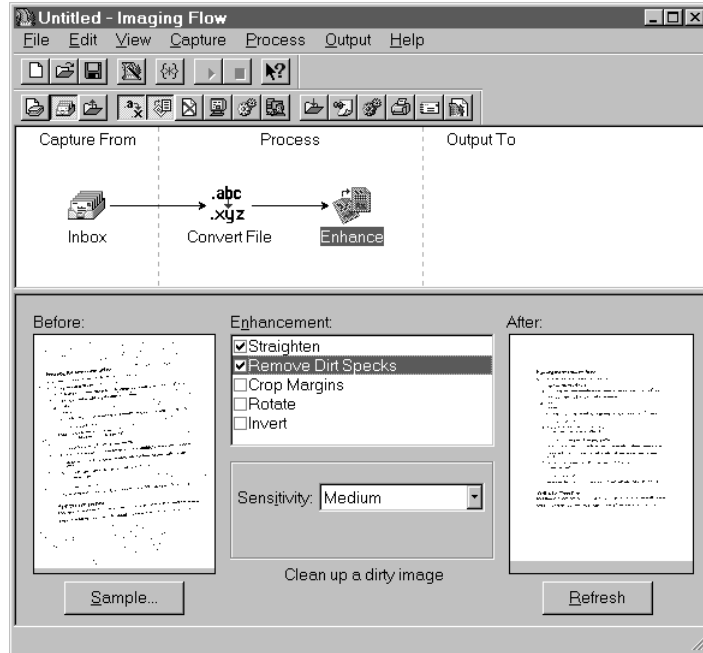
- 1 In the Flow Editor dialog box, click Empty Flow and then click **OK**. A blank Flow Editor screen appears.
- 2 On the Capture menu, click Inbox. The Inbox tool appears in the Chart pane of the window, while Inbox choices and options are displayed in the Options pane.



- 3 Accept the default option to delete image after processing.
- 4 From the Process menu, click Convert File. The Convert File tool appears in the Chart pane of the window, and image conversion and compression options are displayed in the Options pane.



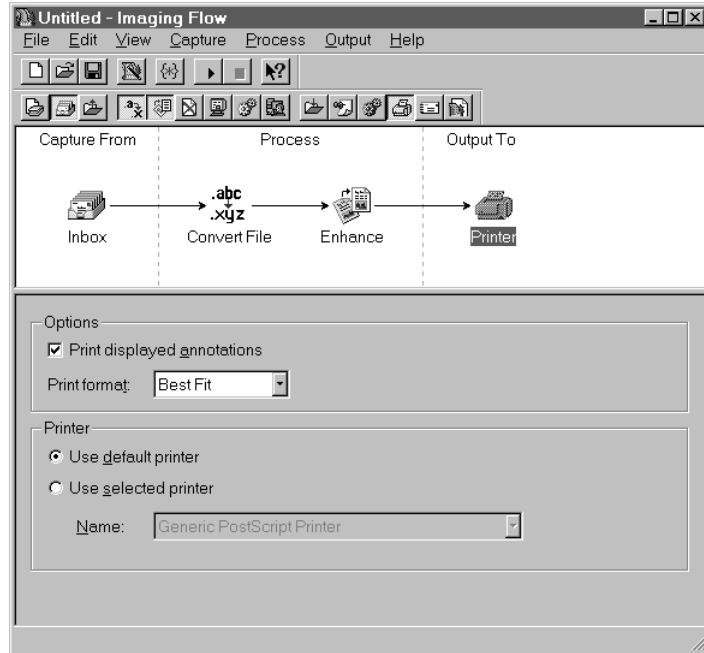
- 5 Under Convert image to, click TIFF Document; under Compress images for, click Good quality and small file size.
- 6 On the Process menu, click Enhance. The Enhance tool is added to the Flow diagram. The Options pane of the window contains enhancement options, a list box of selections associated with the highlighted option, and thumbnails that show how a sample image looks before and after it is enhanced.



- 7 Under Enhancement, click the Straighten and Remove Dirt Specks check boxes. Set Sensitivity to Medium.

To see how these enhancements affect the Before image, click **Refresh** to display the After image.

- 8 On the Output menu, click Printer. The Printer tool is added to the Flow. Print options are displayed in the Options pane. Set the options appropriate for your configuration, or accept the default values.



- 9 On the File menu, click Save. The Save As dialog box appears. Type a name and location for the Flow file.
- 10 To test your flow, click Run Now on the File menu, and send a fax to your inbox.

You can change the behavior of your flow by stopping the Flow and using the Flow Editor to change settings.





