Disconnected Scanning
Disconnected Scanning

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OVERVIEW

The Disconnected Scanning module is a standalone scanning application that allows you to scan documents with a Kofax™, ISIS, or TWAIN compatible scanner, without being connected to an OnBase Client or OnBase Application Server. Additionally, you can import existing digital images directly from an electronic storage medium such as a hard drive or CD using “scan from disk” or “sweeping” processes. Documents can later be uploaded to the Application Server, where they can be accessed from workstations via the OnBase Web Client, Desktop, or the OnBase Client module.

Documents are scanned from a scanner or from disk into user-defined scan queues from a workstation running the Disconnected Scanning module. Documents are then typically indexed -- that is, they are assigned specific values that can be used as search criteria for document retrieval. Indexing also serves as a mechanism to create cross-references between document types, and may serve other functions, depending on which modules your system uses.
The completed documents are stored locally on the computer they were scanned into, and later transferred to the central database via a synchronization function.

**REQUIREMENTS**

A properly installed and configured OnBase Application Server is required.
Disconnected Scanning can be configured from any workstation with access to the OnBase Configuration module and the database being used by the Application Server.

**LICENSING**

A Disconnected Scanning license is required for each scanning workstation.
Check your current licensing status by selecting **Utils | Product Licenses** from the Configuration module.
GETTING STARTED

Logging On

To launch Disconnected Scanning, double-click the Disconnected Scanning shortcut. The Disconnected Scanning user logon dialog box is displayed.

There are two ways to log on to the Disconnected Scanning module:

- **Server:** Log on to the Application Server for initial logon, and to update the Disconnected Scanning module to reflect changes in scan queue configuration.
- **Local:** Log on locally to scan documents without connecting to an Application Server.

**Note:** After a new version of Disconnected Scanning is installed, the first time you log on to Disconnected Scanning through the Application Server, configuration information is automatically downloaded.

Server Logon

Logging on to an OnBase Application Server requires an Internet/intranet connection to the Application Server host machine. The first time you log on to the Application Server, you must provide the information necessary to establish the connection. Once that information is provided, it becomes the default, which you can change in later logons.
Disconnected Scanning OnBase 11.0.0

The first time you log on to the Application Server:

1. In the Disconnected Scanning User Logon dialog box, enter your Username and Password.
2. Click the Server button. The User authentication dialog box is displayed.

![User authentication dialog box]

3. In the Server address field, enter the complete URL for the Application Server host machine. Append /service.asmx to your normal Application Server address.
4. In the Datasource field, enter the name of the OnBase data source that the Application Server will connect to.

**Note:** If you do not specify a data source, the data source specified during installation is used by default.

5. Click OK.
Local Logon
After the initial logon, you can log on and scan documents locally, without connecting to the Application Server. To log on locally:

1. In the **Disconnected Scanning User Logon** dialog box, enter your **Username** and **Password**.

![Disconnected Scanning user logon dialog box](image)

2. Click the **Local** button. You are logged on to the Disconnected Scanning module.

**Note:** After a new version of Disconnected Scanning is installed, the first time you log on locally to Disconnected Scanning the message **“Configuration Error” Unable to Load Local Configuration Information** is displayed. Use the Server logon to upload configuration information.

Auto-Logon
Depending on your configuration, you may be automatically logged onto Disconnected Scanning without having to enter your user name or password. For more information, see your administrator.
The Disconnected Scanning Client

After logging on, the **Disconnected Scanning** client is displayed.

1. **The Batches Window.** The **Batches** window allows you to view and manage batches of documents as they are scanned and indexed in the Disconnected Scanning client. For more information, see Batches Window on page 7.

2. **The Indexing Window.** The **Indexing** window allows you to view, add and modify indexing information for documents scanned and indexed in the Disconnected Scanning client. For more information, see Indexing Window on page 9.
3. **The Working Window.** The **Working** window allows you to view a document that has been scanned, scanned from disk or swept into the Disconnected Scanning client so that it can be scanned or indexed. For more information, see Working Window on page 10.

4. **The Messages Window.** The **Messages** window displays status information about the scanning or uploading process. For more information, see Messages Window on page 13.

5. **The Status Bar.** The Status Bar displays information about the current Disconnected Scanning session. For more information, see Status Bar on page 13.

**Note:** If the Batches, Indexing, or Messages windows are closed, you can open them by clicking **Windows | <Window Name>** from the Main Menu. To reset the Disconnected Scanning client to its default display, click **Windows | Reset Windows.**

### Batches Window

The **Batches** window allows you to manage batches of documents during the scanning and indexing processes.

Documents can be imported individually or in groups. A group of one or more documents brought into OnBase during the same scan session is known as a batch.

Batches are assigned a batch number for identification purposes. In Disconnected Scanning, a local batch number (i.e., the remote batch number) is assigned to the batch until it is uploaded into OnBase. At that time, the remote number is replaced with an OnBase internal batch number.

After documents are scanned or imported, they can be viewed and/or indexed. Indexing information is assigned to the documents either during scanning (when bar codes are used to provide index values) or after scanning, depending on the configuration of the scan queue. The batch of documents can also be renamed.

**Note:** Depending on the scan queue’s configuration, you may or may not have rights to view, index, delete, upload or schedule an upload of batches that other users have scanned, scanned from disk or swept into the system.
Depending on how your scan queues are configured, documents can proceed through one or more stages of indexing. In most cases, there are several stages: Awaiting index, Index in progress, and Fully indexed. If a document upload is interrupted for some reason, documents route to an Incomplete upload. The Batch Status Queues in the Batches window identify the particular indexing stage that a document or batch of documents is in. The Batches window lists the batch status queues, the batches in each queue, and the documents in each batch. This tells you which batches, and which documents within each batch, are in which stage of the indexing process.

If a batch status queue contains batches, the batch status queue listing has a + symbol at the beginning and a number in parentheses at the end. This number is the number of batches currently in the queue.
To list the batches that are in the queue, click the + symbol or double-click the batch status queue name. The number of documents and the total number of scanned pages in the batch are listed in parentheses after the batch name.

To see the documents within a batch, double-click the batch listing. The total number of pages composing each document is listed in parentheses after each document.

The following table explains the names of the various batch status queues:

<table>
<thead>
<tr>
<th>Batch Queue Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Document Separation</td>
<td>Contains batches with documents that need to be manually separated into additional documents. See Separating Documents on page 33 for more information.</td>
</tr>
<tr>
<td>Awaiting index</td>
<td>Contains batches in which no documents in the batch have been indexed.</td>
</tr>
<tr>
<td>Index in progress</td>
<td>Contains batches in which some, but not all, documents have been indexed. Batches enter this status queue if indexing is interrupted before all documents have been indexed.</td>
</tr>
<tr>
<td>Fully indexed</td>
<td>Contains batches in which all documents have been indexed.</td>
</tr>
<tr>
<td>Incomplete upload</td>
<td>Contains batches included in an upload operation that was started but never finished.</td>
</tr>
</tbody>
</table>

**Indexing Window**

The **Indexing** window contains the options used to index documents in the Disconnected Scanning client.
It contains the **No index**, **Pre-index**, and **Full index** options (used before scanning to determine the type of indexing that will be performed during the scanning process) and other options used during the indexing process to specify the Document Type, the Document Date, and Keyword Values for each document.

**Working Window**

Documents that have been scanned, scanned from disk, or swept into the Disconnected Scanning client are displayed in the Working window so that they can be viewed during indexing.
The main area of the Working window displays the currently-selected page of the currently-selected document. All pages of the currently-selected document may be displayed as thumbnails along the bottom or the right of the Working Window (the currently-selected page is highlighted in blue).

**Note:** To change the position of the thumbnail images or to toggle the thumbnail images on/off, click **Windows | Toggle Thumbnails**.

To adjust the position of the image in the viewing window, click and hold the right mouse button and drag the document within the Working window.
The Disconnected Scanning toolbar, located above the Working window, provides viewing and navigation options for the currently-displayed page.

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Page</td>
<td>Displays the first page of the document.</td>
</tr>
<tr>
<td>Previous Page</td>
<td>Displays the previous page of the document.</td>
</tr>
<tr>
<td>Next Page</td>
<td>Displays the next page of the document.</td>
</tr>
<tr>
<td>Last Page</td>
<td>Displays the last page of the document.</td>
</tr>
<tr>
<td>Fit Window</td>
<td>Resizes the document to fit the width of the window.</td>
</tr>
<tr>
<td>Fit Width</td>
<td>Resizes the window to fit the width of the document.</td>
</tr>
<tr>
<td>Show 1:1</td>
<td>Displays the document in its actual size.</td>
</tr>
<tr>
<td>Zoom In</td>
<td>Magnifies the size of the document; shows a smaller portion.</td>
</tr>
<tr>
<td>Zoom Out</td>
<td>Decreases the size of the document; shows a larger portion.</td>
</tr>
<tr>
<td>Rotate Left</td>
<td>Rotates the document 90 degrees to the left.</td>
</tr>
<tr>
<td>Rotate Right</td>
<td>Rotates the document 90 degrees to the right.</td>
</tr>
<tr>
<td>Save Rotation</td>
<td>Saves the rotation. The current rotation is retained after the document is uploaded. This feature allows you to retain the correct page orientation for successful OCR after uploading.</td>
</tr>
<tr>
<td>Toggle Thumbnails</td>
<td>Turns the thumbnail view on and off. When on, clicking the <strong>Toggle Thumbnails</strong> button moves the thumbnail position to the bottom or the right of the page.</td>
</tr>
</tbody>
</table>
Messages Window

The area below the Indexing window is the Messages window. The Messages window has two tabs:

- The Scan tab displays messages about the progress of the scanning process.
- The Server tab displays messages about the progress of the upload process.

OnBase automatically switches tabs so that the messages you see are the ones that are pertinent to the current process.

Status Bar

The left side of the status bar displays the current status of the Disconnected Scanning module.

The right side displays:

- Information about the currently-displayed page (i.e., the page number of the currently-displayed page, the number of pages in the currently-selected document, the document number of the currently-selected document and the number of documents in the batch).

Note: If a non-image document is currently selected, the number of pages is unknown and is displayed as ?.

- The current user’s user name.
- The date and time of the last Disconnected Scanning configuration download.
SCANNING DOCUMENTS

Scanning is a six-part process consisting of the following tasks:

- Select a scan queue.
- Select a scanning method.
- Select a scan source.
- Create and select a scan format.
- Select an indexing option.
- Perform the scan operation.

The following subsections explain each of these tasks in detail.

Selecting a Scan Queue

To import documents, you must first select a scan queue from the Scan Queue drop-down menu. Scan queues keep scanned documents organized as they enter OnBase. Scan queues define where documents are stored, who has access to those documents, the document types into which the documents can be indexed, how documents are routed for indexing, and what steps the documents must go through to be processed into OnBase. Your system administrator determines how your scan queues are configured.

A scan queue also keeps documents that have been scanned into that queue separate from documents that have been scanned into another queue. Thus, the batches contained in a scan queue are unique to that queue. Since the scan queue has no direct link to a scanner, you can have multiple scan queues for the same scanning workstation, and multiple workstations, using different scanners, all submitting documents to the same scan queue.

Access to scan queues is controlled on a user group basis. Which user group you belong to determines which scanned images you can see before they are archived into OnBase. With user group rights, scanned documents can be kept secure across multiple scanning and indexing workstations. Refer to the OnBase Client or Document Imaging documentation for more information about user group rights.
Selecting a Scanning Method

Select the scanning method you want to use by clicking the Select scanning method button and then selecting Kofax, ISIS, Twain, or Sweep:

The TWAIN scanning method is the default scanning method used with Disconnected Scanning; it requires no additional software or configuration.

In order to use a Kofax scanning method, you must have Kofax hardware or software installed on the Disconnected Scanning workstation.

In order to use an ISIS scanning method, you must have the Hyland Barcode Recognition for OnBase software installed on the Disconnected Scanning workstation.

The Sweep option allows you to import electronic files that reside on a storage medium into a scan queue. Sweeping is not the same as scanning from disk. Sweeping does not provide the ability to alter or “clean up” graphics with Kofax image controls. Sweeping does not require that you install Kofax Image controls or Kofax Software Virtual ReScan (SVRS) with the Adrenaline Image Processing Engine (AIPE). At the time of sweeping, you can identify the sweep path, file name(s) and whether you wish to sweep all files in the path or image files only.

Note: If you select Sweep as the scanning method, then Sweep is automatically selected as the scan source and all the standard selections (see Selecting a Scan Source on page 15) are eliminated from the Source drop-down menu.

Selecting a Scan Source

The scan source is the device or file where the documents to be scanned are located.

From the Source drop-down menu, select the appropriate scan source:

- **Scanner**: A physical scanner. If more than one scanner is available, you can change the active scanner by choosing Select from the Source drop-down menu.
- **Disk**: means to import images directly from an electronic storage medium such as a CD or hard drive.
Disconnected Scanning

• **Select** (if more than one scanner is available) enables you to change the active scanner. Scanners available for selection are those that have been identified as Kofax Scan Sources, available ISIS or TWAIN scanners, or the sweep source, depending on the scanning method chosen.

  Additional hardware/software is required for using a Kofax or an ISIS scanner with Disconnected Scanning.

• For more information, see Adding a Scanner as a Kofax Scanner Source on page 105 or Installing the Hyland Barcode Recognition for OnBase Software on page 104.

**Changing the Active Scanner**

Clicking **Select** displays the **Select Scan Source** dialog box.

If available, click **Properties** or **Advanced** to view or change scanner properties. The properties and settings depend on the scanner type and manufacturer.

**Tip:** Detailed information can be found by pressing **F1** in the **Source Properties** dialog box or the **Advanced Source Properties** dialog box.

**Creating and Selecting a Scan Format**

A scan format contains information about the scanner settings, size of documents, and file compression for scanned documents. Scan formats are automatically associated with the workstation where they are created and cannot be used by other workstations.
To create a scan format:

1. Click the **Add/modify scan format** button to the right of the **Format** field. This displays a drop-down menu.
2. Select **Add new format**. This displays the **Create new scan format** dialog box:

![Create new scan format dialog box](image)

3. In the **New format name** field, type a name for the new format.
4. Click OK. The **Modify scan format** dialog box is displayed.

The options displayed in the **Modify scan format** dialog box depend on the type of scan format you are configuring.

- **TWAIN Scan Format**:

![TWAIN Scan Format](image)

- **Koax Scan Format**:

![Koax Scan Format](image)
5. Select either the **One Document** or **Multiple pages per document** radio button.

The **One document** option, selected by default, assigns all scanned pages to a single document. At any time during scanning, you can override this setting and assign scanned pages to more than one document.

The **Multiple pages per document** option assigns a specified number of pages to each document. Enter the number of pages you would like to assign to each document in the **pages per document** field.

6. If you are configuring a TWANI scan format, select a data transfer mode:

- Select the **Buffered Memory Transfer Mode** radio button to use buffered transferring. This is the preferred method for transferring data from the scanner to the Disconnected Scanning client and it is selected by default.

  If the **Buffered Memory Transfer Mode** radio button is selected, the **Disable Hardware Compression** check box is enabled. Select this option to disable hardware compression when scanning in buffered transfer mode.

- Select the **Native Transfer Mode** radio button to use the native TWAIN method of transferring data to the Disconnected Scanning client. While not the preferred method of transferring data, this option must be selected for some older TWAIN devices.
Note: The data transfer mode options are not used by, and are not displayed, when configuring a Kofax or ISIS scan format.

7. To change the default scanner properties, click **Scan settings**. The dialog box that is displayed, including the options it contains, depends on the scanner that you are using. For more information, see Scanner Specific Settings on page 123.

8. To configure the image file that is created when the document is scanned, click **File format**. The **Storage Properties** dialog box is displayed.

![Storage Properties Dialog Box](image)

In the **File Type** drop-down, select the file format of the image file that is created. Depending on the file format you select, you may also be able to select the compression format to use in the **Compression** drop-down.

**Tip:** TIFF is the preferred file format for storing images in OnBase. Whenever possible, it is considered a best practice to store image documents as bi-tonal (black and white) TIFF-Group IV files. If you need to store documents as color or grayscale images, it is considered a best practice to store them as JPEG files.

9. If you are configuring a Kofax scan format, you can specify image procession options to further process and/or enhance images after scanning. To access these image processing options, click **Image processing**. The dialog that is displayed, including the options it contains, depends on the scanner that you are using. For more information, see Scanner Specific Settings on page 123.

**Note:** The Image processing options are not used by, and are not displayed, when configuring a TWAIN or ISIS scan format.

10. Click **OK** to save the settings.
Selecting an Indexing Option

Before you start scanning, determine the type of indexing that will be done during the scan process by selecting one of the option buttons located at the top of the Indexing window:

![Indexing Window](image)

The following table explains the available settings for indexing options:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No index</td>
<td>Select to perform manual indexing after documents have been scanned. Only the Document date field will be available for editing in the Indexing panel.</td>
</tr>
</tbody>
</table>

**Note:** The option should not be used if bar codes are to be read from the documents at the time of scanning.

<table>
<thead>
<tr>
<th>Pre-index</th>
<th>Activates the Document type drop-down list and keyword entry fields, allowing you to specify the document type and keyword values for each scanned or imported document before it is brought into OnBase. When scanning is complete, the newly acquired documents are sent to the Awaiting index batch status queue where indexing information can be completed or reviewed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full index</td>
<td>Sends batches directly to the Fully indexed batch status queue. When you are using bar codes, you can select Full Index to automate the indexing process.</td>
</tr>
</tbody>
</table>

**Note:** If a batch utilizes required keywords, and any required keyword on a document is not supplied by an Auto-Fill Keyword Set or a bar code, the document will be transitioned to the Awaiting Index queue and not the Fully Indexed queue.
**Note:** Either Pre-Index or Full Index must be selected when using bar codes to identify Document Types, or when specific Keyword Values are used during the indexing process. See the Bar Code Process documentation for more information on using bar codes to index documents.

**Note:** Documents indexed in Full Index mode can be transferred to the Awaiting Index queue if the primary value of an AutoFill keyword set is populated from a bar code and that primary Keyword Value has more than one set of secondary Keywords. In this case, a user must select the secondary Keywords to be used.

After documents are scanned, they can be indexed with a document type and keyword values. The document type used is determined during configuration.

**Note:** Double-blind indexing and re-indexing are not supported in the Disconnected Scanning module.

## Scanning a New Batch

To scan a new batch of documents:

1. Place your document(s) in the scanner feed mechanism.
2. Choose File | Scan New Batch or click Scan. The Batch name dialog box, with the default batch name, is displayed.

3. Change the default batch name if desired.
4. Click **OK**.

5. When the document feeder has run out of pages to scan, the **Scanning Complete** dialog box is displayed. Select one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scan More Pages</strong></td>
<td>Enables you to begin scanning a document or to add pages to previously scanned page(s). <code>&lt;ALT&gt;M</code> is the shortcut.</td>
</tr>
<tr>
<td><strong>New Document</strong></td>
<td>Enables you to start scanning a new document into the same batch. <code>&lt;ALT&gt;N</code> is the shortcut.</td>
</tr>
<tr>
<td><strong>Change Format</strong></td>
<td>Enables you to select a different scan format before continuing to scan. <code>&lt;ALT&gt;F</code> is the shortcut.</td>
</tr>
<tr>
<td><strong>Discard Pages</strong></td>
<td>Discards the current batch. All scanned pages are deleted. <code>&lt;ALT&gt;P</code> is the shortcut.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Ends the scanning session. <code>&lt;ALT&gt;D</code> is the shortcut.</td>
</tr>
</tbody>
</table>

**Tip:** The focus is automatically set to the **Done** button by default. Pressing **Enter** or the space bar after the **Scanning Complete** dialog is displayed will select this option.

### Scanning from Disk

You can use the scan from disk option to bring TIFF, BMP or JPEG image files into OnBase. These image files are electronically “scanned” into TIFF images.

**Note:** The ability to bring .bmp image files into the OnBase using the scan from disk feature is dependent on the hardware and software in use.

This option requires Kofax ImageControls or Kofax Software Virtual ReScan (SVRS) with the Adrenaline Image Processing Engine (AIPE).

**Note:** LZW compression for TIFF images is not supported by Kofax for scan from disk. When scanning from disk, TIFF images need to be compressed with CCIT Group IV compression.
To scan from disk:

1. Select a Scan Queue from the **Scan Queue** drop-down in the Disconnected Scanning toolbar.
2. Select **Disk** from the **Source** drop-down in the Disconnected Scanning toolbar.

**Note:** You must have the Kofax scanning method selected in order to select Disk from the Source drop-down.

3. Select a Scan Format from the **Format** drop-down in the Disconnected Scanning toolbar.
4. Choose **File | Scan New Batch**. The **Batch name** dialog box is displayed, with the default batch name, as in the following example:
5. If desired, change the default Batch Name and click **OK**. The **Browse for Folder** dialog box is displayed.

6. If no default folder has been configured for the selected scan queue, the last folder you scanned from disk is selected. You may change the folder by browsing to a different folder containing the images to be scanned from disk into OnBase and click **OK**.

**Note:** The last folder scanned from disk is saved on a per-Windows user basis, so different Windows accounts can have different values for the last folder scanned from disk.
Note: By default, OnBase scans from disk the file with the shortest file name first, and then proceeds alphabetically/numerically. For example, if the folder includes files named `1.tif`, `2.tif`, and `10.tif`, the document with the shortest file name is scanned from disk first (`1.tif`), followed by the files that are displayed next alphabetically or numerically (`2.tif` and then `10.tif`). However, your solution may be configured to scan files in a different order. For more information, contact your solution provider.

7. Once all of the images in the selected folder have been scanned from disk, the Scanning Complete dialog box is displayed. Select one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scan More Pages</strong></td>
<td>Enables you to begin scanning a document or to add pages to previously scanned page(s). <code>&lt;ALT&gt;M</code> is the shortcut.</td>
</tr>
<tr>
<td><strong>New Document</strong></td>
<td>Enables you to start scanning a new document into the same batch. <code>&lt;ALT&gt;N</code> is the shortcut.</td>
</tr>
<tr>
<td><strong>Change Format</strong></td>
<td>Enables you to select a different scan format before continuing to scan. <code>&lt;ALT&gt;F</code> is the shortcut.</td>
</tr>
<tr>
<td><strong>Discard Pages</strong></td>
<td>Discards the current batch. All scanned pages are deleted. <code>&lt;ALT&gt;P</code> is the shortcut.</td>
</tr>
<tr>
<td><strong>Done</strong></td>
<td>Ends the scanning session. <code>&lt;ALT&gt;D</code> is the shortcut.</td>
</tr>
</tbody>
</table>

Tip: The focus is automatically set to the **Done** button by default. Pressing Enter or the space bar after the Scanning Complete dialog is displayed will select this option.

Sweeping Documents

You can use the sweep option to import files from a folder into OnBase via Scan Queue. Unlike scanning from disk, sweeping a folder will bring image or non-image files into OnBase. These files will be left in their native file formats.

Note: Most documents swept into OnBase are exact copies of their source files. Multi-page image files, however, must be broken up and stored individually as single page files.
To sweep documents into OnBase:

1. Select a Scan Queue from the **Scan Queue** drop-down in the Disconnected Scanning toolbar.

2. Click the **Select scanning method** button in the Disconnected Scanning toolbar and select **Sweep**. The **Source** drop-down is automatically set to **Sweep**.

   **Note:** Despite the fact that its settings are not required for a sweep process, a Scan Format must be selected from the **Format** drop-down. If the **Format** drop-down is not automatically populated, select a Scan Format before proceeding.

3. Choose **File | Scan New Batch** or click **Scan**. The **Batch name** dialog box is displayed, with the default batch name, as in the following example:

   ![Batch name dialog box](image)

4. If desired, change the default Batch Name and click **OK**. The **Sweep files path** dialog box is displayed.
5. If no default folder has been configured for the selected scan queue, the last folder you swept is selected in the **Sweep path** field. You may change the folder by entering a path to the folder containing the files to be swept into OnBase in the **Sweep path** field, or by clicking **Browse** to browse out to the folder.

**Note:** The last folder swept is saved on a per-Windows user basis, so different Windows accounts can have different values for the last folder swept.

6. Enter the filename of the file to be swept into OnBase in the **Filename** field. Enter `*.*` to sweep all files in the folder into OnBase.

**Note:** By default, OnBase sweeps the file with the shortest file name into the system first, and then proceeds alphabetically/numerically. For example, if the folder includes files named `1.tif`, `2.tif`, and `10.tif`, the document with the shortest file name is swept in first (`1.tif`), followed by the files that are displayed next alphabetically or numerically (`2.tif` and then `10.tif`). However, your solution may be configured to sweep files in a different order. For more information, contact your solution provider.

7. Select the **Only sweep images** check box to exclude non-image files in the selected folder from being swept into OnBase.

8. Click **OK**.

**Sweeping Documents into Disconnected Scanning Using Windows Autoplay**

Depending on your system configuration, Windows Autoplay can be used to sweep a large number of documents into OnBase quickly and easily from an external source, such as a digital camera or a data CD.

To sweep files into an OnBase scan queue from an external source using Disconnected Scanning and Windows Autoplay:

1. Log on to the Disconnected Scanning module. The **Disconnected Scanning** window is displayed.

2. Trigger Windows Autoplay by inserting removable media or connecting an external device, such as a digital camera, to your system. Select the **Archive Documents using OnBase Disconnected Scanning** option from the Autoplay dialog box.
3. All documents stored in the external device are swept into the working batch of the configured scan queue. If there is no open batch in the scan queue, a new batch is created.

If you have access rights to more than one scan queue that has been configured as a target, then the Disconnected Scanning module will select the queue that appears first alphabetically.

If you do not have rights to a scan queue configured to accept documents swept into the system using Windows Autoplay, the documents are swept into a batch in the current scan queue.

**Note:** For information on configuring a scan queue to be an Autoplay target, see the Document Imaging Help.

4. Once the sweep is complete, a confirmation message is displayed.

**Note:** The Disconnected Scanning module will attempt to determine the imported files’ file formats based on their file extensions.

5. After all files have been imported from the source device, a message is displayed asking if the files should be deleted from the source device.

6. The batch remains open until the Disconnected Scanning module is closed or until the batch is indexed.

**Other Import Methods**

In addition to scanning, scanning from disk, and sweeping, there are several other methods that can be used to bring documents into the Disconnected Scanning client. Some of these methods require additional OnBase modules and separate licensing and registration; contact your solution provider or see their associated documentation for more information.

**Ad-Hoc Import**

Documents can be also be captured by Disconnected Scanning for upload into OnBase by dragging and dropping the document into the Disconnected Scanning client.
To use Disconnected Scanning’s drag-and-drop functionality:

1. Ensure that the scan queue into which you would like to import the document is selected in the **Scan Queue** drop-down.
2. Drag-and-drop a document into the Disconnected Scanning client. Each document that is dragged and dropped into Disconnected Scanning is placed in a batch containing only that document.

**Note:** Documents of any file format, not just images, can be imported using this method.
3. Depending on your workstation’s local client settings:
   - The batch may be sent to the **Awaiting Index** batch status queue, or the scan queue’s first configured batch status queue (i.e. **Awaiting Document Separation**). See Indexing Documents on page 37.
   - The document may be required to be immediately indexed. See Step 4 below.

   For more information on your workstation’s local client settings, see Local Client Settings on page 69.

4. If the document is required to be immediately indexed upon import, the **Archive Documents** dialog box is displayed.

5. Enter the appropriate indexing information for the document and click **Save**. The batch containing the document is routed to the **Fully Indexed** batch status queue or the scan queue’s next configured batch status queue.

### Importing Documents from the Virtual Print Driver

Disconnected Scanning can be used in conjunction with the Virtual Print Driver to efficiently capture documents from outside systems and archive them in the OnBase system.
When printing a document with the Virtual Print Driver, the Disconnected Scanning client will create a new unarchived document, using the values currently set in the keyword panel of the scan queue.

After the document is created, the document will be placed in the **Awaiting** queue (e.g., **Awaiting Index**, **Awaiting Document Separation**) that the scan queue has been configured for. If no other documents exist in the queue, a new batch will be created. Otherwise, the printed documents will be included in the batch that already exists. The document batch can then be uploaded.

**Note:** See the Virtual Print Driver documentation for more information on using the Virtual Print Driver.

### SEPARATING DOCUMENTS

After scanning, batches configured to use document separation move into the **Awaiting Document Separation** queue, where they can be separated into multiple documents.

To begin document separation, right-click on a batch in the **Awaiting Document Separation** queue and select **Perform Document Separation**.

**Using Document Separation**
The Document Separation interface allows you to separate pages of an image document into multiple documents.

The upper pane of the Working window displays thumbnail representations of the document or documents in the queue. The lower pane displays thumbnails of each page of the original document. Double-click on the thumbnail to enlarge the view.

Initially (before any separation has occurred), the upper pane displays a thumbnail of the first page of the document. The number of documents in the queue is displayed above the thumbnail and the range of pages composing the document is displayed directly below the thumbnail.

In the example above, the six-page document has not yet been separated. Note that the upper pane shows that there is one document in the queue, composed of pages 1 through 6.
After document separation begins, a thumbnail of the first page of each new document is displayed in the upper pane.

For example, if you elected to slice the document after page three, two thumbnails would display in the upper pane, one representing a new document composed of pages 1-3 and a second representing a new document composed of pages 4-6, and the Document Count above the first thumbnail would increase from 1 to 2.

Depending on your scan queue configuration, any Keyword Values added to the document prior to the separation process may or may not be kept by the document(s) separated from the original document.
You can separate documents in one of two ways:

- In the lower pane, indicate the separation point in a document by clicking the small buttons between pages.
- In the upper pane, double-click on the document thumbnail. Click the left and right arrows (located on the left and right of the display window) or the left and right arrow keys on your keyboard to scroll through the document. Click the **Start New Document** button at the bottom of the display window (or the keyboard space bar) to designate the current page as the first page of a new document. Click **Esc** to close.

Click the **Save to Database** button (described below), to save changes to the document. Once the **Save to Database** button is clicked, these changes cannot be undone.

**CREATING A NEW DOCUMENT USING DOCUMENT SEPARATION**

Newly separated documents can be copied to create new documents in the Document Separation window.

To copy a document from the Document Separation window:

1. Use the mouse to hover over one of the documents in the upper pane. The **Copy Document** option will be displayed.
2. Click on the **Copy Document** option. The **Copy Collated Document...** dialog box will be displayed.

**Note:** The **Copy Collated Document...** dialog box can also be displayed for the selected document (the document with the page numbers highlighted in blue) by pressing the **F7** key.

3. Enter the number of copies to be created in the **Copy Collated Document...** dialog box. Click **OK**.

   Each document that has been copied will display a **+(Number of copies in addition to the original)** after the page range below the thumbnail of the first page.

4. Separate and create as many copies as needed.
5. Click **Save to Database** to add the new documents to the batch. The newly-created copies appear after the associated original document in the batch.

**Caution:** Once the **Save to Database** button is clicked, these actions cannot be undone.
**DOCUMENT SEPARATION TOOLBAR**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Image]</td>
<td>The <em>Save to Database</em> button saves the images into OnBase as displayed in the <em>Document Separation</em> window, then closes the window.</td>
</tr>
<tr>
<td>![Image]</td>
<td>The <em>Break All</em> button separates all documents in the Document Separation window into individual documents.</td>
</tr>
<tr>
<td>![Image]</td>
<td>The <em>Remove All Breaks</em> button eliminates any separations made between document pages.</td>
</tr>
<tr>
<td>![Image]</td>
<td>The <em>Cancel</em> button closes the Document Separation interface without routing the batch to the next batch status queue.</td>
</tr>
</tbody>
</table>

**INDEXING DOCUMENTS**

*Note:* Depending on the scan queue’s configuration, you may not be able to index batches, indexing may be optional or indexing may be required. To index documents, you must have the appropriate user rights. For more information, contact your system administrator.

Indexing is the process of associating specific values with a document. These values can define search criteria for document retrieval, create cross-references between document types, and serve other functions, depending on which modules OnBase is using.

In most cases, the values you need to provide as index values are displayed somewhere in the document.
**Manually Indexing Documents**

To manually index documents:

1. From the Indexing window of the Disconnected Scanning client, initiate the indexing process:
   - To index all documents in a batch, right-click the batch in the *Awaiting index* or *Index in progress* batch status queues and then choose **Index Batch**.
   - To index a single document, right-click the document and then choose **Index Document**.

   ![Image of Indexing window with options]

The first document in the selected batch is displayed in the Working window.
2. Select a Document Type for the scanned page. The Keyword Type fields associated with the selected Document Type are displayed.
Tip: If the scan queue’s Document Types have been alphabetized, you can filter the list of available Document Types by entering the first few letters of the Document Type’s name.

3. Select the document’s Document Date by entering the date in the Document Date field or by selecting it via the calendar button.

   By default, the Document Date is set to the current date, although your scan queue may be configured to displayed the last user-entered date instead.

4. Enter a Keyword Value for each Keyword Type field.

   Some things to note when entering Keyword Values in Disconnected Scanning:
   - During indexing, to zoom in on an area of the document currently displayed in the Working window, click the **Zoom In** toolbar button or press and hold the left mouse button while using the pointer to draw a box around the area of the document to be displayed in greater detail.
To zoom out on a document, click the Zoom Out toolbar button.

- All currency formats are determined by the workstation's Windows Regional Settings. Disconnected Scanning does not support OnBase Specific Currency Keyword Type formats.

- Depending on your scan queue configuration, you may be able to add additional instances of a Keyword Type by pressing F6 while the cursor is positioned in the Keyword Value field unless the Keyword Type is part of a Keyword Type Group or a Cascading Data Set. This allows you to enter an additional Keyword Value for that Keyword Type on the document.

- If the document is configured to use an AutoFill Keyword Set, entering a value for the primary Keyword Type and pressing Tab or setting the focus to another Keyword Type field automatically populates the secondary Keyword Types with Keyword Values.

- If multiple instances of an AutoFill Keyword Set use the same primary Keyword Value, the Autofill keyword set resolution dialog box is displayed to allow you to select the instance you would like to associate with the document.

If your system is configured to allow multiple instances of an AutoFill Keyword Set associated with the same primary Keyword Value to be added to a document, select each instance of the AutoFill Keyword Set you would like to associate with the document in the Autofill keyword set resolution dialog box before clicking OK.

- To add an additional instance of the AutoFill Keyword Set to the document once one or more instances have been applied, you must clear all Keyword Values from the document, re-enter the primary Keyword Value and re-trigger the AutoFill Keyword Set to again display the Autofill keyword set resolution dialog box.

**Note:** For more information, see AutoFill Keyword Sets, Cascading Data Sets, and Keyword Data Sets on page 81.

- Depending on how the Keyword Type is configured, you may be able to select a Keyword Value from a pre-configured list of potential values (called a Keyword Data Set) by clicking the drop-down list button next to the Keyword Type field.

- If two or more of the Document Type's available Keyword Types contain drop-down lists and are ordered in such a way as to show a hierarchical parent/child relationship, the Keyword Types may be part of a Cascading Data Set. A Cascading Data Set filters Keyword Values available in the drop-down list based on a parent/child Keyword relationship.
For example, a Document Type contains a Cascading Data Set that includes **State**, **County**, and **City** Keyword Types. **State** is the parent, or root, Keyword Type in the Cascading Data Set. **County** is a child to **State**, and **City** is a child to **County**. The values available in the child drop-down list depend on the value selected for its parent Keyword Value; selecting a Keyword Value from the parent drop-down list filters the available Keyword Values from the subsequent child drop-down list.

Keyword Types that are part of a Cascading Data Set are displayed in the order of their parent/child relationship in the Indexing window because they are related and are meant to be used in conjunction with one another. When indexing documents, you must select values for Keyword Types in the order of their parent/child relationship. To use a Cascading Data Set, click the down arrow button next to the parent Keyword Type, and select a value from the list. Once a value is selected, click the down arrow button next to the first child Keyword Type. The values available in the list are dependent on the value selected for the parent Keyword Type. In the previous example, the drop-down list for the **County** Keyword Type is empty until a **State** value has been selected. The drop-down list for the **City** Keyword Type is empty until a **County** value has been selected.

Child Keyword Values are not automatically corrected after modifying the parent Keyword Value. Using the previous example, if a user selects **State**, **County**, and **City** Keyword Values and then modifies the **State** Keyword Value so that the previously-selected **County** and **City** Keyword Values are no longer child values of the new **State** Keyword Value, the selected **County** and **City** Keyword Values will remain.

**Note:** You cannot add additional instances of Keyword Types that are part of a Cascading Data Set. However, Cascading Data Sets can be used with Multi-Instance Keyword Type Groups to add multiple instances of the Keyword Types associated with the Cascading Data Set to the document as long as the scan queue is configured to allow multiple instances of Multi-Instance Keyword Type Groups to documents.

**Note:** Unlike AutoFill Keyword Sets and Keyword Data Sets, Cascading Data Sets are accessed in real-time from the Application Server at all times. They cannot be cached locally.

- The yellow lock button next to each Keyword Value field allows you to lock the current value so that it can be used automatically when the next document is indexed. Once a value has been locked, you can unlock it by clicking the adjacent . Also, all locks are automatically cleared as soon as a batch is completely indexed.
**Note:** If a primary keyword for an AutoFill Keyword Set is locked/unlocked, the secondary keywords will also be locked/unlocked.

**Note:** When indexing documents that are configured with Multi-Instance Keyword Type Groups, if fewer than all of the Keyword Types are locked when using the Append function, a second instance of the Multi-Instance Keyword Type Group is saved to the document. The first Multi-Instance Keyword Type Group contains all values that were entered. The second Multi-Instance Keyword Type Group contains values for the locked Keywords and no values for those that are unlocked. See the Client Help for more information on Multi-Instance Keyword Type Groups.

5. If you discover that you have typed the wrong values for one or more keyword types, you can remove all the existing keyword values by clicking the **Clear Keys** button.

6. When you have supplied all the indexing information for the current document, click the **Index** button to save the indexed document.

**Note:** You can append the current document to the previously indexed document by clicking **Append**.
7. Once all documents in the batch are indexed, the batch is transitioned to the **Fully Indexed** batch status queue. If all documents in the batch are not indexed in one session, the batch is transitioned to the **Index in Progress** batch status queue.

Once a document is indexed, you can view its keyword values by double-clicking on the document in the **Index in progress** or **Fully indexed** batch status queues. Keyword Types and the Keyword Values associated with the document are displayed to the right of the Key icon. Alternatively, you can view/modify keyword values by right-clicking a document and then selecting **Properties**.

---

**The Indexing Toolbar**

The **Indexing Toolbar** is located at the bottom of the **Indexing** window, below the **Index**, **Append**, **Clear Keys**, and **Scan** buttons. You can use this toolbar to perform any of the following operations:

- **The First Document** button returns you to the first document in the batch you are currently indexing. This button becomes available as soon as you move past the first document. `<Alt>1` is the shortcut.

- **The Previous Document** button takes you to the previous document in the batch you are currently indexing. This button becomes available as soon as you move past the first document. `<Alt> V` is the shortcut.
The **Next Document** button takes you to the first page of the next document in the batch you are currently indexing. `<Alt>N` is the shortcut.

The **Last Document** button takes you to the first page of the last document in the batch you are currently indexing. `<Alt>L` is the shortcut.

The **Delete Page** button discards the page of the current document represented by the image in the **Working** window. This is useful for eliminating separator pages or blank sheets that are scanned into OnBase. `<Alt>G` is the shortcut.

The **Delete Document** button deletes the current document from the batch. Whereas **Delete Page** removes the page being viewed, **Delete Document** removes all of the pages that make up the current document. `<Alt>C` is the shortcut.

The **Skip Document** button displays the next document. You will not be able to index the document you were viewing until you reopen the batch in the **Index in progress** queue. `<Alt>K` is the shortcut.

The **Create New Document** button breaks a multiple-page document into two documents, setting the current page as the first page of the new document. `<Alt>R` is the shortcut.

The **Stop Indexing** button takes you out of the batch you were indexing and returns you to the list of batches in that batch status queue. Any images that you have not indexed remain unindexed and the batch is routed to the **Indexing in Progress** queue. `<Alt>Q` is the shortcut.

When all documents in a batch have been indexed, the batch is routed to the **Fully indexed** batch status queue. To suspend indexing before all documents have been indexed, click the **Stop Index** button. When indexing is interrupted before the batch is fully indexed, the batch is moved to the **Index in progress** batch status queue, where indexing can be resumed at a later time.
**Batch Right-Click Options**

The following options are available from the batch right-click menu in the **Awaiting index** and **Index in progress** batch status queues.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Index batch</td>
<td>Begins indexing the first document in the batch and automatically proceeds to the next document until all documents are indexed or the user pushes the <strong>Stop Index</strong> button or indexing is interrupted in some other way, such as when workstation power is interrupted.</td>
</tr>
<tr>
<td>Scan more documents</td>
<td>Scans additional documents into the existing batch.</td>
</tr>
<tr>
<td>Rename Batch</td>
<td>This option allows you to rename the batch.</td>
</tr>
<tr>
<td>Properties</td>
<td>Displays the batch number, batch name, the indexing status and number of documents.</td>
</tr>
<tr>
<td>Upload batch</td>
<td>This option allows you to manually upload a batch.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the batch.</td>
</tr>
</tbody>
</table>

**Document Right-Click Options**

The options explained in the following table are available from the document right-click menu in the **Awaiting index**, **Index in progress**, and **Fully indexed** batch status queues.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Index document</td>
<td>Activates the indexing dialog box for the selected document and displays the document in the document viewing window.</td>
</tr>
<tr>
<td>Scan more pages</td>
<td>Scans additional pages into the existing document.</td>
</tr>
<tr>
<td>Delete/Reorder Pages</td>
<td>Allows the user to manually delete and/or reorder the pages in the scanned batch.</td>
</tr>
<tr>
<td>Properties</td>
<td>Displays the document type and any assigned keyword values.</td>
</tr>
<tr>
<td>Upload Batch</td>
<td>This option allows you to manually upload a batch.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the document from the batch.</td>
</tr>
</tbody>
</table>
Automatically Indexing Documents

Documents can be automatically indexed (i.e., Keyword Values do not need to be manually entered by a user) within Disconnected Scanning in two ways: by bar code processing at the time of scanning and by Keyword Values captured by Application Enabler.

Indexing with Bar Codes

Note: Bar codes are generated by third-party products or they can be generated via the OnBase Bar Code Generator, a separately-licensed product.

Bar codes can be used when scanning documents to speed up and improve the accuracy of indexing by assigning Keyword Values to the documents as they are scanned. Bar codes may also be used to identify the Document Type or to serve as separator pages that signal the beginning of new documents.

In order to perform bar code processing at the time a document is scanned, the Hyland Barcode Recognition for OnBase software or Kofax hardware or software must be installed on the Disconnected Scanning workstation.

Documents containing bar codes may also be processed by the batch on a single workstation. The processing workstation must be registered with a Barcode Recognition Server license and either the Hyland Barcode Recognition for OnBase software or Kofax hardware/software.

For more information on indexing using bar codes, see the Bar Code Process documentation.

Indexing with Application Enabler

Note: Application Enabler is an additional OnBase module that requires separate licensing and registration. Contact your solution provider for more information on Application Enabler.

Application Enabler can be used in conjunction with Disconnected Scanning to capture Keyword Values from a third-party application and automatically apply them to documents residing in the Disconnected Scanning *Awaiting Index* and *Index in Progress* batch status queues

For more information, see the Application Enabler documentation.
UPLOADING BATCHES

Once scanned and (depending on the scan queue configuration) indexed, documents can be uploaded to the Application Server. The upload process can be triggered manually, via a scheduled upload process or via a continuous background upload process.

Once a batch is uploaded to OnBase, the remote batch number assigned to the batch by Disconnected Scanning is replaced by an OnBase internal batch number.

Note: Depending on the scan queue’s configuration, you may be required to index batches before they can be uploaded, you may be able to only scan and upload unindexed batches, or there may be no restrictions on indexing batches prior to uploading them. To index documents, you must have the appropriate user rights. For more information, contact your system administrator.

After documents are indexed, they are moved to the Fully indexed batch status queue. Documents residing in this queue are stored locally until they are uploaded to OnBase.

Uploading Manually

1. To begin uploading, perform one of the following actions:
   - Click the **Upload** button on the toolbar
   - Right-click on a batch and select **Upload batch**
2. Select the scan queues containing the batches you wish to upload. If you would like to upload only some, not all, of the batches of a scan queue, see Uploading Specific Batches on page 50.

3. Click **OK**.

   If batches reside in any batch status queues other than **Fully indexed**, a message is displayed asking you to confirm that you would like to upload both the indexed and unindexed batches.

   Click **Yes** to upload documents from all batch status queues.

   Click **No** to upload only documents from the **Fully indexed** batch status queue.

4. Depending on your Disconnected Scanning client’s configuration, the upload process begins automatically or the **Begin batch upload** dialog box is displayed.

   If the **Begin batch upload** dialog is displayed, confirm that the your logon credentials are correct and click **OK** to begin uploading.
Uploading Specific Batches

If you do not wish to upload all batches associated with a scan queue, you can select one or more specific batches for upload:

1. From the Main Menu, select Server | Upload specific batches. The Select batches dialog box is displayed.

2. Select the check box next to each batch that you want to upload. Or, to select all available batches, click Select all. Click Deselect all to deselect all selected batches.

3. Click OK.

4. If any of the selected batches reside in a batch status queue other than Fully indexed, a message is displayed asking you to confirm that you would like to upload both the indexed and unindexed batches.
   - Click Yes to upload the selected batches from all batch status queues.
   - Click No to upload only selected batches from the Fully indexed batch status queue.

5. Depending on your Disconnected Scanning client’s configuration, the upload process begins automatically or the Begin batch upload dialog box is displayed.
   If the Begin batch upload dialog is displayed, confirm that the your logon credentials are correct and click OK to begin uploading.
Canceling an Upload

Click **Cancel** to cancel an upload. When an upload is canceled, the upload is stopped at the point at which the **Cancel** button is pushed.

- Batches that were completely uploaded are no longer available in Disconnected Scanning, but are available in the OnBase Client.
- Batches that had not begun uploading when the upload was cancelled remain in their current Disconnected Scanning batch status queue(s), e.g. **Fully Indexed, Awaiting Index**, **Index In Progress**, etc.
- Batches that are fully-indexed and are only partially uploaded are routed to Disconnected Scanning’s **Incomplete Upload** batch status queue:
  - Documents that have not yet been uploaded remain in the batch in Disconnected Scanning’s **Incomplete Upload** batch status queue.
  - Documents that have been successfully uploaded are not available in Disconnected Scanning, but are available from the batch in the **Incomplete Disconnected Scan** batch status queue in the OnBase Client.
- The next time uploading is attempted, Disconnected Scanning begins the upload process where it was interrupted.
- To reset the batch’s upload status (i.e., remove the batch from the **Incomplete Upload** batch status queue), right click the batch in the **Incomplete Upload** batch status queue and select **Reset Upload Status**.

You are given the option to delete the already-uploaded documents from the OnBase Client; click **Yes** to delete the documents from the Client and return them to the batch in the Disconnected Scanning client or click **No** to leave the already-uploaded documents in place.

Uploading Automatically

In addition to manually uploading batches to OnBase, your administrator can configure batches to be automatically uploaded.

There are two methods of automatically uploading batches from Disconnected Scanning: Continuous Background Uploads and Scheduled Uploads.

**Continuous Background Uploads**

The **Continuous Background Upload** option automatically uploads batches while you work. When this option is enabled, Disconnected Scanning checks once every five seconds for batches that can be uploaded. If an upload is not already in progress, Disconnected Scanning uploads batches that are ready.
Disconnected Scanning

Depending on your configuration, indexed or unindexed batches may be uploaded. By default, only indexed batches are uploaded.

**Scheduled Uploads**

Batches can also be automatically uploaded during scheduled upload period set by your administrator. In order for the scheduled upload to take place, the Disconnected Scanning client must be closed and the same Windows user that was logged onto the workstation when the Disconnected Scanning scheduler was installed must be logged onto the workstation.

**Exporting Indexed Batches to a DIP File**

Disconnected Scanning has the ability to export information about batches of indexed documents to a DIP file so that, if needed, the documents can be imported to OnBase via DIP.

This is a useful disaster recovery or emergency backup feature; in case of a prolonged lack of connection to the Internet, batches of indexed documents can be exported to a self-configured DIP file for importing into OnBase.

**Note:** Document Import Processor (DIP) must be licensed and registered on the workstation importing the indexed batches.

Only batches that have already been fully indexed can be selected for export to DIP (partially indexed or unindexed batches are not eligible). Users can choose all or only selected indexed batches for export into a self-configured DIP file.

The documents can then be imported into OnBase via DIP.
To export indexed batches to a DIP file:

1. In the Disconnected Scanning client, select **File | Export DIP file**. The **Select batches to export** dialog box displays.
2. All indexed batches in the system display, and are selected by default. Click the check box next to each batch to select or de-select it.

   ![Select batches to export](image)

   **Note:** Use the **Select all** and **Deselect all** buttons to select or de-select all the available batches.

3. When all desired batches have been selected, click **OK**. The **Verify Operation** message box displays.

   **Note:** Click **Cancel** to exit the dialog box.

4. If you wish to delete the selected batches locally after they have been exported to the DIP file, select **Yes**. If you wish to keep the batches, select **No**.

5. In the **Save As** dialog box, enter a name and location for the DIP file in the **File name** field. Click **Save**. The export file will be created.

   Upon successful creation, the **Operation Completed** message box is displayed. Click **OK**.
**SYSTEM INTERACTION**

The following modules can be used in conjunction with, or otherwise interact with, Disconnected Scanning. They may require separate licensing and registration.

**Application Enabler**

Keyword Values captured from a third-party application via Application Enabler can be used to index documents residing in Disconnected Scanning’s *Awaiting index* and *Index in progress* batch status queues.

See the Application Enabler documentation for more information.

**AutoFill Keyword Sets**

**External AutoFill Keyword Sets**

External AutoFill Keyword Sets function slightly differently with Disconnected Scanning than they do with other OnBase modules.

In Disconnected Scanning, when entering a primary Keyword Value for an external AutoFill Keyword Set the primary Keyword Value entered by the user will be overwritten by the primary Keyword Value returned by the external AutoFill Keyword Set.

For more information on external AutoFill Keyword Sets, see the AutoFill Keyword Set documentation.

**Automated Indexing**

You can scan batches of documents into scan queues configured for Automated Indexing from the Disconnected Scanning client. Each batch will be routed to the Awaiting Automated Index batch status queue after being uploaded to OnBase.

Automated Indexing and Point and Shoot Indexing cannot be not performed in the Disconnected Scanning client.

**Encrypted Keywords**
If Disconnected Scanning is being used to assign documents to a Document Type associated with Encrypted Keywords, then the users’ ability to index documents and view Encrypted Keyword Values depends on the configuration of the User Group(s) that they have been assigned to and if the Encrypted Keyword Type has been configured to use Keyword Type Masking.

- If a user belongs to a User Group configured to have the **Access Security Masked Keywords** privilege, then, regardless of if the Encrypted Keyword Type is configured to use Keyword Type Masking, the user is able to index documents with Encrypted Keyword Values, view all Encrypted Keyword Values associated with a document, and upload documents associated with Encrypted Keyword Values to OnBase.
- If a user does not belong to a User Group configured to have the **Access Security Masked Keywords** privilege, then:
  - **If the Encrypted Keyword Type is not configured to use Keyword Type Masking.** The user is able to index documents with Encrypted Keywords, view Encrypted Keyword Values associated with a document and upload documents associated with Encrypted Keyword Values.
  - **If the Encrypted Keyword Type is configured to use Keyword Type Masking.** The user is not able to add Keyword Values to Encrypted Keyword Types, view Encrypted Keyword Values (these Keyword Values are displayed as read-only and with the security mask applied), or upload documents that have had Encrypted Keyword Values applied to them by another user.

### Encrypted Keywords and AutoFill Keyword Sets in Disconnected Scanning

If an Encrypted Keyword Type is part of an AutoFill Keyword Set in Disconnected Scanning, then the AutoFill Keyword Set will function as expected if:

- The user expanding the AutoFill Keyword Set belongs to a User Group with the **Access Security Masked Keywords** privilege.
- The user expanding the AutoFill Keyword Set does not belong to a User Group with the **Access Security Masked Keywords** privilege, but the Encrypted Keyword Types are not configured to use Keyword Type Masking.

If the user does not belong to a User Group with the **Access Security Masked Keywords** privilege and the Encrypted Keyword Type that is part of the AutoFill Keyword Set is configured to use Keyword Type Masking, then no Keyword Value is assigned to the Encrypted Keyword Type when the AutoFill Keyword Set is expanded.

The user will be able to upload this document because the Encrypted Keyword Value was not assigned to it.
Tip: If it is important to your business process that the Encrypted Keyword Value be associated with the document, then it will need to be assigned to the document by a user with the Access Security Masked Keywords privilege at a later point in time (e.g., from within the Document Imaging indexing interface).

Front Office Scanning

If you would like to configure Disconnected Scanning to launch from within Front Office Scanning by pressing a toolbar button and Disconnected Scanning is configured to use NT or LDAP authentication (i.e., the auto-logon command line switch, -AL, is configured for the Disconnected Scanning shortcut) you may also use the -EMBEDDED command line switch.

The -EMBEDDED switch turns off Disconnected Scanning’s continuous background upload feature and forces the Disconnected Scanning client to automatically close after a batch is uploaded.

If the -EMBEDDED switch is used, the -SCANQUEUE=<Scan queue name or Scan Queue #> switch may also be used to specify the scan queue that is used, rather than defaulting to the last scan queue used by Disconnected Scanning.

Additionally, the -SERVER and -LOCALCONNECT switches may be used to determine if the Disconnected Scanning client should be launched using a Local or a Server logon.

If the -LOCALCONNECT switch is used and no local configuration information is available, the user is prompted to create a local Disk Group and the Disconnected Scanning client connects to the Application Server on the first log on.

If neither the -SERVER or the -LOCALCONNECT switches are used in conjunction with the auto-logon switch, the Disconnected Scanning client will, by default, attempt to launch using local configuration information.

Full-Page OCR

You can scan batches of documents into scan queues configured for Full Page OCR from the Disconnected Scanning client. Each batch will be routed to the Awaiting OCR batch status queue after being uploaded to OnBase.

Full-Page OCR processing cannot be performed in the Disconnected Scanning client.

Virtual Print Driver

Disconnected Scanning can be used in conjunction with the Virtual Print Driver to efficiently capture documents from outside systems and archive them in the OnBase system.
When printing a document with the Virtual Print Driver, the Disconnected Scanning client will create a new unarchived document, using the values currently set in the keyword panel of the scan queue.

After the document is created, the document will be placed in the **Awaiting** queue (e.g., **Awaiting Index, Awaiting Document Separation**) that the scan queue has been configured for. If no other documents exist in the queue, a new batch will be created. Otherwise, the printed documents will be included in the batch that already exists. The document batch can then be uploaded.

**Note:** See the Virtual Print Driver documentation for more information on using the Virtual Print Driver.
USER GROUPS AND RIGHTS

Ensure that all users who will be using Disconnected Scanning belong to a User Group with the proper User Group Rights. For example, Disconnected Scanning administrators require a different level of permissions than users who are expected to scan and index documents.

For general information on the User Group Rights required to scan and index documents, see the Document Imaging documentation.

**Note:** The following information is specific to Disconnected Scanning and is not intended to be a comprehensive guide to configuring User Group Rights. For more information on configuring User Group Rights, see the System Administration documentation.

**Note:** A Web Scanning Named User license is not required to use Disconnected Scanning.

Configuring User Groups to Configure/Administer Disconnected Scanning

Disconnected Scanning administrators are given rights to configure the Disconnected Scanning client that Disconnected Scanning end users (e.g., users who perform scanning and indexing tasks) likely would not need.

Disconnected Scanning administrators have the ability to:

- **Perform Local Disconnected Scanning Client Configuration.** For more information, see Local Client Settings on page 69.

- **Configure Connection Information to the OnBase Application Server.** For more information, see Server Communication Settings on page 72.

- **Import and Export Scan Formats.** For more information, see Importing and Exporting Scan Formats on page 73.

- **Configure Automatic (i.e. Scheduled or Continuous) Uploads to OnBase.** For more information, see Configuring Automatic Uploads to OnBase on page 75.
- **Perform Keyword Data Set/AutoFill Keyword Set Maintenance.** For more information, see AutoFill Keyword Sets, Cascading Data Sets, and Keyword Data Sets on page 81.

- **Configure the Local Disk Group.** For more information, see Configuring a Local Disk Group on page 92.

- **Set the Disconnected Scanning Workstation’s Remote ID.** For more information, see Configuring the Remote ID on page 93.

- **Enable/Disable Logging for the Messages Window.** For more information, see Enabling Logging on page 93.

To give members of a User Group the ability to function as Disconnected Scanning administrators, the User Group must have the **DS Client Administrator** Administrative Processing Privilege Product Right. To grant a User Group this right:

1. From the OnBaseConfiguration module, click **Users | User Groups/Rights**. The **User Groups & Rights** dialog box is displayed.

2. Select the User Group to be configured from the User Group Name list and click **Product Rights**. The **Assigning Product Rights for <User Group Name> Group** dialog box is displayed.
3. In the Administrative Processing Privileges section, select the **DS Client Administrator** check box.

4. Click **Save**.

**Note:** In order to access the Disconnected Scanning Script Manager, a user must belong to a User Group that has been granted the **Document Imaging** Administrative Processing Privilege Product Right.

**Configuring User Groups to Perform Disconnected Scanning**

Users expected to use Disconnected Scanning to scan and index documents to be uploaded to OnBase must have rights to all Document Types associated with the scan queues to which they have been assigned.
If, for security reasons, users cannot be given rights to all Document Types associated with a scan queue to which they have been assigned, then separate scan queues must be created.

**GENERAL CONFIGURATION**

Some aspects of your Disconnected Scanning solution are generic in nature and apply to all or part of your OnBase or Disconnected Scanning solution, not just your local Disconnected Scanning workstation.

**Scan Queue Configuration**

Scan queues, a required component of your Disconnected Scanning solution, are configured in the OnBase Configuration module. Adding, modifying, or deleting a scan queue requires that users belong to a User Group configured with the *Scanning Configuration* Right.

Information on scan queue creation and configuration can be found in the Document Imaging documentation.

**Note:** Note that some scan queue configuration options apply exclusively to Disconnected Scanning, while others are not specific to Disconnected Scanning and/or do not affect Disconnected Scanning at all.

**Tip:** Like Document Imaging, it is considered a best practice for your Disconnected Scanning solution to use a 1:1:1 ratio for Disconnected Scanning workstations, scan queues and disk groups. By associating each Disconnected Scanning station with its own, unique scan queue and that scan queue with its own, unique disk group, you ensure that a backlog of pending and/or failed uploads will not be created by multiple Disconnected Scanning workstations attempting to upload batches to the same disk group.

**Making Configuration Changes Available to Disconnected Scanning**

In order to download new configuration information from the Application Server to the Disconnected Scanning workstation, you must restart IIS or recycle the server’s application pool and then log onto the Disconnected Scanning client using the Server logon. The transfer of configuration information is automatic.
Network Security

Auto-Logon

When auto-logon is enabled, users can automatically log on to Disconnected Scanning for the default database by launching the application from the shortcut. Users will not have to provide their logon credentials.

To enable auto-logon for Disconnected Scanning:

1. Right-click the Disconnected Scanning shortcut and choose Properties.
2. Click the Shortcut tab.
3. In the Target field, append the following command line switches to the existing text, placing a space between the existing text and this text: 
   -UN="<OnBase User Name>" -PW="<Password>"
4. (Optional) Add -LOCAL or -SERVER to the command line switch you created in Step 3 to automatically log on to Disconnected Scanning using the Local or Server logon, respectively.
5. Click OK.

LDAP & NT Authentication

Disconnected Scanning can be used with the extra security of NT Authentication and LDAP. In order to configure these options, your Configuration module has special network security capabilities.

To add these capabilities to your Configuration module, contact technical support or the vendor who supplied this product. Separate documentation is available from your vendor.

To use NT Authentication with auto-logon for Disconnected Scanning:

1. Right-click the Disconnected Scanning shortcut and choose Properties.
2. Click the Shortcut tab.
3. In the Target field, append the following command line switch to the existing text, placing a space between the existing text and this text:
   -AL -ODBC="<Data Source>" -SERVER
4. Click OK.
5. Once the configuration file is downloaded locally, the command line switch listed in Step 3 can be removed. Use the following command line switch to access the local configuration file:
   -AL
6. If the **-AL** command line switch is used in conjunction with either the **-INTERACTIVE** or the **-NETAUTH** command line switches (for backwards compatibility), the Disconnected Scanning module prompts the user for a domain, a user name and a password. See the Network Security documentation for more information.

**Integrating Application Enabler with Disconnected Scanning**

In order to use Application Enabler to index documents within Disconnected Scanning, you must append the **-AE** command line switch to the Target command line in the Disconnected Scanning desktop shortcut’s properties.

**Note:** You may instead append the **-AE:LEGACY** command line switch in order to use the legacy method of communication between Application Enabler and Disconnected Scanning. This method of communication does not have the same software requirements as the current method of communication between the two modules. For more information, contact your solution provider.

**Configuring VB Scripts**

VB Scripts extend system functionality by providing a powerful and easy way to manipulate documents and their associated keyword values. With VB Scripts, you invoke fragments of BASIC code to perform user-customized operations on selected documents. For example, a script may present a message box with directions to the user, write data to a text file, or even access another application and update values gathered from Disconnected Scanning.

**Script Manager**

The Disconnected Scanning Script Manager allows you to add and modify VB Scripts. You can add your own VB Scripts or import an existing script from another Disconnected Scanning client.

To access the Script Manager, from the Main Menu, click **Settings | Script Manager**.

The **Script Manager** dialog box is displayed:
Creating a Script

1. From the Script manager, click Add new. The Script Settings dialog is displayed.

2. Enter a name for the script in the Script Name field.

3. Select the Script Type. Available script types are shown below:
   - **Pre-scan**: The script runs automatically when the user initiates any scanning operation, including Scan More Pages or Scan More Documents.
   - **Post-scan**: The script runs automatically after a scanning operation is complete. This includes Scan More Documents, but not Scan More Pages.
   - **Post-scan more**: The script runs automatically after a Scan More Pages scanning operation is complete.
   - **Pre-index**: The script runs automatically when the user initiates a batch indexing operation, including when batches existing in the Fully Indexed batch status queue undergo additional indexing.
• **Barcode**: The script runs automatically when scanned documents are undergoing barcode processing at the time of scanning.

When the **Barcode** script type is selected, a text field is displayed next to the **Barcode** check box. In this field, enter the **VB Script #** (displayed when a VB script is selected in the **VB Scripts** dialog box in the OnBase Configuration module) for the VB script that is assigned to the corresponding bar code field.

**Note**: For more information on associating a VB script with a Bar Code process, see the Bar Code Process documentation.

• **Post-index**: The script runs automatically after each document is indexed, including when documents existing in batches in the **Fully Indexed** batch status queue undergo additional indexing.

• **Manual during index**: This script can be run at any time on a document or page by clicking a button in the Keywords section of the Indexing window.

• **Ad-hoc**: This script can be run at any time on a document or page by right-clicking and selecting **Scripts**.

**Note**: Scripts can have more than one script type.

4. Select the scan queue(s) that you would like to enable the selected script(s) for.

5. Click **OK** to save the new script. The **Script Editor** is displayed.

**Script Editor**

The body of the script code is edited in the Script Editor screen that is displayed when creating a new script or when selecting the **Edit text...** button on an existing script.

**Note**: Scripts are limited to a maximum of 1 million characters.

Script execution begins in the function or subroutine named **DSMain**. The script editor provides a shell of this subroutine when creating a new script object.

The editor interface also provides a mechanism for jumping to a given line of the code. This may be helpful for debugging purposes if the script engine reports an error on a certain line of the script at runtime.

**Note**: For additional information on VB script options, see the API documentation.
**Importing and Exporting Scripts**

Scripts can be imported and exported manually, and can be imported automatically by users who do not have administrative rights to open the Script Manager dialog box. Clicking the Import button allows you to select a script file that was exported by another Disconnected Scanning client and bring all of the scripts into the current client.

**Manually Importing a Script**

To import a script file, select **Settings | Script Manager** and click **Import**. Browse to the script file that was exported by another system. Scripts are named **DSCRIPT.DSS** by default.

**Note:** If the script file has the same name as a previously imported script file, the scripts contained in that file will be overwritten. If the Script file has a different name, scripts are appended to the existing scripts.

**Automatically Importing a Script**

Script files can be imported automatically, making it easy for administrators to distribute scripts to Disconnected Scanning clients.

To import script files automatically, name the Script file to be imported **DSCRIPT.DSS** and place it in the local diskgroup folder of the Disconnected Scanning Client. The script file will be automatically imported when the Disconnected Scanning Client is started.

Non-administrative users cannot open the script editor, once the script file has been imported.

**Exporting a Script**

1. To export a script, select **Settings | Script Manager**. The **Script Manager** dialog box is displayed.
2. Select the script to be exported from the Script Name list and click **Export**. The **Save As** dialog box is displayed.
3. Browse to the location where you would like to export the script to and click **Save**.

The exported script is saved as a .DSS file. It cannot be read or edited by hand, making this a secure mechanism for distribution. Non-administrative users cannot open the script editor, once the script file has been imported.
LOCAL DISCONNECTED SCANNING CLIENT CONFIGURATION

Disconnected Scanning administrators have the ability to access configuration options specific to the Disconnected Scanning client from within the Disconnected Scanning client itself.

**Note:** For more information on creating/configuring Disconnected Scanning administrators, see Configuring User Groups to Configure/Administer Disconnected Scanning on page 59.

Disconnected Scanning administrators have rights to the **Settings** and **Scheduling** menus, as well as additional options underneath the **File** and **Server** menus. These options are discussed below.

Additionally, Disconnected Scanning administrators also have access to the Disconnected Scanning Administration toolbar, displayed below the Disconnected Scanning toolbar.

### Local Client Settings

Most Disconnected Scanning client configuration options are set using the **Local Client Settings** dialog box.
To access the **Local Client Settings** dialog box, from the Main Menu, click **Settings | Local Client Settings**.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic timeout (minutes)</td>
<td>The number of minutes of inactivity after which the Client will close.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Automatic Connect to Server:</strong></td>
<td>When selected, you are automatically connected to the server when you perform a manual upload or an AutoFill Keyword Set download. The last known connection settings are used and you are not prompted with a logon dialog.</td>
</tr>
<tr>
<td><strong>Always upload all batches without confirmation</strong></td>
<td>When selected, you are not prompted to select specific scan queues at the time of upload. All available scan queues are selected by default.</td>
</tr>
<tr>
<td><strong>Include unindexed batches in automatic upload mode</strong></td>
<td>When selected, unindexed batches are uploaded when the Continuous background uploads setting is enabled.</td>
</tr>
<tr>
<td><strong>Ask indexing information at time of drag and drop</strong></td>
<td>When selected, documents captured by Disconnected Scanning via drag and drop must be indexed immediately. When not selected, documents captured by Disconnected Scanning via drag and drop are sent to the Awaiting Index batch status queue or the first configured batch status queue (i.e. Awaiting Document Separation) of the scan queue.</td>
</tr>
<tr>
<td><strong>Log user activity to CSV file (requires application restart)</strong></td>
<td>When selected, user actions performed in the Disconnected Scanning client on this workstation are logged to a comma-separated value text file stored locally on the workstation. Once the Log user activity to CSV file (requires application restart) check box is selected, the User activity CSV log file location field is enabled. This field allows you to specify the location where the local log file is created. By default, it is set to C:\Program Files\Hyland\Disconnected Scanning for 32-bit systems and C:\Program Files (x86)\Hyland\Disconnected Scanning for 64-bit systems. In order for this setting to take effect, the Disconnected Scanning client must be restarted. For more information, see Enabling Logging on page 93.</td>
</tr>
</tbody>
</table>

*Note:* By default, this option is not selected.
Server Communication Settings

The Server Communication Settings allow you to change the default Server address and Datasource.

Click Settings | Server Communication.... The Server Communication Settings dialog box is displayed.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Additional Autoplay Events | A list of the Windows Autoplay events configured for the Disconnected Scanning workstation is displayed in the Additional Autoplay Events list.  
Select the check box next to the Autoplay event that you would like to make Sweeping via Disconnected Scanning available for.  
For more information, see Sweeping Documents into Disconnected Scanning Using Windows Autoplay on page 28. |
Using the drop-downs, select the URL to your OnBase Application Server and your datasource or enter the URL in the **Server address** field and the name of the datasource in the **Datasource** field.

**Note:** The URL in the **Server address** file must be appended with **service.asmx**.

Enter the port number to be used in the **Port number** field, or click the **Automatic** check box to have Disconnected Scanning automatically select a port number.

**Note:** The **Maximum pages per request** option, available in the **Server Communication Settings** dialog box in previous versions of Disconnected Scanning, has been deprecated. Disconnected Scanning now automatically has the ability to upload large documents, or batches of documents, with less of a risk of timing out. For more information on Disconnected Scanning’s ability to upload large documents or batches, see Setting the Maximum File Upload Size on page 105.

Click **OK** to save your settings and close the **Server Communication Settings** dialog box.

### Importing and Exporting Scan Formats

Scan formats configured for each workstation can be imported and exported between workstations. Settings are saved to an export file, which can be imported on another workstation running Disconnected Scanning.

**Tip:** Exporting and importing scan formats between workstations ensures that Disconnected Scanning is still able to function even if a workstation used to scan specific types of documents has been incapacitated. Simply export the scan format settings to another workstation with Disconnected Scanning and continue working.

**Note:** Scan formats exported from a Document Imaging workstation cannot be used with Disconnected Scanning. Likewise, scan formats exported from a Disconnected Scanning workstation cannot be used with Document Imaging. Only scan formats from another Disconnected Scanning workstation can be imported into a Disconnected Scanning workstation.

### Importing Scan Formats

Scan formats can be imported manually by an administrator or they can automatically be imported when Disconnected Scanning is launched on the scanning workstation.
**Manually Importing a Scan Format**

1. In the Disconnected Scanning client, select **File | Import Scanner Settings**. The **Open** dialog box is displayed.
2. Navigate to the location of the export file and select it. Click **OK**.
3. Click **OK**. The scan format settings have been imported, and can be accessed and used per normal procedure in the Disconnected Scanning client.

**Automatically Importing a Scan Format**

To automatically import a scan format, ensure that the scan format export file is named `dsformats.dsf` and place it in the Disconnected Scanning client’s local disk group.

The next time that Disconnected Scanning is launched, the scan format is automatically imported.

If the scan format export file is not named `dsformats.dsf`, it will not be imported.

**Exporting Scan Formats**

To export scan formats:

1. In the Disconnected Scanning client, select **File | Export Scanner Settings**. The **Scan Format Export** dialog box displays.
2. All configured scan formats are listed in the tree, and selected for export by default. Click on a format to de-select it.

3. When all desired scan formats have been selected, click **OK**. The **Save As** dialog box displays.

4. Enter a name and location for the export file. Click **OK**. The export file will be saved to the chosen location.

### Configuring Automatic Uploads to OnBase

Batches scanned and/or indexed from the Disconnected Scanning client must be uploaded to OnBase before they are available to other users. Batches can be uploaded manually by the scanning/indexing user, or an administrator can configure the Disconnected Scanning client workstation to automatically upload batches to OnBase.

There are two automatic upload methods available: continuous background uploads and scheduled uploads.

#### Continuous Background Uploads

When continuous background uploads are enabled, batches are automatically uploaded in the background while scanning and indexing is being performed on the Disconnected Scanning client workstation.

The Disconnected Scanning client checks once every five seconds for batches that can be uploaded. If an upload is not already in progress, Disconnected Scanning uploads batches that are ready.
To enable continuous background uploads:

1. From the Main Menu, select **Server | Continuous background uploads**.
2. When a batch is ready to be uploaded, the **Begin batch upload** dialog box is displayed to confirm your logon credentials.

![Begin batch upload dialog box](image)

To prevent this message from being displayed, click **Settings | Local Client Settings | Automatic Connect to Server** from the Main Menu to automatically confirm each upload and provide logon credentials.

3. Confirm your logon credentials and click **OK**. The batch is uploaded.

By default, only indexed batches are uploaded. To also upload unindexed batches, select the **Include unindexed batches in automatic upload mode** option on the **Local client settings** dialog box (from the Main Menu, click **Settings | Local Client Settings | Include unindexed batches in automatic upload mode**).

**Scheduled Uploads**

Batches can be automatically uploaded to OnBase at scheduled times.

In order for the scheduled upload to take place, the Disconnected Scanning client must be closed and the same Windows user that was logged onto the workstation when the Disconnected Scanning Scheduler service was installed must be logged onto the workstation.
INSTALLING THE DISCONNECTED SCANNING SCHEDULER SERVICE

1. Launch the Disconnected Scanning Scheduler service in one of the following ways:
   - From the Main Menu, click **Scheduling | Schedule operations**
   - Click the **Schedule Uploads** button in the main Disconnected Scanning toolbar.

2. You are prompted to install the scheduler.

   **Note:** The Windows user that is logged on when the Scheduler service is installed must be logged on when the Scheduler service is running to automatically upload batches to OnBase. Or, if needed, the Scheduler service can be installed and run using the Windows **LocalSystem** user account, but this will require you to use standard OnBase security (i.e., an OnBase user name/password must be provided in the **Schedule item** dialog box). NT/LDAP authentication cannot be used when running the Scheduler service using the Windows **LocalSystem** user account.

   The installation process is brief, and you are notified when it is complete. Until the Scheduler service is installed and running, scheduled uploads cannot be performed.
**USING THE DISCONNECTED SCANNING SCHEDULER SERVICE TO CONFIGURE SCHEDULED UPLOADS**

1. Launch the Scheduler service in one of the following ways:
   - From the Main Menu, click **Scheduling | Schedule operations**
   - Click the **Schedule Uploads** button in the main Disconnected Scanning toolbar.

   The **Scheduled operations** window is displayed.
2. Click **Add new** to add a new scheduled upload. The **Schedule item** dialog box is displayed.

3. The dialog box opens with defaults for the **Server**, **Username**, **Password**, and **Datasource** fields. If you wish to change any of these defaults, edit the field(s).

4. Select **Batch upload**. A batch upload uploads documents from the selected scan queues.
5. Provide the information required in the **Schedule time** section:
   a. In the **Run time** field, select the time of day to run the upload.
   b. To schedule a time frame in which to continuously upload batches, select **Until** and enter an end time in the field. Disconnected Scanning will continuously upload any available batches in the time range set by the **Run time** and **Until** fields.

   **Note:** The maximum length of a scheduled continuous upload time frame is 23 hours and 59 minutes.

   c. Deselect/select the day(s) of the week to run the upload by clicking the appropriate check box(es).
   d. In the **Number of retries** field, type the number of additional times to attempt the upload if a communication failure occurs during the initial attempt.

6. In the **Scan queues** section, deselect the scan queues that are not to be included in the scheduled upload. To deselect/select a scan queue, click the check box at the beginning of the scan queue listing.

7. To exclude unindexed documents, click the **Unindexed** check box to deselect it.

8. To exclude documents that are currently checked-out, click the **Checked-out** check box to deselect it.

9. To prevent the scheduler from performing this upload, click the **Disable this schedule item** check box to select it. This option is typically used later on, to temporarily deschedule an upload that is normally run per schedule.

10. Click **OK** to add the upload operation to the scheduler.

Some additional notes about scheduled uploads:

- The scheduled work is performed by a separate executable named **dsupload.exe**.
- This executable can run as a service on Windows platforms that support services, or it can run as a background executable on platforms that do not. The Disconnected Scanning module will attempt to install and configure the service any time the scheduling menu is accessed and the upload application is not running.
- If Disconnected Scanning is running when the upload process is scheduled to take place, a message is displayed informing the user that a scheduled upload time has passed and asking if the upload should be performed.
• Events associated with uploading (i.e., an upload was completed, an upload was not completed, a scheduled upload was deferred to the user because Disconnected Scanning was running) are logged to the rsschedule.log file. This log file is stored in the local disk group.

**AutoFill Keyword Sets, Cascading Data Sets, and Keyword Data Sets**

AutoFill Keyword Sets, Cascading Data Sets and Keyword Data Sets can be very valuable tools to help users quickly and accurately index documents.

• An AutoFill keyword set is a group of related keywords that provide the ability to automatically assign values to multiple keywords based on the value of a primary keyword. AutoFill keyword sets are an effective tool for increasing the speed and accuracy of indexing, since entry of a single keyword value can be used to populate an entire data entry dialog.

When documents are indexed, if an AutoFill keyword set exists for a primary keyword, the secondary keyword values are automatically assigned to the document. If more than one AutoFill keyword set exists for the primary keyword, the user, depending on the system configuration, may be prompted to select one or more AutoFill keyword sets to assign to the document. See the OnBase Client help files for more information about AutoFill keyword sets.

• A Keyword Data Set is a set of Keyword Values, which limits the values that appear in a drop-down select list. Only those values that reside in the Keyword Data Set are displayed in the drop-down select list.

• When entering values for a Keyword Type that uses a Keyword Data Set, typing a partial value and selecting the drop-down select list will return all Data Set values that begin with the entered value. Disconnected Scanning internally applies a wildcard to the typed value and searches for it in the Data Set.

• A Cascading Data Set functions similarly to a Keyword Data Set, but the Cascading Data Set orders Keyword Types in a way so that they are arranged in a hierarchical way and the data set values for the child Keyword Type depend on the value selected for the parent Keyword Type.

During indexing, the Disconnected Scanning client connects to the Application Server and is able to access in real-time or cache all available Auto-Fill Keyword Sets and cache Keyword Data Sets locally on the Disconnected Scanning workstation.

Unlike AutoFill Keyword Sets and Keyword Data Sets, Cascading Data Sets cannot be cached; they are always accessed in real-time from the Application Server each time they are used.
Once a cache is established, AutoFill Keyword Set and Keyword Data Set information is accessed from the local cache. The cache information will be used until it is cleared. AutoFill Keyword Sets and Data Sets are cached separately.

**AUTOFill KEYWORD SET CACHE**

To cache one or more AutoFill Keyword Sets on your Disconnected Scanning workstation:

1. Select **Server | Autofill Keyset/dataset maintenance | Build local autofill set cache**. The **Select autofill keysets** dialog box is displayed.

2. Select the check boxes that correspond to the appropriate AutoFill Keyword Set(s) that you want to cache for usage.
3. Click **OK**. The **Begin autofill keyword set query** dialog box is displayed.

![Begin autofill keyword set query dialog box]

4. Ensure that the parameters are correct and click **OK**. The AutoFill Keyword Set information is downloaded to a cache.

**Importing AutoFill Keyword Sets**

Some workstations may require one or more instances of an AutoFill Keyword Set that differ from those available from the OnBase Application Server.
You can import a cache of AutoFill Keyword Sets to the Disconnected Scanning workstation from a text file. In order to use the import file for populating AutoFill Keyword Sets, the file must contain both the appropriate data and the appropriate formatting. To set up a proper import text file, ensure the following:

- Each line in the text file represents one instance of the AutoFill Keyword Set. The order of Keyword Values in the line must match the order of Keyword Types in the AutoFill Keyword Set. See the OnBase Configuration module Help for more information on AutoFill Keyword Set configuration.
- The first value in each instance of the AutoFill Keyword Set is the primary Keyword Value. Delimiters are placed to the left and right of each value. Values are separated by separators. An example file is shown below.

![ArbitrationJuly03AFimport.txt - Notepad](image_url)

Note: If a Keyword Type that is part of the AutoFill Keyword Set is configured to use Keyword Type Masking, be aware that the Keyword Value will be imported correctly regardless of if the static characters are present in the import file or not.
To import the file:


2. Select the AutoFill Keyword Set you are adding instances to from the Autofill Keyset drop-down.

3. Specify the delimiter in the text file.
   A delimiter is a character that encloses each Keyword Value in the text file, such as quotation marks. Delimiters are commonly used when a separator is present within the field.

4. Specify the separator in the text file. A separator is character that separates Keyword Values in the text file, such as a comma or a back slash.

5. If you wish to clear existing AutoFill Keyword Set data from the workstation prior to importing instances of the AutoFill Keyword Set from the text file, select the Clear all existing instance data for this keyword set before import check box.

Using the Local AutoFill Keyword Set Cache
Disconnected Scanning, by default, first checks for an instance of the AutoFill Keyword Set in the local cache.

If a local cache has not been created, or if an instance of the AutoFill Keyword Set with a matching primary Keyword Value is not found in the cache, Disconnected Scanning will attempt to obtain a matching instance of the AutoFill Keyword Set from the Application Server.
This default behavior can be modified by setting the options on the **Autofill keyword set/dataset options** dialog box. To display the **Autofill keyword set/dataset options** dialog box, click **Server | Autofill keyset/dataset options**.

![Autofill keyword set/dataset options dialog box](image)

- To automatically clear the Disconnected Scanning workstation’s AutoFill Keyword Set/Keyword Dataset cache when the workstation is started or shut down, select the **Always clear the local autofill keyword set/dataset cache at startup and shutdown** check box.

**Tip:** This option is useful when AutoFill Keyword Sets stored in the local cache contain sensitive data (e.g., social security numbers, account numbers, patient care data, etc.).

- To prompt users to clear the Disconnected Scanning workstation’s AutoFill Keyword Set/Keyword Dataset cache when a new Disconnected Scanning configuration file is downloaded to the Disconnected Scanning workstation, select the **Ask to clear the local autofill keyword set/dataset cache after server configuration update** check box.

**Note:** If both the **Always clear the local autofill keyword set/dataset cache at startup and shutdown** check box and the **Ask to clear the local autofill keyword set/dataset cache after server configuration update** check box are selected, the **Always clear the local autofill keyword set/dataset cache at startup and shutdown** check box.

- To use cached instances of the AutoFill Keyword Set exclusively, and never accept instances of AutoFill Keyword Sets in real-time from the Application Server, select the **Use local autofill keyset cache only** check box.
KEYWORD DATA SET CACHE

Note: Cascading Data Sets function differently from Keyword Data Sets, and cannot be cached. Cascading Data Sets are always accessed in real-time from the Application Server.

Keyword Data Sets are accessed from the OnBase Application Server and are cached on the Disconnected Scanning workstation when the drop-down arrow is selected and the data set is displayed.

You can also access the OnBase Application Server once and cache all available Keyword Data Sets prior to indexing. To create a cache of Keyword Data Sets:

1. Select Server | Autofill keyset/dataset maintenance | Build local dataset cache. The Select keyword datasets dialog box is displayed.

2. Select the check boxes that correspond to the appropriate Data Set(s) that you want to cache for usage.
3. Click OK. Depending on your local Disconnected Scanning client configuration, the download may automatically begin or you may be required to enter your OnBase logon credentials.

- If the **Automatic Connect to Server** option in the **Local client settings** dialog box is selected, the download automatically begins.
- If the **Automatic Connect to Server** option is not selected in the **Local client settings** dialog box, the **Begin keyword dataset query** dialog box is displayed.

![Begin keyword dataset query dialog box](image)

Ensure that the parameters are correct and click **OK**. The Data Set information is downloaded to a cache.

**ENSURING AUTOFILL KEYWORD SET AND KEYWORD DATA SET INFORMATION IS RECENT**

If you are using cached AutoFill Keyword Set and/or Keyword Data Set information, Disconnected Scanning will use the cached information regardless of how recent the download is. To ensure you have the proper information cached, the cache should be cleared and re-created on a regular basis.

An AutoFill Keyword Set or Keyword Data Set cache can be cleared manually at any time. You can configure Disconnected Scanning to prompt you for an update after the Application Server's configuration has been updated, or you can schedule an automatic download of AutoFill Keyword Set or Keyword Data Set information to take place regularly.
Manually Clearing the Cache

To clear the cache manually:

1. Select **Server | Autofill keyset/dataset maintenance | Clear local cache**.
2. A prompt asking **Are you sure you want to delete all of the cached autofill/dataset data?** is displayed. Click **Yes**.

   The local cache, including AutoFill Keyword Sets and Keyword Data Sets, is cleared.

Prompting a User to Clear the Cache After a Configuration Update

To be prompted to clear the cache manually after a configuration update:

1. Select **Server | Autofill keyset/dataset maintenance | Options**. The **Autofill keyset/dataset options** dialog box is displayed.

   ![Autofill keyword set/dataset options dialog box]

2. Select the **Ask to clear local autofill keyset/dataset cache after server configuration update** check box.
3. Click **OK**.

   Now, when you log onto the Disconnected Scanning client using the Server logon, you will be prompted with a message asking you if the cache should be cleared. Click **Yes** to clear the cache or click **No** to continue to Disconnected Scanning without clearing the cache.

   If the cache is cleared, you will need to download a new cache for both the AutoFill Keyword Sets and the Data Sets in order for them to be available to the Disconnected Scanning client.
Scheduling a Cache Download

To schedule a cache download:

1. Select **Scheduling | Schedule operations**. The **Scheduled operations** dialog box is displayed.

![Scheduled operations dialog box](image)

**Note:** For information on installing or starting the Scheduler Service, see Installing the Disconnected Scanning Scheduler Service on page 77.
2. Click **Add new**. The **Schedule item** dialog box is displayed.

3. The dialog box opens with defaults for the **Server**, **Username**, **Password**, and **Datasource** fields. If you wish to change any of these defaults, edit the field(s).

4. Select **Autofill keyset download** or **Dataset download**. If you want to download both AutoFill Keyword Sets and Data Sets, you must configure a scheduled item for each.
5. Provide the information required in the Schedule time section:
   - In the Run time field, select the time of day to run the upload.
   - Deselect/select the day(s) of the week to run the upload by clicking the appropriate check box(es).
   - In the Number of retries field, type the number of additional times to attempt the upload if a communication failure occurs during the initial attempt.

6. Select the appropriate AutoFill Keyword Set(s) or Data Set(s) for download.
7. To prevent the scheduler from performing this upload, click the Disable this schedule item check box to select it. This option is typically used later on, to temporarily deschedule an upload that is normally run per schedule.
8. Click OK to add the upload operation to the scheduler.

Configuring a Local Disk Group

You can specify the location of the local disk group, the folder where scanned documents are stored before being uploaded to OnBase. To set the location of the local disk group:

1. Click Settings | Local diskgroup.... The Local diskgroup settings dialog box is displayed.

2. Enter the path to a folder on the Disconnected Scanning workstation in the Local diskgroup base path: field or click Browse to browse to the folder.

   The folder specified must be on the Disconnected Scanning workstation.

   **Note:** You must use a local path to a folder on the Disconnected Scanning workstation. A UNC path cannot be entered.

3. Click OK.
Configuring the Remote ID

Once a batch is uploaded, its batch name contains a remote ID, which identifies the Disconnected Scanning workstation. By default, the remote ID is the computer NetBIOS name.

To change the remote ID:

1. From the Main Menu, click **Settings | Remote ID**. The **Workstation remote ID** dialog box is displayed.

   ![Workstation remote ID dialog box](image)

   The current remote ID is displayed in the **Workstation Remote ID** field.

2. Enter a new remote ID into the **Workstation Remote ID** field. The ID can include any combination of up to 10 letters, digits, and/or special characters.

3. Click **OK**.

Enabling Logging

Two types of logging are available in the Disconnected Scanning client.

- **User Action Logging**. For more information, see User Action Logging on page 94.
- **Scan/Server Message Logging**. For more information, see Scan/Server Message Logging on page 94.
User Action Logging

You can log user actions performed in the Disconnected Scanning client on a workstation to a log file stored locally on the Disconnected Scanning workstation. When user action logging is enabled, the following actions are logged:

- **Log On/Out**: Logging On, Logging Out
- **Scanning**: Begin Scanning: New Batch, Begin Scanning: Additional Documents, End Scanning: Successful, End Scanning: Failure, Cancel Scanning
- **Indexing**: Begin Indexing, End Indexing
- **Uploading**: Begin Uploading, End Uploading, Uploading Cancelled, Uploading Error, Begin Scheduled Uploading, End Scheduled Uploading
- **Deleting**: Delete Batch, Delete Document, Delete Page

The log file contains the following information: User Activity, User Name, Disconnected Scanning Workstation Name, Type of Disconnected Scanning Log On (i.e., Local or Server), Date/Time Action Performed.

To log locally-performed Disconnected Scanning user actions, select the **Log user activity to CSV file (requires application restart)** check box in the **Local Client Settings** dialog box.

Once the **Log user activity to CSV file (requires application restart)** check box is selected, the **User activity CSV log file location** field is enabled. This field allows you to specify the location where the local log file is created. By default, it is set to **C:\Program Files\Hyland\Disconnected Scanning** for 32-bit systems and **C:\Program Files (x86)\Hyland\Disconnected Scanning** for 64-bit systems.

In order for this setting to take effect, the Disconnected Scanning client must be restarted.

Scan/Server Message Logging

To log all messages from the **Messages** window to a text file stored on the local workstation, from the Main Menu, click **Settings | Log Messages To File**. To disable logging, click **Settings | Log Messages To File** again.

When scan/server message logging is enabled:

- Messages displayed in the **Scan** tab are written to the **rsscan.log** file in the in the local disk group.
- Messages displayed in the **Server** tab are written to the **rscomm.log** file in the local disk group.
If Disconnected Scanning is running in debugging mode:

- If you are scanning using an ISIS scan format, scanning information is recorded in the `ISIS_debug.log` file in the local disk group.
- If you are performing bar code recognition using the Hyland Barcode Recognition for OnBase software, bar code processing information is recorded in the `Barcode_debug.log` and `BarcodeImage_debug.log` files in the local disk group.

For information on running Disconnected Scanning in debugging mode, contact your solution provider.
INSTALLATION

REQUIREMENTS

- Windows XP SP3 or later service pack
- Windows Server 2003 SP2 or later service pack
- Windows Vista SP1 or later service pack
- Windows Server 2008 SP1 or later service pack
- Windows Server 2008 R2 RTM or later service pack
- Windows 7 RTM or later service pack

Note: As of release 7.2, OnBase no longer supports the use of the Windows® NT 4.0 and Windows® 98 operating systems. Microsoft retired its support of Windows NT 4.0 on January 1, 2005 and Windows® 98 on July 11, 2006. Microsoft no longer offers technical support or security updates for these operating systems.

Note: As of release 10.0.0, OnBase no longer supports the use of the Windows 2000 Professional Edition and Windows 2000 Server operating systems. Microsoft’s extended support for these operating systems was retired on July 13, 2010. Microsoft will no longer offer technical support or security updates for these operating systems after that date. Additionally, these operating systems do not support Microsoft .NET Framework 4.0, which is an OnBase requirement as of version 10.0.0. If you are using either Windows 2000 operating system, you should not upgrade to OnBase 11.0.0 until you have upgraded to a Windows operating system supported by OnBase.

Databases Supported

The following tables list the databases supported in OnBase 11.0.0.
**Microsoft SQL Server**

<table>
<thead>
<tr>
<th>Microsoft SQL Server</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft SQL Server™ 2000</td>
<td>Microsoft SQL Server 2000 and 2005 must be running in compatibility mode 7 or greater. Running in compatibility mode 6.5 or lower will result in errors during the upgrade process. SQL Server 2005 drivers must be upgraded to the Feature Pack for Microsoft SQL Server 2005 - December 2008 or a later feature pack.</td>
</tr>
<tr>
<td>(SP4 recommended)</td>
<td></td>
</tr>
<tr>
<td>Microsoft SQL Server 2005</td>
<td></td>
</tr>
<tr>
<td>(SP2 or later recommended)</td>
<td></td>
</tr>
<tr>
<td>Microsoft SQL Server 2008</td>
<td></td>
</tr>
<tr>
<td>(RTM, SP1, SP2; SP2 recommended)</td>
<td></td>
</tr>
<tr>
<td>Microsoft SQL Server 2008 R2</td>
<td></td>
</tr>
<tr>
<td>(RTM, SP1; SP1 recommended)</td>
<td></td>
</tr>
</tbody>
</table>

*Note:* On January 11, 2011 Microsoft discontinued technical support for Microsoft SQL Server 7.0. As of release 11.0.0, Hyland Software no longer supports SQL Server 7.0.

*Note:* You must ensure that your SQL Server database client software version matches or exceeds the database server version. For example, if your database server is SQL Server 2005, verify that the database client is SQL Server 2005 (or later). Running a previous client version, such as SQL Server 2000, will result in system instability and memory issues. For instructions on determining your server and client versions, see Database Client / Server Version Compatibility on page 99.

**Oracle**

*Note:* If you are using an Oracle database, it is strongly recommended that you have a certified Oracle Database Administrator on staff.

<table>
<thead>
<tr>
<th>Oracle</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle v 8.0.5.0 or later</td>
<td>Oracle version 8.0.5.0 can be used, but it is not recommended due to potential memory leaks. If Oracle 8.0.5.0 is used, a third-party ODBC driver is recommended.</td>
</tr>
<tr>
<td>Oracle 8i: 8.1.7.7 or later</td>
<td>ODBC drivers should be 8.1.7 or later. 8.1.6.x drivers have known issues and are not supported.</td>
</tr>
</tbody>
</table>
Due to critical issues that have been reported to Hyland Software, Hyland Software strongly recommends that:

- your database client software version matches or exceeds the database server version and
- you are running the most recent version of the database client.

This will help to reduce compatibility issues and minimize troubleshooting time when issues do occur.
Disconnected Scanning

Your database administrator can determine the database server version and identify the most-recent version of the database client software. The ODBC driver number indicates which version of the database client software you are using. For example, if your database server software is Oracle 10 Release 2, verify that the Oracle Client software is Oracle 10 Release 2 (or later). The same is true of SQL databases. For example, if your database server is SQL Server 2005, verify that the database client is SQL Server 2005 (or later).

To check your database client version, perform the following steps from the workstation or server where the ODBC connection is configured:

1. Open your ODBC Data Source Administrator, and click on the **Drivers** tab.
2. Select the driver you are using to connect to your OnBase database.
   - If your database server software is Oracle 10 Release 2, the version number should appear as `10.2.[#.#.#]` (or later), where `10.2` is the version number and `[#.#.#]` represents the service pack.
   - If your database server software is SQL Server 2005, the version number should appear as `2005.[##.####.##]` (or later), where `2005` is the version number and `[##.####.##]` represents the service pack.

The above descriptions are examples of two commonly used database version numbering schemes. Ensure that the supported database you use adheres to the database client/server recommendation.

**Database/File Servers**

Server requirements are site-specific. Database/file servers should be dedicated purpose servers; i.e., not used as a domain controller, e-mail server, print server, proxy server, etc. Network and disk I/O hardware should be optimized for performance and redundancy. Multiple network interface cards on servers are often required to minimize network bottlenecks.

**Scanning Workstation Hardware Requirements**

<table>
<thead>
<tr>
<th>Hardware</th>
<th>Minimum</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU</td>
<td>1 GHz</td>
<td>2 GHz or faster</td>
</tr>
<tr>
<td>Memory (RAM)</td>
<td>512 MB</td>
<td>1 GB or greater (2 GB or greater for Windows Vista and later versions of Windows)</td>
</tr>
</tbody>
</table>
Note: To determine the minimum hard disk space required for your Disconnected Scanning workstation, you must consider the number of documents and the characteristics of the documents (e.g., color/bi-tonal, resolution, etc.) being stored on the local workstation prior to being uploaded to OnBase.

### Scanner

The Disconnected Scanning module can use any TWAIN, ISIS, or Kofax™-compliant scanner.

Note: Your Disconnected Scanning workstation may have different minimum requirements based on the minimum requirements suggested for your scanner.

### The OnBase Database and Application Server

The Disconnected Scanning module requires access to an OnBase Application Server. The Disconnected Scanning Client version must match the version of the Application Server.

#### Application Server

Refer to the Web Server documentation for current Application Server hardware requirements.
About Virtual Environments

Hyland Software develops, tests, and supports the OnBase suite of products on specific Operating Systems, not specific hardware configurations. When OnBase is operated in a virtual environment (such as Citrix, VMware, Hyper-V, or Windows Remote Desktop) there may be limitations or subtle differences imposed by the environment. The customer and the virtual environment vendor are responsible for any interactions or issues that arise at the Hardware or Operating System layer as a result of their use of a virtual environment.

When it appears that an OnBase performance-related issue is either caused by (or is unique to) the virtual environment, organizations may be asked to validate that the issue occurs in a non-virtual environment. Hyland Software will make this request if there is reason to believe that the virtual environment is a contributing factor to the issue.

Each OnBase site is unique. Hyland Software depends on the customers who deploy OnBase in virtual environments to do so only after careful design and adequate planning (that takes into account the workloads of your organization), and in accordance with recommendations provided by the virtual environment’s vendor. As with any implementation, Hyland Software strongly recommends that any customer deploying an OnBase solution in a virtual environment thoroughly test the solution before putting it into production.


64-Bit Support Statement

The OnBase suite of products is tested on 64-bit systems and is capable of being deployed on 64-bit systems using the Windows 32-bit on Windows 64-bit Emulator (WOW64) layer. However, OnBase modules that integrate with third-party applications may not be able to be used with the 64-bit versions of these applications. For these modules, only the 32-bit versions of these third-party applications are currently supported by the OnBase integrations. Consult the module-specific requirements section in each module reference guide for complete requirements details.

Supported database versions that are deployed on a 64-bit database server are also supported. For more information, contact your solution provider.

Windows User Account Control Statement

Windows User Account Control (UAC) is a feature of Windows operating systems that was introduced with Windows Vista. It limits the ability of standard users to make global system changes to a workstation and prevents malicious software from making unauthorized changes to protected areas.
Note: For details on UAC, refer to your Microsoft support information or see http://technet.microsoft.com/en-us/library/cc709691(WS.10).aspx.

Disconnected Scanning is not compatible with UAC; in order to use Disconnected Scanning on any Windows Vista or later workstation, UAC must be disabled.

Third-Party Software

To use Disconnected Scanning to scan from disk or to perform Image Processing, you must install and configure Kofax software or hardware.

Kofax hardware or software may also be used to perform bar code processing, or patch code recognition in lieu of the Hyland Barcode Recognition for OnBase software.

For more information, see Kofax Image Controls on page 105.

If you are using the Adrenaline Image Processing Engine, a dongle (a hardware device similar to a HASP) is required. The dongle is purchased with the Adrenaline software.

See “Requirements” on page 97 for more information regarding image processing options.

Licensing

See Licensing on page 2 for licensing requirements.

PRE-INSTALLATION

Installing the OnBase Application Server

Your Disconnected Scanning solution requires one or more OnBase Application Servers. Each Disconnected Scanning workstation connects to the OnBase Application Server via Hyland Services. The URL to the Application Server must end in service.asmx.

Ensure that the Application Server’s pool identity or impersonated identity account has the appropriate permissions to access the OnBase Disk Group that documents are being upload to from the Disconnected Scanning workstation.

The Application Server’s pool or impersonated identity require the following permissions for the Disk Group:

- **Change** share permission
- **Modify** NTFS permission
The OnBase Application Server is installed using the Hyland Server Side Components installer.

**Installing the Hyland Barcode Recognition for OnBase Software**

**Tip:** It is considered a best practice to install the Hyland Barcode Recognition for OnBase software on each Disconnected Scanning workstation, even if your solution does not require bar code processing or ISIS scanning, so that some additional software tools are installed.

You must install the Hyland Barcode Recognition for OnBase software on the Disconnected Scanning workstation if you are:

- Planning to perform bar code processing at the time of scanning without using Kofax hardware or software.
- Planning to scan documents using an ISIS scan format.

In the unlikely event that the Hyland Barcode Recognition for OnBase software cannot be installed on the Disconnected Scanning workstation, the ISIS software tools required for Disconnected Scanning for versions of OnBase prior to OnBase 10.0 may be installed to allow an ISIS scanner to be used.

This software can be obtained from Technical Support; be aware, however, that it is recommended that the Hyland Barcode Recognition for OnBase software be used whenever possible.

The Hyland Barcode Recognition for OnBase software is available from your solution provider.

**Installing an Application Enabler/Disconnected Scanning Solution**

If you want to automatically index documents using Keyword Values captured from a third-party line-of-business application via Application Enabler, the `Hyland.Applications.AppEnabler.Connector.dll` file must be installed in the same location as the Disconnected Scanning client’s executables, and the OnBase Application Enabler must be installed and an Application Enabler configuration file must be created.

**Note:** The scanning workstation does not need .NET 2.0 or the `Hyland.Applications.AppEnabler.Connector.dll` file if you are using the legacy method of communication between Application Enabler and Disconnected Scanning.
**Kofax Image Controls**

To use Disconnected Scanning to scan from disk or for image processing, you must install and configure Kofax Image controls or Kofax Software Virtual ReScan (SVRS) with the Adrenaline Image Processing Engine (AIPE) on the scanning station.

- **Adrenaline Software.** The Adrenaline Image Processing Engine software can be purchased separately (without the purchase of a Kofax SCSI board). When software performs the image processing, processing speeds are slower than those performed by Kofax hardware.

- **Kofax Hardware.** If using hardware, the SCSI card performs image processing, resulting in faster image processing. The Adrenaline Capture Engine software is delivered with your KOFAKX SCSI board. The following cards are supported:
  - 650i – SCSI board
  - 850 - SCSI board
  - 1700 - SCSI board

Install the appropriate Kofax scanner using the manufacturer’s instructions.

**Adding a Scanner as a Kofax Scanner Source**

If you are using a Kofax scanner source, identify each scanner that will be available as a scanner source:

1. From the Windows **Control Panel**, choose **KSM** (Kofax Source Manager).
2. Click **Create**.
3. Fill in the appropriate information for your scanner source.

**Setting the Maximum File Upload Size**

The **Maximum pages per request** option, available in the **Server Communication Settings** dialog box in previous versions of Disconnected Scanning, has been deprecated. The maximum file upload size is now controlled by the **MaxBytesPerRequest** registry setting.

By default, this registry value is set to 32 KB. If a user attempts to upload a document or batch that is larger than 32 KB, the request is broken into packets of data no larger than 32 KB for transmission to the Application Server.
If necessary, you can modify the value of the `MaxBytesPerRequest` registry setting by opening the Registry Editor and browsing to the `MaxBytesPerRequest` setting. This setting can be found in the following location of the Windows Registry:

- **32-Bit Operating Systems**: HKLM\Software\Hyland Software\Remote Scan\MaxBytesPerRequest
- **64-Bit Operating Systems**: HKLM\Software\Wow6432Node\Hyland Software\Remote Scan\MaxBytesPerRequest

### INSTALLATION

Disconnected Scanning is installed using the Hyland Client Components installer (Hyland Client Components.msi). For information on the Hyland Client Components installer, see the Installer documentation.

### Selecting a Language Resource DLL

By default, the Hyland Client Components installer will copy all available Disconnected Scanning language resource DLLs (e.g., `dsenglish.dll`, `dsspanish.dll`, `dsfrench.dll`, etc.) to the Disconnected Scanning installation folder.

By default, when more than one language resource DLL is located in the installation folder, Disconnected Scanning automatically selects the language resource DLL to use. If the English resource DLL is present in the installation folder, it is always selected by default.

To configure the Disconnected Scanning client to be displayed in a particular language, delete all language resource DLLs from the Disconnected Scanning installation folder except for DLL associated with the language you wish to use. For example, to display the Disconnected Scanning client in Japanese, delete all language resource DLLs in the Disconnected Scanning installation folder except for `dsjapanese.dll`. 
Installing Disconnected Scanning Manually

The following instructions detail how to install the Disconnected Scanning software onto a scanning workstation manually, without using the Hyland Client Components installer. However, you may use the Hyland Client Components installer to install Disconnected Scanning on a scanning workstation instead of following these manual steps.

1. Create a folder for Disconnected Scanning in the appropriate sub-folder of your workstation’s Program Files folder (e.g., C:\Program Files\Hyland\Disconnected Scanning on 32-bit systems and C:\Program Files (x86)\Hyland\Disconnected Scanning on 64-bit systems).

2. Obtain the following files from your solution provider and copy them into the folder you created in Step 1:
   • Disconnectedscan.exe
   • The appropriate Language Resource DLL (e.g., dsenglish.dll, dsspanish.dll, etc.).

   **Note:** If multiple language resource DLLs are located in the folder you created in Step 1, Disconnected Scanning automatically selects the DLL to use. If the English resource DLL is present in the folder, it is always selected by default.

   • Disconnectedscan.chm
   • Disconnectedscan.exe.config. This file is optional. For more information on this file and its purpose, see Authenticode Signature Verification on page 108.
   • Hyland.Applications.AppEnabler.Connector.dll. This file is optional. For more information on this file and its purpose, see A Note About Using Application Enabler with Disconnected Scanning on page 107.
   • Dsupload.exe
   • Hyland.Types.dll
   • lib_HylandServices.dll
   • snbd17cm.dll

A Note About Using Application Enabler with Disconnected Scanning

Regardless of how Disconnected Scanning is installed on the scanning workstation, if you plan to automatically index documents using Keyword Values captured from a third-party line-of-business application via Application Enabler, the **Hyland.Applications.AppEnabler.Connector.dll** file must reside in the same folder as the Disconnected Scanning client’s executables.
Note: The scanning workstation does not need .NET 2.0 or the Hyland.Applications.AppEnabler.Connector.dll file if you are using the legacy method of communication between Application Enabler and Disconnected Scanning.

Authenticode Signature Verification

Authenticode is a Microsoft technology that uses digital certificates to identify the publisher of an application to ensure the application’s integrity and to verify that the software has not been infected by any malware since it was created.

Signature verification is disabled by default because, depending on the speed of your network connection and other factors, the signature verification check may take a noticeably long time. This causes the application to take longer to launch.

Note: For more information on this topic, see: http://support.microsoft.com/kb/936707.

To enable signature verification:

1. Locate the application’s .config file.
2. Open the file for editing in a plain-text editor, such as Notepad.
3. Locate the generatePublisherEvidence element.
4. Change the enabled attribute to true:

   `<generatePublisherEvidence enabled="true"/>`

5. Save and close the file.

Note: The Disconnectedscan.exe.config file is not required to install or run Disconnected Scanning. When installing Disconnected Scanning manually, if you want to enable Authenticode signature verification, you must request this file from your solution provider.
Assigning File and Registry Permissions

Ensure that users have sufficient file and registry permissions to run Disconnected Scanning.

**Key to Directory Variables**

Because file structures vary by operating system, the file permissions tables use the following variables to describe file and directory locations. These variables and their operating system defaults are described below:

**%USERNAME%** — Windows current user name.

**%USERPROFILE%** — The Windows current user directory.
- Windows 2003, XP: C:\Documents and Settings\%USERNAME%
- Windows Vista, 7: C:\Users\%USERNAME%

**%WINDIR%** — The Windows root directory.
- Windows 2003: C:\WINNT\n- Windows XP, Vista, 7: C:\Windows\n
**%PROGRAMFILES%** — The configured Windows Program Files folder. This is the default directory Windows applications install to. This directory may change based on custom installation options.
- 32-bit environment: C:\Program Files\n- 64-bit environment: C:\Program Files (x86)\

**%SYSTEMDRIVE%** — The root path of the drive Windows is installed to.
- Windows: C:\

In the following tables, the **Permissions** column specifies the permission level required for each directory. The **Comment** column lists the files needed to be accessed or gives a default location for the directory.

An asterisk (*) denotes a wild card; an asterisk next to a path references all files and directories in the path. The information within angled brackets describes locations that depend on the particular system.
**File Permissions**

The following tables list file permissions required to run Disconnected Scanning. Because Disconnected Scanning uses Core Services components, users must also have sufficient permissions to run the OnBase Desktop.

The following file permissions are required to run Disconnected Scanning:

<table>
<thead>
<tr>
<th>Permission</th>
<th>Directory</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>write</td>
<td><code>&lt;Local Diskgroup&gt;\*</code></td>
<td>Directory configured in Disconnected Scanning. Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
<tr>
<td>read</td>
<td><code>&lt;OnBase Directory containing the Disconnected Scanning executable&gt;</code></td>
<td>Default location is <code>%PROGRAMFILES%\Hyland\Disconnected Scanning\</code>. Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
</tbody>
</table>

The following file permissions are also required to run Disconnected Scanning. Users may also require these permissions to run other Core Services applications, such as the OnBase Desktop.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Directory</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>write</td>
<td><code>%USERPROFILE%\*</code></td>
<td>Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
<tr>
<td>read</td>
<td><code>&lt;OnBase Directory 'Forms'&gt;</code></td>
<td>Default location is <code>%PROGRAMFILES%\Hyland\Desktop\Forms\</code>. Location of OnBase Desktop forms. Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
<tr>
<td>read</td>
<td><code>&lt;OnBase Directory containing EDMBriefcase.exe&gt;</code></td>
<td>Default location is <code>%PROGRAMFILES%\Hyland\EDM Briefcase\</code>.</td>
</tr>
<tr>
<td>read</td>
<td><code>&lt;OnBase Directory containing DMDesktop.exe&gt;</code></td>
<td>Default location is <code>%PROGRAMFILES%\Hyland\Desktop\</code>.</td>
</tr>
</tbody>
</table>
The following registry permissions are required to run Disconnected Scanning.

### 32-BIT OPERATING SYSTEMS

<table>
<thead>
<tr>
<th>Permission</th>
<th>Directory</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>read</td>
<td>%SYSTEMDRIVE\autoexec.bat</td>
<td>Requires rights to msonsext.dll, pkmws.dll</td>
</tr>
<tr>
<td>read</td>
<td>%PROGRAMFILES\Microsoft Shared\Web Folders</td>
<td>Requires rights to nsextint.dll</td>
</tr>
<tr>
<td>read</td>
<td>%PROGRAMFILES\Microsoft Shared\Web Folders\1033</td>
<td>Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
<tr>
<td>read</td>
<td>%PROGRAMFILES\Internet Explorer*</td>
<td>Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
<tr>
<td>read</td>
<td>%PROGRAMFILES\Microsoft Office\Office\outlib.dll</td>
<td>Requires rights to outlib.dll</td>
</tr>
<tr>
<td>read</td>
<td>%WINDIR*</td>
<td>Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
<tr>
<td>read</td>
<td>%WINDIR\WinSxS</td>
<td>Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
<tr>
<td>read</td>
<td>&lt;OnBase Directory containing Core DLLs and OCXs&gt;</td>
<td>Default location is %PROGRAMFILES\Hyland\Core. Requires rights to directory and all contained files, directories, and subdirectories.</td>
</tr>
</tbody>
</table>

**Registry Permissions**

The following registry permissions are required to run Disconnected Scanning.
There are no .ini file settings that affect the Disconnected Scanning module.

**COMMAND LINE SWITCHES**

The following command line switches can be used with Disconnected Scanning:

**-AE**

In order to use Application Enabler to index documents within Disconnected Scanning, you must append the **-AE** command line switch to the Disconnected Scanning’s executable.
**-AE:LEGACY**

The `-AE:LEGACY` command line switch is used to force Disconnected Scanning to use the legacy method of communication between Application Enabler and Disconnected Scanning. This method of communication does not have the same software requirements as the current method of communication between the two modules. For more information, contact your solution provider.

**-AL**

This switch is used with Disconnected Scanning when it is used in conjunction with LDAP or NT Authentication. It will automatically log a user onto Disconnected scanning when the correct ODBC connection and the `-SERVER` command line switch are also included:

```
-AL -ODBC="<Data Source>" -SERVER
```

The `-AL` switch can also be used with either the `-INTERACTIVE` or `-NTAUTH` (for backwards compatibility) command line switches to prompt the user for a domain, a user name and a password.

**-AUTOTWAIN**

This command line switch is used with Disconnect Scanning to ensure the Disconnected Scanning client returns to an idle state after scanning, instead of locking.

**-DEBUG**

When applied to the Disconnected Scanning client shortcut, the `-DEBUG` switch enables the following information to be logged to the local disk group:

- If you are scanning using an ISIS scan format, scanning information is recorded in the `ISIS_debug.log` file.
- If you are performing bar code recognition using the Hyland Barcode Recognition for OnBase software, bar code processing information is recorded in the `Barcode_debug.log` and `BarcodeImage_debug.log` files.

**Note:** The log files cannot be viewed while you are logged on to Disconnected Scanning. To view the log files, you must exit the Disconnected Scanning client.
**-DOMAIN**

The `DOMAIN=“DOMAIN”` command line switch is used to specify the domain name to use when performing automatic logins with the `-AL` switch. Using the `-AL` switch with Disconnected Scanning is different from using this switch with the OnBase Client module. In the OnBase Client module, `-AL` uses integrated login. In Disconnected Scanning, the equivalent switch is `-NETAUTH`. In a Disconnected Scanning client, `-AL` uses the specified information in the command line to login without user intervention. You can use `-AL` and `-NETAUTH` together in Disconnected Scanning client to use integrated login with the command line information to login to Disconnected Scanning without user intervention.

**-INTERACTIVE**

The `-INTERACTIVE` command line switch is used with Disconnected Scanning when it is used in conjunction with LDAP or NT Authentication if you would like the Disconnected Scanning client to prompt the user for a domain, user name and password upon logging on.

The `-INTERACTIVE` command line switch must be used in conjunction with the `-AL` command line switch (i.e., `-AL -ODBC=“<Data Source>” -SERVER -INTERACTIVE`)

**-LOCAL**

The `-LOCAL` command line switch is used with Disconnected Scanning when it is configured for auto-logon or LDAP or NT Authentication. The `-LOCAL` command line switch is used to force the Disconnected Scanning client to use the locally-stored configuration options (i.e., the Local logon).

**-NOTWAINUI**

This command line switch is used with Disconnect Scanning to prevent the Disconnected Scanning client from displaying a TWAIN scanner’s user interface prior to scanning.

**-NTAUTH**

This switch, retained for legacy purposes, is used with NT or LDAP authentication mode in Disconnected Scanning. This adds a DOMAIN edit box to the server login screen. It also allows passwords to be entered in lower case, since domain passwords are case sensitive and can be lower case. Using this switch on a Disconnected Scanning Client that is connecting to an OnBase database that is setup for NT or LDAP authentication, the user can enter their NT or LDAP username, password, and domain and it will attempt to authenticate that way instead of using normal OnBase authentication. Once authenticated, local logins for NT and LDAP users will work the same way as local logins for normal users.
**-ODBC**

This switch sets the ODBC connection used when logging on to the Disconnected Scanning client.

**-PW**

This switch sets the password of the OnBase user logging on to the Disconnected Scanning client. It is used in conjunction with the **-UN** command line switch when configuring Disconnected Scanning to be used for auto-logons.

For example: `-UN="John Adams" -PW="Password"`

**-SERVER**

The **-SERVER** command line switch is used with Disconnected Scanning when it is configured for auto-logon or LDAP or NT Authentication. The **-SERVER** command line switch is used to force the Disconnected Scanning client to contact the Application Server to download new configuration information (i.e., the Server logon).

**-UN**

This switch sets the user name of the OnBase user logging on to the Disconnected Scanning client. It is used in conjunction with the **-PW** command line switch when configuring Disconnected Scanning to be used for auto-logons.

For example: `-UN="John Adams" -PW="Password"`

**BACKUP/RECOVERY**

In the event of data loss, configuration information can be recovered from the OnBase database or its backup. See the Web Server Administration documentation for more information.

Local scanned batch information cannot be recovered if it is lost after being scanned but before being uploaded.

**NT AUTHENTICATION AND LDAP**

Disconnected Scanning can be used with the extra security of NT Authentication and LDAP. In order to configure these options, your Configuration module has special network security capabilities. To add these capabilities to your Configuration module, contact technical support at the vendor who supplied this product.
Separate documentation for NT Authentication and LDAP is available from your vendor.

## TROUBLESHOOTING

### Common Issues

1. **When I attempt to work with a large AutoFill Keyword Set, I receive a time out error.**

   If the AutoFill Keyword Set you are attempting to work with is large, you may need to configure your Disconnected Scanning client to allow more time for the data to be received from the server. Click **Settings | Local Client Settings** and increase the value of the **Receive request time out (seconds)** option.

2. **I have two users working with documents in the same scan queue. Neither user has rights to the Document Type that the other user is working with. Documents indexed by one user appear as “Unindexed” to the other user and when either user attempts to upload all batches, batches from the other user are sent to the “Incomplete Upload” queue.**

   Users who are expected to scan documents into OnBase need rights to all Document Types associated with the scan queues to which they have been assigned. If a user was to encounter a batch of fully or partially-indexed documents to which he did not have rights while working in a scan queue, those documents would be stripped of their Keyword Values, becoming unindexed documents.

   If a user was to try to upload this batch into OnBase, it would be sent into the **Incomplete Upload** batch status queue until it could be re-indexed. This is a data safety feature intended to prevent unindexed documents from unintentionally being imported into OnBase.
Tip: If, for security reasons, users cannot be given rights to all Document Types associated with a scan queue to which they have been assigned, then separate scan queues should be created.

3. I run Disconnected Scanning as part of an application pool and would like to use NT Authentication, but the application pool-assigned account is being used instead of the current user’s account.

If the server-side Disconnected Scanning code is being run as part of an application pool, NT Authentication will not operate as expected because the application pool-assigned account is used instead of the current user’s account.

In this case, to use the current user’s credentials for NT Authentication, you must open the Server Communication Settings dialog box (Settings | Server Communication...) and select the Override User Account for domain authentication check box.

Note: This option is only enabled if the Disconnected Scanning client is using the -BETA command line switch.
4. **I've recently made changes to my system configuration in the OnBase Configuration module. I logged onto Disconnected Scanning using the Server logon to re-build the configuration file, but my changes still are not reflected in the Disconnected Scanning client.**

Like other modules that depend on the OnBase Web or Application Server, Disconnected Scanning requires additional steps to be taken before changes made in the OnBase Configuration module are reflected in the Disconnected Scanning client. See the Web Server Admin documentation for more information.

5. **I've noticed that my Disconnected Scanning client takes an unusually long time to launch. Is there any way to make it launch faster?**

If your Disconnected Scanning client is taking an unusually long time to launch, you can speed it up by disabling the Authenticode signature verification check that is performed each time the Disconnected Scanning client is launched. For information on disabling the signature verification, see Authenticode Signature Verification on page 108.

6. **I cannot get an auto-logon to work correctly when using a server and scanning workstations on multiple domains.**

In order to use an auto-logon across multiple domains, your Application Server’s virtual directory must be configured appropriately for your auto-logon method in order for it to work correctly.

For trusted domains:

- When using a non-interactive auto-logon method (i.e., the **-INTERACTIVE** command line switch is not applied to the shortcut to the Disconnected Scanning client), Anonymous Access must not be selected for the Application Server’s virtual directory.

- When using an interactive auto-logon method (i.e., the **-INTERACTIVE** command line switch is applied to the shortcut to the Disconnected Scanning client) the auto-logon will work correctly if Anonymous Access is selected or if it is not selected for the Application Server’s virtual directory.

For non-trusted domains:

- When using a non-interactive auto-logon method (i.e., the **-INTERACTIVE** command line switch is not applied to the shortcut to the Disconnected Scanning client), Anonymous Access must not be selected for the Application Server’s virtual directory.

- When using an interactive auto-logon method (i.e., the **-INTERACTIVE** command line switch is applied to the shortcut to the Disconnected Scanning client) the auto-logon will work correctly only if Anonymous Access is selected for the Application Server’s virtual directory.

For more information, see the Network Security documentation.
7. **I am having trouble getting my scanner’s user interface to close after all documents in a batch have been scanned.**

If your TWAIN scanner does not end the scanning operation after all documents have been scanned, one of the following command line switches can be added to the Disconnected Scanning shortcut.

- Use the `-AUTOTWAIN` switch to ensure that Disconnected Scanning returns to an idle state after scanning, instead of locking.
- Use the `-NOTWAINUI` switch to prevent the scanner’s user interface from being displayed altogether.

8. **I am having trouble getting the Disconnected Scanning client to recognize values from self-configured bar code sheets.**

The Kofax hardware or software used to read bar code values in the Disconnected Scanning client sporadically has an issue reading the `%SELFCONFIG%` string that identifies a self-configured bar code sheet.

To resolve this issue, generate self-configured bar code sheets using the string `OBSELFCONFIG` instead of `%SELFCONFIG%`.

9. **When using standard OnBase security, users are able to log on to the Disconnected Scanning client despite password restrictions (e.g., the user’s password has expired, the password expired on first use, etc.).**

When performing a Server logon to log on to Disconnected Scanning, the OnBase Application Server checks to ensure that the user’s password meets all password restrictions (e.g., the password has not expired, the password did not expire after first use, etc.). If the user’s password has expired, he/she is prompted to reset it.

However, when performing a Local logon, the Disconnected Scanning client does not connect to the OnBase Application Server to perform these checks; if the password restrictions were met at the time of the last Server logon (i.e., the last configuration file update), then the user’s log on credentials will remain valid for Local logons until the next Server logon is performed and the OnBase Application Server is able to determine that the user’s password no longer meets the password restrictions.

10. **Multiple translations of the `<Default>` option are displayed in the Datasource drop-down in the User authentication dialog box.**

When switching between system locales on the same workstation (e.g., moving from one language DLL to another), the previous language values are not cleared. The previous values for the `<Default>` option, such as `<Predeterminado>` (for Spanish), are displayed.
11. If you are using Kofax SVRS, the Disconnected Scanning client unexpectedly closes after clicking OK in the Modify Scan Format dialog box and then clicking Scan immediately after.

There is a known issue with Kofax SVRS that causes the Disconnected Scanning client to close after clicking OK in the Modify Scan Format dialog box and clicking Scan immediately after.

To prevent the Disconnected Scanning client from unexpectedly closing, wait a few seconds after clicking OK in the Modify Scan Format dialog box before clicking Scan.

12. Is there any way to run the Scheduler service using a Windows account other than the account that was logged on when the Scheduler service was installed?

Typically, the Windows user that is logged on when the Scheduler service is installed must be logged on when the Scheduler service is running to automatically upload batches to OnBase.

However, if needed, the Scheduler service can be installed and run using the Windows LocalSystem user account, but this will require you to use standard OnBase security (i.e., an OnBase user name/password must be provided in the Schedule item dialog box). NT/LDAP authentication cannot be used when running the Scheduler service using the Windows LocalSystem user account.

Error Messages

**TWAIN Drive**
A general fault of the MSG_OPENDS response. (Internally)
There has been a sharing violation. Twain source may be in use. (Code: DS50171)

This error occurs when Disconnected Scanning attempts to use a TWAIN driver and finds it already in use by another module or application. Wait until that module or application has finished scanning and unlocks the driver, or ensure that no module or application currently has the TWAIN driver window open.

**Server encountered an error while parsing/setting keyword values**

This error occurs when one or more Keyword Values associated with documents in the batch contains more than the maximum number of characters configured for the Keyword Type. Each Keyword Value associated with a document in the batch will need to be manually checked to ensure it does not exceed the maximum length specified in the Keyword Type configuration settings.

**Runtime Error!**
**Program: <Path to Disconnected Scanning Executable>**
abnormal program termination
Runtime Error!
Program: <Path to Disconnected Scanning Executable>
R6025
-pure virtual function call

These errors are displayed in succession when you attempt to log on to Disconnected Scanning using the Server logon and the local Disk Group has been moved or deleted.

Ensure the directory specified in the Disk Group registry key exists. The Disk Group registry key can be found in the following location of the Windows Registry:

- **32-Bit Operation Systems**: HKLM\Software\Hyland Software\RemoteScan\DiskGroup
- **64-Bit Operating Systems**: HKLM\Software\Wow6432Node\Hyland Software\RemoteScan\DiskGroup

If the directory specified by the Disk Group key does not exist, you must either:

- Create the directory as specified by the Disk Group registry key.
- Modify the Disk Group registry key to point to an existing directory.

**The web server returned unrecognized configuration information, unable to continue**

This error is displayed when a user without rights to any scan queues attempts to log onto the Disconnected Scanning client. If a user is assigned to User Group(s) that do not have rights to any scan queues, this error message is displayed and the user is not able to log onto the Disconnected Scanning client.

To resolve this issue:

- Add the user to a User Group that already has rights to one or more scan queues.
- Assign one or more scan queues to a User Group that the user is assigned to.

**Failed to create new document request**

One or more errors occurred while uploading batch, leaving batch open and routing to Incomplete Upload

This error is displayed when the Application Server’s pool identity or impersonated identity account does not have the appropriate permissions to access the OnBase Disk Group that documents are being uploaded to from the Disconnected Scanning client.

The Application Server’s pool or impersonated identity require the following permissions for the Disk Group:

- **Change** share permission
- **Modify** NTFS permission

**Failed to save scanned image to the local disk group**
This error is a result of having User Account Control (UAC) enabled on the Disconnected Scanning workstation. UAC is a feature of Windows that was introduced with Windows Vista. It limits the ability of standard users to make global system changes to a workstation and prevents malicious software from making unauthorized changes to protected areas. UAC must be disabled on Disconnected Scanning workstations.

**CONTACTING SUPPORT**

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build (Example: 11.0.0.571) and/or the Core Services version and build (Example: 11.0.0.6).
- The type and version of the connected database, such as Microsoft SQL Server 2008 or Oracle 11g, and any Service Packs that have been installed.
- The operating system that the workstation is running on, such as Windows XP or Windows Server 2008, and any Service Packs that have been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer, and any Service Packs that have been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.
SCANNER SPECIFIC SETTINGS

SCAN SETTINGS

When creating or modifying a scan format, you have the ability to select or modify the scanner’s default properties.

Note: For more information on creating or modifying a scan format, see Creating and Selecting a Scan Format on page 16.

To access the scanner properties, click Scan settings on the Modify scan format dialog box. The Scanner Properties - <Scanner Name> dialog box is displayed.

The layout of the dialog box that is displayed, and the options that it contains, depends on your scanner. The following example represents a typical Kofax scanner.

Note: The dialog box, and options displayed, for a TWAIN or ISIS scanner, or another Kofax scanner, may be different.
The **Scanner Properties - <Scanner Name>** dialog box is used to specify general configuration options for your scanner. Press **F1** when positioned on the **Scanner Properties - <Scanner Name>** dialog box for a detailed description of each option.

Click **OK** when finished to save the configuration options and return to the Disconnected Scanning window.

### Image Source Options

To specify general configuration options for your image source (e.g., images obtained from a scanner or scanned from disk), click **Options** from the **Scanner Properties - <Scanner Name>** dialog box. The **Source Properties** dialog box is displayed.

![Source Properties Dialog Box](image)

Press **F1** when positioned on the **Source Properties** dialog box for a detailed description of each option. When finished, click **OK** to return to the **Scanner Properties - <Scanner Name>** dialog box.
Advanced Properties

To specify advanced configuration options for your scanner, click Advanced from the Scanner Properties - <Scanner Name> dialog box. The Advanced Properties dialog box is displayed.

Press F1 when positioned on the Advanced Properties dialog box for a detailed description of each option. When finished, click OK to return to the Scanner Properties - <Scanner Name> dialog box.

IMAGE PROCESSING

Depending on the scanner you are using, you may have the ability to specify any additional image processing and/or enhancements for the images you have scanned when creating or modifying a scan format.

Note: For more information on creating or modifying a scan format, see Creating and Selecting a Scan Format on page 16.

To access the image processing options, click Image processing on the Modify scan format dialog box. The Image processing settings dialog box is displayed.
The layout of the dialog box that is displayed, and the options that it contains, depends on your scanner. The following example represents a typical Kofax scanner.

![Image processing settings dialog box]

**Note:** The dialog box, and options displayed, for your scanner may be different.

The **Image processing settings** dialog box is used to access image processing/enhancement options for your scanner. To configure an image process/enhancement, click its associated button.
Black Border Removal

An image may be displayed with a black border as an unintended result of the scanning process. To configure the black border removal process, click **Black Border Removal**. The **Black Border Properties** dialog box is displayed.

![Black Border Properties](image)

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable</td>
<td>Activates black border removal, which changes black pixels to white, keeping the original document dimensions.</td>
</tr>
<tr>
<td>Crop</td>
<td>Removes black pixels from the image border, reducing the size of the image by the amount of border removed.</td>
</tr>
<tr>
<td>White Noise Gap</td>
<td>Specifies the maximum number of consecutive white pixels that are considered part of the border. If the number of white pixels encountered in the border is greater than the number specified in this field, the system treats the area as the edge of the page and stops the border removal process.</td>
</tr>
</tbody>
</table>

When finished, click **OK** to return to the **Image process settings** dialog box.
Deshade

The deshade process removes unwanted shaded areas from an image. To configure the deshading process, click Deshade. The Deshade Properties dialog box is displayed.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable</td>
<td>Activates detection of shaded areas.</td>
</tr>
<tr>
<td>Enable</td>
<td>Activates removal of shaded areas based on the configured parameters.</td>
</tr>
<tr>
<td>Minimum Width of Area</td>
<td>Defines the minimum width of the shaded area to remove.</td>
</tr>
<tr>
<td>Minimum Height of Area</td>
<td>Defines the minimum height of the shaded area to remove.</td>
</tr>
<tr>
<td>Maximum Speckle Width</td>
<td>Defines the width of an individual speckle in the shaded area.</td>
</tr>
<tr>
<td>Maximum Speckle Height</td>
<td>Defines the height of an individual speckle in the shaded area.</td>
</tr>
<tr>
<td>Speckle Width Compensation</td>
<td>Defines a number of pixels to add to the Maximum Speckle Width to detect variable speckle sizes.</td>
</tr>
</tbody>
</table>

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When finished, click **OK** to return to the **Image process settings** dialog box.

**Deskew**

The deskew process automatically re-aligns images that were skewed during scanning. To configure the deskewing process, click **Deskew**. The **Deskew Properties** dialog box is displayed.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable</td>
<td>Activates skew detection.</td>
</tr>
<tr>
<td>Use Scanner</td>
<td>This option is active if your scanner has deskew capabilities. This instructs the scanner to deskew before sending the image to the Kofax engine. The other deskew options are executed directly by the Kofax engine.</td>
</tr>
<tr>
<td>Enable</td>
<td>Activates skew correction.</td>
</tr>
<tr>
<td>Minimum Angle</td>
<td>Defines the minimum angle, from the vertical axis, to correct. The valid range is from 0.1 to 12.0 degrees. Higher degrees of correction increase processing time and scales the original image.</td>
</tr>
<tr>
<td>Maximum Angle</td>
<td>Defines the maximum angle, from the vertical axis, to correct. The valid range is from 0.1 to 12.0 degrees. Higher degrees of correction increase processing time and scales the original image.</td>
</tr>
</tbody>
</table>

When finished, click **OK** to return to the **Image process settings** dialog box.
Despeckle

The despeckle process removes unwanted background noise from an image. To configure the despeckling process, click Despeckle. The Despeckle Properties dialog box is displayed.

![Despeckle Properties dialog box](image)

<table>
<thead>
<tr>
<th>Properties</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable</td>
<td>Activates the despeckle process.</td>
</tr>
<tr>
<td>Height</td>
<td>Determines the maximum height of unwanted speckles.</td>
</tr>
<tr>
<td>Width</td>
<td>Determines the maximum width of unwanted speckles.</td>
</tr>
</tbody>
</table>

When finished, click OK to return to the Image process settings dialog box.
Edge Enhancement

The edge enhancement process provides filters that can be used to smooth or enhance the edges of lines and characters on the image. To configure the edge enhancement process, click Edge Enhancement. The Image Filter Properties dialog box is displayed.

![Image Filter Properties dialog box]

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Character Smoothing</td>
<td>Useful for improving readability for OCR by changing pixel (px) colors on the edges of lines or characters to match surrounding pixels.</td>
</tr>
<tr>
<td>Thinning Filter</td>
<td>Thins lines and characters by changing black pixels to white, (depending on their proximity to other white pixels). In some cases it removes background shading or speckling. Designed for use on images or characters that are ballooned or blended together.</td>
</tr>
<tr>
<td>Thicken Filter</td>
<td>Thickens lines and characters by changing white pixels to black, (depending on their proximity to other black pixels). In some cases it exaggerates background shading and speckling.</td>
</tr>
<tr>
<td>Smooth and Clean</td>
<td>Smooths characters/may remove lines. Changes black pixels to white if they are not part of a 2 x 2 (or greater) block of black pixels. Combine with the Deshading, Despeckling, and Line Removal options for best results.</td>
</tr>
<tr>
<td>Fill Line Breaks</td>
<td>Fills and smooths lines by changing black pixels to white if they are not part of a 2 x 2 block of white pixels. May merge horizontal and/or vertical lines, depending on their proximity to each other.</td>
</tr>
</tbody>
</table>
Streak Removal

The streak removal process removes streaks from an image. To configure the streak removal process, click **Streak removal**. The **Streak Properties** dialog box is displayed.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable</td>
<td>Activates the streak removal process.</td>
</tr>
<tr>
<td>Streak Width</td>
<td>Determines the maximum width of the streak to remove.</td>
</tr>
</tbody>
</table>

When finished, click **OK** to return to the **Image process settings** dialog box.
Line Removal

The line removal process removes lines from an image (lines that were purposefully part of the paper document, not streaks that were unintentionally created during scanning). To configure the line removal process, click Line removal. The Line Removal Properties dialog box is displayed.
<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Horizontal</strong></td>
<td></td>
</tr>
<tr>
<td>Enable</td>
<td>Activates the horizontal line removal process.</td>
</tr>
<tr>
<td>Minimum Length</td>
<td>Defines the minimum horizontal line length to remove.</td>
</tr>
<tr>
<td>Maximum Height</td>
<td>Defines the maximum horizontal line thickness to remove.</td>
</tr>
<tr>
<td>Maximum Break</td>
<td>Defines the maximum number of consecutive white pixels that are considered part of a horizontal line.</td>
</tr>
<tr>
<td>Edge Clean Factor</td>
<td>Defines the number of pixels to clean up after removing a horizontal line.</td>
</tr>
<tr>
<td><strong>Horizontal Character Reconstruction</strong></td>
<td></td>
</tr>
<tr>
<td>Enable</td>
<td>Activates the horizontal character repair process.</td>
</tr>
<tr>
<td>Minimum Repair Height</td>
<td>Defines the minimum horizontal character height to reconstruct.</td>
</tr>
<tr>
<td>Maximum Repair Width</td>
<td>Defines the maximum horizontal character width to reconstruct.</td>
</tr>
<tr>
<td><strong>Vertical</strong></td>
<td></td>
</tr>
<tr>
<td>Enable</td>
<td>Activates the vertical line removal process.</td>
</tr>
<tr>
<td>Minimum Height</td>
<td>Defines the minimum vertical line length to remove.</td>
</tr>
<tr>
<td>Maximum Width</td>
<td>Defines the maximum vertical line thickness to remove.</td>
</tr>
<tr>
<td>Maximum Break</td>
<td>Defines the maximum number of consecutive white pixels that are considered part of a vertical line.</td>
</tr>
<tr>
<td>Edge Clean Factor</td>
<td>Defines the number of pixels to clean up after removing the vertical line.</td>
</tr>
</tbody>
</table>
When finished, click OK to return to the Image process settings dialog box.

**Endorser**

**Note:** In order for the Endorser button to be available, you must have a scanner capable of endorsing paper documents and the scanning workstation must be equipped with Kofax Adrenaline hardware.

An endorser stamps the remote batch number and the scanning workstation remote ID on each paper document as it is scanned.

**Note:** This option is not available for scanning from disk or sweeping, and it is not available for gray scale scanning or with scanning hardware that returns compressed data.

Endorsing prints only on the front side of pages in a duplex scanning process.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vertical Character Reconstruction</td>
<td>Activates the vertical character repair process.</td>
</tr>
<tr>
<td>Minimum Repair Height</td>
<td>Defines the minimum vertical character height to reconstruct.</td>
</tr>
<tr>
<td>Maximum Repair Width</td>
<td>Defines the maximum vertical character width to reconstruct.</td>
</tr>
</tbody>
</table>
To configure the endorser settings, click Endorser. The Automated Endorser/Annotation Properties dialog box is displayed.

**Note:** The Electronic Annotation, Font Setting and Counter Start/Increment/Reset options are not supported for Disconnected Scanning. The only configuration option in the Automatic Endorser/Annotation Properties dialog box that is respected in Disconnected Scanning is the Mechanical Endorser option.

Select the Enable Automatic Endorser check box to enable the endorser for Disconnected Scanning. Click OK to return to the Image processing settings dialog box.

**Note:** In order for this feature to operate correctly, the selected scan queue must also have the Auto Endorse Pages option selected on the Capture tab of the Assign Process Options for. <Scan Queue Name> dialog box. For more information on scan queue configuration, see the Document Imaging documentation.
The following are considered to be best practices for OnBase Disconnected Scanning:

**USAGE**

It is recommended that the following best practice information be supplied to users who will be scanning and indexing documents via Disconnected Scanning.

- It is considered a best practice that you be aware of the number of documents to be scanned as part of the batch to ensure the size of the scanned batch does not exceed available space in the disk group volume. Once a scan process has begun, OnBase will not promote a disk group volume; if the size of the batch exceeds the available space in the volume, the volume will be larger than expected and may not be able to be stored on the disk or sent to other media (i.e., CDs, DVDs).

- TIFF is the preferred file format for storing images in OnBase. Whenever possible, it is considered a best practice to store image documents as bi-tonal (black and white) TIFF-Group IV files. If you need to store documents as color or grayscale images, it is considered a best practice to store them as JPEG files.

**CONFIGURATION**

It is recommended that the following best practice information be considered before configuring your Disconnected Scanning solution.

**Disk Groups**

It is considered a best practice to use a 1:1:1 ratio for Disconnected Scanning workstations, scan queues and disk groups. By associating each Disconnected Scanning station with its own, unique scan queue and that scan queue with its own, unique disk group, you ensure that a backlog of pending and/or failed uploads will not be created by multiple Disconnected Scanning workstations attempting to upload batches to the same disk group.
User Groups & Rights

It is considered a best practice that users have rights to all Document Types associated with each of the scan queues to which they have rights.

Scan Queue Configuration

It is recommended that the following information should be considered before you create or modify a scan queue.

Batch Processing

It is considered a best practice to set a default Document Type for each scan queue using the Default Document Type drop-down to increase the speed and accuracy of indexing.

Auto-Name

It is considered a best practice to select the Auto-Name Batches batch processing option, especially in high-volume scanning operations, to increase the speed of the scanning/sweeping process.

Capture

- It is considered a best practice to select the Discard Blank Page check box in the Page Separation section unless your business needs require that blank pages that are scanned be kept as part of a document.
- It is considered a best practice that the Blank Threshold value in the Page Separation section be set to 2500 bytes or the size of the largest image file created when ten blank pages are scanned.

Indexing

- It is considered a best practice to select the Keep Keywords and/or the Keep Common Keywords options to allow Keyword Values common to documents in a batch to be carried over from one document to the next to increase the speed and accuracy of indexing.
- It is considered a best practice to select the Keep Zoom Region option to keep the Document Viewer’s focus on the same section of each image in the batch. This will increase the speed and accuracy of indexing by repeatedly displaying the section of the document the user needs to view for indexing.
- It is considered a best practice to select the Index Document radio button in the Numeric Enter Key section to increase the speed of indexing.
- When configuring exclusion properties for a Reverse Keyset Lookup, it is considered a best practice to select the Zero/Empty Value option in the Keyword Exclusion Properties dialog box for numeric Keyword Types, although it will function with alphanumeric Keyword Types as well.

**INSTALLATION**

It is recommended that the following best practice information be considered before implementing a Disconnected Scanning solution.

**Pre-Installation**

**HARDWARE**

It is considered a best practice to first test your scanner outside of OnBase to ensure that it is functioning and has been installed and configured correctly.

It is considered a best practice to use a dedicated scanning workstation for Disconnected Scanning to ensure the maximum performance of your OnBase solution. Your scanning workstation should not double as a process server (i.e., Workflow server, Scheduling server, etc.).

**SOFTWARE**

It is considered a best practice to install the Hyland Barcode Recognition for OnBase software on each Disconnected Scanning workstation, even if your solution does not require bar code processing or ISIS scanning, so that some additional software tools are installed.

It is considered a best practice to ensure that the Snowbound Imaging DLL used by your system is the same Snowbound Imaging DLL that was distributed with your version and build of OnBase. These DLLS are not always forward or backward-compatible with other versions of OnBase.