



REMOTE INPUT & INDEXING SOLUTION

Overview Document

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Preface

Remote Input and Indexing Solution Overview Document describes how to install and configure the Dexik Remote Input and Indexing Solution.

Audience

The *Remote Input and Indexing Solution Installation Guide* is intended for business analysts, professional services and system administrators. The readers must have a good understanding of Windows system and general computer technology.

Chapter 1: Remote Input and Indexing Solution Overview

This chapter introduces Remote Input and Indexing Solution and lists the system requirements.

The following topics are described in this chapter:

- [Product Overview](#)
- [System Requirements](#)

Product Overview

Remote Input and Indexing Solution is a powerful multi-tier tool that is designed to provide file and indexing information transfer from the remote workstations to the server side. The files are transferred to the server side to the pre-configured folder and indexing information is written to the multi-line pre-configured text file on the server side.

What tasks RII is designed to automate?

- Scanning and Document Importing in remote offices whether on LAN or WAN.
- Document Indexing based on the predefined or user-managed values.
- Server-based Document Conversion and Document Merge (requires optional Dexik Conversion Server).
- Monitor transfer and usage statistics by User.

What are main advantages of RII Solution?

- Easy and Efficient Indexing Form design.
- Ability to utilize existing Image Enhancement package or any scanning software for the scanning process.
- All the transfers are performed in background, allowing user to process while documents are being sent to the server.
- Integration with any current or perspective Document Management system via Importing Component.
- Advanced expansion capabilities allow using custom modules for automation and validation tasks.

Remote Input and Indexing Solution can be integrated with Dexik Mail Capture and Dexik Conversion Server component. Working separately or together, these components allow you to greatly enhance your operations in remote offices and can be easily integrated with your existing Vertical Application, Workflow System or Document Management System.

If required, RII Solution can be easily complemented with Barcode Recognition and OCR/ICR recognition engines, to provide indexing automation capabilities.

The setup for RII Solution is quick and efficient, the server side setup can be completed in 10-15 minutes and individual workstation setup shouldn't take more than 5 minutes.

System Requirements

This section lists Remote Input and Indexing Solution system requirements.

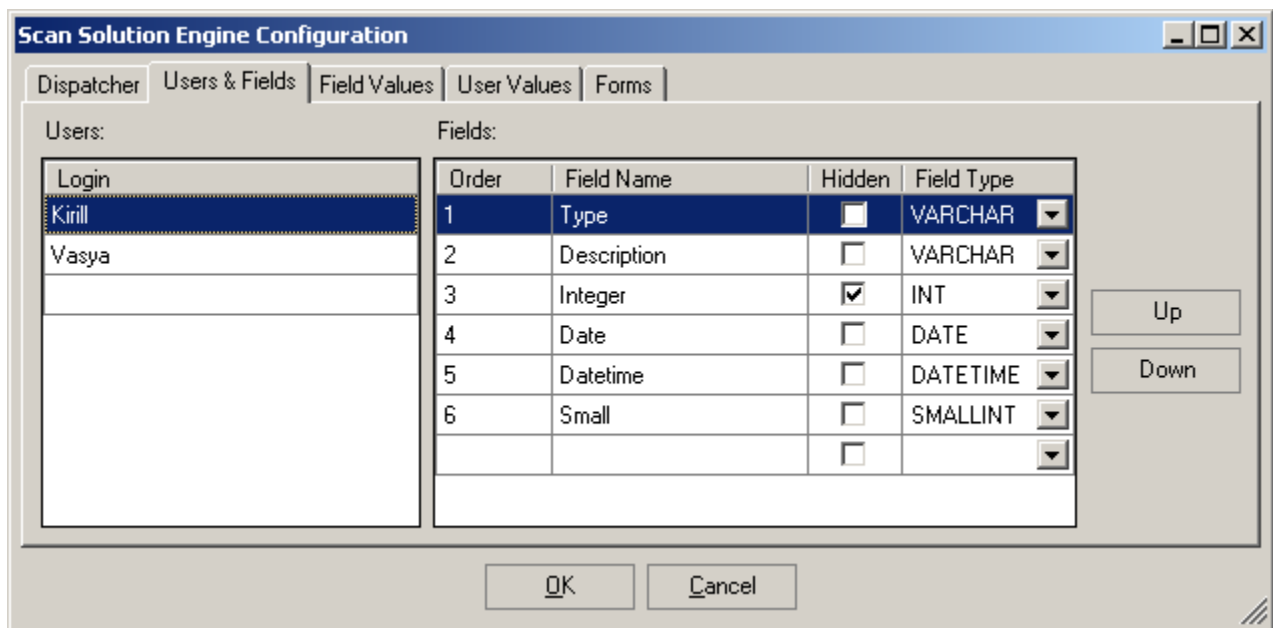
Component	Description
Operating System	Windows 2000/2003 Server, Windows 2000/XP
RAM	1 GB or more
Available disk space	20 MB
Software	Microsoft .NET 3.5 SP1.

Chapter 2: Remote Input and Indexing Solution Server Modules

The Remote Input and Indexing Solution package consists of three Server side modules:

- **Workflow Engine** is responsible for configuring and storing fields, forms, users and default values.
- **WorkItem Indexer** is responsible for capturing the indexing information on the server side.
- **Workflow Context Provider** is responsible for handling UI and other context requests from the client.

Workflow Engine

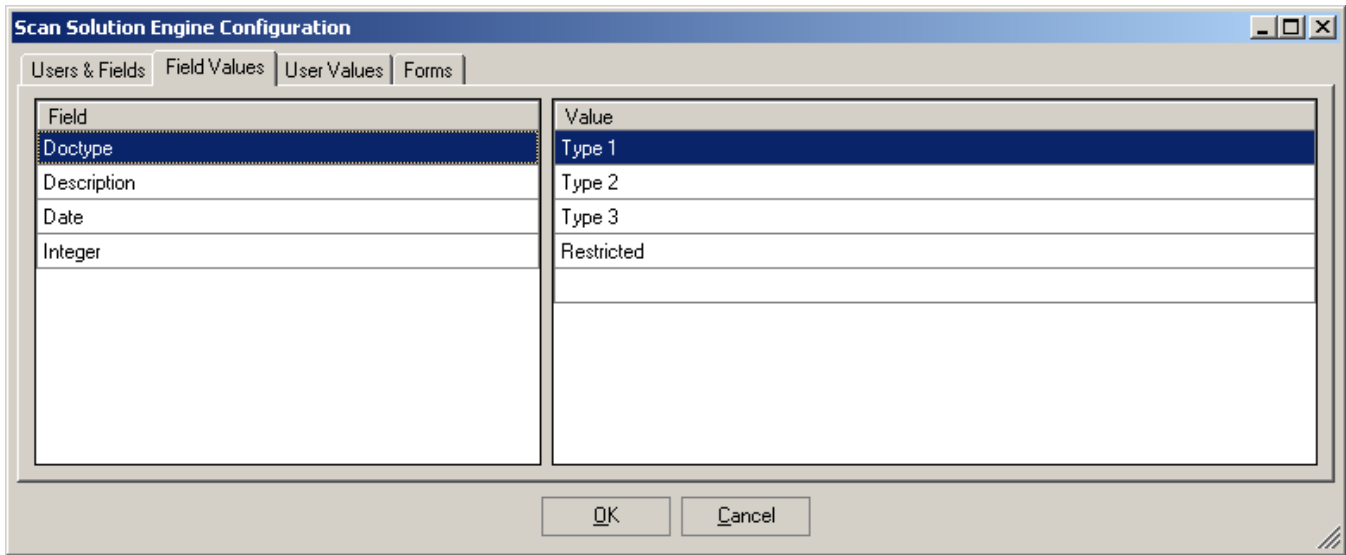


The **Users & Fields** tab allows adding, modifying and removing Users and Fields.

Users are required for the both processing purposes (field values association) and statistics purposes (providing monthly document count per user). It is recommended to have one user for each client station.

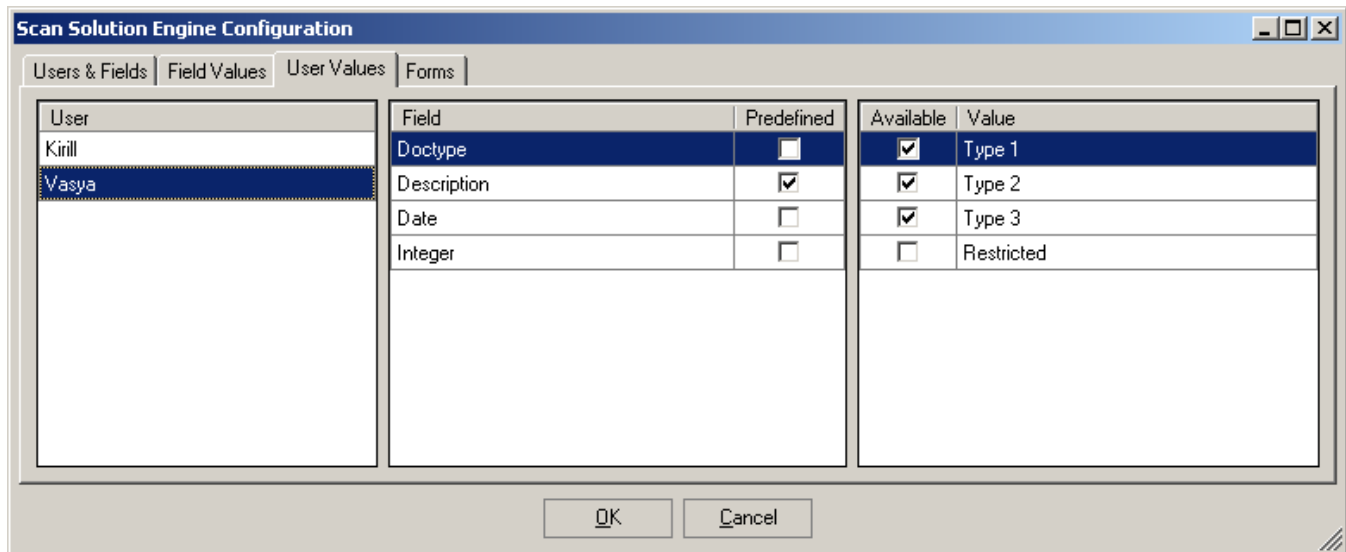
Fields are linked to the items that are put on the indexing forms; each field should be of corresponding type and unique name.

Fields should be marked "hidden", in this case the fields will be available for setting up the default values, but will not be visible on the form during the indexing process. It is recommended to put all the hidden fields on the bottom of the form for the better visual output of the form.



The **Field Values** tab allows managing pre-defined values for the certain types of fields. These fields should be mapped on the form to the “parent box” control. The good example for such a field is a document type; the user will not be able to enter the document type manually, but only select from the list.

The **User Values** tab allows managing what field values will be available for selection to the current user. In addition, you can set some of the fields as “Predefined”. That will mean these fields will not be modifiable during the indexing process itself, but only via local DEFAULTS setup. That allows setting fields that will need to be pre-indexed the same way for every document in case if the user should not have a way to change those.

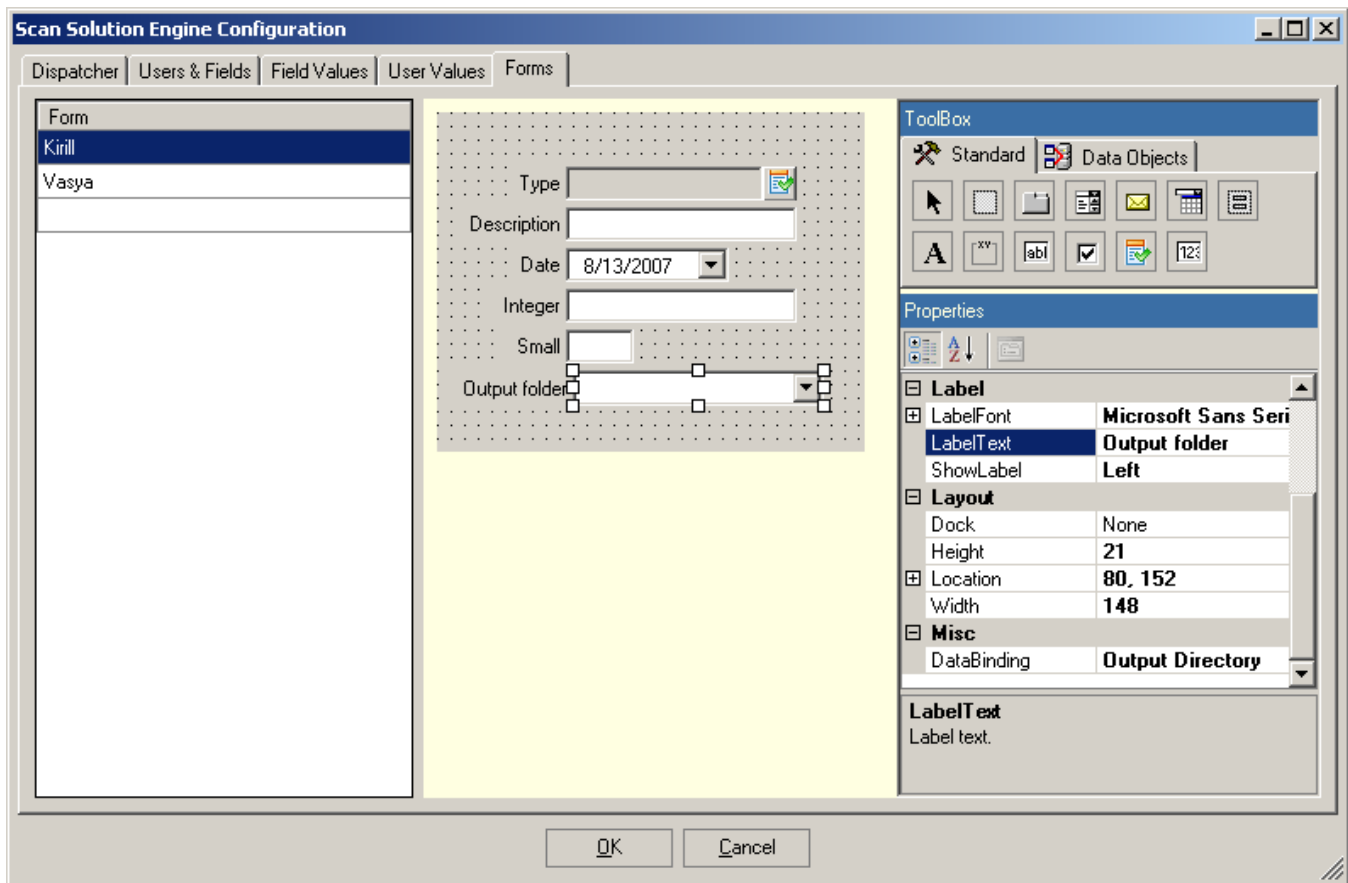


The **Forms** tab allows creating and managing the forms that will be available on the client side for indexing. It is possible to have forms that will differ in the set of the fields used, in the field layout or both. Each form control should have a field linked to it by using the Data Binding property. In the Data Binding combo box, it is only possible to see the fields that are compatible with the Control Type. The name of the form may or many not be similar or contain the user name, but it is recommended to choose names that would be easily identifiable on the client side when configuring a certain client. Each client setup will only be able to index using one form, although one client station can have multiple setups for different input folders or file types.

Name the new form, drag and drop the items from the Toolbox on the form, move those, edit properties, data binding and the form creation is done.

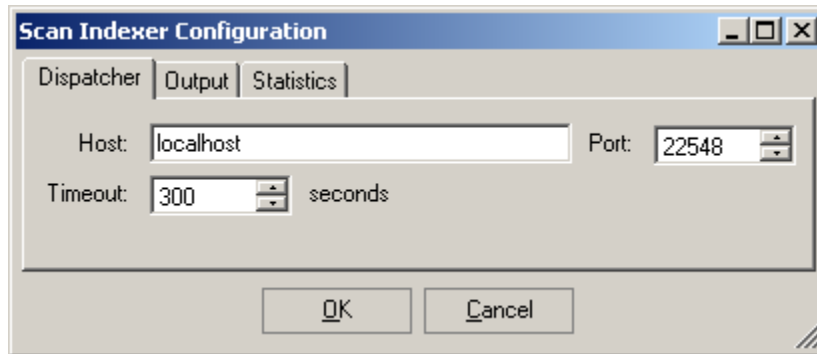
The Workflow Engine allows configuring multiple output folders on the server side to keep the files and indexing information.

On the specific form add a combobox or parentbox control and link this control to **Output Directory** item as shown below. The control linked to the **Output Directory** will be hidden and will not appear on the form during indexing.

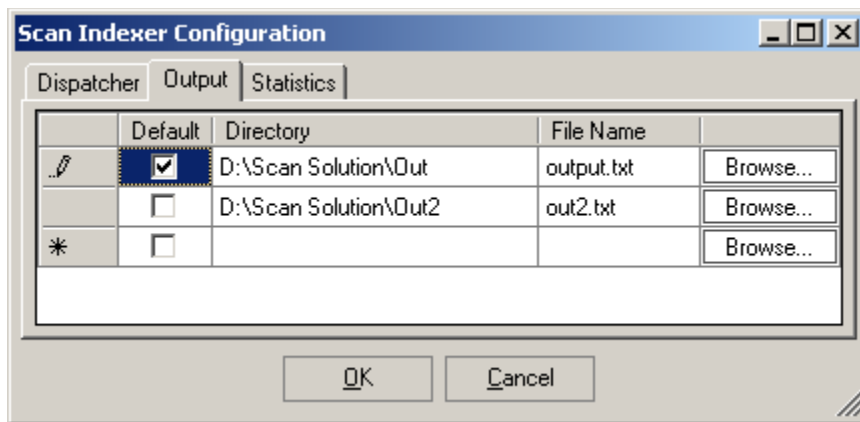


WorkItem Indexer

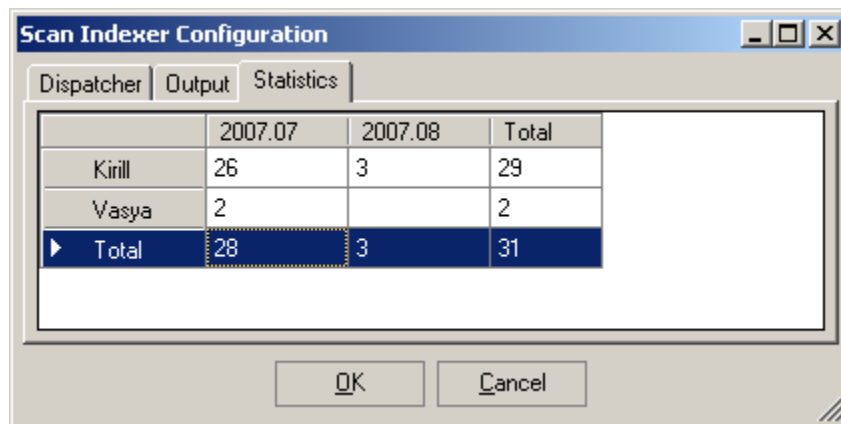
The **Dispatcher** tab allows configuring the Dispatcher connection properties, like Host, Port and Connection Timeout value.



The **Output** tab is used to configure the Output folder(s) on the Server side, where all the transferred files and index file will be residing and the file name for indexing information containing text file.

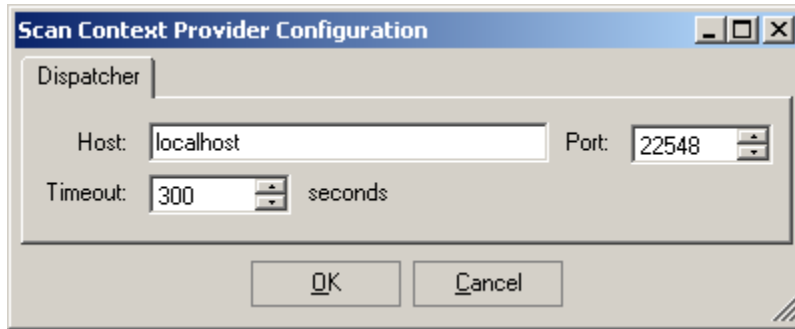


The **Statistics** tab shows monthly statistics for the documents transferred by user and period. Each period is one calendar month. This information can be used for both management and financial purposes.



Workflow Context Provider

The **Dispatcher** tab allows configuring the Dispatcher connection properties, like Host, Port and Connection Timeout value.

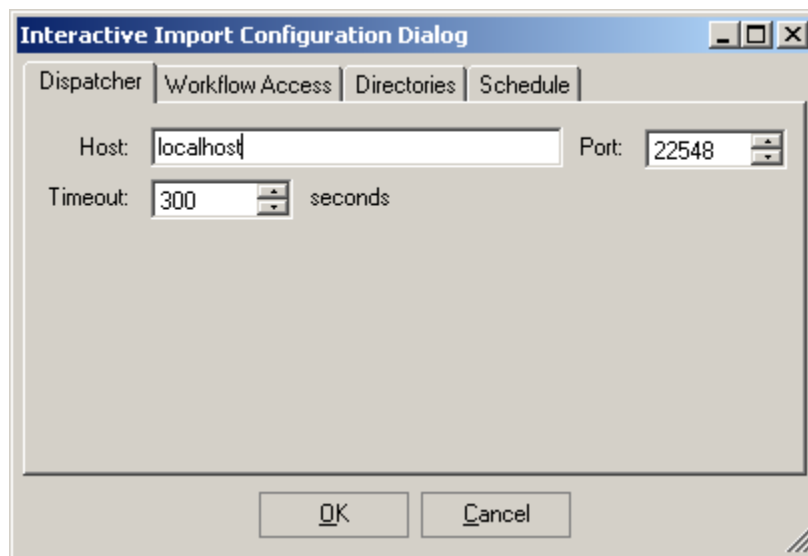


Chapter 3: Remote Input and Indexing Solution Client

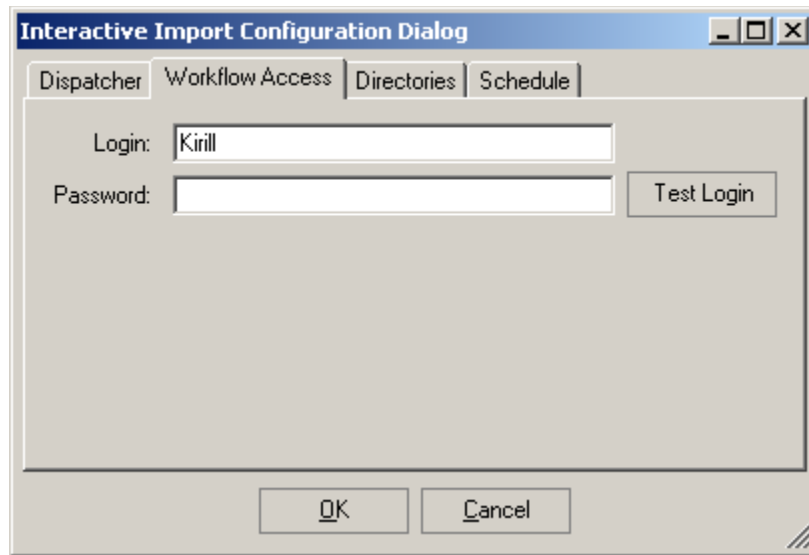
The Remote Input and Indexing Solution is a multi-user interactive import and indexing environment.

Interactive Document Module

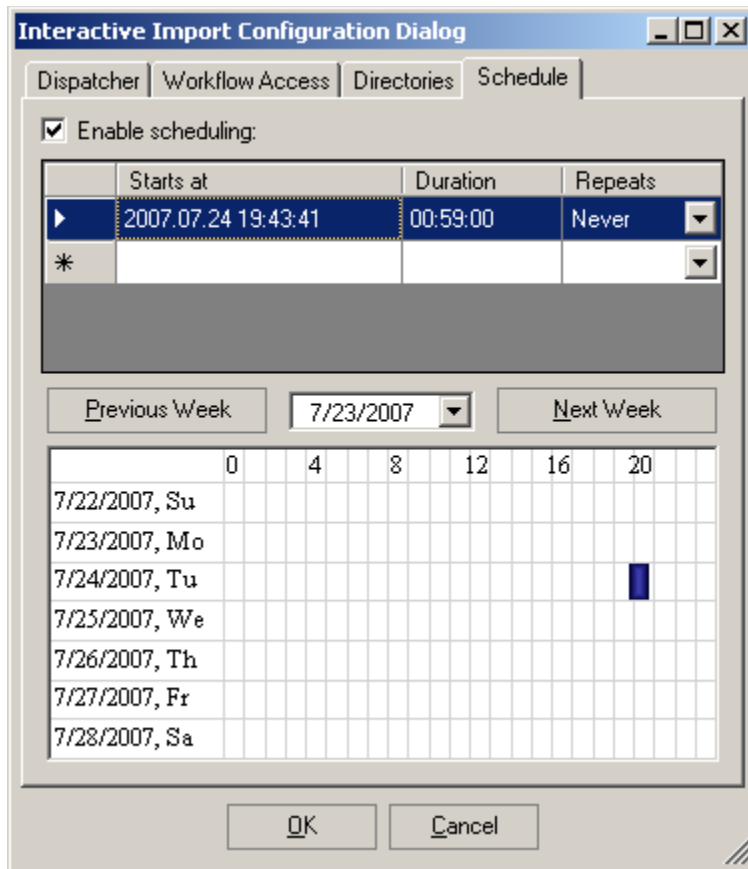
The **Dispatcher** tab allows configuring the Dispatcher connection properties, like Host, Port and Connection Timeout value. Put the Dispatcher machine host and port to configure the module properly.



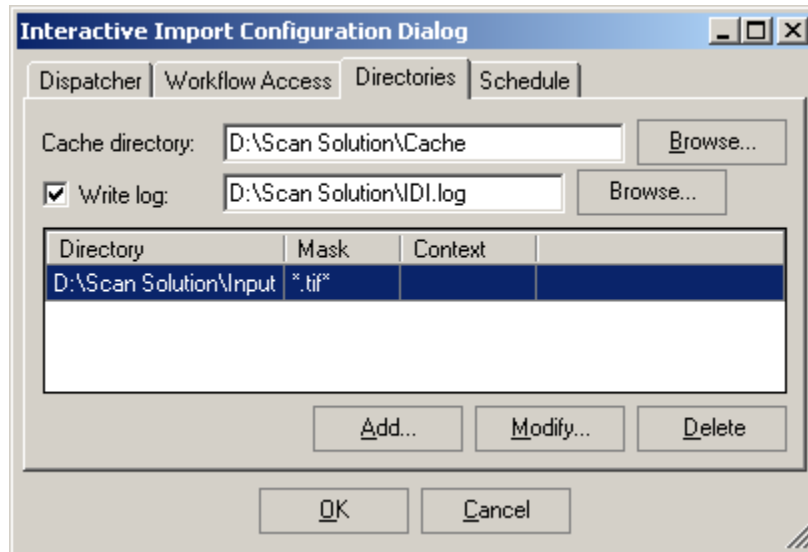
The **Workflow Access** tab contains the indexing user access parameters. The user should be one of the users registered in the **Workflow Engine** module; the Password field is not used and could be left blank. It is recommended to use a unique user for each client station as it will be used for data control and statistics purposes.



The **Schedule** tab allows managing the transmitting activity periods for the application. During these periods, the application will try to submit documents to the server. During the “inactive” period the application will work locally preparing all the data, but will not try to send anything to the server. The activity periods could be repeatable or one-time occurring.

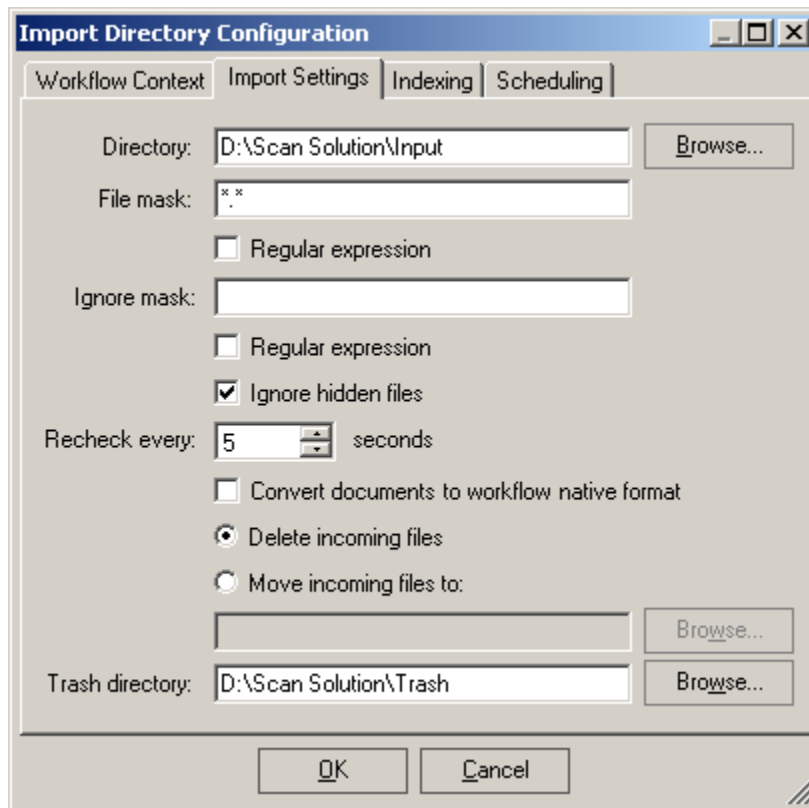


The **Directories** tab allows managing local client-specific importing and indexing settings. It is recommended to keep those setups unique, either by specifying different importing folders or by using different filename masks. The **Cache Directory** is a folder where IDI will be storing document file and indexing information to for documents that are in the process of being transferred. It is also possible to configure a local log file, where IDI will log all the actions on individual files.



The Interactive Document Import allows monitoring multiple directories for incoming files.

To add a directory, click the **Add...** button in the Interactive Import Configuration Dialog **Directories** tab. The Import Directory Configuration window will appear.



The **Import Settings** dialog allows configuring basic importing parameters, like: Import directory, file mask for the input file, Trash directory and the option how to post-process the files.

The **Directory** defines the local folder that IDI will monitor for the incoming files.

File Mask defines the filename(s) template to look for in the **Directory**.

Ignore Mask defines the filename(s) template not to pick-up in the **Directory**. This option might be usefull as some scan packages generate the temporary files in the same folder.

Both masks can be specified by regular expression.

The **Ignore hidden files** option could be useful for some applications that create temporary files in the local directory when document is edited, for example: MS Word, MS Excel, etc. Checking this option will force the application to ignore these files.

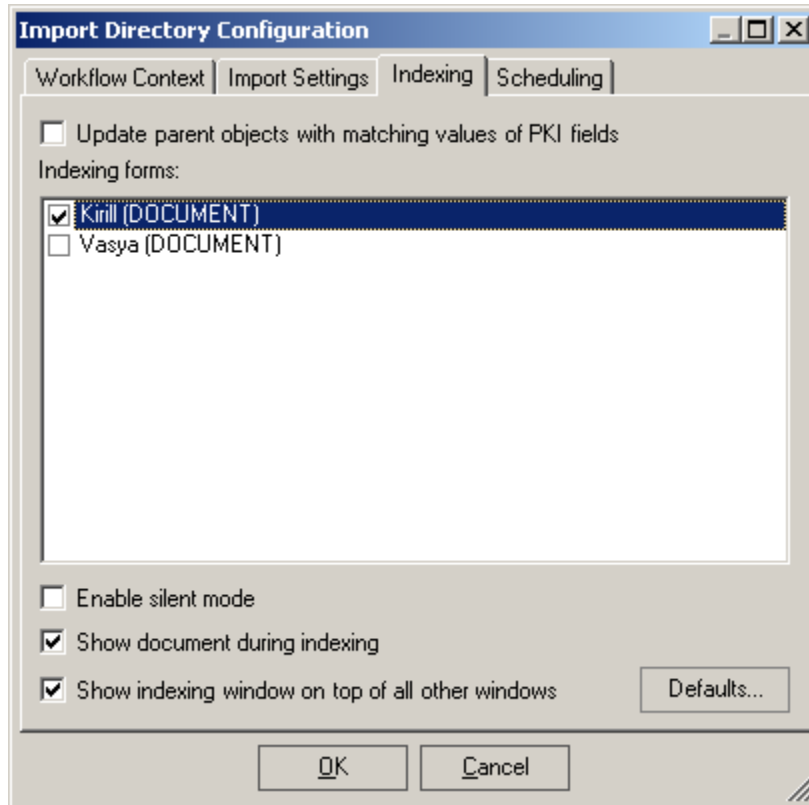
The **Recheck** parameter allows setting up full folder re-scan interval. Usually re-scan is initiated on start-up, but in some cases tuning this option might improve the application response time.

The incoming documents could be converted to TIFF format upon importing if the **Conversion** module is set up. The **Conversion** is a separate module and is not included in this solution by default, so leave the checkbox un-checked, unless advised otherwise by Dexik Support or Professional Services.

The incoming files that have been successfully imported could either be deleted or moved to the completed folder.

The **Trash Folder** is the place where all the documents that were not imported due to a fault or user cancellation are kept.

The **Indexing** tab allows selecting the indexing form to use for indexing incoming files from the corresponding import directory. It is possible to configure Default values for the form fields and indexing window behavior in this dialog.



The **Update parent objects** check box is not used in this solution and should be left un-checked.

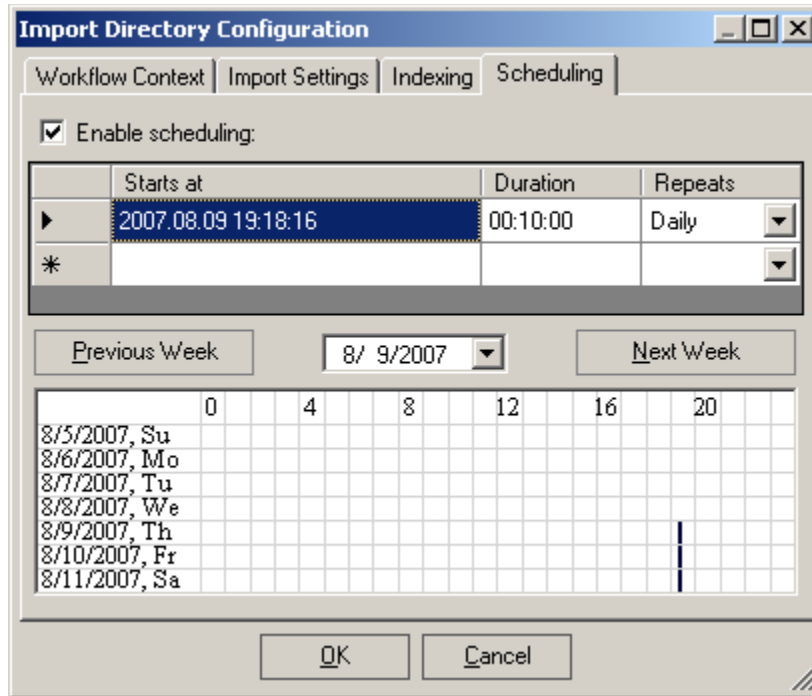
If the **Enable silent mode** checkbox is checked – the indexing window will not appear and the document file will be sent out automatically together with the indexing information defaults, if any of those are configured.

The **Show document during indexing** checkbox allows to setup whether or not document will be opened during indexing. By default the option is checked, but in some cases user does not need to see the document during the process and it could be unchecked for that particular setup.

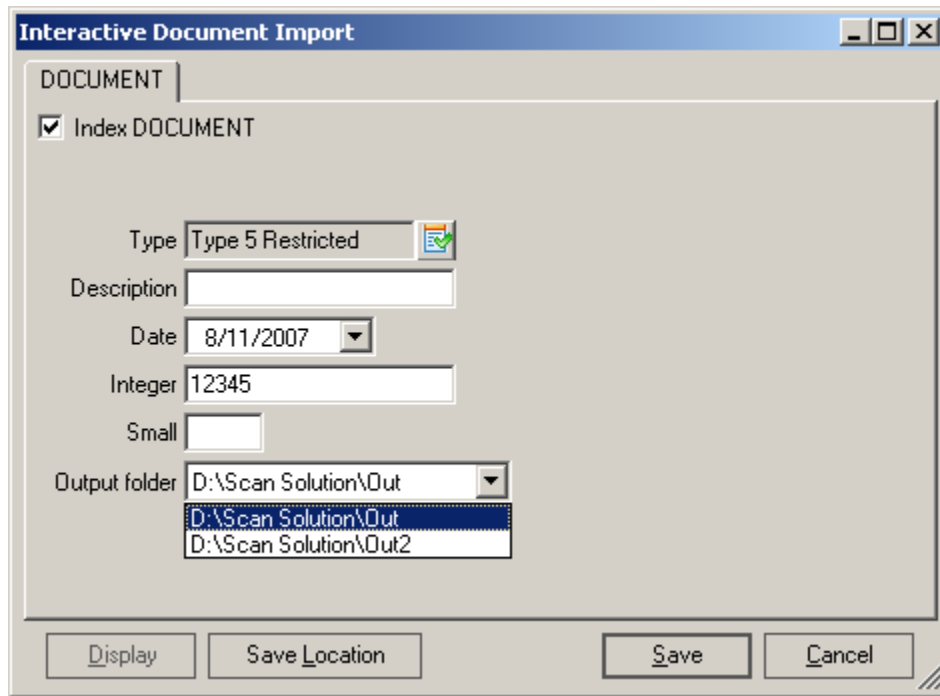
The **Show indexing window on top of all other windows** checkbox allows keeping the indexing window in front while indexing even if the window with the document has opened later. In this case, the indexing window will also try to capture the focus back one time. It is a common situation as usually the document display application opens slower than the indexing window.

To setup defaults for the form, select the form and click the **Defaults...** button. The indexing screen will appear where default values could be defined. Enter all the desired default values and click **OK**.

The **Scheduling** tab allows managing activity periods for the specific folder. During these periods, the application will try to monitor this folder. If file(s) found – it will be processed according to the setup. During the “inactive” period the application will not monitor this folder. The activity periods could be repeatable or one-time occurring.



Interactive Document Import Client



The **Display** button initiates the current document display in the default viewer.

The **Save Location** button allows preserving current indexing window location during the future indexing process.

The **Save** button sends the document and indexing information to the server for processing.

The **Cancel** button sends the document to the **Trash** folder.