



Opera 3 Document Management – Bar Coding

Training Courseware
Work-Shop



Pegasus Software Ltd
Accreditation Training Courseware

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Introduction

About Opera 3

Opera 3 is the most versatile and user-friendly accounting, supply chain management, payroll & HR, manufacturing and reporting solution from Pegasus Software. A modular solution, Opera 3 enables you to select the components that match your current business model, whilst making it possible to add further functionality as requirements change. This means that the capability or capacity of a system can be seamlessly expanded whilst safeguarding the investment.

For more information about Opera 3, select the Solutions link on the [Pegasus](#) web site.

About this Guide

This Accreditation Training Courseware offers an accompanying guide to the accreditation training course.

If you are new to Opera 3, read the Getting Started section of the Opera 3 Help that covers the application in more detail. You can access this from the Windows Start menu, or by using the F1 Key or Help menu when you have logged in to the product.

Opera 3 is available for both Visual FoxPro and SQL Server database platforms. This Accreditation Training Courseware applies to both database platforms, however, there are certain elements that are only included in one or the other database, and as such, the relevant sections or paragraphs are clearly identified with the following labels:

[SQL] – only relevant if you are running the application on an SQL Server database.

[VFP] – only relevant if you are running the application on a Visual FoxPro database.

Sections that are not identified with these labels are relevant to both database types.

For more information, see the [section Functional Differences between Opera 3 Enterprise & Opera 3 Enterprise SQL section in the release guide](#).

Introducing the module

Document Management is a full integrated Opera 3 module that provides highly efficient and secure document capture and retrieval functionality both in the Document Management module and throughout the Opera 3 product. Paper documents and previously saved electronic documents and emails can be captured and securely archived.

Documents can be captured and retrieved at header and transactional level via direct modular integration, or captured in batch through the Document Management module. When capturing or retrieving in another Opera 3 module, like the Sales Ledger, all document type selection and indexing is managed such that there is the minimum of additional clicks or data entry. Indexing can also be done using bar codes.

Barcode scanning is an additional function of PDM and does not prevent the continued use of manual scanning.

Feedback

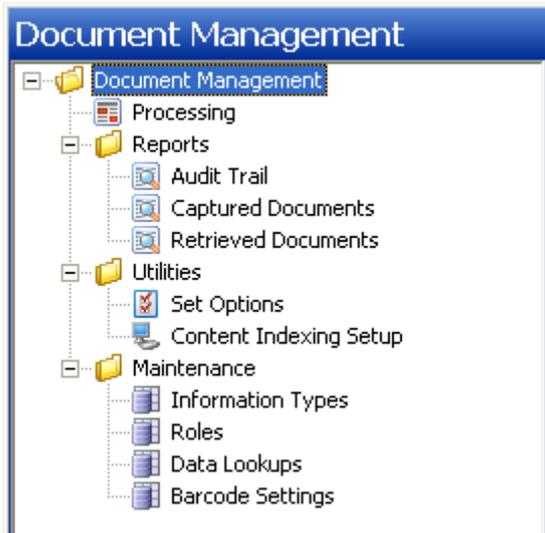
Pegasus is interested to hear your views on the documents we provide. To give your feedback, send an email to training@pegasus.co.uk. Please type "O3Training_Accreditation_REP35DocumentManagerBarCodingR2.0.docx Accreditation Training Courseware" in the subject box.

Please note that product support is not offered through the above email address.

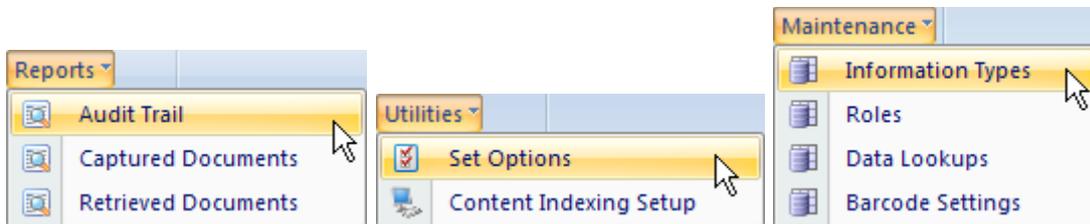
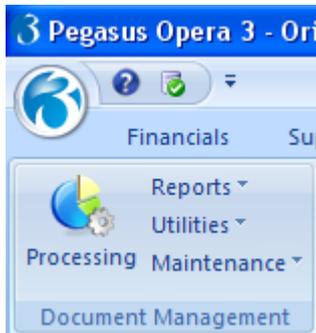
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Module Menu Structure

The following sections will cover the functionality of the options in this module as outlined in the image below which shows each menu option contained in this module.



Or



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Glossary (of Menu Structure)

Navigator Folder	Command	Purpose
Processing		In the Processing command you can scan paper documents, capture electronic files, and retrieve archives. Before the form loads, your rights are checked and the options are displayed accordingly. These rights are defined in the Roles command.
Reports	Audit Trail	Lists what has been done, when they were captured and by whom in Document Management. System operations that capture activities like a form being opened or closed in Document Management are excluded if the Exclude System Operations option is ticked.
	Captured Documents	Provides details of the documents that have been captured, when they were captured, and who captured them.
	Retrieved Documents	Provides details of the documents that have been retrieved, when and by whom from Document Management.
Utilities	Set Options	Use the Set Options command to specify options and controls that affect the operation of the Document Management module. The settings include Microsoft SQL Server Connection parameters, file locations for scanned documents, default roles for users, archiving settings, and context indexing settings.
	Content Indexing Setup	Content Indexing is available if your activation includes the Advanced Document Management feature. Content Indexing captures machine typed text from scanned TIFF (Tagged Image File Format) images, text files (.txt) and document (.doc) electronic files, then uses the text to index the document. Inclusion and exclusion dictionaries let you manage the words that are used to update the indexes.
Maintenance	Information Types	Information Types define the types of documents that are captured in Document Management. They are a representation of the different types of document that you may need to scan. The view of Information Types is structured like the Opera 3 menu structure in the various groups, like 'Financials' and 'Payroll & HR'. Beneath the groups, the modules are displayed, like 'Sales' and 'Personnel'. Index details are also defined for each information or document type. For example, a sales invoice can be indexed by the account code, company name and the document reference (or invoice number).
	Roles	User Roles in Document Management is where you define the rights that users have to capture and retrieve documents. When a user first uses Document Management, they are assigned the default role that is defined in the Set Options command.
	Data Lookups	To prevent inaccurate indexing information being added to the Document Management databases, data 'lookup' lists allow you to choose index information from a prepared list when updating the Manual Indexing form in Document Management. This means you do not need to manually type an index so avoids mistakes being made. For example if you enter 'AD' as a customer account code when capturing a document using the Sales Processing information type, all the accounts that include 'AD' in either the account code or company name are displayed.
	Barcode Settings	Barcode settings are additional settings for indexing documents using barcodes. If you want to define the number of barcodes that are included on a page, that barcodes must be displayed on every x number of pages, and so on, this is where you define those settings. Each information type can have different barcode settings.

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The Module

Document Management is a full integrated Opera 3 module that provides highly efficient and secure document capture and retrieval functionality; both in the Document Management module and throughout Opera 3. Paper documents, previously saved electronic documents and emails can be captured and securely archived.

Documents can be captured and retrieved at header and transactional level via direct modular integration; or captured in batch through the Document Management module. When capturing or retrieving in another Opera 3 module, such as the Sales Ledger, all document type selection and indexing is managed so that there is a minimum of additional clicks or data entry. Indexing can also be done using bar codes.

You can easily see which records have documents attached, because an icon is displayed in the status bar, making it apparent that something is available to retrieve and view.

Barcode scanning is an additional function of PDM and does not prevent the continued use of manual scanning.

Advanced Document Management

Document Management includes two other features at additional cost - Content Indexing and Deferred Indexing.

Content Indexing captures machine typed text from scanned TIFF (Tagged Image File Format) images, text files (.txt) and documents (.doc) electronic files, then uses the text to index the document. This is an additional, automated method of indexing documents above the manual indexing and barcode indexing methods.

Deferred Indexing is an alternative to Manual Indexing and Barcode Indexing. It allows documents to be scanned, and then indexed later.

Document Management is designed to work with other modules in Opera 3 Enterprise and Opera 3 Enterprise SQL (6.00) or later.

About this Training Guide

This training guide provides you with background information required in using Bar Codes in Document Management.

This document is designed to aid in the understanding and setting up of bar code scanning in Pegasus Document Management (PDM). It discusses the various components involved and advises on configuration. It does not provide indepth detail about all options but provides an effective summary for the configuration for user to then test and develop Bar Code Scanning and analyse respective settings further if required.

Bar code scanning is an additional function of PDM and does not prevent the continued use of manual scanning.

Notes

Opera 3 Readme File

The Opera 3 Readme file contains Late Breaking News and any other release specific important information, including information about Pegasus Document Management. You are advised to check this file. It is installed in the Opera 3 Client installation's main folder and can be accessed from the Start menu or Desktop folder after installation.

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1 Getting Started

1.1 System Requirements

Document Management must be installed and activated on the system with Opera 3.

Appropriate Hardware or VRS Software must be installed and functioning correctly.

To be able to scan barcodes in Document Management you need set up additional software, install a barcode font on your computer, and update the Barcode Settings for each Information Type in Document Management. Barcode Settings define the rules that each paper document must follow before Document Management will allow it to be indexed.

Once you have installed the Kofax VRS software, installed a barcode font and created your barcode fonts, and updated the Barcode Settings, you will be in a position to index paper documents using barcode indexing.

You need to do the following:

1. Install additional software (Kofax VRS) on your computer to complement the software drivers that are included with your scanner.
2. Install a barcode font on your computer so that you can create barcodes to use on paper documents.
3. Add barcodes to the Opera 3 reports or paper documents you are going to scan. You can also create labels that display the barcodes to attach to documents you want to scan.
4. Update the options for barcode scanning on the Barcode Settings that define the index information for scanned paper documents. These options must be updated before you can scan barcodes to index paper documents.

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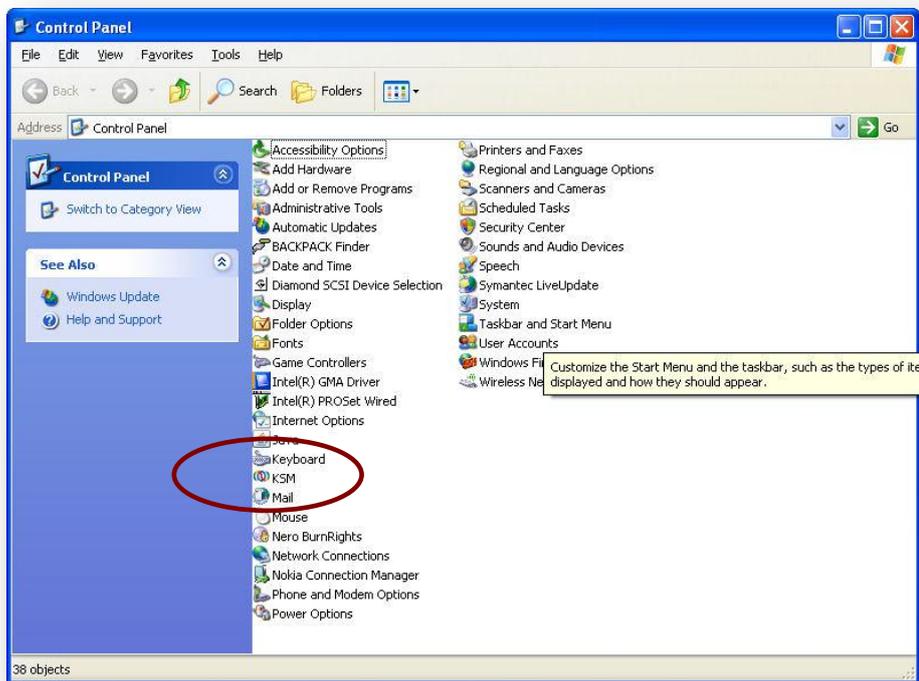
2 Scanner & System Set-up

2.1 Installing Kofax VRS

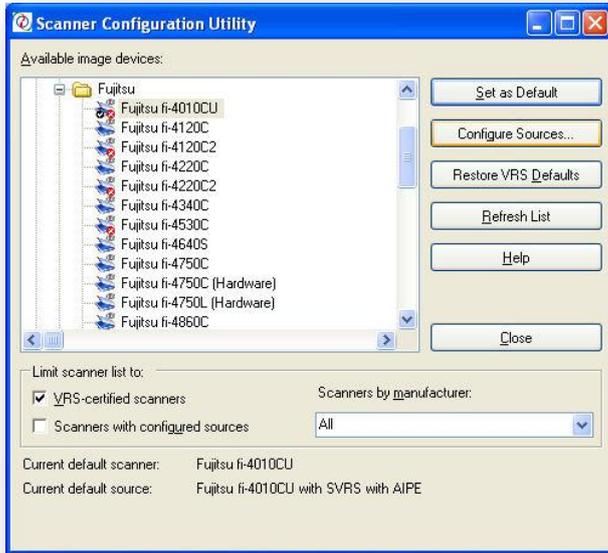
You must have Kofax VRS software with a “Professional” license that includes AIPE (Adrenaline Image Processing Engine). Kofax VRS is supported with a wide range of industry standard scanners and is bundled free with scanners from certain manufacturers such as Fujitsu. You can find information about Kofax VRS at www.kofax.com/products.asp.

During the installation of Kofax VRS you will be asked which scanner you have. This is so it can automatically create appropriate scanner “sources” for you with the Kofax Source Manager (KSM). If you have not done this you can go into KSM from the **Control Panel** in Windows and configure as required.

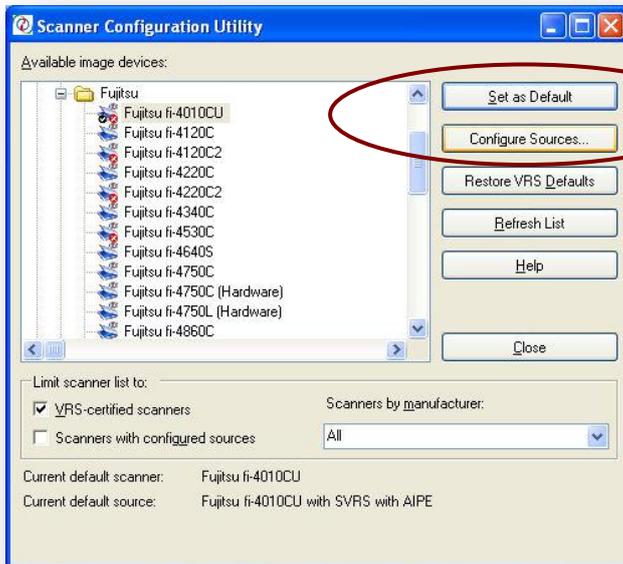
Note: To install and configure your Kofax VRS software, please refer to the installation guide for more in-depth details which is included with the VRS software.



When loading KSM you will be presented with a screen similar to the one illustrated below;



In KSM, scanner configurations are described as “Sources”. To configure Sources select the scanner model in question from the list and then select Configure Sources as illustrated below;



This will present you with the configured sources for the scanner (if there are any) as illustrated below;



If you need to add a new Source either select New, enter a source name and follow the prompts, or select Create Standard Sources. This is the easier option and will create the various possible Sources for the selected scanner as shown above.

When complete make sure the default Source is described as“with SVRS with AIPE”, as shown above, by selecting Set Device Default Source. This will assist when selecting the correct source for the first time in PDM.

Note: If you do not have a “Professional” license for AIPE, you will not be able to use this source and subsequently the scanner will not recognise bar codes.

2.2 Installing Barcode Fonts

Kofax VRS, and therefore Document Management, supports the recognition of a number of different barcode formats. The most common choice is a font called Code 39 (3 of 9). This is an industry standard barcode format that can be purchased as a Windows font from a number of different sources on the internet. Once purchased and installed, it acts as any other font in Windows and can be used on Opera 3 report designs, as well as other products such as Microsoft Word to put fields and text on documents in a bar code font.

Code 128 is another industry standard barcode format font, which is more complex than the Code 39 font. Code 39 is the simplest choice but does not deal with the majority of non-alphanumeric characters, including a space, whereas Code 128 can encode all 128 ASCII characters.

Note: Code 39 or Code 128 fonts can be purchased from a number of sources on the internet. To install a font, please refer to the instructions that are included with the software.

2.3 Adding Barcodes to Opera 3 Reports & Other Documents

There are two different types of barcodes:

- **Information Type separator barcodes (patch codes):** these barcodes are used to separate different types of documents in a batch of documents. For example, if a batch includes supplier invoices and sales orders, one patch code is used for the supplier invoices and another patch code is used for sales orders.

Patch codes are sometimes used on separate sheets of paper rather than on the documents that need to be archived. The sheets are then fed into the scanner to inform Document Management that a new type of document will be scanned next.

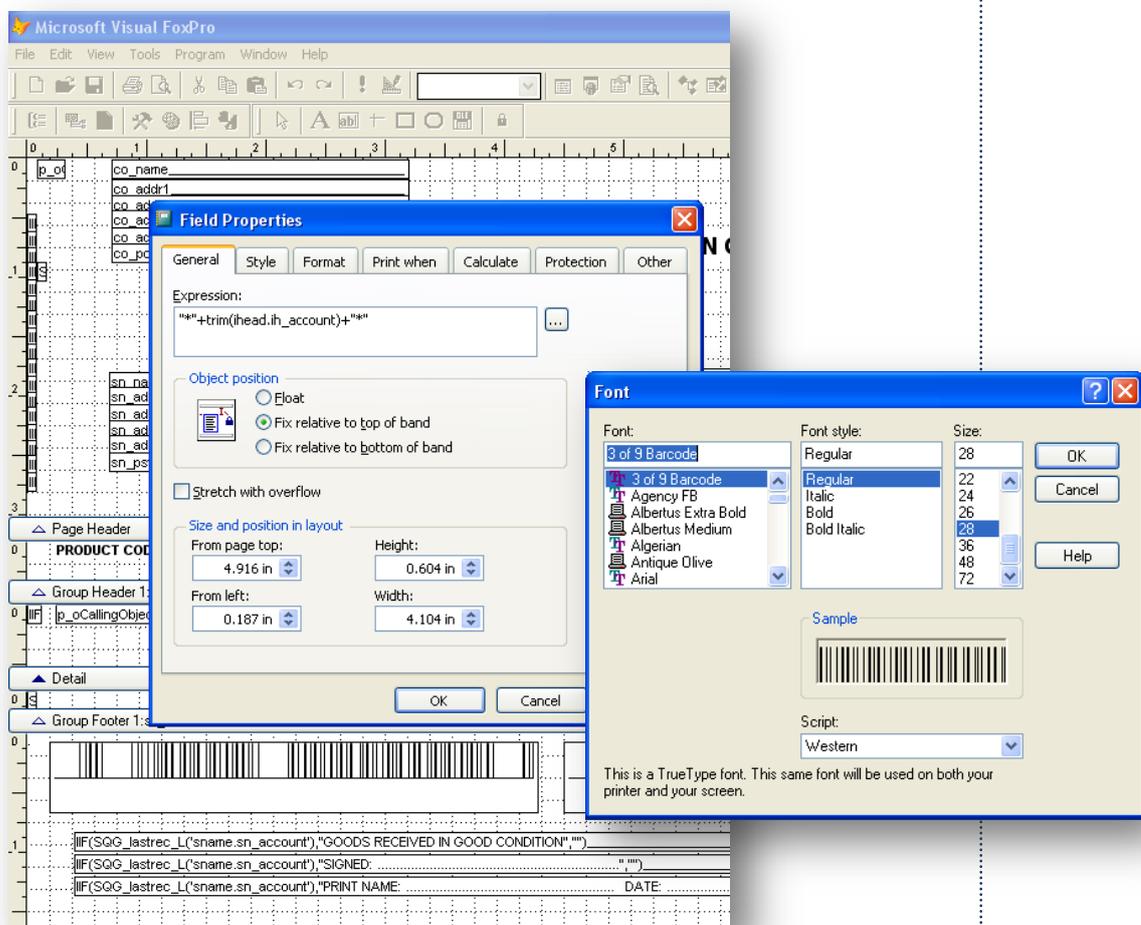
- **Index barcodes:** these barcodes are used on each document to indicate the index that Document Management should use to archive it. In the example of supplier invoices and sales orders, each invoice and sales order will have an index barcode to identify the index information.

Note: To add barcodes to your report designs in Opera 3 you need a technical understanding of Microsoft Visual Foxpro 9 reports. If you are going to create barcodes to print on labels to attach to documents you receive from your partners, or create barcodes on documents, you will need to a technical understanding of using the software product. If required refer to your Pegasus Partner for help.

2.3.1 Bar Code Formats & Fonts

Kofax VRS, and therefore Pegasus Document Management, supports the recognition of a number of different barcode formats. The following section defines how to select which ones you are using within the software. When scanning in Pegasus Document Management the most appropriate choice is "Code 39 (3 of 9)". This is an industry standard format and can be purchased as a Windows font from a number of sources on the web. It is worth noting that Code 39 is the simplest choice but does not deal with the majority of non-alphanumeric characters, including a space, whereas a font such as "Code 128" can encode all 128 ASCII characters. Code 128 is another commonly used bar code font type.

Once purchased and installed, they act as any other font in Windows and can therefore be used in Opera 3, as well as other products such as Word, to put fields and text on documents into the barcode font, effectively turning them into a barcode.



Alternatively it is possible to consider using 2D barcodes, such as PDF417, but these formats cannot be produced using simple fonts, they have to be constructed in programme code and therefore require software development input.

2.3.2 Add index barcodes to Opera 3 reports

Important: This procedure requires a technical understanding of Microsoft Visual Foxpro reports.

To add barcodes to an Opera 3 report, simply choose the fields you want to use for the index using the barcode font installed on the computer. It does not generally matter where on the document the barcodes is placed provided the following rules are applied:

1. You are still likely to need the original, human-readable fields so add new fields to the report using the barcode font rather than replace the human-readable fields.
2. The Code 39 (3 of 9) font needs an asterix surrounded by quote marks ("*") at the start and end of each barcode. As an example, when you create a barcode for the document number from the Sales Order Processing or Invoicing module's document header (?_IHEAD) table, you would construct it as "*" + IHEAD.IH_DOC + "*". It is also good practice to trim the field to avoid unnecessary spaces, for example "*" + TRIM(IHEAD.IH_DOC) + "*".

Note: The Code 39 font does not recognise spaces in index entries (easily), for example in a customer's or supplier's name. If your index entries include spaces you must use the Code 128 font. Code 128 does not require the asterix (*) at the start and end of each barcode but it does encode ASCII characters so to interpret a space, for example, you must use ASCII character 128, Ç.

3. Barcodes should be in the correct order when looking at the document reading top to bottom and left to right. The correct order is defined as the order the indexes are shown on the [Information Type](#). Barcodes can be positioned either vertically or horizontally on the document.
4. Barcodes should be at least 5mm away from any other lines on the document.
5. Barcodes should be at least 0.25" high.
6. Barcodes cannot be printed on any printer that does not form a solid block of colour, for example a dot matrix printer.

Video Example

Note: You need to have access to the internet to view this video which displays in your default web browser.

Here is a [short video example](http://www.screencast.com/users/PegasusSoftware/folders/Jing/media/c0dfddd2-3ca6-4628-ae5c-a64ad231a1e9) (<http://www.screencast.com/users/PegasusSoftware/folders/Jing/media/c0dfddd2-3ca6-4628-ae5c-a64ad231a1e9>)

of how to do this using a delivery note from the Sales Order Processing module and logging in as ADMIN. The example shows two barcodes using the Code 39 Font - one for the account number and the other for the document number - using the demonstration data in Opera 3. Both fields are copied from existing fields on the report.

2.3.3 Add index barcodes to other documents

To add barcodes to a document like a Microsoft Word document, simply add the index entries you want using the barcode font installed on the computer.

It does not generally matter where on the document the barcodes is placed provided the following rules are applied:

1. The Code 39 (3 of 9) font needs an asterix (*) at the start and end of each barcode. As an example, when you create a barcode for a customer code and document number, you would construct it as ***CustomerCode*** and ***CustomerName*** (where **CustomerCode** is the code for the customer record in the Sales Ledger, and **CustomerName** is the reference number for the document).

Note: The Code 39 font does not recognise spaces in index entries, for example in a customer's or supplier's name. If your index entries include spaces you must use the Code 128 font. Code 128 does not require the asterix (*) at the start and end of each barcode but it does encode ASCII characters so to interpret a space, for example, you must use ASCII character 128, Ç.

2. Barcodes should be in the correct order when looking at the document reading top to bottom and left to right. The correct order is defined as the order the indexes are shown on the Information Type. Barcodes can be positioned either vertically or horizontally on the document.
3. Barcodes should be at least 5mm away from any other lines on the document.
4. Barcodes should be at least 0.25" high.
5. Barcodes cannot be printed on any printer that does not form a solid block of colour, for example a dot matrix printer.

Tip: To barcode-index paper documents you receive from a business partner, create a separate header page document using the barcode font to create the necessary barcode entries. You can use Word Processing software like Microsoft Word to do this. Then feed the header page into the scanner before the document you want to scan. Both pages will be scanned and archived together and the indexing will be completed automatically by the barcode on the header page.

Video Example

Note: You need to have access to the internet to view this video which displays in your default web browser.

Here is a [short video example](http://www.screencast.com/users/PegasusSoftware/folders/Jing/media/a2750c2b-5375-48b2-be84-799985a5fe9e)
(<http://www.screencast.com/users/PegasusSoftware/folders/Jing/media/a2750c2b-5375-48b2-be84-799985a5fe9e>)

of how to do this in Microsoft Word 2003 using the Code 39 Font. The example shows two barcodes - one for the account number and the other for the account name of a customer in the demonstration data in Opera 3. The font size used is large so it is easier to see - the actual font size does not need to be this size.

2.3.4 Add Information Type separator barcodes (patch codes)

Whilst Information Type Barcodes can exist on the documents themselves it may ignore other bar codes on that page. Therefore it is advisable to use inserts, pieces of A4 white paper with nothing on them other than the barcode representing the Information Type in question, for example FIN-SL-01 and, if required, text describing it. These can then easily be inserted into a batch of documents at the appropriate locations to automatically change Information Type "mid scan" as previously described.

The same rules apply as for putting barcodes on Opera 3 documents albeit with a blank page and a single barcode it is much simpler.

Information Type separator barcodes or patch codes can exist on the documents that are going to be scanned. However it is advisable to use page inserts between batches of paper documents of different information types. For example a supplier invoice or a customer delivery note.

Page inserts are A4 white paper that include only the barcode that represents the **Information Type** in question. For example, the code for a supplier invoice is **FIN-PL-02** and the code for a customer delivery note is **SCM-IN-04**. These page inserts can easily be inserted into a batch of documents at the appropriate point to automatically change Information Type "mid scan". You must not use a page insert **before** the first type of document. Using the example above you would use a page insert **between** the supplier invoice and the customer delivery note - you must not use a page insert before the supplier invoice.

To check the barcode reference for each Information Type

To Add a Patch Code to a Paper Document

1. To add an Information Type separator barcode to a document, like a Microsoft Word document, simply add the index entries you want using the barcode font installed on the computer. You must have only one Information Type separator barcode on a page.
2. The Code 39 (3 of 9) font needs an asterisk (*) at the start and end of each barcode. As an example, when you create a Information Type separator barcode for a supplier invoice, you would construct it as ***FIN-PL-02***.

Note: The Code 39 font does not recognise spaces in index entries, for example in a customer's or supplier's name. If your index entries include spaces you must use the Code 128 font. Code 128 does not require the asterisk (*) at the start and end of each barcode but it does encode ASCII characters so to interpret a space, for example, you must use ASCII character 128, Ç.

3. Barcodes should be at least 0.25" high.
4. Barcodes cannot be printed on any printer that does not form a solid block of colour, for example a dot matrix printer.

Notes

Video Example

Note: You need to have access to the internet to view this video which displays in your default web browser.

Here is a [short video example](#)

(<http://www.screencast.com/users/PegasusSoftware/folders/Jing/media/922044d6-b659-4be5-b9e7-9488faca8c6c>)

of how to do this in Microsoft Word 2003 using the Code 39 Font. The example shows one barcode for a supplier invoice Information Type. The font size used is large so it is easier to see - the actual font size does not need to be this size.

2.4 Updating Barcode Settings

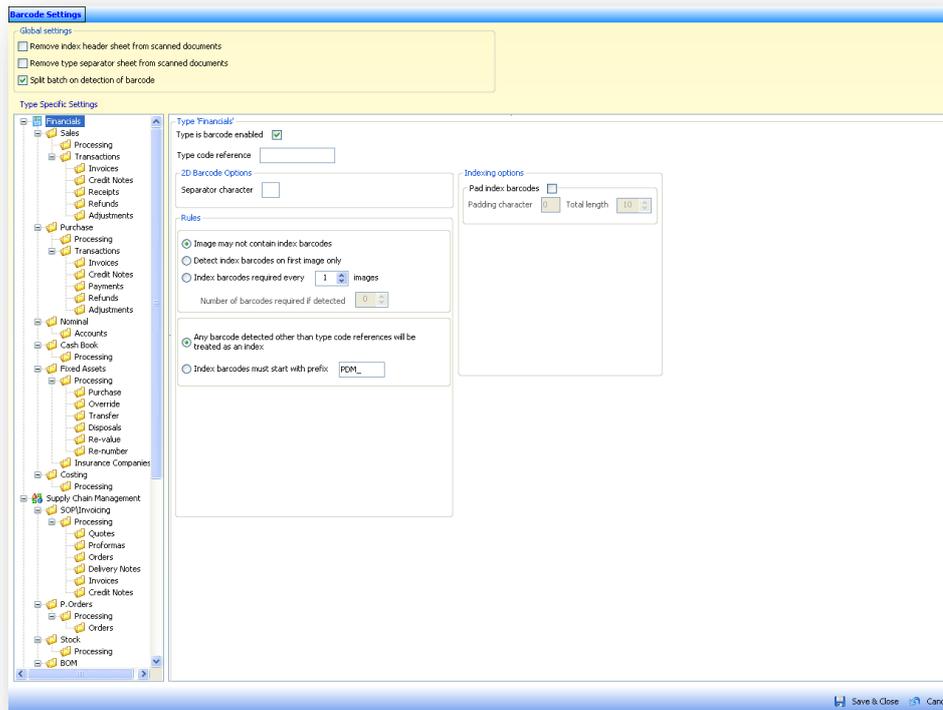
Barcode Settings must be updated for each Information Type to define the rules that each paper document must follow before Document Management will allow it to be indexed using the information in the barcodes.

1. Open the Document Management folder, click Maintenance and then click Barcode Settings.
2. To change the settings to all Information Types, tick the boxes under Global settings. An explanation for each option is included in the Barcode Settings Help topic.
3. Select the Information Type you want to change the settings for.
4. Under Type, Rules, and Indexing Options, tick the boxes to apply the settings to the chosen Information Type. An explanation for each option is included in the Barcode Settings Help topic.
5. When you have finished, click Save & Close to save the settings or Cancel to lose your changes.

2.4.1 Barcode Settings

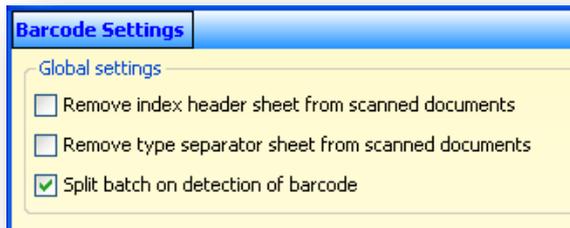
Information Types for Barcoding are configured in Pegasus Document Management (PDM), Maintenance.

Barcode settings are additional settings for indexing documents using barcodes. If you want to define the number of barcodes that are included on a page, that barcodes must be displayed on every x number of pages, and so on, this is where you define those settings. Each information type can have different barcode settings.



2.4.2 Defining Global Barcoding Settings

These global settings will effect all Information types.



<p>Remove index header sheet from scanned documents</p>	<p>If you use header sheets that include only index barcodes that are inserted into the scanner before the documents that need to be archived, tick this option if you do not want the header sheet to be archived. If you do not use header sheets, leave this option unticked.</p> <hr/> <p>Example: You have a supplier invoice to archive in Document Management. To index the invoice, you add index barcodes to a separate 'header' sheet for the supplier's account code and the invoice number.</p> <hr/> <p>With the Remove index header sheet from scanned documents box ticked, when the invoice is archived the header sheet is used to index the invoice but it is not archived so it not displayed when you retrieve it in Document Management.</p>
<p>Remove type separator sheet from scanned documents</p>	<p>If you use separator sheets to separate documents into different information types, tick this option if you do not want the separator sheets to be archived. If you do not use information type header sheets, leave this option unticked.</p> <hr/> <p>Example: You have a supplier invoice and a supplier credit note to archive in Document Management. To index them, you need to make sure they are archived using the relevant information type. You can do this using a separate 'header' sheet for each information type, one for supplier invoices and the other for supplier credit notes.</p> <hr/> <p>With the Remove type separator sheet from scanned documents box ticked, when the invoice and credit note are archived the header sheets are used to select the relevant information type but they are not archived so are not displayed when you retrieve them in Document Management.</p>
<p>Split batch on detection of barcode</p>	<p>If ticked, batches are split when a barcode is detected. This works together with the Image may not contain index barcodes option.</p>

2.4.3 Defining an Information Type for Bar Code Scanning

The following options are specific to each highlighted information type;

Type is Barcode Enabled-

This allows documents for this information type to be indexed using barcodes. This box is ticked for all information types by default.

Type code Reference-

This is the predefined reference for the information type that follows the convention Group-Ledger-id, for example FIN-SL-02 (Financials-Sales Ledger-02) for sales invoices.

These values have not been changed and default to existing presets. There are no pre-defined rules for this code but in standard Information Types as created for each company, the structure FIN-SL-01 has been used where FIN is Finance, SL is Sales Ledger and 01 is the first Information Type in that section. Detailed below is a complete list.

Sales Ledger	Processing		FIN-SL-01
	Transactions	Invoices	FIN-SL-02
		Credit Notes	FIN-SL-03
		Receipts	FIN-SL-04
		Refunds	FIN-SL-05
		Adjustments	FIN-SL-06
Purchase Ledger	Processing		FIN-PL-01
	Transactions	Invoices	FIN-PL-02
		Credit Notes	FIN-PL-03
		Receipts	FIN-PL-04
		Refunds	FIN-PL-05
		Adjustments	FIN-PL-06
Nominal Ledger	Accounts		FIN-NL-01
CashBook	Processing		FIN-CB-01
Costing	Processing		FIN-JC-01
Payroll	Processing		PHR-WG-01
Personnel	Processing		PHR-PE-01
Invoicing/SOP	Processing	Quote	SCM-IN-01
		Proforma	SCM-IN-02
		Orders	SCM-IN-03
		Delivery Note	SCM-IN-04
		Invoice	SCM-IN-05
		Credit Notes	SCM-IN-06
Purchase Orders	Orders		SCM-PO-01
Stock	Processing		SCM-ST-01
BOM	Processing		SCM-BM-01
Sales & Service Management	Company Processing		SM-CO-01
	Contracts	Processing	SM-CT-01
		Groups	SM-CT-02
	Sales Opportunity	Processing	SM-SO-01
		Referral Methods	SM-SO-02

2D Barcode Separator-

This is only applicable if using 2D barcodes and specifies the separator character used.

Note: In 2D barcodes, data is encoded in both the horizontal and vertical dimensions to pack in more data.

Rules:

Image may not contain index barcodes	<p>This allows you to define that not all of the pages in a batch of documents will contain index barcodes.</p> <hr/> <p>Example: You have five pages in a batch with index barcodes on the first page, third page, and fifth page. Pages two and four do not have index barcodes. When the images are scanned, pages one and two are indexed using the barcode on page one, pages three and four are indexed using the barcode on page three, and page five is indexed using its barcode.</p>
Detect index barcodes on first image only	<p>This allows you to define that index barcodes must be included on the first image in the batch. Index barcodes on any other pages are ignored.</p> <hr/> <p>Example: You have five pages in a batch with index barcodes on the first page, third page, and fifth page. Pages two and four do not have index barcodes. When the images are scanned, all pages in the batch are indexed using the barcode on page one. The index barcodes on pages three and five are ignored.</p>
Index barcodes required every x images	<p>This allows you to define that index barcodes must be included every so many pages in the batch.</p>
Number of barcodes required if detected	<p>If the Index barcodes required every x images box is selected, you can define the number of barcodes that must exist on the required pages in the batch.</p>
Any barcode detected other than type code references will be treated as an index	<p>This treats any scanned barcode as an index barcode.</p>
Index barcodes must start with prefix ...	<p>This allows you to force barcodes to start with a prefix, for example 'PDM_'.</p>

Index Padding

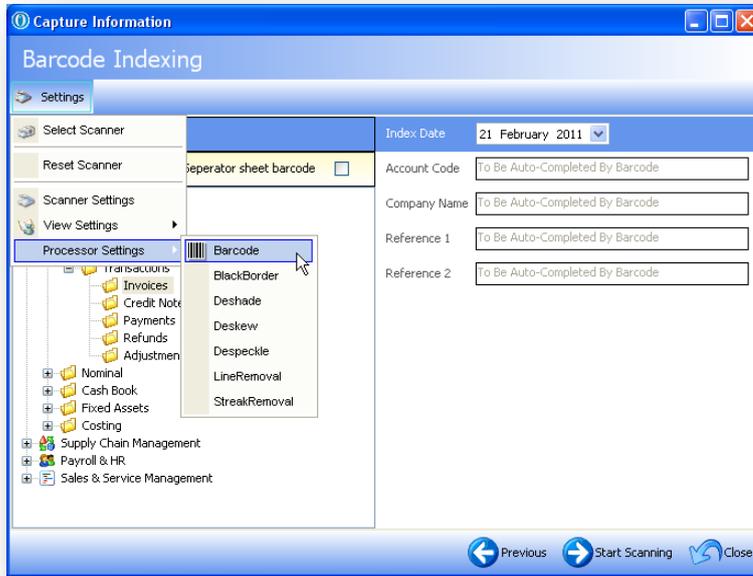
Pad index barcodes	<p>This is to specify if any barcodes need to be “padded” to be a certain length. This is useful if you have barcodes of different lengths or where leading zeros are removed when barcodes are produced.</p>
Padding character	<p>This character defines the character that will be used to pad a barcode.</p>
Total length	<p>If indexes are padded to a certain length, this is the total length of the barcode.</p>

Please Note: Default settings requires the Barcoding Indexing to be on the first scanned image of the batch.

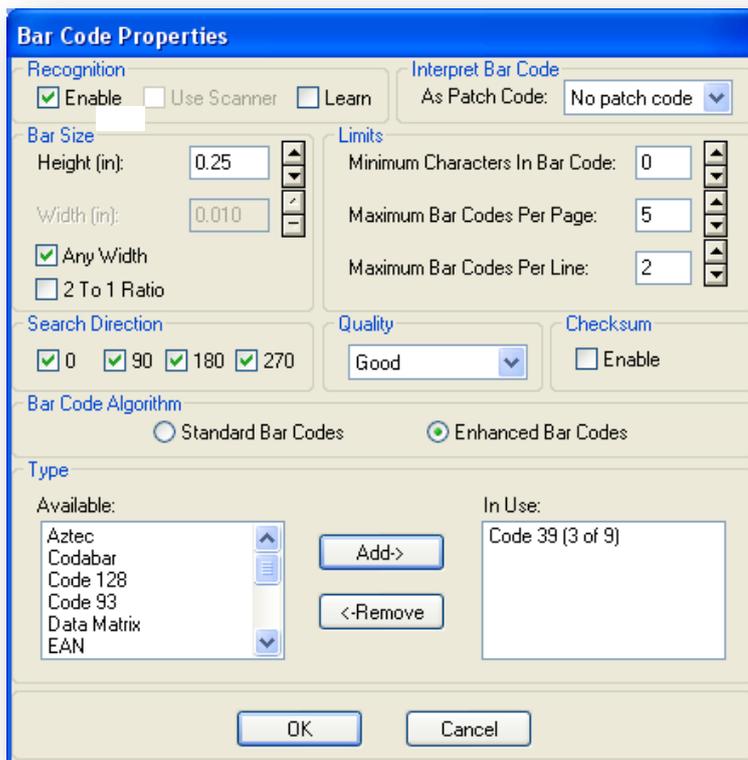
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3 Scanner Barcode Settings in PDM

When barcode scanning in PDM, settings need to be defined that enable Kofax VRS to understand how to search for and interpret barcodes on documents. These settings are accessed and configured from the Processor Settings option of the Settings menu when scanning in PDM, as illustrated below;



When selected the following screen will be presented;



1. Configure these setting as follows;
2. Tick on "Enable"
3. Set Height to a minimum of at least 0.25"
4. Tick on "Any Width"
5. Tick on all "Search Directions"
6. Tick on Enhanced Bar Codes
7. Add Code 39 (3 of 9) to the "In Use" Types using the Add button

Notes

There should not be a need to change any other settings unless bar codes being produced are of a poor quality.

Note: Settings are held per PC/Scanner not per user so this only needs to be done once for each PC/Scanner configuration that is to scan bar codes

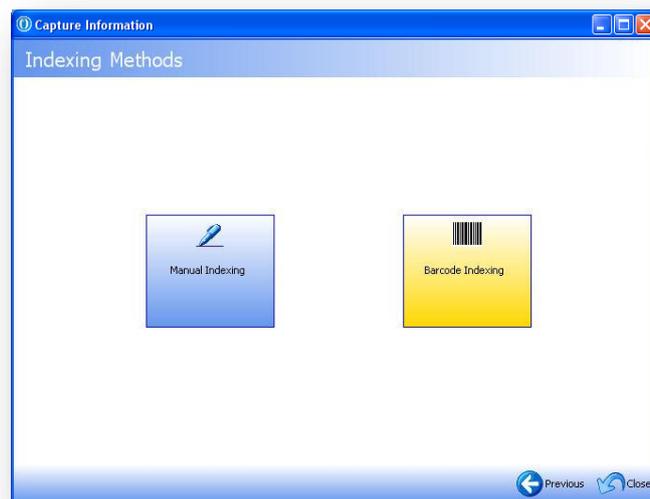
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4 Barcode Scanning in PDM

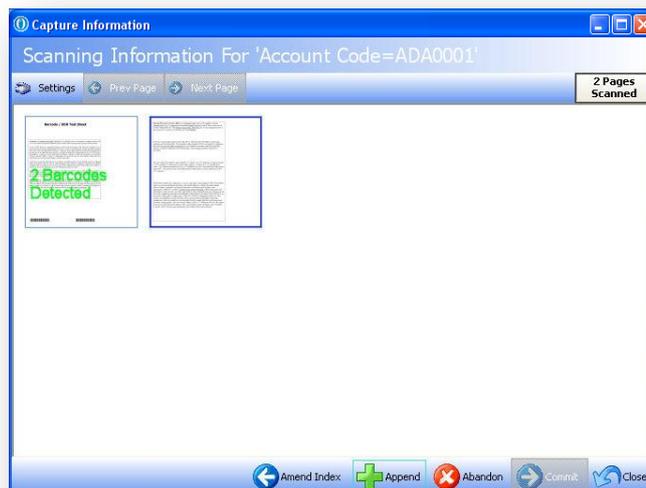
It is recommended that scanning is done at 300dpi or more for bar codes.

4.1 Scanning Bar Codes to be Used as Indexes

1. Bar codes are most often used to represent indexes to be applied to the document being scanned, hence the phrase "Barcode Indexing".
2. To scan with Opera 3 select Document Management | Processing | Scan Information | Barcode Indexing



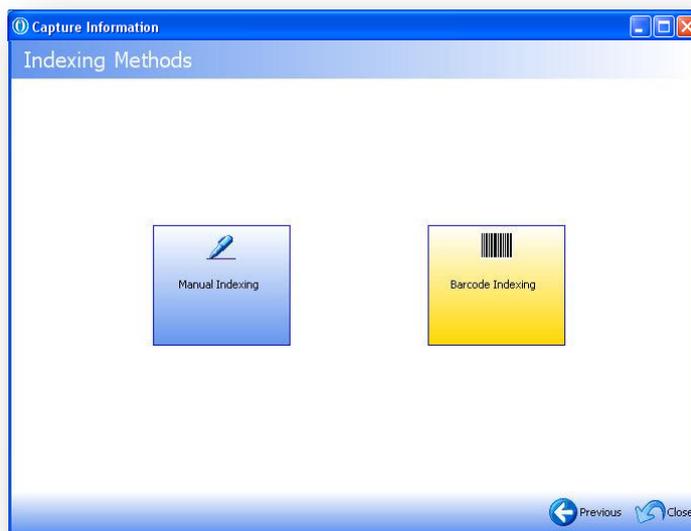
3. Select the Information Type that you are scanning against and put your documents in the scanner with the bar codes on the leading page.
4. Select Start Scanning
5. This will scan the document and read the barcodes.
6. Whilst scanning, for every page that the system finds bar codes on, the screen will display how many it has found. This will allow you to see if there are any pages that the barcodes have not been read on, which you will be able to rescan using standard principals before you commit the documents.



4.2 Scanning Bar Codes to be Used as Information Type Selectors

In a more complex environment barcodes can also be used to define a change in Information Type during the scanning process, as previously discussed. If this functionality is to be used then any barcode detected that matches an Information Type setting will be interpreted as a change of Information Type as opposed to an index. Therefore, all documents from that point onward will be in the newly selected Information Type until another separator is detected or until the batch of documents is finished. This process allows documents for different Information Types to be scanned at the same time provided there are “barcode separators” at the appropriate points in the paper being scanned.

From within Opera 3 select Document Management | Processing | Scan Information | Barcode Indexing”



Make sure the Information Type separator sheets, if used, are inserted in the batch at appropriate points, and place the batch into the scanner with the barcodes on as the leading page, select Start Scanning.

Scanning will then proceed as described.

NOTE: Currently it is not possible to have an Information Type bar code at the start of a batch that is on a separate sheet from the first set of index bar codes. The user should select the appropriate Information Type (the one that matches the first set of documents in the scanner) before starting to scan.

If an Information Type separator barcode is not detected, the system will continue to commit documents to the previously selected Information Type.

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Appendix

Appendix A Components & Useful Utilities Notes

.Net Framework

.Net Framework (v2)

This MS component is provided on the DVD ROM but alternatively may be downloaded from the MS Download centre Website. Recommend to search or try the following link as a guide - <http://www.microsoft.com/downloads/details.aspx?FamilyID=0856eacb-4362-4b0d-8edd-aab15c5e04f5&DisplayLang=en>

.Net Framework (v3.5 sp1)

This MS component is provided on the DVD ROM but alternatively may be downloaded from the MS Download centre Website. 3.5 is required for Dashboard version 2.6+. Recommend to search or try the following link as a guide - <http://www.microsoft.com/net/Download.aspx>

Loopback Adapter

On standalone systems which run Windows XP or lower, a MS Loopback Adapter may be required. This allows UNC paths to be resolved (pretend it is on a Network). The current Loopback Adapter provided by MS runs at 10Mbs. Windows Vista has this pre-installed but be aware this can be turned off.

There are several articles on the MS website to install the Loopback Adapter – suggest a Google search is done to find the appropriate steps (www.google.co.uk).

As an example the XP steps are found here - <http://support.microsoft.com/kb/839013>

1. Click Start, and then click Control Panel.
2. If you are in Classic view, click Switch to Category View under Control Panel in the left pane.
3. Double-click Printers and Other Hardware, and then click Next.
4. Under See Also in the left pane, click Add Hardware, and then click Next.
5. Click Yes, I have already connected the hardware, and then click Next.
6. At the bottom of the list, click Add a new hardware device, and then click Next.
7. Click Install the hardware that I manually select from a list, and then click Next.
8. Click Network adapters, and then click Next.
9. In the Manufacturer box, click Microsoft.
10. In the Network Adapter box, click Microsoft Loopback Adapter, and then click Next.
11. Click Finish.

SYSINTERNALS Utility Suite

The Sysinternals Troubleshooting Utilities have been rolled up into a single Suite of tools. This file contains the individual troubleshooting tools and help files. It does not contain non-troubleshooting tools like the BSOD Screen Saver or NotMyFault.

It contains FileMon and RegMon with respective help files on how to use them. These two utilities are invaluable when checking permissions and access rights to files, folders and registry keys.

<http://technet.microsoft.com/en-us/sysinternals/0e18b180-9b7a-4c49-8120-c47c5a693683.aspx> is the latest link and was updated in March 2009. This is the complete Sysinternals suite that has several useful utilities. To ensure you have the most up-to-date suite, please ensure you search the Microsoft Technet site thoroughly, however we endeavour to keep the most updated link in the courseware.

Code 128 Font

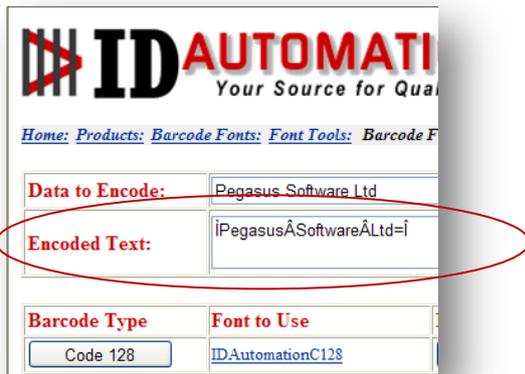
Font 128 understand special characters such as a space, however Ascii codes are required for this. For example;

If you wanted to put the text "Pegasus Software Ltd" in Code 128 you would do:

"Pegasus"+Ç+"Software"+Ç+"Ltd" (Example from developers)

<http://www.bcggen.com/fontencoder/default.aspx> is an online encoder page. Place the text in the box and click the font you wish to encode it too.

Example from Website;



Copy and paste the encoded text to notepad, print and scan.

Font 128 also require certain open and close characters. Further information can be found on the web, for example; <http://www.idautomation.com/fonts/code128/> and how the font 128 encoding automatically could work including license details (this would be external to Pegasus) <http://www.idautomation.com/foxpro/#module>

NB: Although Code 128 can interpret spaces far simpler than code 3 of 9 (if at all), it is unlikely that indexes required as barcodes will contain spaces. Code 3 of 9 would be the preferred solution.

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Other Guides and Help

The following user documents are also provided with the respective software. Guides are available from various sources including Answerlink, the Opera 3 CD and from the Opera 3 Client installation's main folder, normally *C:\Program Files\Pegasus\Client XXX\User documents (where XXX is either VFP or SQL)*. Some guides are also available from the Opera 3 Help menu or respective software Help menu.

Readme File

The Readme file is an HTML document. It contains late breaking news and any other release specific important information.

Note: This file can also be accessed from the Opera 3 CD Installation Menu with regards to Opera 3.

Release Guide

When new versions are released such as Opera 3, they are normally accompanied by a Release Guide that contains information such as What's New in this Release, Release History, and Functional Differences between versions.

Note: This guide can also be accessed from the Opera 3 CD Installation Menu with regards to Opera 3.

Installation Guide

The Installation Guide is provided to help you install the application in your chosen Windows environment. It contains technical information and advice to ensure the installation process is successful.

Demonstration Data Guide

This guide is provided to assist the use of the demonstration data and contains pertinent information that is not contained elsewhere in the product documentation. It is recommended that the Help be used at the same time.

Implementation Guide

The Implementation Guide provides a high-level view of an application such as Opera 3 and how to approach an implementation. It details how the modules are integrated, and recommends the order in which elements should be set up.

System Requirements Guide

The System Requirements Guide details the minimum and recommended computer hardware and software requirements that are required to install and use software such as Opera 3 Enterprise and Opera 3 Enterprise SQL.

It also includes guidance on using Opera 3 Enterprise and Opera 3 Enterprise SQL in a Terminal Services environment run in Windows Server 2003 and Windows Server 2008 (32-bit & 64-bit).

Help

F1 Help provides details of all the functions available in the application.

Document Management & Executive Dashboards Guides

Installation Guides are available for both Document Management and Executive Dashboards. A user guide is also available for Executive Dashboards. Help for Document Management is in the Opera 3 Help.

Note: The guides are in the respective folders on the Opera 3 CD and can be accessed from the Opera 3 CD Installation Menu.
