

CAPTURENOW FOR IMAGENOW 5.4 QUICK START GUIDE

by Perceptive Software, Inc.


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CaptureNow 5.4 Quick Start Guide

CaptureNow is a rich feature set in ImageNow that lets you scan and import documents from multiple sources into ImageNow. At the core of CaptureNow's efficiency is the Capture Profile where users set up and store all the options they want for securing quality images and other documents in ImageNow.

1. Log in and start the ImageNow client

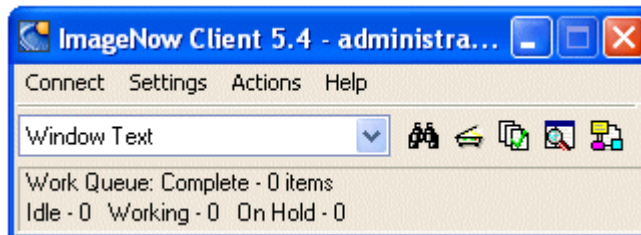
ImageNow can be started in several ways. You can start ImageNow by double-clicking the ImageNow icon on the desktop, or by clicking **Start**, pointing to **Programs**, and then clicking **ImageNow**; you can also start ImageNow by clicking the **Tray** icon .

As you start ImageNow, you will see the following splash screen:



Important If the **Profile** list box is blank, then a Login Profile has not been configured. Please contact your system administrator to configure the following profile fields: **Server ID**, **Protocol**, **Port Number**, and **User ID**.

1. In the **Profile** list box, select the profile you want to use.
2. In the **User ID** box, confirm or enter the user name.
3. In the **Password** box, enter your password.
4. Click **Connect** to initiate the connection to the ImageNow Server. The ImageNow ControlBar will display if you are successfully logged into ImageNow:



Note If you are unable to connect to the server, verify that you entered the user ID and password correctly.

2. Create a Scanning Profile

Before you can create a new Scanning Profile, you must have a scanning device installed and licensed on your computer, and then configure it to work with CaptureNow by using Device Manager. For Help about installing your scanning device on your computer, see the installation documentation that accompanied your scanner. Skip this first procedure (Configure a scanning device to work with CaptureNow) if the scanning device you want is already configured, and you want to create a new scanning profile using the device you currently have configured.

Configure a scanning device to work with CaptureNow

1. From the ImageNow Client, on the **Settings** menu, click **Options**.
2. In the **ImageNow Options** dialog box, on the **Capture** tab, under **Scanning Profiles**, click **Manage Profile List**.
3. In the **Scanning Profile Manager**, click **Add**.
4. In the **Scanning Profile** dialog box, on the **General** tab, click **Manage Device**, and then In **Device Manager**, click **Add**.
5. Follow the steps through the wizard to select the driver you want to run your scanning device – typically "Kofax" or "Pixel" – next enter your license key, then select the scanner device detected on your computer, and then type a concise and unique name for the device.

Note In order for a Kofax driver to appear as a **Driver Type** option in the **Device Manager** wizard, you need to have Kofax installed on your system and configure **KSM (32-bit)** from the Microsoft Windows **Control Panel**. When you double-click **KSM (32-bit)**, the **Kofax Source Manager** will open where you can quickly complete the steps using a wizard.

6. Click **Finish**, and then click **OK** to close **Device Manager**. If you configured your device in the **ImageNow Options** dialog box, click **OK**.

Create a new Scanning profile

1. From the ImageNow Client, on the **Settings** menu, click **Options**.
2. In the **ImageNow Options** dialog box, on the **Capture** tab, under **Capture Profiles**, click **Manage Profile List**.
3. In the **Capture Profiles** dialog box, click **Add**.
4. In the **New Capture Profile** dialog box, on the **Source** tab, from the **Source** drop-down list box, click **Scanner**.
5. Click **Manage Scanning Profiles**.
6. In the **Scanning Profile Manager**, click **Add**.
7. In the **Scanning Profile** dialog box, on the **General** tab, in the **Name** field, type a short and unique name for the new profile.
8. In the **Description** field, type a short description.
9. In the **Device** drop-down list box, click the device name you want.

Note Depending on the type of driver you are using, the **Scanning Profile** dialog box will display different tabs and options. Pixel drivers use the **General**, **Properties**, and **ImageNow Processing** tabs. Kofax drivers use **General**, **Properties**, **Advanced**, and **Options** tabs.

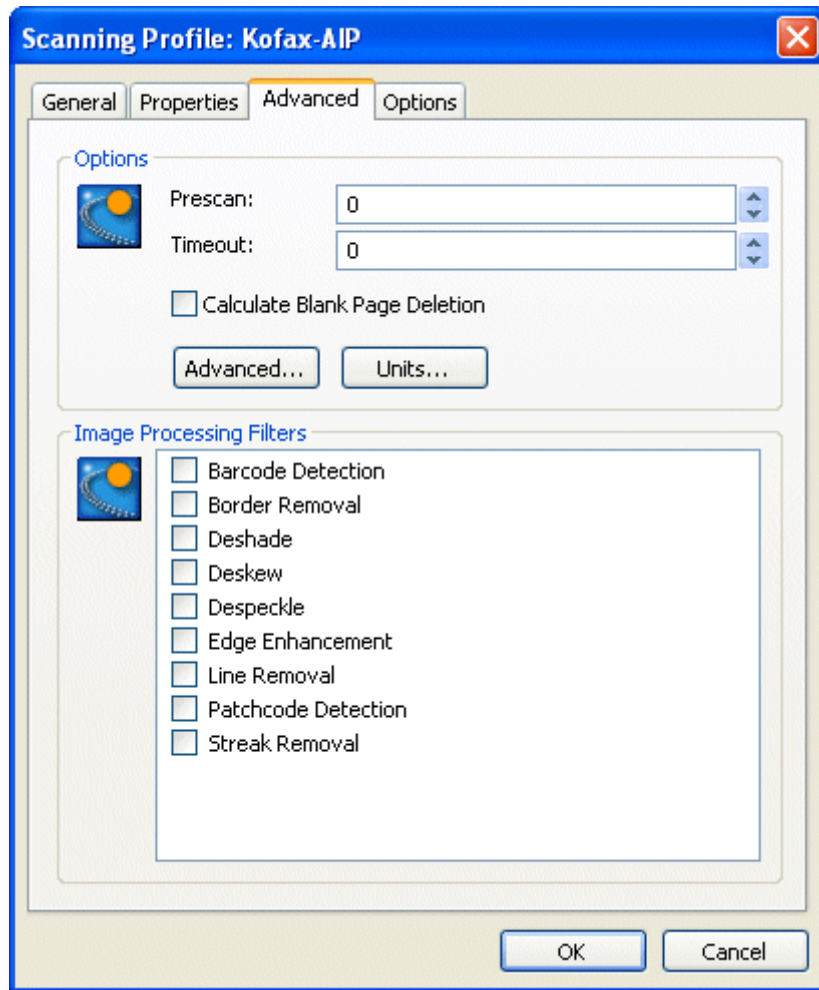
10. On the **Properties** tab, under **Properties**, choose the options you want.
11. If you are working with a flatbed scanner, under **Flatbed Settings**, choose the options you want.
12. For Kofax users, on the **Advanced** tab, under **Options**, choose from the following:
 - In the **Prescan** field, specify the number of pages to be cached by the Kofax Accelerator.
 - In the **Timeout** field, specify the time in seconds before the scanning process will stop after the last page is scanned.
 - To delete blank pages from the scanning process by using a more advanced comparison, select the **Calculate Blank Page Deletion** check box.
 - Click **Advanced**, and then choose the options you want. These vary based on the device you have installed.
 - Click **Units**, and then specify what units of measurement you want for the current profile.
13. For Kofax users, on the **Options** tab, choose the options you want in order to scan part of a document, not all of it. If your scanning device supports duplex scanning, then you can specify a picking rectangle for both front and back pages.
14. For Pixel users, on the **ImageNow Processing** tab, select the filter you want and then add, remove, configure or move it up or down in the list. Before you configure a filter, first move it to the **Selected Filters** list. See the **Image processing filters** sections for information about each filter.

Notes

- To add filters quickly to the **Selected Filters** list, you can double-click on the one you want to add it, or select multiple filters at once by using the **CTRL** or **SHIFT** keys, and then click **Add** (or **Remove**).
- When you remove a filter from the **Selected Filters** list, that filter is not removed completely. It is returned to the **Available Filters** list.

3. Set your Kofax image processing filters

Image processing allows for scanned images to be manipulated either to improve quality of the incoming image, or to gather data from the image itself. Kofax VirtualReScan (VRS) supports a number of image processing filters, some of which are described here.

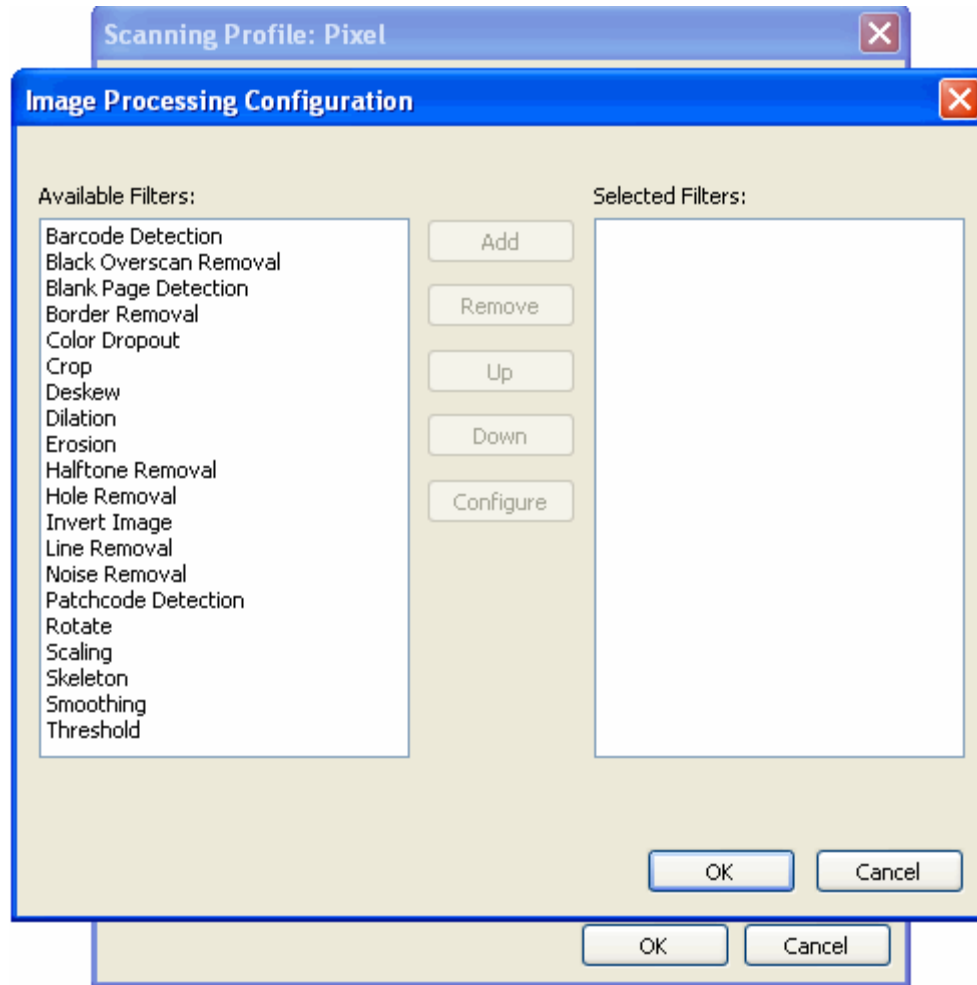


Filter	Description
Barcode Detection	The Barcode Detection filter can be used to detect and decode barcodes on scanned images. The filter can detect many different types of barcodes, and there is no limit to the number of barcodes it can detect on a page.
Border Removal	The Border Removal filter can be used to remove black edges that sometimes appear around the image during scanning or photo-copying. The Border Removal filter looks for black around the edge of an image (borders) and changes it to white. Note Borders must be all black. If the border contains white, the filter will not remove it. The Border Removal filter has no configurable settings.
Deshade	Shaded areas on an image are rectangular areas made up of black speckles. You can remove shaded areas using the deshade feature. The deshade process removes the speckles that make up the shaded areas while preserving the text inside the shaded areas.
Deskew	The Deskew filter can be used to straighten images that show a slant from its correct orientation. Skewing can occur if the original document was skewed when it was fed into the scanner, fax machine, or photocopier. The Deskew filter examines the image and determines the skew angle. The skew angle is measured between the actual edge of the image data and the horizontal or vertical axis. The image data is then rotated to correct the skew angle. Deskewing an image makes the image contents more legible and can improve OCR results.

Despeckle	Speckles on an image are groups of black pixels surrounded by white pixels (or white pixels surrounded by black pixels). You can remove unwanted speckles with the despeckle feature.
Edge Enhancement	The process of cleaning up lines and characters on an image, making them easier to read.
Line Removal	The Line Removal filter can be used to remove lines from or to reconstruct lines on a form-based image. Removing lines can reduce the image file size and improve OCR results.
Patchcode Detection	The Patchcode Detection filter can be used to detect and decode patchcodes on scanned images. The Patchcode Detection filter has no configurable settings.
Streak Removal	Sometimes streaks are included on an image during the scan process. For example, they might occur as a result of marks on the original page, dust in the scanner assembly, or faulty scanner. These streaks can be removed with the streak removal feature.

4. Set your Pixel image processing filters

Image processing allows for scanned images to be manipulated either to improve quality of the image as it is imported into ImageNow, or to gather data from the image itself. Pixel supports a number of image processing filters, which are described in this topic.



When you build your Scanning Profile as part of building your Capture Profile, the following filter options are available on the **Properties** tab when you choose Pixel as your device. **Binary** and **Recognition** filters only support black and white imaging. Color filters support color imaging.

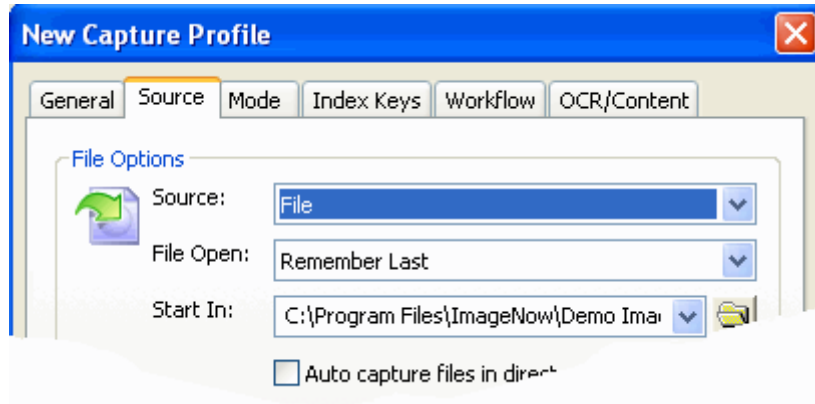
Filter	Type	Description
Barcode Detection	Recognition	The Barcode Detection filter can be used to detect and decode barcodes on scanned images. The filter can detect many different types of barcodes, and there is no limit to the number of barcodes it can detect on a page.

Black Overscan Removal	Color and Binary	<p>The Black Overscan Removal filter can be used to remove the black area around an image when a page is scanned using an overscan option. Unlike the Border Removal filter, which inverts the black pixels and makes them white, and the Crop filter which removes white space from around the edge of the image, the Black Overscan Removal filter removes the overscan area from your image.</p> <p>This filter reduces the physical size of the scanned image and the image file size by eliminating the black border generated by scanners with black backgrounds. For best results, deskew images with black fill before applying this filter. The Black Overscan Removal filter has no configurable settings.</p>
Blank Page Detection	Recognition	<p>The Blank Page Detection filter can be used to detect blank pages. Use the Sensitivity property to specify noise tolerance during detection.</p> <p>In order to achieve the best image quality after image processing and to find the optimal balance between processing speed and accuracy, you should test with sample images that are similar to the real images you expect to process, and then adjust the parameters for each filter to find the values most suitable for your document type.</p>
Border Removal	Binary	<p>The Border Removal filter can be used to remove black edges that sometimes appear around the image during scanning or photo-copying. The Border Removal filter looks for black around the edge of an image (borders) and changes it to white.</p> <p>Note Borders must be all black. If the border contains white, the filter will not remove it. The Border Removal filter has no configurable settings.</p>
Color Dropout	Color	<p>The Color Dropout filter takes a color image and transforms specified colors into other colors. The filter maintains a list of color mappings that it should make when the filter is run. The Color Dropout Properties dialog allows the user to manage a list of colors that will be transformed.</p>
Crop	Binary	<p>The Crop filter can be used to set image margins and to remove white space around the edge of the image. You can set different values for the Top, Left, Bottom, and Right properties, or you can use the Force Symmetry property to lock the top/bottom and left/right margins to the same values.</p>
Deskew	Color and Binary	<p>The Deskew filter can be used to straighten images that show a slant from its correct orientation. Skewing can occur if the original document was skewed when it was fed into the scanner, fax machine, or photocopier. The Deskew filter examines the image and determines the skew angle. The skew angle is measured between the actual edge of the image data and the horizontal or vertical axis. The image data is then rotated to correct the skew angle. Deskewing an image makes the image contents more legible and can improve OCR results.</p>
Dilation	Binary	<p>The Dilation filter can be used to expand the area of black objects in an image. Using this filter may improve image quality and the legibility of text. Performing dilation can increase the file size.</p>
Erosion	Binary	<p>The Erosion filter can be used to trim the area of black objects. Using this filter will reduce the file size, but you could lose a lot of detail from the image content.</p>
Halftone Removal	Binary	<p>The Halftone Removal filter can be used to remove a background from an image or a graphics object on the image. The Halftone Removal filter has no configurable settings.</p>
Hole Removal	Binary	<p>The Hole Removal filter can be used to remove punch holes from the edges of the image. The algorithm searches for objects which look like punch holes around the edges of the image. Punch hole-like graphics objects in other areas of the image will not be removed. The Hole Removal filter has no configurable settings.</p>
Invert Image	Binary	<p>The Invert filter can be used to invert the image to its negative equivalent. The filter actually modifies the image data itself, changing white pixels to black and black pixels to white. The Invert filter has no configurable settings.</p>
Line Removal	Binary	<p>The Line Removal filter can be used to remove lines from or to reconstruct lines on a form-based image. Removing lines can reduce the image file size and improve OCR results.</p>
Noise Removal	Binary	<p>The Noise Removal filter returns or sets the maximum area percentage an object can take up within the area defined by the maximum noise width and height in order for the object to be considered noise.</p>
Patchcode Detection	Recognition	<p>The Patchcode Detection filter can be used to detect and decode patchcodes on scanned images. The Patchcode Detection filter has no configurable settings.</p>
Rotation	Binary	<p>The Rotation filter can be used to perform image rotation in 90 degrees increments. It can rotate the image 90 degrees clockwise and counterclockwise. It can also rotate it 180 degrees as well as perform mirroring, which flips the page across the vertical axis so that it appears to be the mirror image of the original.</p>
Scaling	Binary	<p>The Scaling filter can be used to resize an image while preserving the original aspect ratio. After you specify the desired width and height after scaling, the image area is resized so that it fits within those boundaries while maintaining the aspect ratio. If either the desired height or width value is larger than the scaled image area, then the image area is centered along that dimension and white margins added to both sides.</p>
Skeleton	Binary	<p>The Skeleton filter can be used to reduce black objects in an image to one pixel thick skeletonized versions. Using this filter can reduce file size, but it can seriously distort the image. It should be used with caution and is usually only appropriate with certain types of OCR engines. The Skeleton filter has no configurable settings.</p>

Smoothing	Binary	The Smoothing filter can be used to remove bumps and spurs that appear on text characters or graphics objects in the image. The filter looks for any pixel that is surrounded by five or six other connected pixels of the opposite color, and then inverts that center pixel based on the filter configuration. Smoothing is a good way to improve legibility or to reduce the file size without losing a lot of image detail.
Threshold	Color	The Threshold filter can be used to convert a 24-bit color image to a binary image. All of the pixels in a color image that are darker than the threshold specified with the Brightness and Contrast properties are converted to black and all of the pixels that are lighter than the threshold are converted to white.

5. Create a Capture Profile

When creating a CaptureNow profile, you choose a source that declares from where you want to capture documents, and in addition to other options, you also define the mode in which you want to capture. There are three sources (File, Scanner and ImageNow Printer) and three modes (Single, Batch, Package).



1. From the ImageNow Client, click **Settings**, point to **Capture**, and then click **Manage Profiles**.
2. In the **Capture Profiles** dialog box, click **Add**.
3. In the **New Capture Profile** dialog box, on the **General** tab, under **Profile Settings**, type the following:
 - In the **Name** field, type the name of your profile. Make it short and unique.
 - In the **Description** field, type a short description of your profile.
4. On the **Source** tab, in the **Source** drop-down list box, click one of the following.

File

1. In the **File Open** drop-down list box, choose the option you want.
2. In the **Start In** or **Default** drop-down list box, set the pathname for where CaptureNow should locate the files.
3. Optional: If you want to automatically capture files in a directory of certain file type, select the **Auto capture files in a directory** check box, and then in the **Files** field, type the file extensions you want using a wildcard symbol before the period (*.txt, *.doc, Scan*.tif). Select to **Remove files after capture** if you want clean our the folder each time you capture from file.
4. Optional: If your Scanner profile works with a Pixel device and you have set up the image processing filters you want to work with it, then on the **Source** tab, under **Image Processing**, select the **Enable Image Processing** check box and then enter your Image Processing license key.

Scanner

- If you have already set up one or more scanning profiles and want one of these, in the **Profile** drop-down list box, click the profile you want.
- If you have not set up a scanner profile or want another one, click **Manage Scanning Profiles** to create a new Scanner Profile.

ImageNow Printer

- Select the **Always use this capture profile** check box only if you don't want to be prompted to use a different ImageNow Printer profile.

5. On the **Mode** tab, from the **Mode** drop-down list box, choose one of the following:

Single - this mode captures documents and immediately indexes them in ImageNow.

1. Under **Single Mode**, if your Scanning Profile Source is set to **Scanner**, in the **Type** drop-down list box, choose from the following:

- **Page** – only a single piece of paper will be scanned. If more than one page is loaded in the document feeder, only the first page will be scanned and on one side only, even if your device is configured to support duplex scanning.
- **Duplex Page** – only a single piece of paper will be scanned on both sides. To enable duplex page capturing, your scanning device must support duplex scanning and the current profile must be enabled for duplex scanning.
- **Document** – the scanning device will scan until the document feeder is empty. If duplex scanning is supported and enabled in the current scanning profile, both sides of each document will be scanned.

2. Under **Applet**, in the **Applet** drop-down list box, click the applet you want.

Note If set to **Use Applet from ControlBar**, the Capture profile will use whichever applet happens to be set in the ImageNow control bar at the time you click **Capture**.

Batch - this mode captures documents and stores them in a local group known as a batch, where it is eventually uploaded to ImageNow Server and processed based on settings specified in the Capture Profile.

1. Under **Batch Options**, select from the following options:

- **Automatic Server Processing** – requires at least one index key be set, and sends the batch to ImageNow Server for automatic processing. Useful for when you want to send documents directly to a workflow queue.
- **Bypass QA Processing Step** – Until you are certain of the quality of your scanned documents, it is recommended that you do not bypass QA.
- **Create a new batch when feeder is empty** – useful if you load a group of related documents that, when scanned, complete the batch you want to bring into ImageNow.
- **Enable Pre-Scan Worksheet** – tracks batch preparation information.
- **Prompt user for notes at Batch creation** – when a new batch is created, prompts you to enter notes about the batch.
- **Show Batch Report** – displays a report showing the Batch Sequence number and number of pages scanned.
- **Barcode Separator Sheet** – will create a new batch when a barcode is detected.
- **Patchcode Separator Sheet** – will create a new batch when a Patchcode is detected.
- **Trigger** – specify a barcode filter that a barcode must match before a new batch is started.
- **Discard Separator Sheet** – determines whether or not the separator sheet will be retained.

2. Under **Grouping**, choose the options you want for grouping pages in a single batch:

- **Barcode Grouping** – when selected, enables grouping by barcode and requires that one or more index keys be set for barcode.

- **Max Pages** – specifies the maximum number of pages in a barcode group as a safeguard should a barcode go undetected. This assumes that you have some knowledge of how many of the documents you want to scan typically contain barcodes. The **Barcode Grouping** check box must be selected to activate this option.
- **Trigger** – if more than one barcode is detected, specify using an integer or barcode filter, which barcode should be used for grouping. The **Barcode Grouping** check box must be selected to activate this option.

Package - this mode captures documents and allows for indexing of related data into a set of predefined baskets. Related data means documents share common index values such as Patient ID or Patient Name.

Create your Basket Groups

1. Select **Direct**, and then from the drop-down box click **Edit List**.
2. In **Basket Manager**, click **Add**.
3. In the **New Basket Group** dialog box, on the **General** tab, type the **Name**, a **Description**, and then verify that the **Status** is set to **Active**.
4. On the **Baskets** tab, click **Add**. Now you will create the baskets for your basket group.
5. In the **New Basket Definition** dialog box, label the basket, set the index keys you want, and then set the **Profile** to **Use selected Capture Profile**.

Notes

- It is recommended that you leave the **Basket Must Be Empty** check box deselected by default, otherwise the basket would need to be free of any documents before you could drop any additional documents into it.
 - Package Mode is typically used with an applet, and is therefore the default index key setting in Package Mode. The documents that you scan into ImageNow by using Package Mode inherit the index keys of the associated applet, regardless of how many baskets you have set up. If you want to uniquely identify a basket in ImageNow, then it is recommended that you set additional index keys at the basket level. For example, if the applet provides index keys for Drawer, Folder, and Tab, then for Field 3, you could set it to **Literal**, and then enter an alpha numeric value to give each basket a unique identifier. For Field 4, you could create a **Pre-defined list** for personal use (locally) or store it on the server that, for example, will tell you who scanned the documents for that day, or what type of documents they are. When you choose Pre-defined list, you simply add items to that list which you can then choose from in a drop-down box to uniquely identify the documents as being scanned by Peggy or a driver's license.
6. Optional: Click the **Workflow** tab, and in the **Send To:** drop-down list box, click the location to send your scanned documents in workflow. The default option is **<None>**. All other options are the queues to which the current user has "Start" access. Routing to workflow in **Batch** mode requires that at least one index key be set.
 7. Optional: Click the **OCR/Content** tab, and configure the zone settings for the page in order to acquire the desired field value. OCR Zone is only available if the Recognition Agent is installed on the server.
 1. Select the **Submit Documents to Content Server** checkbox if you want the captured objects to be submitted to Content Server for full-text indexing.

Note It is possible to submit certain object types to Content Server without having to go through an OCR process. This would be used for non-raster files that contain text (.DOC, .TXT, .PDF, and so forth).
 2. Select the **Perform Auto OCR on Captured Documents Objects** checkbox to submit objects to the Recognition server for OCR processing. This is most commonly used in conjunction with Content Server. The Recognition Agent produces the text output that can be submitted to Content Server.
 8. Click **OK**. The **Default** basket in the group is now set to the basket you just created.
 9. Click **OK** until you're back on the **Mode** tab in the **New Capture Profile** dialog box. Under **Package Options**, in the **Direct** drop-down list box, click the name of the

Basket Group you just created.

Identify the Basket group to which to send your documents

Select one of the following:

- **Direct** - Click the option you want. The list displays the basket names that you've created, and the Currently Selected Basket option uses the last known basket you have selected in the Package Mode interface. The advantage of the Currently Selected Basket option is that you can select different baskets, scan documents into those baskets, without having to change the profile you are using. In other words, the Currently Selected Basket option gives you more flexibility.
- **Script** - In the text field provided, type the code you want, and then click **OK**.

Typically, a good use of the script option is with barcode recognition. Example:

```
select case GetBarCode(1)

case "00000100"
SetBasket("Barcode Test_Basket 100")
case "00000101"
SetBasket("Barcode Test_Basket 101")
case "00000102"
SetBasket("Barcode Test_Basket 102")
case "00000103"
SetBasket("Barcode Test_Basket 103")
case "00000104"
SetBasket("Barcode Test_Basket 104")
end select
```

Complete your Capture Profile: Define Applet and build Document Rules

1. From the ImageNow Client, click **Settings**, and then click **Options**.
 2. In the **ImageNow Options** dialog box, on the **Capture** tab, under **Package Settings**, in the **Applet** drop-down list box, click the applet option you want.
 3. Click **Document Rules**.
 4. In the **Document Rules Manager**, click **Add**.
 5. In the **New Document Rule** dialog box, on the **General** tab, type a **Name** and **Description**.
 6. In the **Priority** drop-down list box, choose how you want the rule to be applied.
 7. In the **Profile** drop-down list box, choose the profile to which you want to apply the document rules.
 8. In the **Behavior** drop-down list box, choose the action you want to be performed.
 9. Click the **Conditions** tab, and then click **Add** to choose the type of rules you want based on scripts and index keys. For example, you could set a condition to check whether a driver's license is in the system and if it is expired.
 10. In the **Comment** field, type the message you want users to see when the condition has been met, and then click **OK**.
 11. Click the **Basket Groups** tab, and select the Basket Group that you want the rules to evaluate.
 12. Repeat to create all the document rules you want, and then continue to click **OK** to close the **ImageNow Options** dialog box.
6. Optional: Click the **Index Keys** tab, and choose the options you want. Double-click a key to make any changes. It is recommended that you leave the index keys set to **Applet** when working in **Single** mode. If a key is of Type **Empty**, this is a default setting and no key is set up for that field.
 7. Optional: Click the **Workflow** tab, and in the **Send To:** drop-down list box, choose the options you want for where to first send your captured documents in workflow. The default option is **<None>**. All other options are the queues to which the current user has "Start" access. If you plan to do Auto Processing, routing to workflow in **Batch** mode requires that at least one index key be set. Otherwise, keys are provided during Batch Link.
 8. Optional: Click the **OCR/Content** tab, and configure the zone settings for the page in order to acquire the desired field value. OCR Zone is only available if the Recognition Agent is installed on the server.

1. Select the **Submit Documents to Content Server** checkbox if you want the captured objects to be submitted to Content Server for full-text indexing.

Note It is possible to submit certain object types to Content Server without having to go through an OCR process. This would be used for non-raster files that contain text (.DOC, .TXT, .PDF, and so forth).

2. Select the **Perform Auto OCR on Captured Documents Objects** checkbox to submit objects to the Recognition server for OCR processing. This is most commonly used in conjunction with Content Server. The Recognition Agent produces the text output that can be submitted to Content Server.

Notes

- If the Capture Profile is set to Package mode, the **Workflow**, **OCR/Content**, and **Index Keys** tabs will only be available by adding or editing a basket group.
- To quickly create a new Capture Profile, you can base it on an existing profile by clicking **Copy** in the **Capture Profiles** dialog box. Next, click **Modify** and make the changes you want to create the new profile.

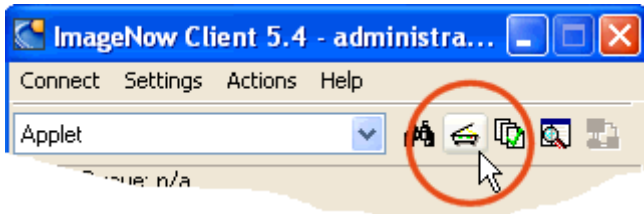
6. Capture a document from File source


Before you can complete this procedure, you must have created a corresponding Capture Profile for the documents you want to capture. The following procedures walk you through capturing one or more File source documents for each mode (Single, Batch, and Package) where all other profile settings are default settings.

Choose the option you want for the mode you are using.

Capture Profile: File source in Single mode

1. Open the appropriate record within your host application.
2. From the ImageNow Client, click **Settings**, point to **Capture**, and then click to select the Capture Profile you want where **File** is the source and your mode is **Single**.
3. On the ImageNow Client control bar, click **Capture: <profile name>**.



4. In the **Importing Disk to File Document** window, click the files you want to scan, and then click **Open**. CaptureNow scans the documents into ImageNow.
5. In the **PowerView 5.4 - Scan Mode** window, verify image quality, make any changes you want using the options available to you in PowerView, and then do one of the following:
 - Click **Rescan**, click the Capture Profile name, and then repeat steps 3 and 4.
 - Click **Scan Save**. To view your document again, on the ImageNow control bar, click **View** .
 - Click **Scan Discard**, and then click **Yes** to verify you want to discard.

Capture Profile: File source in Batch mode

1. From the ImageNow Client, click **Settings**, point to **Capture**, and then click to select the Capture Profile you want where **File** is the source and your mode is **Batch**.
2. On the ImageNow Client control bar, click **Capture: <profile name>**.
3. In the **Importing Disk to File Document** window, click the files you want to scan, and then click **Open**. CaptureNow scans the documents into ImageNow.
4. On the ImageNow Client control bar, click **Batch**, and then double-click the batch you just scanned to begin the QA and document linking process.

Capture Profile: File source in Package mode

1. Unlike Single or Batch mode, Package Mode uses a set of pre-defined Basket Groups, Document Rules, and Capture Profile options so users can capture, organize, and verify they have the documents they need.
2. Before you begin, verify that any document rules you have set, point to the capture profile you want where **Scanner** is the source and **Package** is the mode.
 1. From the ImageNow Client, click to **Settings**, point to **Capture**, and then click **Package Mode**.
 2. On the ImageNow Client control bar, click **Capture: <profile name>**.
 3. If the **Scan Prompter** window appears, click **Scan**, which will begin the scan process according to the document rules, profile, and baskets you have set up.
 4. In the **Exporting Document to Disk File** window, click the files you want to scan, and then click **Open**. CaptureNow scans the documents into ImageNow.
 5. When **Scan Prompter** shows a successful scan process with a green check mark and status set to **Scanned**, click **OK**.
 6. In the **PowerView 5.4 - Package Mode** window, verify document integrity, move documents to the baskets you want (represented by folder icons), and then do one of the following:
 - Click **Simplex Scan** to scan the document again.
 - If you want to delete one or more pages, click the page icons you want in the basket list, and then click **Delete Page**. Click **Yes** to verify the deletion.
 - Click **Relink**.
 - Click **Submit**, and then click **OK**. To view again, on the ImageNow control bar, click **Search** to open the search grid, and then click the **Search** button.

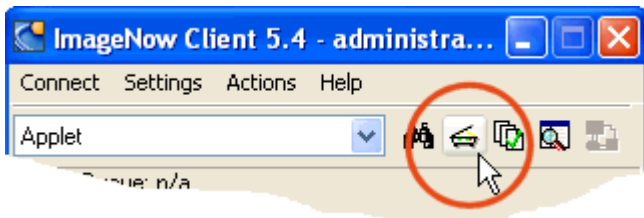
7. Capture a document from Scanner source


Before you can complete this procedure, you must have created a corresponding Capture Profile for the documents you want to capture. The following procedures walk you through capturing one or more Scanner source documents for each mode (Single, Batch, and Package) where all other profile settings are default settings.

Click the procedure you want for the mode you are using.

Capture Profile: Scanner source in Single mode

1. Load the document you want to scan into the document feeder.
2. From the ImageNow Client, click **Settings**, point to **Capture**, and then click to select the Capture Profile you want where **Scanner** is the source and your mode is **Single**.
3. On the ImageNow control bar, click **Capture: <profile name>**.



4. In the **PowerView 5.4 - Scan Mode** window, verify image quality, make any changes you want using the options available to you in PowerView, and then do one of the following:
 - Click **Rescan**, click the Capture Profile name, and then repeat steps 3 and 4.
 - Click **Scan Save**. To view your document again, on the ImageNow control bar, click **View** .

- Click **Scan Discard**, and then click **Yes** to verify you want to discard.

Capture Profile: Scanner source in Batch mode

1. Load the document you want to scan into the document feeder.
2. From the ImageNow Client, click **Settings**, point to **Capture**, and then click to select the Capture Profile you want where **Scanner** is the source and your mode is **Batch**.
3. On the ImageNow control bar, click **Capture: <profile name>**.
4. On the ImageNow control bar, click **Batch**, and then double-click the batch you just scanned to begin the QA and document linking process.

Capture Profile: Scanner source in Package mode

1. Unlike Single or Batch mode, Package Mode uses a set of pre-defined Basket Groups, Document Rules, and Capture Profile options so users can capture, organize, and verify they have the documents they need.
2. Before you begin, verify that any document rules you have set, point to the capture profile you want where **Scanner** is the source and **Package** is the mode.
 1. Load the document you want to scan into the document feeder.
 2. From the ImageNow Client, click **Settings**, point to **Capture**, and then click **Package Mode**.
 3. On the ImageNow control bar, click **Capture: <profile name>**.
 4. If the **Scan Prompter** window appears, click **Scan**, which will begin the scan process according to the document rules, profile, and group baskets you have set up.
 5. In the **PowerView 5.4 - Package Mode** window, verify document integrity, move documents to the baskets you want (represented by folder icons), and then do one of the following:
 - Click **Simplex Scan** to scan the document again.
 - If you want to delete one or more pages, click the page icons you want in the basket list, and then click **Delete Page**. Click **Yes** to verify the deletion.
 - Click **Relink**.
 - Click **Submit**, and then click **OK**. To view again, on the ImageNow control bar, click **Search** to open the search grid, and then click the **Search** button.

8. Capture a document from ImageNow Printer source

ImageNow Printer allows you to import a document, such as a Microsoft Word document, into ImageNow without having to print and scan it first. You can import the document directly using the Print button inside the software program with which the document was created.

Before you can complete this procedure, you must have created a corresponding Capture Profile where ImageNow Printer is the source. The following procedure walks you through capturing one or more ImageNow Printer source documents using default settings in both Single and Batch mode. ImageNow Printer is not available with Package mode.

Choose the option you want for the mode you are using:

Capture Profile: ImageNow Printer source in Single mode

1. Open the document you want to import into ImageNow, click **File**, and then click **Print**.
2. Set the printer Name to **ImageNow Printer**, and then click **OK**.

Note If you have more than one ImageNow Printer Capture Profile set up, the **ImageNow Print** dialog box appears. From the **CaptureNow Profile** drop-down list box, click the ImageNow Printer profile you want, and then click **OK**. CaptureNow "prints" the document into ImageNow.

3. In the **PowerView 5.4 - Scan Mode** window, verify image quality and make any changes you want using the options available to

you in PowerView.

Capture Profile: ImageNow Printer source in Batch mode

1. Open the document you want to import into ImageNow, click **File**, and then click **Print**.
2. Set the printer Name to **ImageNow Printer**, and then click **OK**.

Note If you have more than one ImageNow Printer Capture Profile set up, the **ImageNow Print** dialog box appears. From the **CaptureNow Profile** drop-down list box, click the ImageNow Printer profile you want, and then click **OK**. CaptureNow "prints" the documents into ImageNow.

3. On the ImageNow control bar, click **Batch**, and then double-click the batch you just imported to begin the QA and document linking process.