

# Quick Reference Guide – Webscan

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This guide focuses on the Web-Based Scanning functions which are used to generate images from paper copies of records from a remote location. The images become the permanent record and are sent to the IQC server. You may create new batches using the Web-Based Scanning feature, or you may add new documents to existing batches.

## Web-Based Scanning

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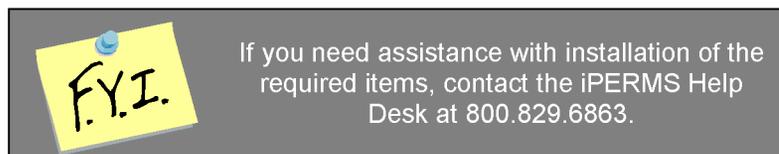
## Web-Based Scanning Requirements

In order to perform Web-Based scanning, ensure that the following requirements are met. If all these requirements are already met, you can begin Web-Based Scanning.

- 1 The workstation must be running Windows XP, 2000 or 2003 and at least Internet Explorer 6 with Service Pack 1.
- 2 The User must have a valid AKO account with scanning privileges in IQC.
- 3 The Workstation must have access to the IQC server.
- 4 The Workstation must have a supported scanner installed using a TWAIN driver.
- 5 In addition, your machine must have the following installed:
  - a. **JAVA** - Most PCs will have Java installed as part of the standard load. The JAVA software allows you to run “applets”.
  - b. **Scanner Certificate** - The Scanner Certificate will load automatically in most cases. If you do not receive a prompt to

accept the certificate the first time you use Web-Based scanning, you will need to install the Scanner Certificate.

- c. **Image Viewer** - Prior to using the Web-Based Scanning feature the first time on a local PC, an iPERMS ActiveX applet for viewing images must be installed. This must be performed by personnel logged on to the PC with Administrative rights.



## Web-Based Scanning Installation

- 1 Access iPERMS
- 2 Access Scan Role
- 3 Install Sun JRE 1.4
- 4 Install Certificate
- 5 Install Image Viewer

### Step 1 - Access iPERMS

- 1 Double-click the browser application (Internet Explorer) icon on your Windows desktop.
- 2 Enter the iPERMS Web address.
- 3 Type your AKO user name in the Username field.
- 4 Type your AKO password in the Password field.
- 5 Press the Enter key on your keyboard or click the Login button. The OMPF Select Session Role Screen appears.

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## Web-Based Scanning Installation (continued)

### Step 2 - Access Scan Role1

- 1 Click the Scanner Operator in <domain>link on the Select Session Role Window. *The Scan Batch Manager Window opens with a list of batches that are in the scan queue.*

### Step 3 - Install Sun JRE 1.4

Most PCs will already have JAVA installed. If not, follow the steps below. You must have administrative rights on the PC in order to install JAVA.

- 1 Click Install JRE and LEAD Tools button on the Batch Manager Window.  
*The iPERMS Installer Window opens.*
- 2 Click Install Sun JRE 1.4 link.  
*The Browser will go to the Java Install Page.*
- 3 Click the Download Now button.  
*The JAVA Download Details window opens.*
- 4 Click the Begin Download button.
- 5 Click Yes to Accept the Security Warning.  
*The system downloads and installs files on the workstation.*
- 6 Select “I accept the terms in the license agreement” radio button and click Next.  
*The JAVA Runtime Environment (JRE) installs.*
- 7 Click Finished when the Install Shield Wizard completes.

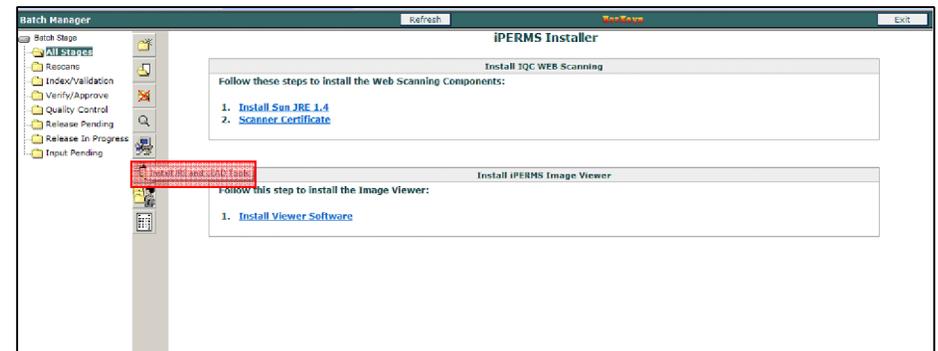
*JAVA is installed. You will need to restart your computer. When you access Web-Based Scanning again, you will receive a prompt to verify the installation. Select Yes to verify the install.*



### Step 4 - Install Scanner Certificate

Installing the Scanner Certificate is not necessary as the application will prompt the user to accept it automatically. However, depending on the security settings, it may be necessary to install the certificate. Follow the steps below to install the scanner certificate.

- 1 Click Install JRE and LEAD Tools button.  
*The iPERMS Installer Window opens.*
- 2 Right click the Install Scanner Certificate link.  
*A pop up menu opens.*
- 3 Select Save As.  
*The Save As window opens.*
- 4 Save “scanner.crt” to your desktop.
- 5 Double click the certificate on your desktop.  
*A Certificate Dialog box opens.*
- 6 Click the Install Certificate button.  
*A Certificate Import Wizard opens.*
- 7 Click Next twice to Automatically Select a Certificate Store.
- 8 Click Finish to Complete the Certificate Import Wizard.
- 9 Click Yes to the Security Warning.  
*You receive a message that the import was successful.*
- 10 From the Start Menu, select Shutdown and then Restart.  
*Your computer will be restarted.*



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## Web-Based Scanning Installation (continued)

### Step 5 - Install Image Viewer

Prior to using the Web-Based scanning feature the first time on a local PC, an iPERMS ActiveX applet for viewing images must be installed. This must be performed by personnel logged on to the PC with Administrative rights.

- 1 Log into the Workstation as a local Administrator. Install JRE 2
- 2 Open Internet Explorer
- 3 From the Tools Menu, select Internet Options (at the top of the Internet Explorer Window).

*The Internet Options Window opens.*

- a. Click the Security tab.
- b. Highlight Local Intranet.
- c. Click Custom Level.
- d. From the Security Settings Window, change the Active X settings to Enable.
- e. Click OK.
- f. Click YES on the Warning! Window.
- g. Close Internet Explorer

- 4 Open a New Internet Explorer Window.
- 5 Enter the iPERMS web address.
- 6 Type your AKO user name in the Username field.
- 7 Type your AKO password in the Password field.
- 8 Press the Enter key on your keyboard or click the Login button.
- 9 The OMPF Select Session Role Screen appears.
- 10 Click the Scanner Operator in <domain>link on the Select Session Role window.
- 11 Click the Install JRE and LEAD Tools button  
*The iPERMS Installation Window opens.*
- 12 Click Install Viewer Software link.
- 13 Click YES on the Security Window (may take a minute to open).  
*The Image Viewer is installed.*

IMAGE VIEWER INSTALLED

## Web-Based Scanning Step-by-Step

### Step 1 - Document Preparation

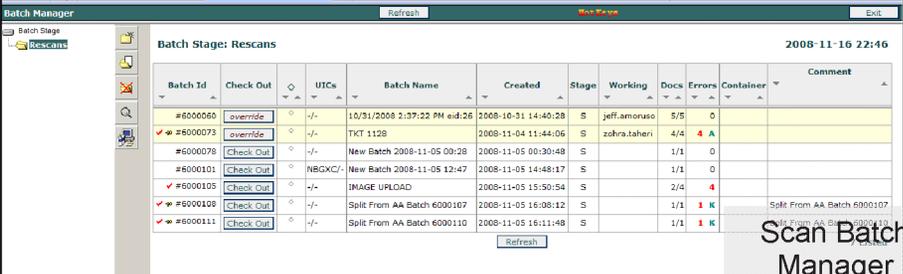
Prior to scanning, documents must be organized and prepared to ensure that they are in good condition to avoid problems with scanning.

- 1 Documents can be organized by soldier name or document type.
- 2 Remove all staples and paper clips from the documents.
- 3 Remove all sticky notes.
- 4 Repair small tears in the pages with tape and straighten bent pages. If a page is badly torn, repair it with tape or photocopy the paper and scan the photocopy.

### Step 2 - Access Scanning

- 1 Click the Scanner Operator in <domain>link on the iPERMS Login (Select Session Role) window.

*The Scan Batch Manager window opens with a list of batches in the Scan queue.*



Batch Id	Check Out	UTCs	Batch Name	Created	Stage	Working	Docs	Errors	Container	Comment
#600060	Override	-/-	10/31/2008 2:37:22 PM eid:26	2008-10-31 14:40:28	S	jeff.amoruso	5/5	0		
#600073	Override	-/-	TKT 1128	2008-11-04 11:44:06	S	zohra.taheri	4/4	4	A	
#600078	Check Out	-/-	New Batch 2008-11-05 00:38	2008-11-05 00:30:48	S		1/1	0		
#600101	Check Out	NBQXC/	New Batch 2008-11-05 12:47	2008-11-05 14:48:17	S		1/1	0		
#600105	Check Out	-/-	IMAGE UPLOAD	2008-11-05 15:50:54	S		2/4	4		
#600108	Check Out	-/-	Split From AA Batch 6000107	2008-11-05 16:08:12	S		1/1	1	K	Split From AA Batch 6000107
#600111	Check Out	-/-	Split From AA Batch 6000110	2008-11-05 16:11:48	S		1/1	1	K	Split From AA Batch 6000110

Scan Batch Manager Window



Once you have scanned an image into the system call the iPERMS help desk at 800.829.6863 to check the image size and format. Images should be Group IV TIFF images, 300 dpi.

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Batch Manager

Batch Stage: Rescans

2008-12-17 11:10

Batch Id	Check Out	UICs	Batch Name	Created	Stage	Working	Docs	Errors	Container	Comment
#6000060	Check Out	-/-	10/31/2008 2:37:22 PM eid:26	2008-10-31 14:40:28	S		5/5	0		
✓ #6000105	override	-/-	IMAGE UPLOAD	2008-11-05 15:50:54	S	jeff.amoruso	2/4	4		

Indicates there are errors associated with the batch

2 Listed

- 1 Create a New Batch** button allows you to create a batch by uploading images to the server or by Web-Bases Scanning.
- 2 Manually Check Out a Batch** button allows you to enter a specific Batch ID to check out a batch.
- 3 Manually Delete a Batch** button allows you to enter a specific Batch ID to delete a batch.
- 4 Search for a Batch** button allows you to enter a Batch ID or text to search for a specific batch only among the batches displayed. An operator will need to click the Show All button to display and search all the batches.
- 5 Install JRE and LEAD Tools** button provides access to the iPERMS installer window. A user can download Sun JRE 1.4, a Scanner Certificate and an Image Viewer used for Web-Based Scanning.
- 6 Batch ID** lists the system-generated batch number. A check will appear next to the Batch ID if there are errors associated with the batch. A push pin icon will appear next to the Batch ID if there are documents or images flagged for rejection.
- 7 Check Out** button opens the batch for processing. *(If a batch is already checked out, the button changes from Check Out to Override)*
- 8 Override** button allows you to open a batch that is currently checked out.

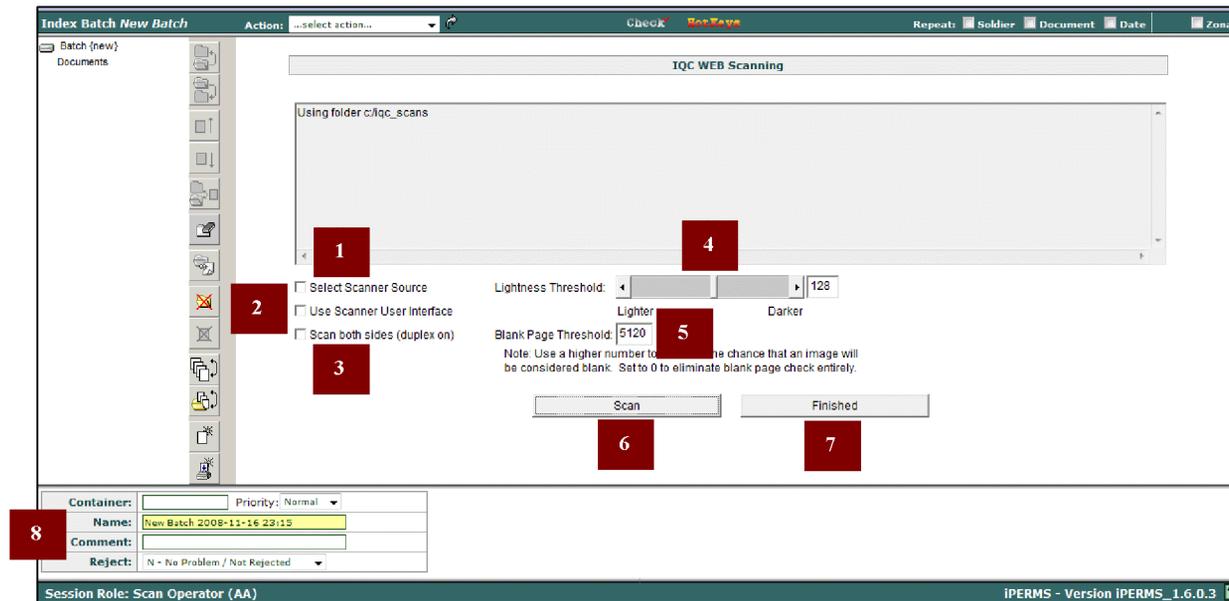
- 9 Priority** lists the priority of the batch so operators may prioritize work.
- 10 UIC** lists the Unit Identification Code associated with the batch.
- 11 Batch Name** lists the batch name generated during scanning or modified during indexing.
- 12 Created** lists the date when the batch was scanned or imported.
- 13 Stage** lists the stage the batch is in (e.g., I=Index).
- 14 Working** lists the AKO user ID for the person who currently has the batch checked out.
- 15 Docs** lists the number of documents and images in the batch.
- 16 Errors** lists the number of errors associated with the batch. Errors can include incorrect or missing data. If a document is rejected, the Reject Reason Code is included.
- 17 Container** - lists the Container ID. This information can be used to retrieve original forms or to assign work to indexers (e.g., index container #). The Container ID is entered during Kofax scanning.
- 18 Comment** lists any comment entered during processing.
- 19 Refresh** updates the list to provide a current list of batches in the queue.
- 20 Hot Keys** lists all the available hot keys used in Batch Manager.
- 21 Exit** returns you to the iPERMS Login (Select Role) screen.



The length of the batch list can be adjusted by a DM or DA. The default is a list of 250 batches, and can be adjusted to 500, 1000, or 5000. If all the batches are not in view because of the selected list size, a Show All button will be available to view the entire list. If you are experiencing a slow response time, have the DM or DA change the list display to a smaller number; the smaller the display, the quicker the response time.

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## IQC Web Scanning Window Described



- 1 **Select Scanner Source** allows you to select the scanner.
- 2 **Use Scanner Interface** allows you to adjust scanner settings.
- 3 **Scan Both Sides** allows you to scan both sides of the document (duplex scanning).
- 4 **Threshold Adjustment Bar** allows you to adjust the brightness of the image. Move the slider to the left to lighten the image, and to the right to darken the image.
- 5 **Blank Page Threshold Box** allows you to adjust the setting to delete blank pages. The value entered in the box is the size the new image file must be so that it will not be deleted. Use a higher number to increase the chance that a page containing information will be scanned. A higher number will also ensure that pages that contain blotches and marks will not be scanned. Set to 0 to

- eliminate the blank page check entirely. This will ensure that all pages, regardless of the quality of the content, will be scanned.
- 6 **Scan** button begins the scan process.
- 7 **Finished** button closes the IQC Web Scanning Window.
- 8 **Batch Information** allows you to modify the batch name, set the batch priority, and enter a comment.

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## Web-Based Scanning Step-by-Step (continued)

### Step 3 - Access the Web-Based Scanning

You can either scan documents to create a new batch, or you can scan documents into an existing batch.

#### Create a New Batch:

- 1 Click the Create Batch button in the Scan Batch Manager window.
- 2 Click the Scan Images Button.  
*The IQC Web Scanning Window opens. You may now scan images to create a new batch.*

#### Open an Existing Batch:

- 1 Click the Check Out button or the Override button next to the batch you want to open in the Batch Manager Window.  
*The Batch window opens with images in view.*
- 2 Click the Scan Images button in the Batch window.  
*The IQC Web Scanning Window opens. You may now scan documents into the existing batch.*

**F.Y.I.** You can access the Web-Based Scanning module from any of the input process modules (e.g., Indexing, Verification, Quality Control).

### Step 4 - Scan Batches

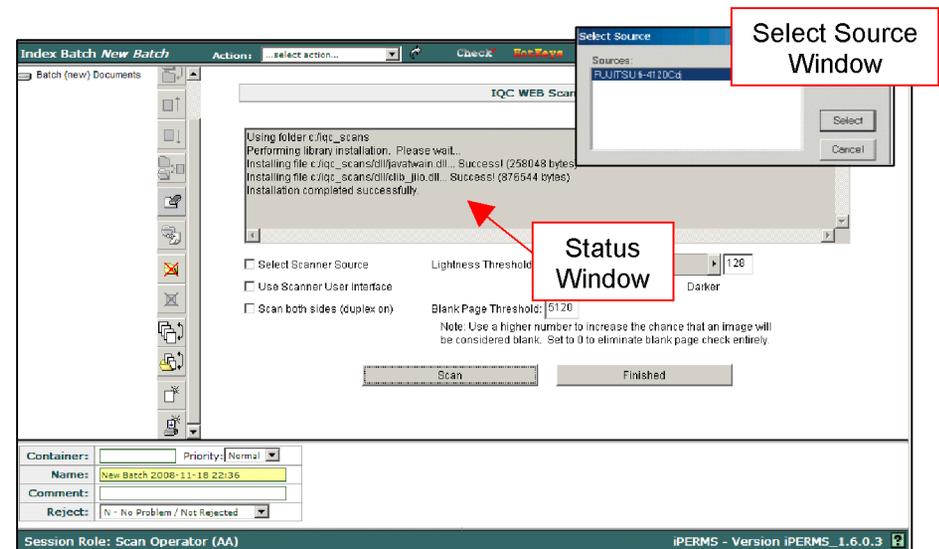
#### Scan a Batch:

- 1 Place the documents in the automatic document feeder (ADF).
- 2 Click the Scan button in the IQC Web Scanning Window.
- 3 Click the Finished button when the Scan Status is in view and indicates that the scan is successful.  
*The documents are in view and blank index fields are available at the bottom of the Scan window.*

**Don't FORGET!** If you check all three options (Select Scanner Source, Use Scanner Interface, and Scan Both Sides) at the same time, you will receive all of the prompts described for each option.

#### Scan Using the Select Scanner Option:

- 1 Check the Select Scanner Source box in the Web Scanning Window. (This box only needs to be checked if more than one scanner is available.)
- 2 Place the documents in the ADF.
- 3 Click the Scan button.  
*The Select Source window opens.*
- 4 Select the scanner that has a TWAIN driver, and click the Select button.  
*Scanning begins.*
- 5 Click the Finished button when the Scan Status is in view and indicates that the scan is successful.  
*The documents are in view and blank index fields are available at the bottom of the Scan window.*



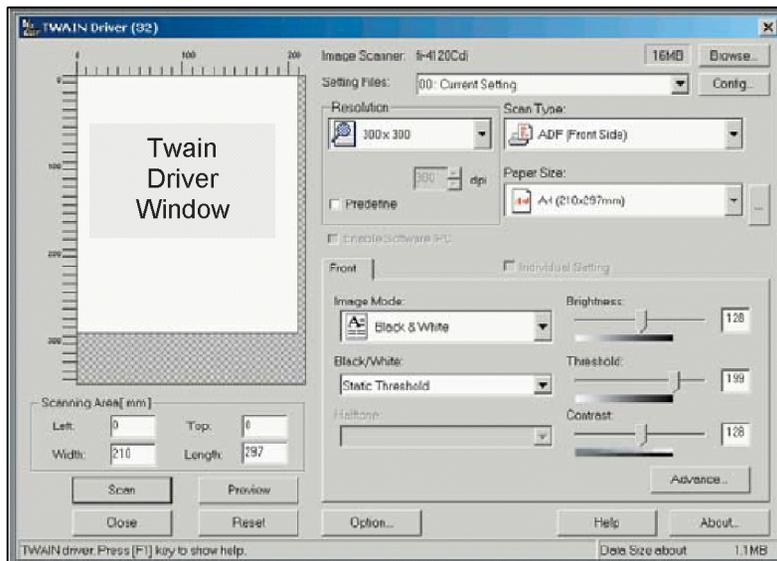
**F.Y.I.** Users who experience a "LEAD Error Invalid Format" error should contact the iPERMS Help Desk at 800.829.6863.

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## Web-Based Scanning Step-by-Step (continued)

### Scan Using the Use Scanner Interface Option:

- 1 Check the Use the Scanner Interface box in the Web Scanning window.  
(This box only needs to be checked if you want to adjust the scanner settings.)
- 2 Place the documents in the ADF.
- 3 Click the Scan button.  
*The Twain Driver window opens.*
- 4 If necessary, adjust the brightness, threshold, and/or contrast by moving the sliders.
- 5 Click the Scan button on the TWAIN Driver Window.  
*Scanning begins using the new settings.*
- 6 Click the Finished button when the Scan Status is in view and indicates that the scan is successful.  
*The documents are in view and blank index fields are available at the bottom of the Scan window.*



Note: Depending on your scanner this window may look different.

### Scan Using the Scan Both Sides Setting:

- 1 Check the Scan Both Sides box in the IQC Web Scanning window.  
(This box only needs to be checked if you want the front and back of the documents scanned.)
- 2 Place the documents in the ADF.
- 3 Click the Scan button.  
*Scanning begins.*
- 4 Click the Finished button when the Scan Status is in view and indicates that the scan is successful.  
*The documents are in view, and blank index fields are available at the bottom of the Scan window.*

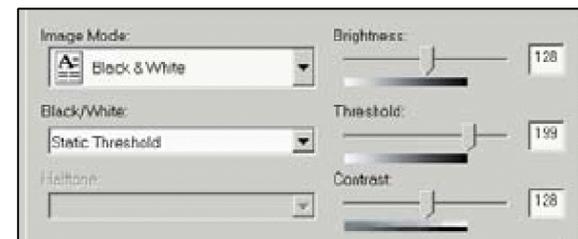
### Adjust the Threshold:

Prior to scanning, you may adjust the threshold using the Threshold tool.

- 1 Move the Threshold slider to adjust the settings. Move the slider to the left to lighten the image, and to the right to darken the image.  
*The brightness is adjusted.*

### Adjust the Blank Page Threshold:

- 1 Enter a number in the field. Use a higher number to increase the chance that a page containing information will be scanned. A higher number will also ensure that pages that contain blotches and marks will not be scanned. Set to 0 to eliminate the blank page check entirely. This will ensure that all pages, no matter the quality of the content, will be scanned.



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## Step 5 - View and Edit Documents/Images

Once the documents are scanned, you should view them to ensure the quality is acceptable. If the quality is acceptable, you can send the batch to Index/Validation. If not, you can delete images or the entire batch.

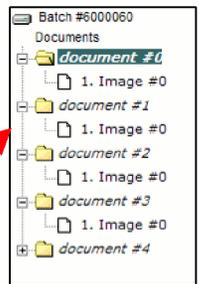
- 1 In the Batch Contents window, click the documents/pages links.

*The images are in view.*

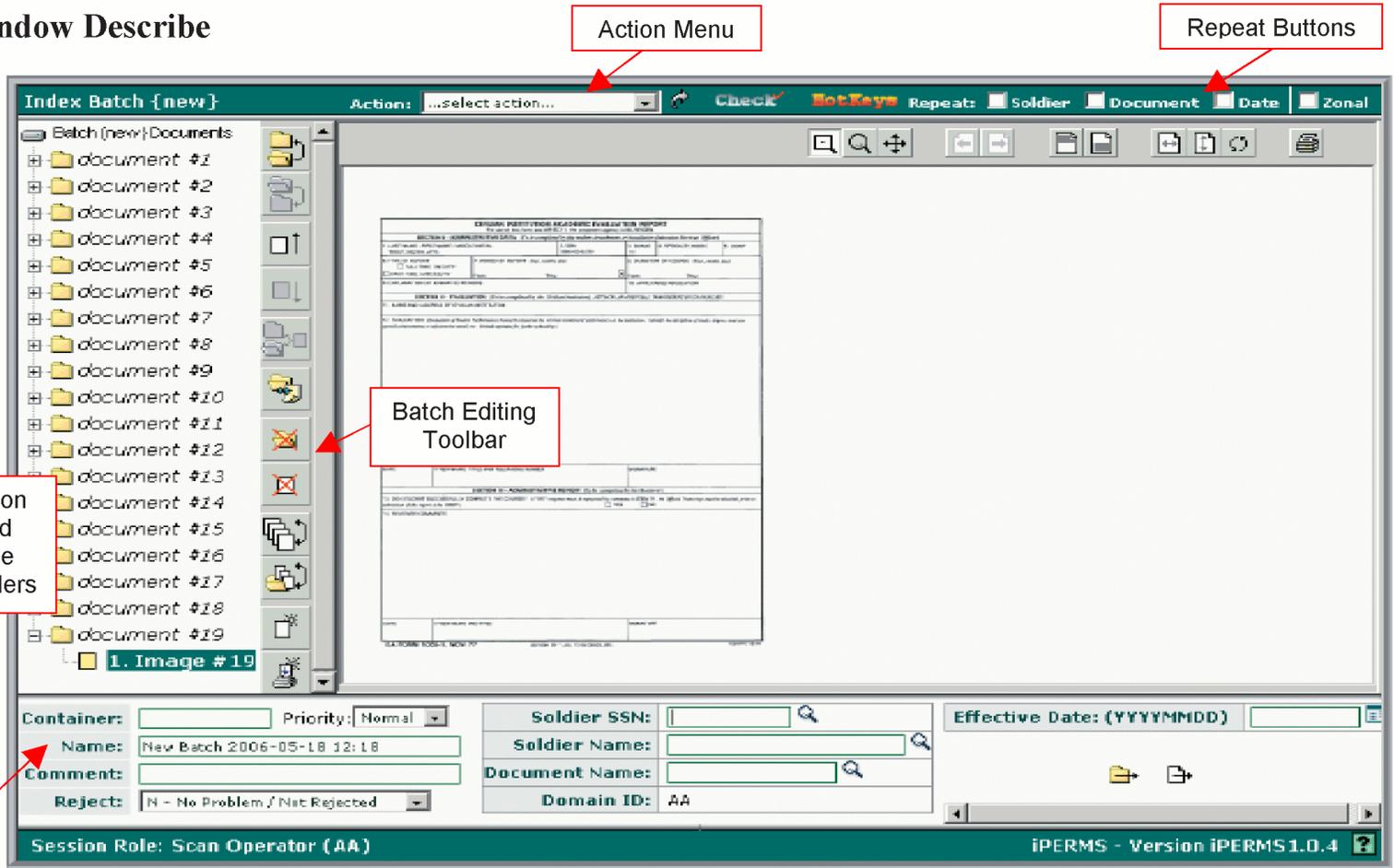
or

- 1 Use the up and down arrows to move through the images.

Click on the Document or Image links to view



## Web Scanning Window Describe



Action Menu

Repeat Buttons

Batch Editing Toolbar

Open All button expands and collapses the document folders

Index Fields

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### Batch Editing Toolbar Described

The Batch Editing Toolbar in the Batch window includes the tools needed to organize batches. The buttons are grayed when they become unavailable for use.



**Join Up** joins a document with the document above it.

**Join Down** joins a document with the next document.

**Move Image Up** moves an image up within a document or into the preceding document.

**Move Image Down** moves an image down within a document or into the next document.

**Split** separates images into two separate documents.

**Clear Index Values for this Document** deletes all the index data entered in the fields.

**Toggle Document/Image Rejection Flag** marks a document for rejection.

**Delete Selected Document and all of its images** deletes a document from the batch, including all associated images.

**Delete Image** deletes a selected image from a document.

**Reverse Document/Image Order for the Entire Batch** reverses the order of documents and images for the entire batch.

**Reverse Image Order in Selected Document** reverses the order of images in a selected document.

**Upload Images** allows you to add tagged image file format (TIFF) images to a batch.

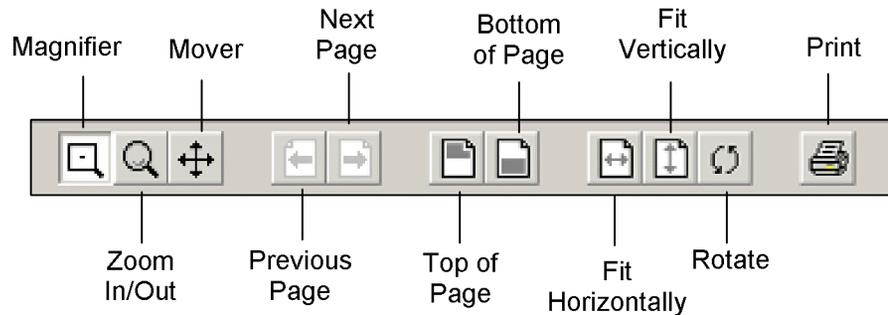
**Scan Images** provides access to the Web-Based Scanning functions and allows you to scan images into the batch.

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## The Image Tool Bar Described

The Image Viewer Tools are available in the Batch window. The tools allow you to change the view of the image so it is easier to view.



**Magnifier** magnifies a selected section of the image.

**Zoom in/out** magnifies the entire image or reduces the entire image.

**Mover** moves the image around the image window.

**Previous Page** moves to the previous page of a multi-page TIFF.

**Next Page** moves to the next page of a multi-page TIFF.

**Top of Page** displays the top of the page in the entire image window.

**Bottom of Page** displays the bottom of the page in the entire image window.

**Fit Horizontally** fits the image within the width of the image window.

**Fit Vertically** fits the image within the height of the image window.

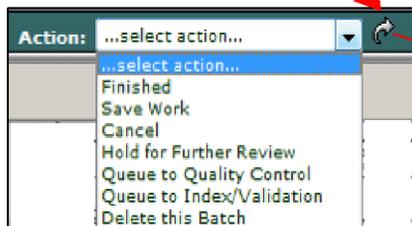
**Rotate** rotates the page in 90 degree increments to the right.

**Print** prints the image.

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## Batch Tools Described

The Batch Toolbar provides a convenient way to suspend and close batches, cancel work on a batch, check batches for errors, and send batches to other queues (e.g., Verification and Validation).



Click the Do Selected Action arrow

Indexers need to manually deselect “sticky” values to disable the fields. If “sticky” functionality is employed during a session and a new batch is opened, the initially blank “sticky” values will acquire value(s) from the new document's index field. These acquired value(s) will become the new “sticky” values. If you enter a different value in any of the activated “sticky” fields, the new value will then “stick” for the following documents.

### 1 Action Menu

- Finished** - completes a batch and moves it to the next queue. If the batch contains errors, the system displays a warning message indicating that there are errors, and places a checkmark next to the index fields where errors are detected. The batch will not move to the next queue until the errors are corrected.
- Save Work** - saves any work performed on the batch. It is recommended that the operator periodically save the data when working with large batches.
- Cancel** - cancels all unsaved work performed on the batch during the current session. The batch will remain in the current queue.
- Hold for Further Review** - keeps a batch checked out to a specific AKO ID until processing is completed.
- Queue to Quality Control** - sends the batch to Quality Control.
- Queue to Index/Validation** sends the entire batch to the Index/Validation queue.
- Delete this Batch** - this action is only available for previously saved batches. Using this action will delete the entire batch.

### 2 Do Selected Action performs the selected action.

### 3 Check button checks the data associated with the batch. If errors are found (e.g., missing data or data entered in the incorrect format), a message is displayed indicating the number of errors, and a checkmark is displayed next to any field with an error.

### 4 Hot Keys lists the available hot keys for indexing. Hot Keys can be used to speed up and simplify batch processing since only the keyboard is used (i.e., without using the mouse). Press Esc H to view the Batch Manager Legend and press Escape L for Indexing Hot Key legend. The legends are provided as an attachment to the Indexing Quick Reference guide.

### 5 Repeat check boxes are used for the Soldier (i.e., SSN and Soldier Name fields), Document, and Effective Date fields. When you check one of these boxes, the data entered pre-fills or “sticks” to the selected fields for all the following subsequent documents in the batch. An Indexer will need to manually deselect the repeat boxes to disable them. The repeat values are retained for the entire batch and cleared in between batches.

### 6 Zonal button moves the image as you tab through the index fields to areas on the form where the data can be found.

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## Web-Based Scanning Step-by-Step (continued)

### Delete a Document:

- 1 Highlight the document you want to delete.
- 2 Click the Delete Document button.  
*A delete document message opens, asking if you are sure you want to delete the selected image.*
- 3 Click OK.  
*The document is deleted.*

### Delete an Image:

- 1 Highlight the image you want to delete.
- 2 Click the Delete Image button.  
*A delete image message opens, asking if you are sure you want to delete the selected image.*
- 3 Click OK.  
*The image is deleted.*

### Delete a Batch:

This action is only available for existing (previously saved) batches.

- 1 Select Delete this Batch from the Action menu.
- 2 Click the Do Selected Action arrow.
- 3 Click OK, indicating you are sure you want to delete the batch.  
*The batch is deleted.*

### Cancel a Batch:

This action allows you to delete a new, unsaved batch.

- 1 Select Cancel this Batch from the Action menu.
- 2 Click the Do Selected Action arrow.
- 3 Click OK, indicating you are sure you want to cancel (delete) the batch.

## Step 6 - Send the Batch to Index/Validation

Once all the images are in the batch, the batch should be sent to the Index/Validation queue.

### Send the Batch to Index/Validation:

- 1 If necessary, set the batch priority in the index fields.
- 2 Select Queue to Index/Validation from the Action menu, and click the Do Selected Action arrow.
- 3 Click OK to send the batch to Indexing.
- 4 Click Cancel to indicate that you do not want to open the next available batch.  
*The batch closes and moves to the Index/Validation queue. The Batch Manager window is in view.*

### Hold a Batch:

If you need to hold the batch to work on it at a later time, follow the steps below.

- 1 Select Hold for Further Review from the Action menu.
- 2 Click the Do Selected Action arrow.  
*The batch is suspended and remains checked out to you in the Scan queue.*

## Step 7 - Exit Web-Based Scanning

- 1 Click the Exit button on the Batch Manager Window.  
*The Select Session Role window opens.*
- 2 Click Logout on the iPERMS Login (Select Role) window.  
*You are logged out of iPERMS.*



If you index from the Scan window, refer to the Index/Validation Quick Reference guide for instructions. If the batch is indexed in the Scan queue, the batch will still go to the Index/Validation queue.