

Technical Note

Version 1.4

IRIS Powerscan 9.6.2

Add-ons

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I.R.I.S. Products & Technologies

Dgi

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Overview of the add-ons

The following software add-ons are available for IRIS Powerscan:

- **Language add-ons: Asian, Arabic, and Hebrew.**

These add-ons allow you to recognize documents in 4 Asian languages (Traditional Chinese, Simplified Chinese, Japanese and Korean), Arabic and Farsi, and Hebrew.

- **iHQC add-on**

By means of the iHQC add-on you can hyper-compress your PDF and XPS output documents.

Note that the iHQC add-on is yearly renewable. The price of the add-on is based on the number of scanned images per year.

- **Background processing add-on**

This add-on reduces IRIS Powerscan's processing time as it allows you to work on more than one batch at a time. Thanks to this add-on you can start scanning a second batch while the first one is still being converted into searchable output formats.

- **IRISFingerprint add-on**

IRISFingerPrint is a document identification technology based on the layout of a document. It is used as a separation method to split up stacks of scanned pages into **batches** and **documents**. Thanks to this add-on you no longer need to use barcodes, patch codes or blank pages as separators.

- **ISISDriver add-on**

This add-on activates the ISISDriver compatibility in IRIS Powerscan. Thanks to this add-on you can use IRIS Powerscan in combination with ISIS driver scanners.

- **LegalScanning add-on**

This add-on allows you to generate documents that are compliant with Belgian legal scanning regulations.

- **SharedDrive add-on**

This add-on allows you to share batches and entire configurations of IRIS Powerscan with other IRIS Powerscan stations via a Shared Drive.

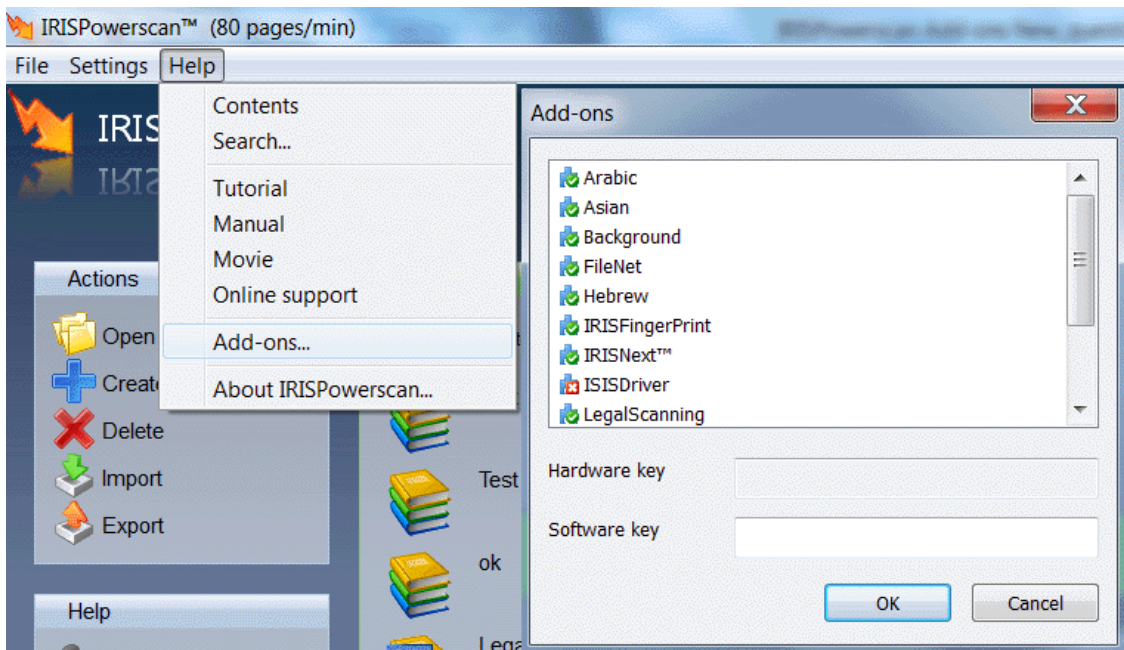
This way all IRIS Powerscan users can use exactly the same configuration, without having to configure each IRIS Powerscan station separately. Any modifications that are made to the share configuration can be propagated to every IRIS Powerscan station.

<p>Important note: a wide series of connectors are available too for IRIS Powerscan, through the IRIS Connect connectors suite. IRIS Powerscan is able to export fully indexed documents to numerous ECM (Electronic Content Management) systems and Cloud systems such as Microsoft SharePoint, Therefore, FileNet, IRIS Next, GoogleDocs, Dropbox, etc. Refer to the separate <u>IRIS Connect documentation</u>.</p>
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Registering the add-ons

To register an add-on:

- Start IRIS Powerscan from the Windows **Start** menu.
- In the **Help** menu click on **Add-ons**.
- Select the add-on you want to install.
- Copy the hardware key and send it to irispowerscan@iriscorporate.com.
- You'll receive the software key in return.
- Enter the software key and click **OK** to complete the registration.



Note: in case of the ISISDrive you will also receive - besides the software key - two license files from I.R.I.S. Support. They must be placed in the IRIS Powerscan installation folder.

To do so:

Close IRIS Powerscan.

Place the two license files in C:\Program Files\IRIS Powerscan (default installation folder)

Relaunch the application.

Language add-ons

Introduction

Three language add-ons are available for IRIS Powerscan:

- **Asian add-on:** this add-on offers recognition of four Asian languages: Japanese, Simplified Chinese, Traditional Chinese and Korean.

A large number of Asian languages such as Malay, Tagalog etc. are supported by the standard IRIS Powerscan software as those languages use the Latin alphabet.

- **Hebrew add-on:** this add-on offers recognition of the Hebrew language.
- **Arabic add-on:** this add-on offers recognition of Arabic and Farsi.


Using the language add-ons

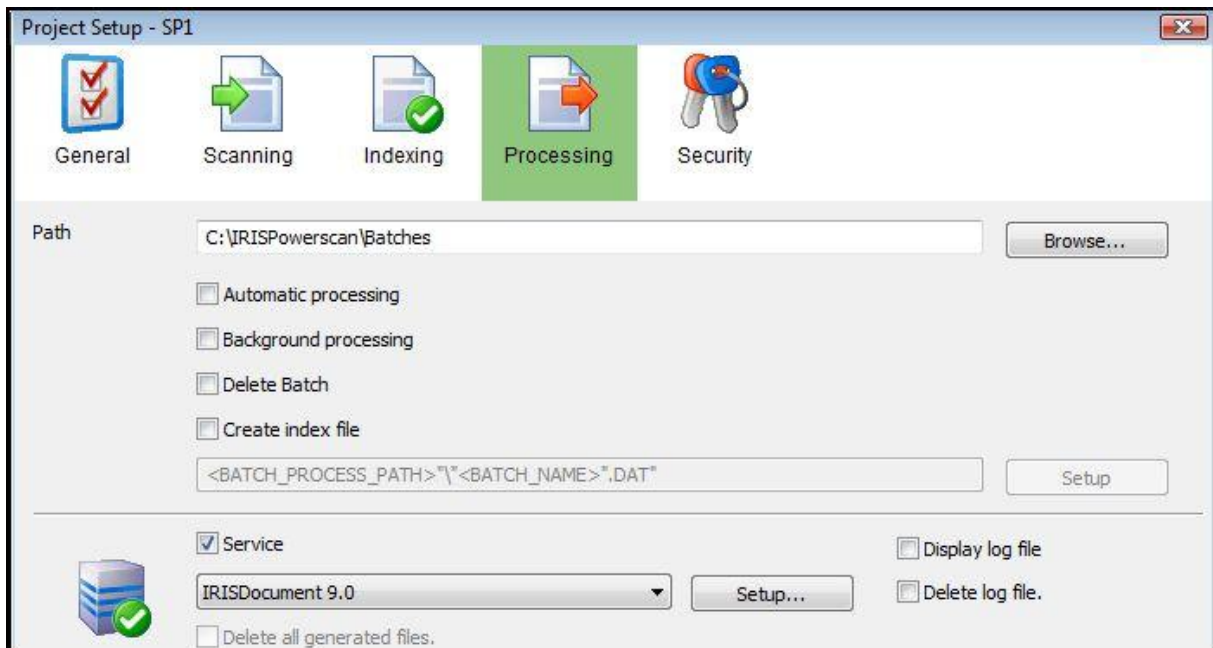
After you have registered a language add-on IRIS Powerscan does not automatically recognize the added language. You first have to select it.

To do so:

- Create a new project in IRIS Powerscan and open it.

Tip: you can create a new project based on an existing Quick Project, Solution Package or Template, or create a new project from scratch by means of the Demo project.

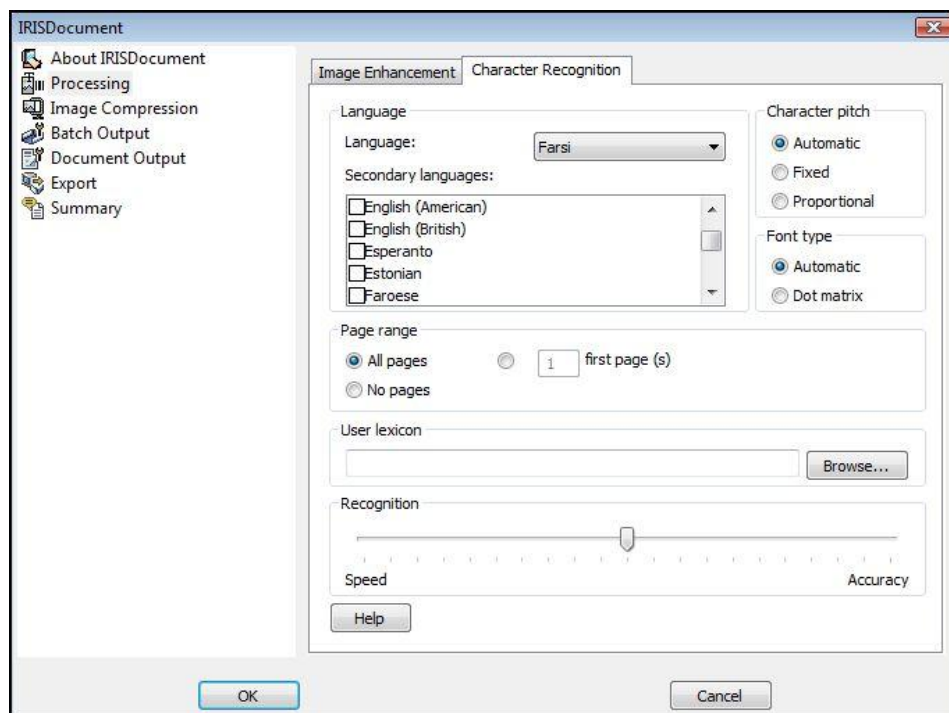
- Click  on the main toolbar to enter the **Project Setup**.
- Click the **Processing** icon, and activate the **IRIS Document 9.0** service.



- Then click **Setup** to open the IRISDocument service.
- In the left side pane, select **Processing** and then click the **Character Recognition** tab.
- Select the added language from the **Language** list.



The Asian, Hebrew and Arabic language options are only visible in the list if the corresponding add-on has been activated.



Applying a secondary language

When you are processing Asian language documents, Arabic or Hebrew documents, and you also want to recognize Western words that occur in your documents, select **American** or **British English** as secondary language in the **Secondary languages** list. Depending on the selected language, some secondary languages are disabled.

iHQC add-on

Introduction

iHQC stands for **intelligent High-Quality Compression** and is I.R.I.S.' proprietary compression technology.

By means of iHQC, PDF and XPS documents can be compressed without loss of image quality.

Volume licenses

Several volume licenses are available for the iHQC add-on. Which add-on you should acquire depends on the number of pages you want to process per year. There are iHQC add-ons ranging from one hundred thousand pages per year to an unlimited number of pages per year.

The volumes licenses are yearly renewable. They are reset automatically on the anniversary date of first use.

Contact I.R.I.S. at irispowerscan@irisporate.com to obtain an iHQC license.

Levels of iHQC

Three levels of iHQC are available for PDF documents, and two levels for XPS documents.

In each level, there is a distinction between a **Good Size** and a **Good Quality** mode. Good size offers smaller documents. Good Quality offers slightly larger documents that have a better image quality.

Level 1 - Good Quality is available by default and does not require an add-on.

Important note: when you register the iHQC add-on you seem to have access to all iHQC levels, even the ones you haven't acquired. This is not the case, however. Should you select an

higher iHQC level that is not covered in your license, an error will occur during processing, resulting in your documents not being processed.

Benefits

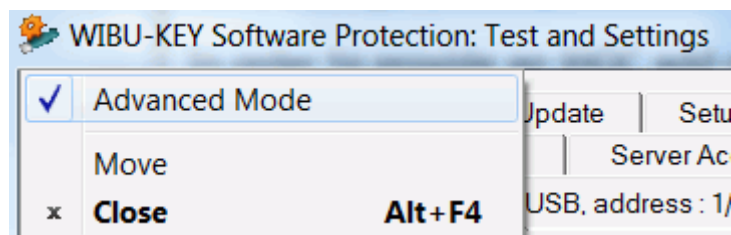
- Extremely small output images, saving you a lot of disk/server space
- No loss of image quality during compression

Acquiring an iHQC add-on or renewing a license

In order to provide an iHQC add-on or to renew a license, I.R.I.S. needs the license information stored in your IRIS Powerscan wibu key.

Follow the three steps below to acquire or update your license:

1. Create an RTC file containing the current information of your WIBU-KEY:
 - Go to **Windows Control Panel > Hardware and Sound > Wibu Key Tool**.
 - Click the Wibu key icon in the left corner of the title bar, then select **Advanced mode**.



- Click the **WIBU-BOX Context** tab.
 - Select your IRIS Powerscan dongle in the list.
 - Click on the **Browse** button to save the RTC file to a location of your choice.
2. Send this RTC file to I.R.I.S. at irispowerscan@iriscorporate.com so we can create an RTU file and send it to you.
 3. Update your dongle using this RTU file through the update utility:


- Go to **Windows Control Panel > Hardware and Sound > Wibu Key Tool**.
- Click the Wibu key icon in the left corner of the title bar, then select **Advanced mode**.
- Click the **WIBU-BOX Update** tab.
- Select your IRIS Powerscan dongle in the list.
- Click on the **Browse** button to open the RTU file you received by e-mail.

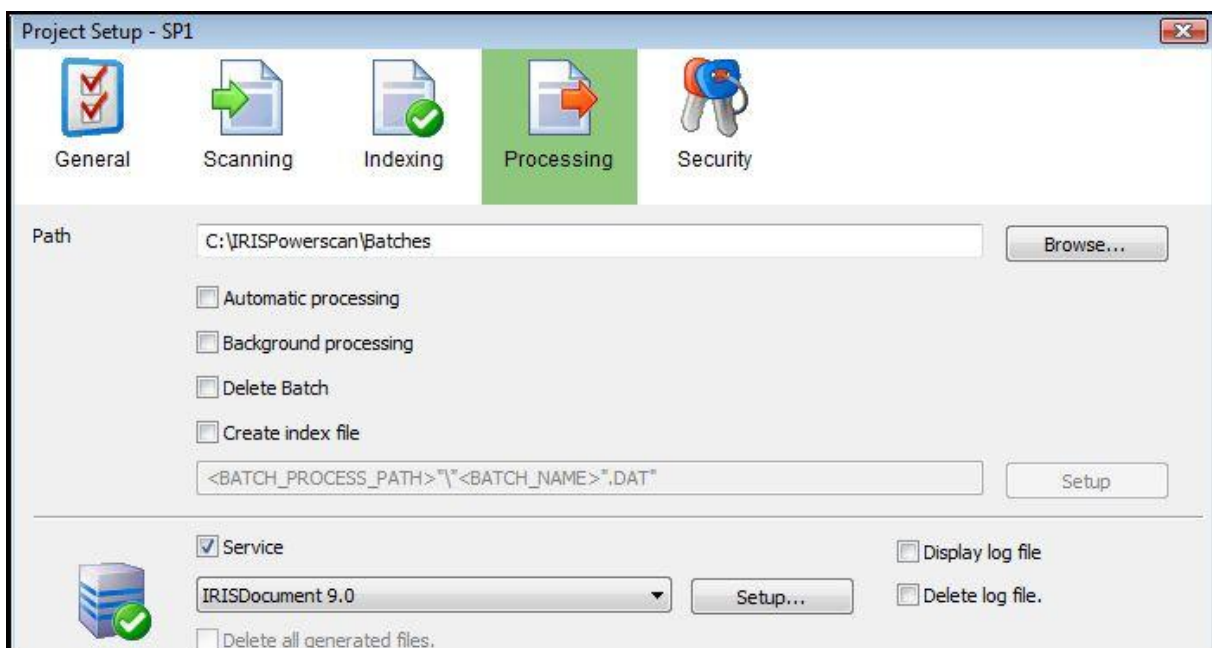
Making use of the iHQC add-on

After you have registered the iHQC add-on IRIS Powerscan does not automatically generate iHQC documents. You first have to indicate the output format:

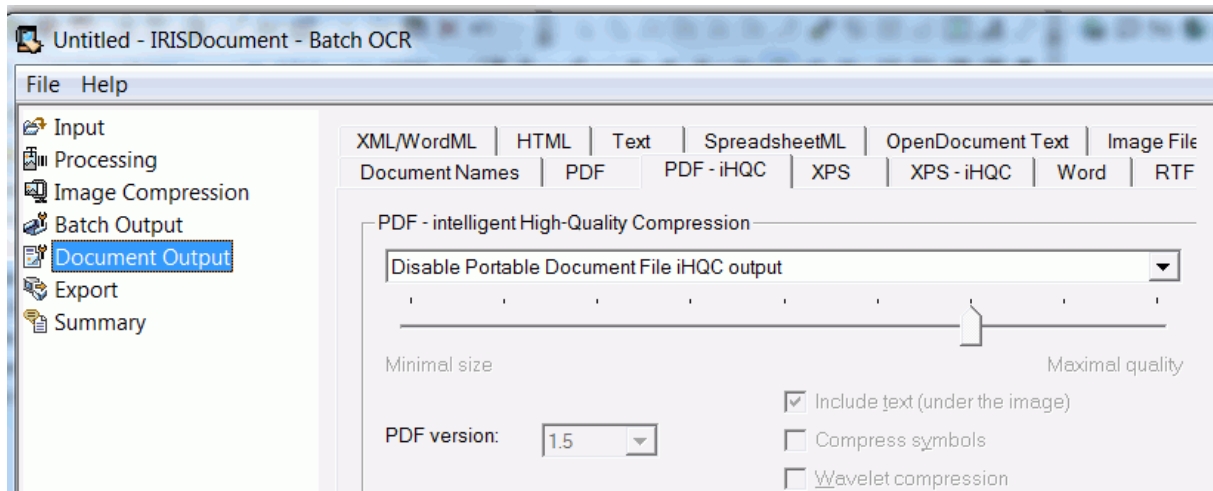
- Insert the dongle containing the iHQC add-on in a USB port on your computer.
- Create a new project in IRIS Powerscan and open it.

Tip: you can create a new project based on an existing Quick Project, Solution Package or Template, or create a new project from scratch by means of the Demo project.

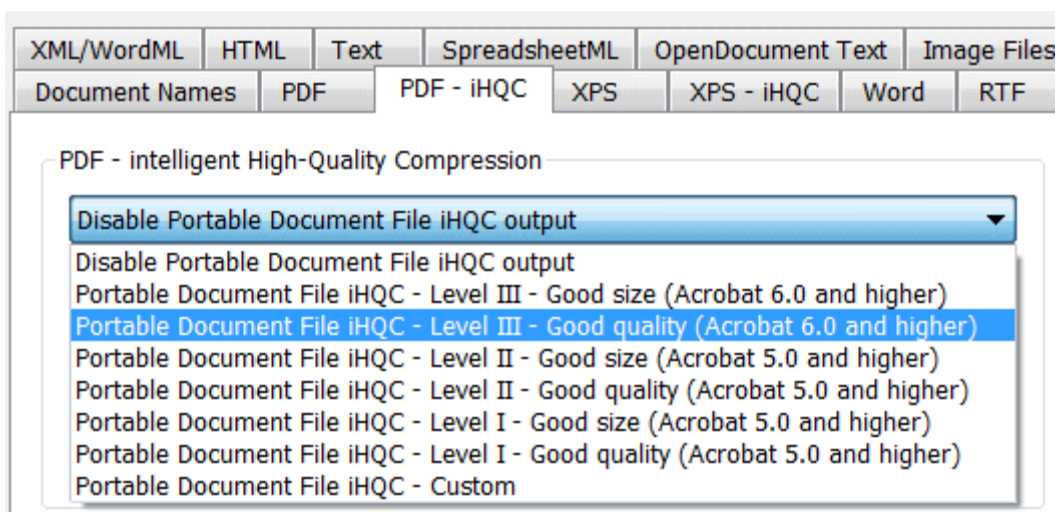
- Click  on the main toolbar to enter the **Project Setup**.
- Click the **Processing** icon, and activate **IRIS Document 9.0** service.



- Then click **Setup** to open the IRISDocument service.
- In the left side pane, select **Document Output**.
- Then click the **PDF-iHQC** or **XPS-iHQC** tab depending on the output files you want to generate.



- Select the iHQC level you want to apply.



Important note: when you register the iHQC add-on you seem to have access to all iHQC levels, even the ones you haven't acquired. This is not the case, however. Should you select an higher iHQC level that is not covered in your license, an error will occur during processing resulting in your documents not being processed.

- Next time you process documents with IRIS Powerscan it will generate iHQC output files.

Background add-on

Introduction

The **Background add-on** enables IRIS Powerscan to process batches in the background. This way, you don't have to wait for your batch to be processed before scanning the next batch.

Benefits

- Increased scanner productivity
- Reduced processing time

How does it work?

Throughout its workflow IRIS Powerscan carries out two main software activities **Scanning** and **Processing**.

The **Scanning phase** we define as the import, clean-up, sorting and indexing of images coming from a scanner. During scanning any captured information is turned into metadata.

The **Processing phase** is when all those scanned images are turned into electronic documents (either image files or searchable documents).

Normally it is not possible for IRIS Powerscan to carry out both activities at the same time: when IRIS Powerscan is processing batches it is not possible to scan new batches.

Thanks to the **Background processing add-on**, however, this does become possible. As a result, the productivity of the scanner increases and the processing time is reduced.


Note, however, that the PC will be under more stress since you are scanning and processing at the same time. You may need to adjust the resources of your PC, otherwise the scanning speed may decrease.

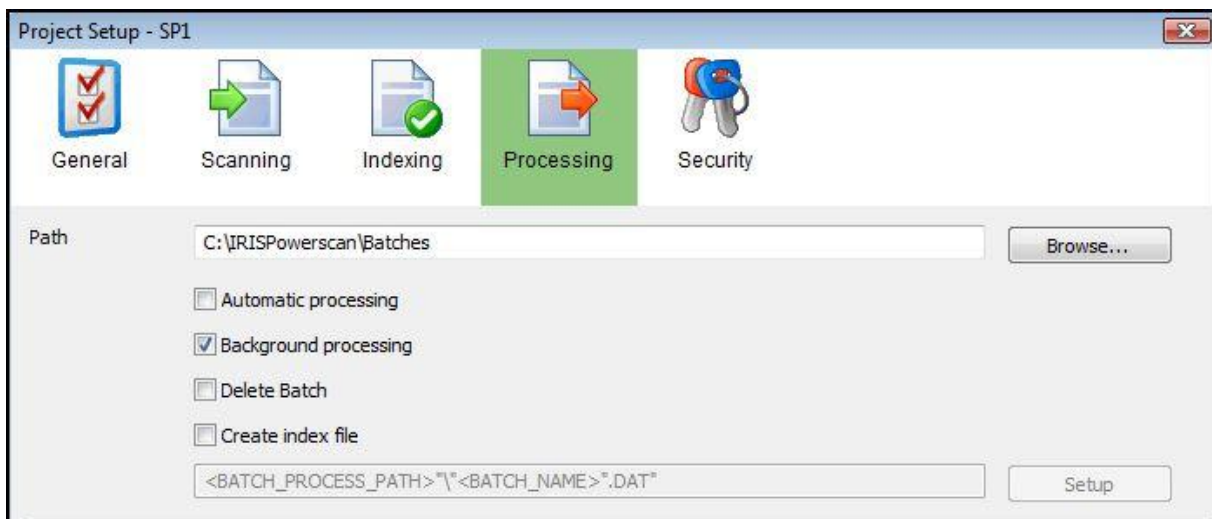
Important note: it is not possible to use the IRISDocument service in combination with Background processing. So if you want to convert your scanned documents into searchable documents such as PDF, hyper-compressed PDF, Word, SpreadhseetML, XPS, etc. you need to acquire and install **IRISDocument Server**.

Using the Background add-on

- Create a new project in IRIS Powerscan and open it.

Tip: you can create a new project based on an existing Quick Project, Solution Package or Template, or create a new project from scratch by means of the Demo project.

- Click  on the main toolbar to enter the **Project Setup**.
- Then click the **Processing** icon and check the **Background processing** box.



- Scan the first batch you want to process, then click **Process**.



- While IRIS Powerscan is processing the batch you can scan the second one.

IRISFingerPrint add-on

Introduction

The **IRISFingerPrint add-on** activates the IRISFingerPrint technology in IRIS Powerscan.

IRISFingerPrint is a document identification technology based on the layout of a document. It is used as a separation method to split up stacks of scanned pages into **batches** and **documents**.

How does it work?

Basically, you train IRIS Powerscan to recognize documents with a certain layout – here called FingerPrint. Then whenever any scanned documents match the FingerPrint of those documents, IRIS Powerscan recognizes them and executes the action you have determined: start a new batch or document, attach pages to the current document, or delete the page.

This way you no longer have to use barcodes, patch codes or blank pages as separators. This speeds up the processing, since no OCR and no reading of barcodes or patch codes is to be done.

Technical information

IRIS Powerscan uses robust image-oriented algorithms to examine the graphic and geometrical features on a scanned page. The structure of these features is called the FingerPrint of the page.

While treating scanned documents, the FingerPrint structure is extracted from the documents and compared to the FingerPrints you have stored in IRIS Powerscan. Comparing the FingerPrints is only matter of milliseconds. When there is a match, IRIS Powerscan executes the action you had determined for that FingerPrint.

Since IRIS Powerscan examines the graphical and geometric features on pages, IRISFingerPrint works best on pages containing many geometric items of fixed size and

constant relative positions. Such items are for instance machine written text, lines, boxes and logos.

Examples of good FingerPrint material

300205 01 1 01 41011 4011 9801 56

MINISTERIE VAN ECONOMISCHE ZAKEN MAANDSTATISTIEK VAN DE INDUSTRIELE BEDRIJVIGHEID
IN DE BURGERLIJKE EN UTILITEITSBOUW
EN DE GROND-, WATER- EN WEGENBOUW
(Koninklijk Besluit van 29.12.1978 - Belgisch Staatsblad van 2.3.1979)

50 M

Jaar en maand van aangifte: januari 1998

NATIONAAL INSTITUUT VOOR DE STATISTIEK

INDUSTRIELE STATISTIEKEN
Louvainseweg, 44
1000 Brussel
Tel: (02) 548.65.12
Fax: (02) 548.62.54

50M...210/41011/04011NN

ALG. BOUWONDERNEMING

980100452101

9470 DENDERLEEUV

IDENTITEIT EN ADRES VAN DE LOKALE EENHEID
(Invullen, of verbeteren indien nodig)

NAAM
CALLEBAUT F. BVBA ALG. BOUWONDERNEMING

8 Sexe : masculin féminin

9 Quel est votre âge ? (A la date de votre dernier anniversaire)
ans

10 Niveau d'étude :
 pas de scolarité
 enseignement primaire
 enseignement secondaire général 1er cycle (n...)
 enseignement secondaire technique court (n...)
 enseignement secondaire long général (menant au bacc...)
 enseignement secondaire long technique (menant au brevet de te...)
 enseignement supérieur

11 Situation actuelle :
 activité au foyer retraité
 étudiant ou en formation chômage
 activité professionnelle (Précisez) invalidité
 Autre (Précisez) :

12 Quelle est votre situation familiale ?
 célibataire, jamais marié(e) séparé(e)
 marié(e) divorcé(e)
 concubin veuf(ve)

Nous vous remercions de votre collaboration

FormID: 01

Code étude

Xample AG
10 Jahre Garantie

Code de contrôle
ECC-278901-1567

CAHIER
D'OBSERVATION

CHEQUE - ECHANGE
LA MEUSE

No de CONTROLE
005912300015

Reste chèques.

VALABLE UNIQUEMENT POUR UN EXEMPLAIRE DU
JOURNAL LA MEUSE.

LIMITE VALIDITE : 27/04/2003

Diffuseur de Presse: voir verso.-Persverdelers: zie op keerzijde.

9905

PATIENT N°: []

INITIALES: []

MASTER
CF-039-0002

Since IRISFingerPrint looks at pages from a distance to examine the geometrical elements, details disappear and only the coarse layout is taken into account. That's why IRISFingerPrint can be applied to images which bad OCR quality, like faxes, as the text information is no longer important.

Benefits

These are the benefits of using IRISFingerPrint:

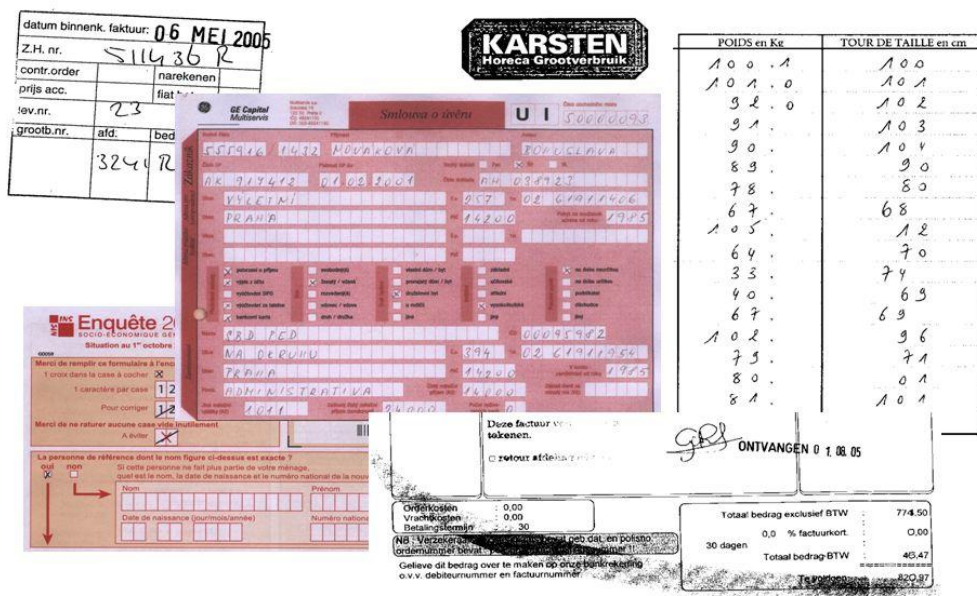
- Fitted for high-speed scanners
- Very fast separation of batches and documents.

- Easy to set up.
- No need for separator pages based on barcodes, patch codes or OCR zones.
- Efficient with bad quality OCR documents.

Limitations

- Only works on black-and-white images.
- The geometric elements must be constant: handwritten text and non-separable, overlapping items are not suited for FingerPrint recognition.

Example of bad FingerPrint material



Using IRISFingerPrint

- Create a new project in IRIS Powerscan and open it.

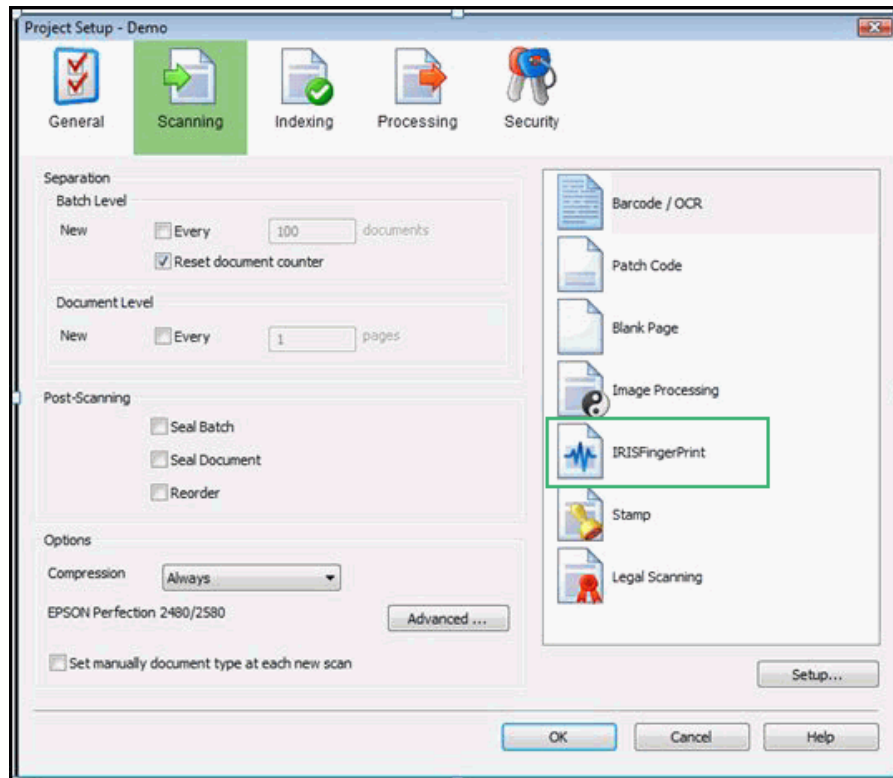
Tip: you can create a new project based on an existing Quick Project, Solution Package or Template, or create a new project from scratch by means of the Demo project.

- Click  on the main toolbar to enter the **Project Setup**.

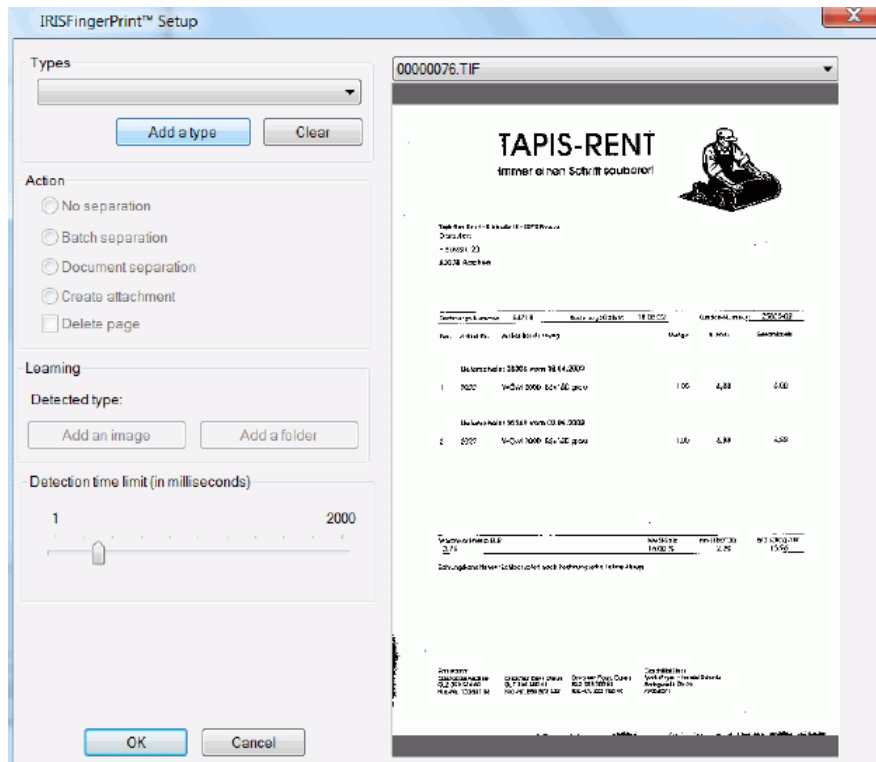
- Click on the **Scanning** icon and then select **IRISFingerPrint** in the right-hand column.

Note: IRISFingerPrint is only visible if the add-on has been activated.

Should the add-on be missing from the list, then disable User Account Control on your computer and restart the machine.



- Then click **Setup**.



- Now add the type of FingerPrint page you want to apply:
 - Click **Add a type**.
 - Name the FingerPrint type.

Tip: it might be a good idea to choose a name that corresponds to the **Action** you want IRIS Powerscan to take. For instance "**Batch separation**".

Note: in case you want to delete the FingerPrint types, click **Clear**. This deletes all the FingerPrint types you created.

- Select the **Action** you want IRIS Powerscan to take when it encounters the FingerPrint type:
 - **Batch separation:** IRIS Powerscan starts a new batch, sub-divided in documents
 - **Document separation:** IRIS Powerscan starts a new document.
 - **Create attachment:** IRIS Powerscan attaches the pages to the current document.
 - **Delete page:** select this option in combination with one of the three above to delete the FingerPrint page.

Note: the action **No separation** is useful in case you specifically don't want IRIS Powerscan to use a certain type as FingerPrint page. See the topic **Negative training** in the **IRIS FingerPrint F.A.Q** section for more information on this topic.

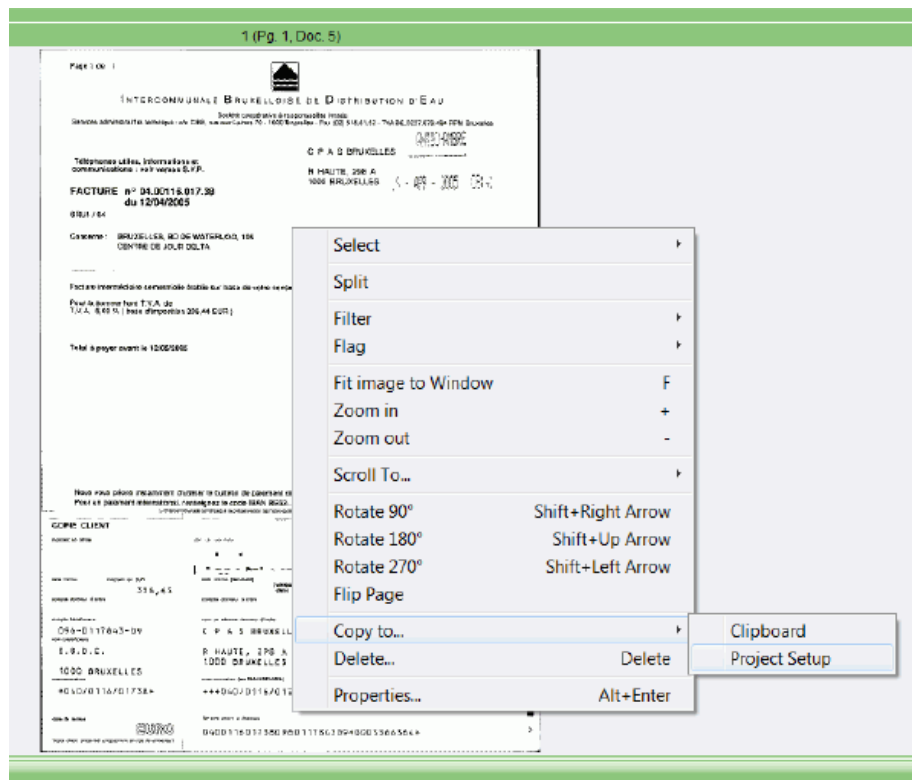
Now that you have selected a FingerPrint type and the corresponding action IRIS Powerscan needs to take when it encounters the FingerPrint type, you need to add actual pages that correspond to that type. Later on, when IRIS Powerscan encounters scanned pages that match the FingerPrint type you defined, IRIS Powerscan will recognize those pages and take the set action, for instance **Batch separation**.

You need to add at least one FingerPrint page that corresponds to the FingerPrint type, but you can also add an entire folder of pages that correspond to a single FingerPrint type. The latter option is useful when you have many pages (approximately 10) with a similar layout and you want to train IRIS Powerscan on them.

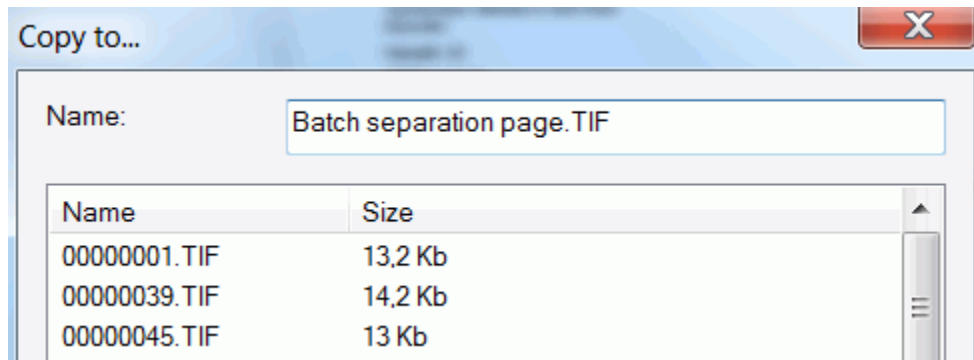
Note: in order for a page to match a FingerPrint page, there must be at least 15 matching items.

To add a single page to a FingerPrint type:

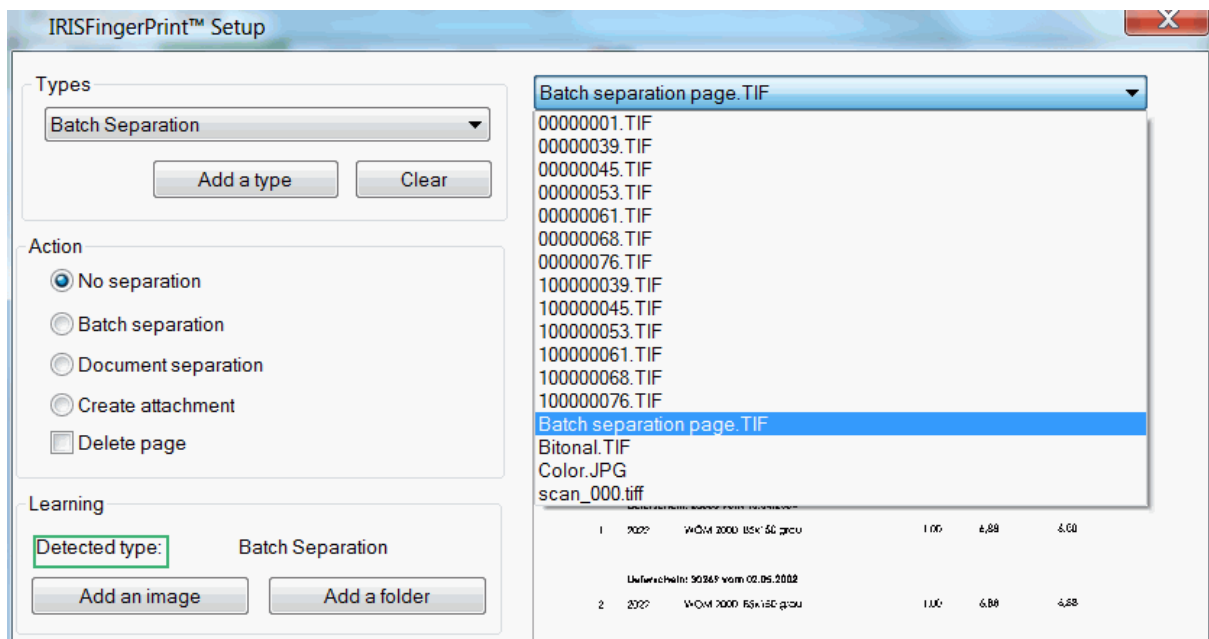
- Scan a page in IRIS Powerscan.



- Right-click the page, select **Copy to** and then choose **Project Setup**. Now name the page.



- Then go to the **FingerPrint Setup** via **Project Setup>Scanning>IRISFingerPrint**.



- In the **Types** drop-down list select the FingerPrint type you created. Or create a new one if necessary.
- Then select the page you copied to the Project setup in the right-hand drop-down list.
- Now click **Add an image**.

The page you scanned is now linked to the FingerPrint type. Whenever IRIS Powerscan encounters a scanned page that resembles the FingerPrint layout of that page, it will be recognized as being a FingerPrint page and IRIS Powerscan will take the necessary action.

Note: to check if page has been linked to a FingerPrint type, check the **Detected type** status. In the figure above, you see that the page is linked to the type "Batch Separation". If this space is empty you know the page has not been linked to any type.

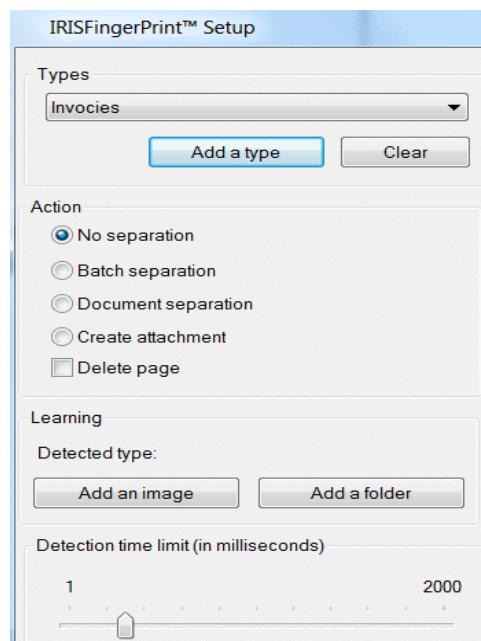
To add an entire folder of images to a FingerPrint type:

- Go to the **FingerPrint Setup** via **Project Setup>Scanning>IRISFingerPrint**.
- Select the FingerPrint type you created in the **Types** drop-down list. Or create a new one if necessary.
- Then click **Add a folder**.
- Browse for the folder you want to use, and click **OK**.
- The pages from the folder are added to the drop-down list on the right, and they are automatically linked to the FingerPrint type.

Setting the detection time limit

The detection time limit is set to 300 by default. This means IRIS Powerscan will examine each page for 300 milliseconds to see if it is a FingerPrint page.

Should IRIS Powerscan have trouble recognizing your FingerPrint pages then increase the detection time limit. Note, however, that this slightly decreases the processing speed.



In case IRIS Powerscan does not recognize the FingerPrint page after the set detection time limit it will not be treated as FingerPrint page.

Scanning documents

When you are finished configuring the IRISFingerPrint settings you can proceed to scanning your documents.

IRISFingerPrint F.A.Q.

This topic answers a number of questions you might have regarding IRISFingerPrint.

Which geometric items are unsuitable for IRISFingerPrint recognition?

Handwritten items, since they have varying sizes and positions.

Stamps that have varying positions and intensity, and stamps that are rotated.

Inverted items, e.g. white text on a black background.

Non-separable, overlapping items.

What is the minimum number of items that need to match in order for a page to be recognized as FingerPrint page?

The minimum number is fixed to 15. This number cannot be changed.

Is there a risk of negative matching? For instance when there are 15 items that match but a few others that don't?

Yes, it's possible that a page is still recognized as FingerPrint page in that case. But there is a way to avoid it.

Example: you have different documents that all have the same header, but a different content. The headers contain at least 15 matching items and are sufficient for IRISFingerPrint recognition, even though the content is different.

To avoid FingerPrint recognition on the pages that do not match, you can do a **negative training** of IRIS Powerscan. To do so, follow the regular procedure to add a FingerPrint type and link your pages to that type. Then select **No separation** as **Action**. This way IRIS Powerscan will not treat those pages as FingerPrints; they are on your blacklist if you will.

Is IRISFingerPrint able to cope with shifted imprints, scalings and rotations?

Yes, IRISFingerPrint is able to cope with minor shifted imprints, minor scalings and minor rotations.

Should matching problems occur for one of these reasons, then the non-matching pages need to be added to the training set.

What are the limits for "minor" shifted imprints and skew?

The limits depend on the given overall segmentation structure, so quantified limits are not known.

The shift tolerance is approximately the size of 8 standard text lines (10pt), in all directions.

Deskewing is required and should be done by the host application, in this case IRIS Powerscan.

What is the recommended document orientation?

In general, the reading direction must be left to right or right to left. The documents you train and the ones you want to recognize as FingerPrint pages must have the same rotation.

Is it possible to use different scanners with the same IRIS Powerscan configuration?

In general, that could cause problems due to the scanners' mechanical and electronic design. It is recommended to configure each scanner individually.

ISISDriver add-on

Introduction

IRIS Powerscan natively supports TWAIN and TWAIN-VRS. Thanks to the **ISISDriver add-on**, you can also use **ISIS scanners** in combination with IRIS Powerscan.

ISIS stands for **Image and Scanner Interface Specification**. The ISIS drivers provide scanner support for over 400 ISIS scanners.

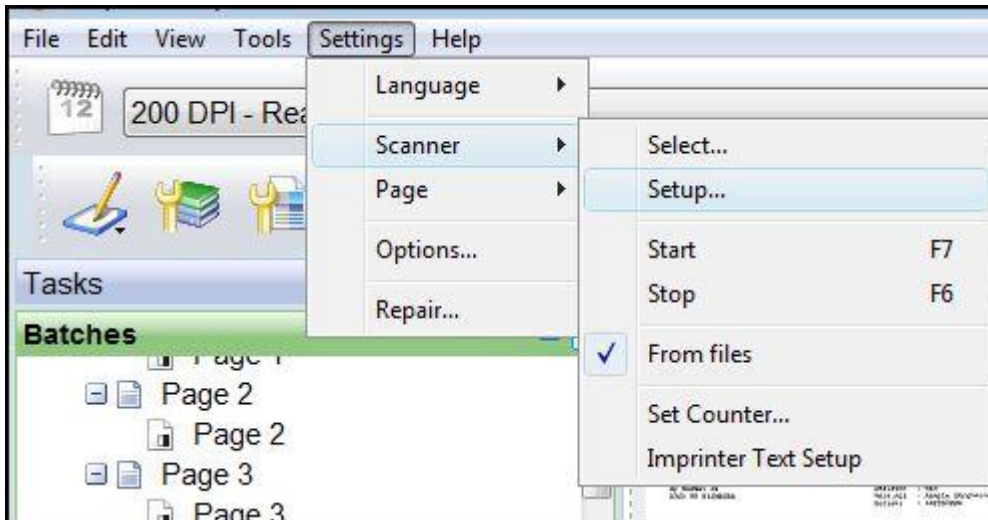
Benefits

Below you find an overview of the benefits ISIS drivers provide compared to TWAIN drivers.

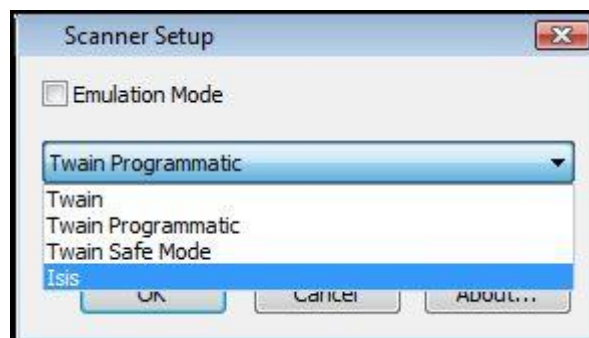
- ISIS drivers provide the most robust scan feature support.
- The driver interface is consistent from scanner to scanner. This is not the case with TWAIN drivers.
- ISIS drivers optimize the hardware scanner's performance, allowing it to always run at rated speed.
- ISIS drivers provide a consistent interaction with all ISIS scanners and vice versa.

Activating the ISISDriver add-on:

- Open a Project in IRIS Powerscan.
- Then go to **Settings>Scanner>Setup**.



- Select **ISIS** from the list.



Note: ISISDriver is only visible if the add-on has been activated and the required license files are copied to the IRIS Powerscan installation folder. See [Registering the add-ons](#) for details.

- Now you can configure your ISIS driver scanner to run with IRIS Powerscan.

Legal Scanning add-on

Introduction

The **Legal Scanning add-on** activates the legal scanning mode in IRIS Powerscan. Legal Scanning is a secure scanning technique that guarantees the invariability and durability of digitized documents. The Legal Scanning mode in IRIS Powerscan generates electronic documents that are suited for **legal and regulatory archiving purposes**. The key objective of Legal Scanning is to provide electronic documents the same **legal value** as paper documents.

For this reason the IRIS Powerscan Legal Scanning mode has been designed to be compliant with the Belgian legal regulations on legal scanning. Cfr. Circulaire nr. AFER 16/2008 (E.T.112.081) dd. 13.05.2008. To consult the full text on these regulations, click the link below. The text is available in French and Dutch.

<http://ccff02.minfin.fgov.be/KMWeb/document.do?method=view&id=787afde4-0b59-4538-b8cd-69751ac3a999>

Legal Scanning in IRIS Powerscan

In order to comply with the current regulations, the integrity and authenticity of the scanned images must be ensured during the entire IRIS Powerscan workflow: scanning, indexing, processing and export.

In practice this means a number of conditions must be met*:

- The scanning operator of each scanned image must be identifiable.
- The document owner and scanning company information must be embedded in each scanned image.
- A unique batch number must be displayed on every scanned image.
- Each scanned image must be traceable.
- The scanned images must not be altered.
- The sequence of the scanned images must not be altered.

E.g. images must not be modified, moved, added or deleted in the IRIS Powerscan workflow.

To achieve all this, IRIS Powerscan makes use of digital signature technology and third-party certificates to authenticate the entity who performed the scanning and to check that no modifications has been done on the scanned images since they were scanned.

*Note that this is not an exhaustive list. A full description of the conditions can be found in the legal text mentioned above.

How does Legal Scanning work in IRIS Powerscan?

The Legal Scanning process in IRIS Powerscan consists of the following steps:

1. Identification of the scanning operator, i.e. the user/company who scans the document.

Before a user can scan documents in Legal Scanning mode:

- you - as administrator - must first provide the required user information. Each scanned image will be **identified** by means of this information.
- you must link a PKCS # 12 certificate (Public-Key Cryptography Standard). This certificate will be used to **sign** each scanned document.

Both steps are carried out in the **Project Setup**.

Limitation: the Belgian electronic ID card certificate is currently not supported.


When the Legal Scanning mode has been activated, the user will no longer have the possibility to modify the scanned documents in any way.

2. Scanning and signing of documents

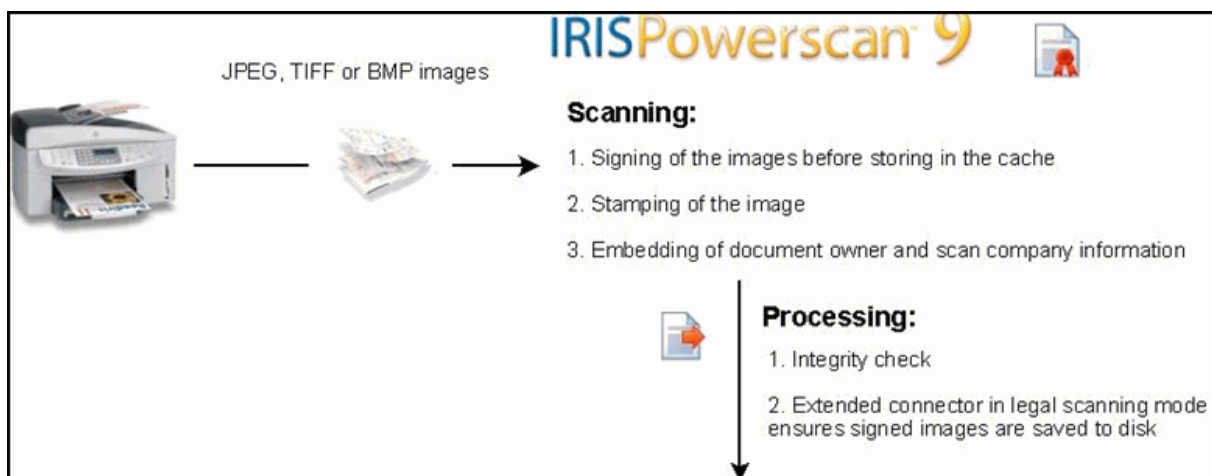
After scanning, each image is signed with the certificate provided in step 1 before the image is stored in the IRIS Powerscan cache. The document owner and scan company information are also embedded in the scanned image.

Optionally, you can configure IRIS Powerscan to **stamp** each scanned image. Stamps contain additional, unique information such as the scanning date, project name, station name, etc. See the topic **Stamping images** for more information.

3. Processing and integrity check

At each step of the processing the integrity of the scanned images is being checked. If any illegal alterations are made, IRIS Powerscan will notify you that the integrity has been broken. You can also manually check the integrity at batch, document and page level by means of the **Data Integrity Check** icon in the main toolbar. 

Note: to save or export the scanned images, you need to use a connector that is compliant with the Legal Scanning mode. The four **Extended Connectors** that are currently available in IRIS Powerscan are all Legal Scanning compliant.




Using the Legal Scanning add-on

In order to use the Legal Scanning mode in IRIS Powerscan you must first create a new project and configure the Legal Scanning options in the **Project Setup**. The user who will use that project will not have the possibility to make any modifications to the scanned documents. In practice this means that certain functions, such as Delete image, Crop image, etc., are disabled in IRIS Powerscan.

To create a new project:

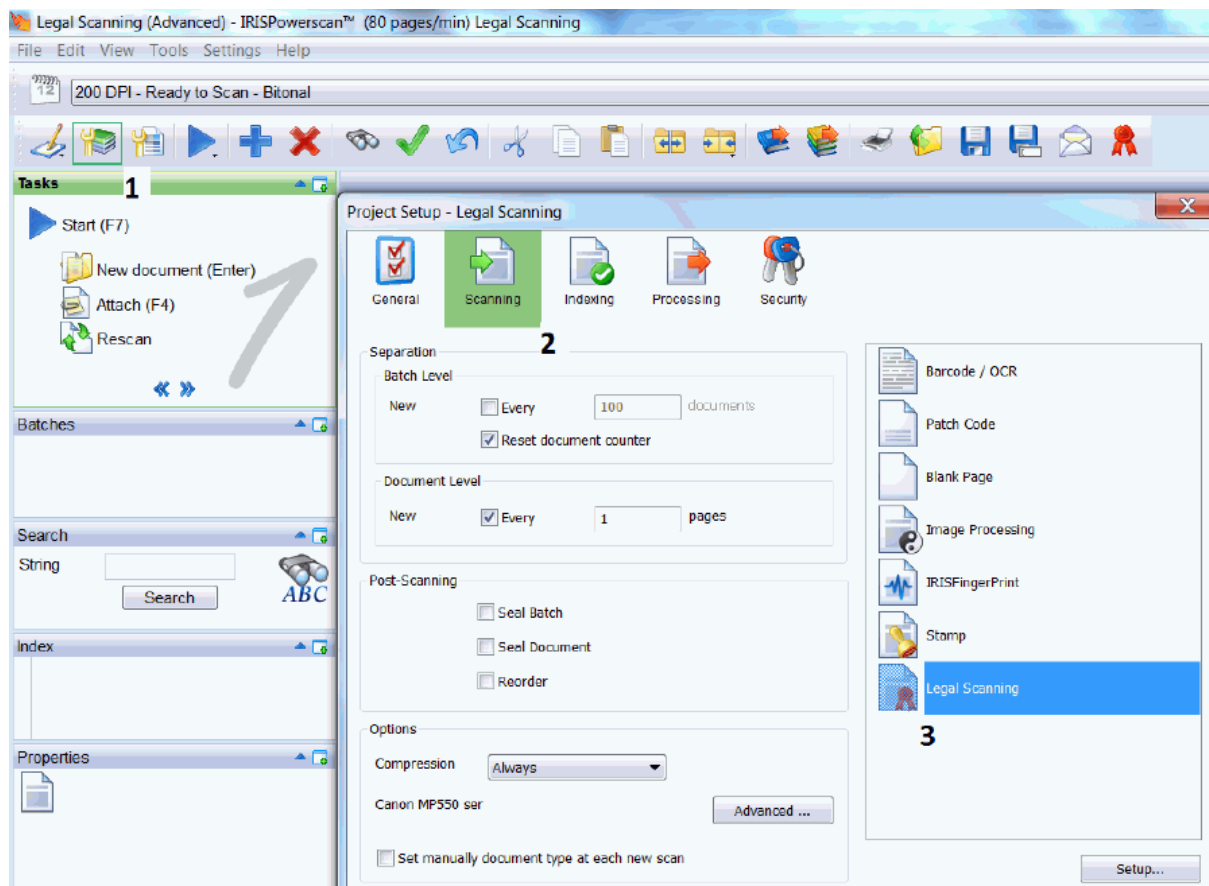
- Create a new project in IRIS Powerscan and open it.

Tip: you can create a new project based on an existing Quick Project, Solution Package or Template, or create a new project from scratch by means of the Demo project.

- Click  on the main toolbar to enter the **Project Setup**.
- Click on the **Scanning** icon and then select **Legal Scanning** in the right-hand column.

Note: LegalScanning is only visible if the add-on has been registered.

Should the add-on be missing from the list, then disable User Account Control on your computer and restart the machine.



Step 1: Identification of the scanning operator

- Fill in your company's credentials: **Name, Address and V.A.T. ID.**

The credentials will be embedded in each scanned image.

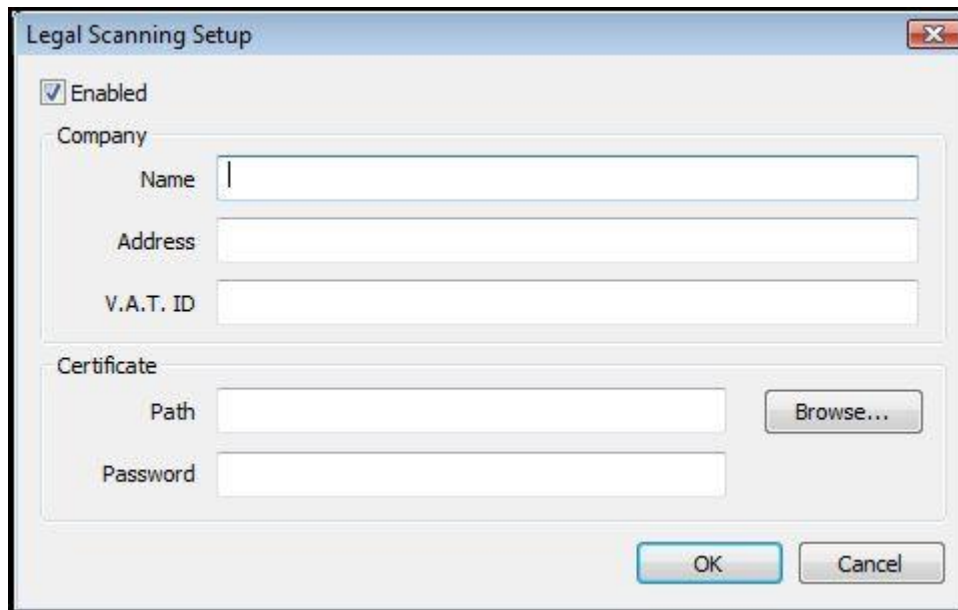
- Then click **Browse** to search for your certificate file.


The certificate file needs to be a PKCS # 12 file (Public Key Cryptography Standard).

Note that IRIS Powerscan currently doesn't support the Belgian electronic ID card certificate.

- Enter the password matching the certificate, then click **OK.**

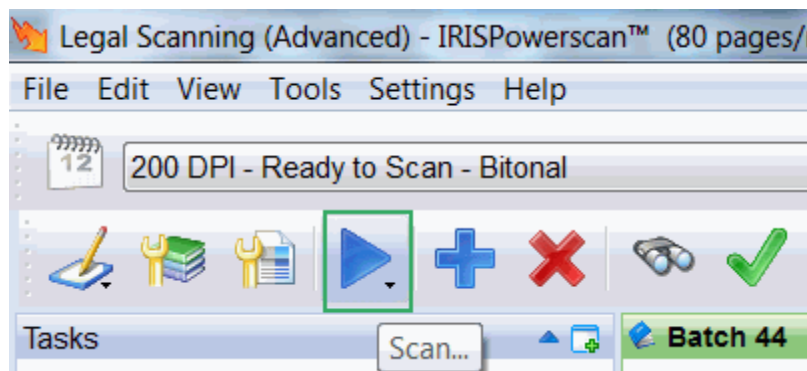
The certificate you provided will be used to sign the scanned documents.



Once you have filled in the **Legal Scanning Setup** fields, and you provided a valid certificate and password, then you will find this additional icon  in the main toolbar. This is the **Data Integrity Check**. Click this icon to manually check the integrity of the scanned documents. You can do so at batch level, document level and page level. Note, however, that the integrity is also checked automatically at each step of the processing, during the entire IRIS Powerscan workflow.

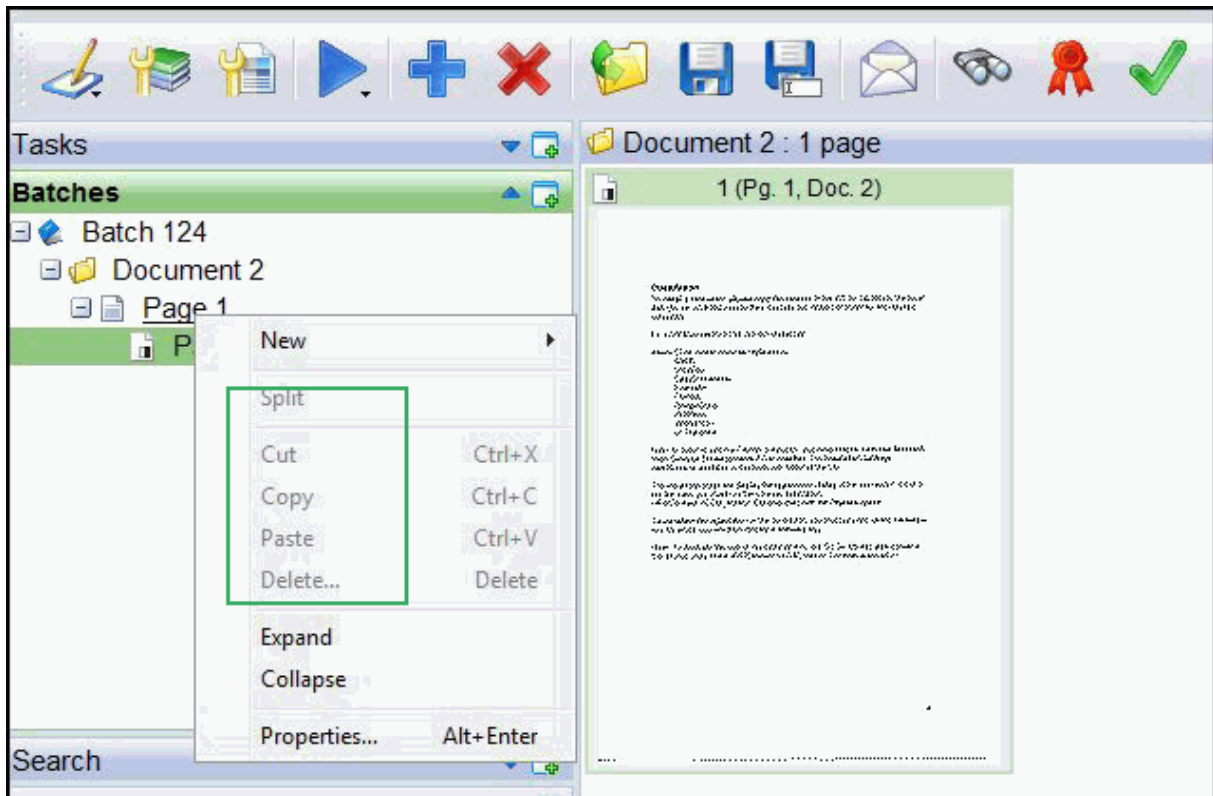
Step 2: Scanning and signing documents

- Scan your documents.




- When Legal Scanning is activated, every single image received from the scanner is signed with the certificate you provided at step 1, before the image is stored in the IRIS Powerscan cache.

It is no longer possible to make any modifications on these images. The images cannot be deleted, added, duplicated, and not even reordered inside a document.



Note that you can also add a digital stamp to each image. Such a stamp contains a unique information based on a formula. See the topic **Stamping images** for more information.

- IRIS Powerscan automatically verifies that the integrity of the documents has not been broken.

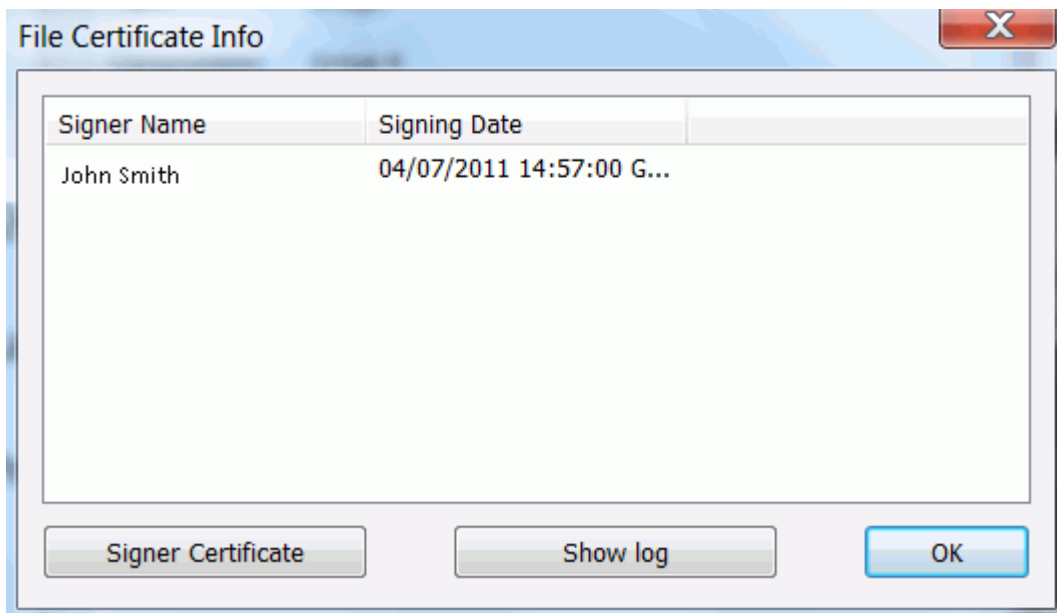
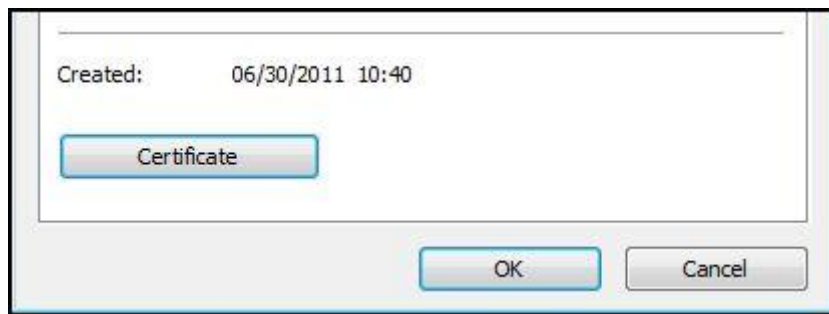
Note that you can also do a manual check by clicking the **Data Integrity Check** icon 

Certificate information

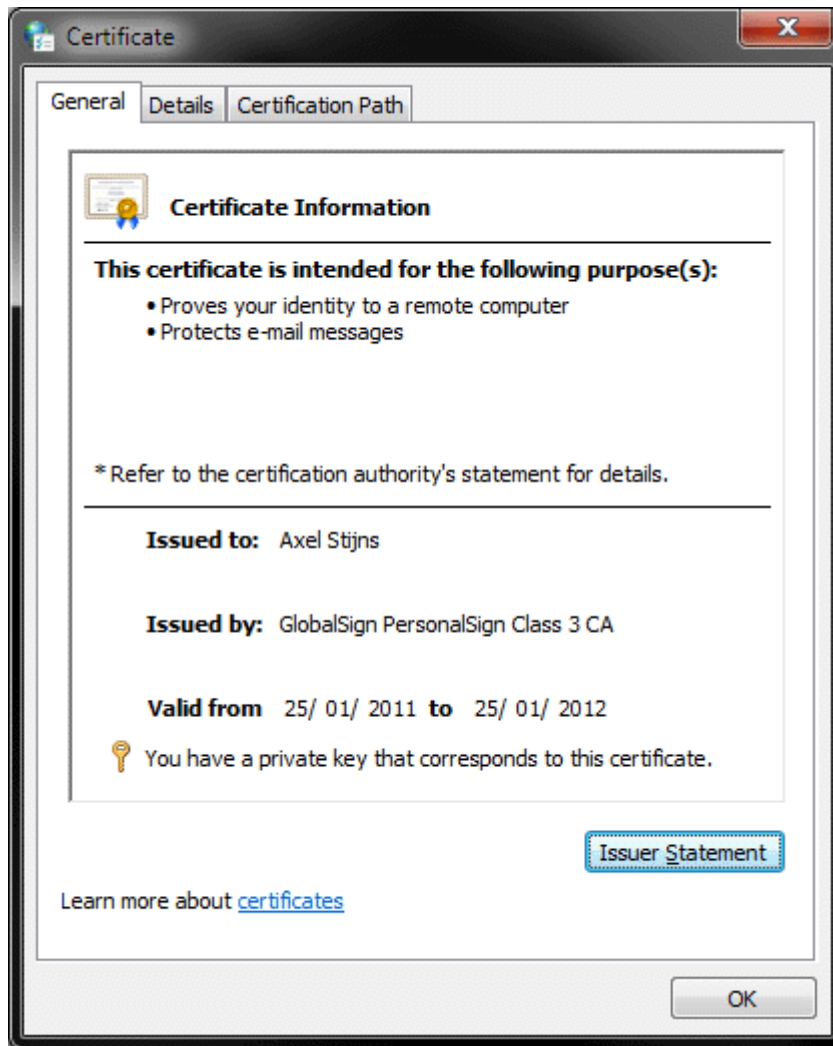
In case you want to check the certificate information of the scanned images:

- Right-click an image you scanned, then select **Properties**.
- Click the **Certificate** button to display the **File Certification Info**.

Note that is only works on page side level. The certificate information cannot be accessed on page, document or batch level.



- Click the **Signer Certificate** option to display all the related info (company, certificate authority, validity period).




Step 3: Processing and integrity check

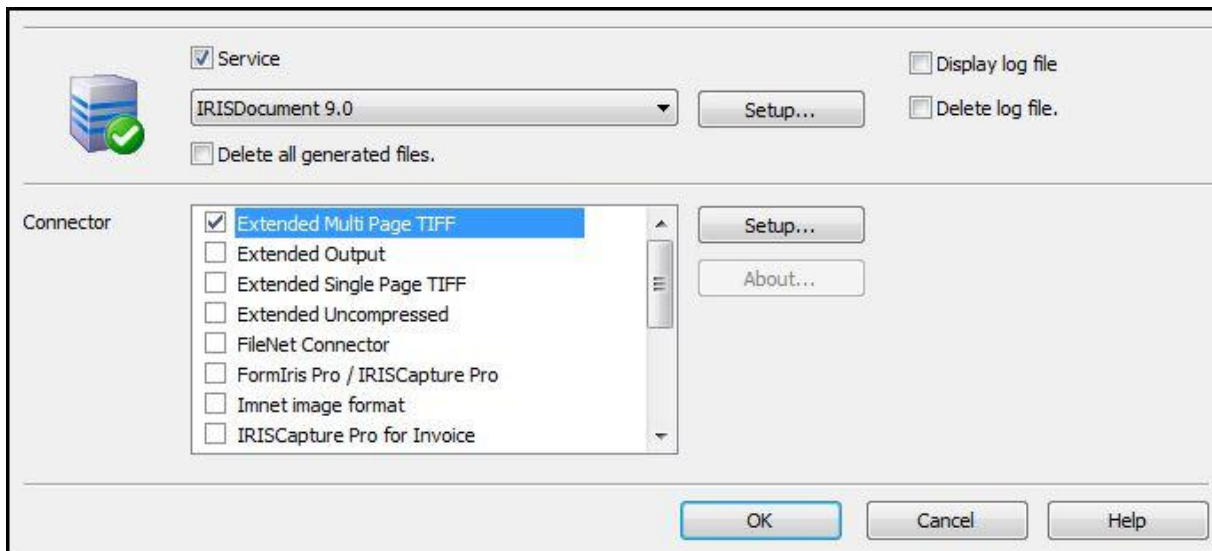
As mentioned earlier, the integrity of the scanned images is checked during the entire IRIS Powerscan workflow, so also during the processing. Therefore you need to select and **export** mode that is compliant with the Legal Scanning regulations.

For IRIS Powerscan, this means the scanned images must be exported in the **multipage TIFF** or **single-page TIFF** format via one of the extended connectors.

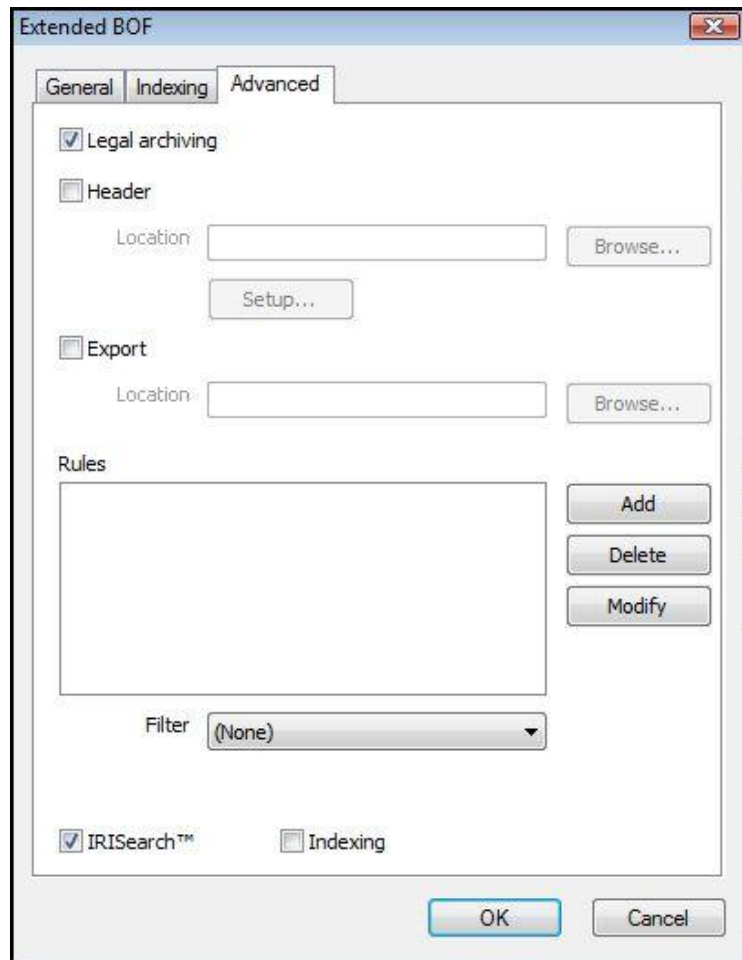
To select the right output format:

- Click  to enter the **Project Setup**.
- Click the **Processing** icon and select one of these Extended Connectors from the **Connector** list:
 - **Extended Multipage TIFF**

- **Extended Single-page TIFF**
- **Extended Output**



- Then click their **Setup** button. Make sure the output format is set to **TIFF**.
- Then click the **Advanced** tab and select the **Legal archiving** option.



- Now return to your project and **Process** your documents.




The documents you process will contain their authenticity and integrity information.

Stamping images

In order to provide additional information to scanned images, it is possible to add **stamps** while scanning in **Legal Scanning mode**.

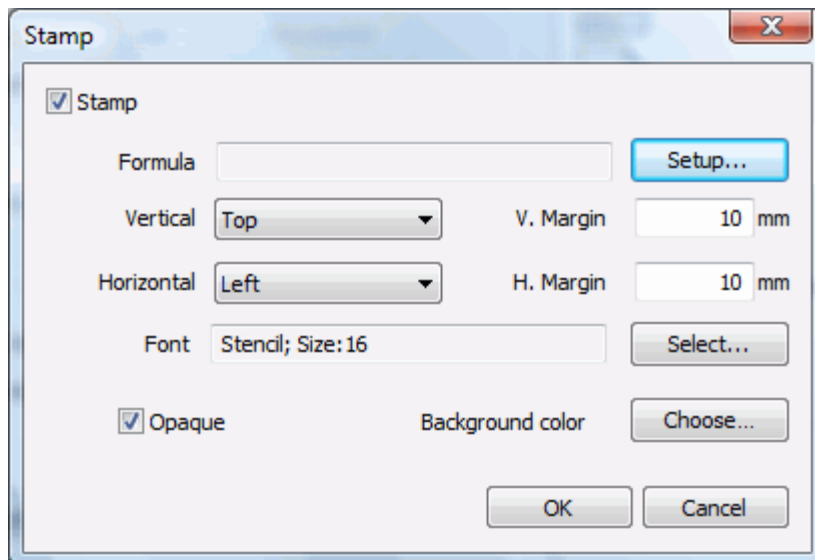
Stamps contain unique information such as the scanning date, project name or station name and are based on a formula.

To set the Stamping options:

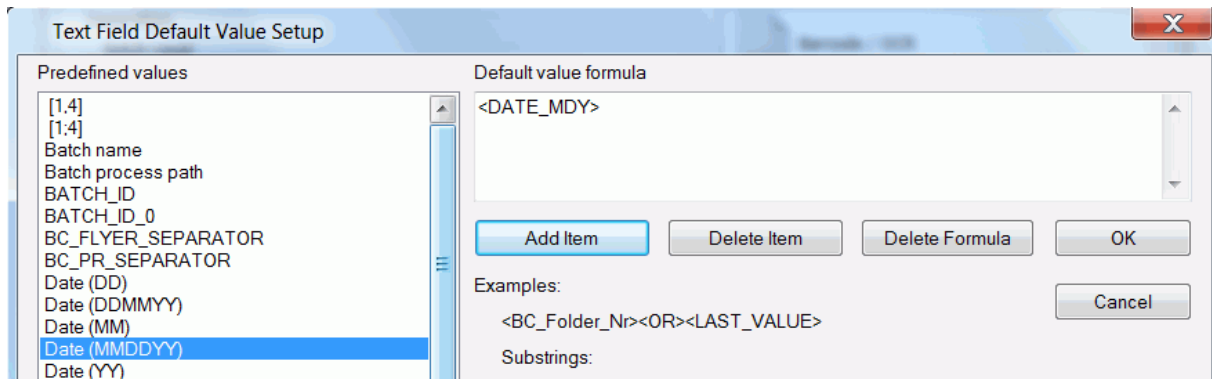
- Open the Project you have configured for Legal Scanning.
- Click  on the main toolbar to enter the **Project Setup**.
- Click on the **Scanning** icon and then double-click **Stamp** in the right-hand column.



- Select **Stamp** to activate the settings, then click **Setup**.



- Now select the **values** you want to add to the stamp.



- Then determine the **position** on the stamp on the page, its **font** and **background color** and click **OK**.

The stamps you defined will appear on the documents you scan.

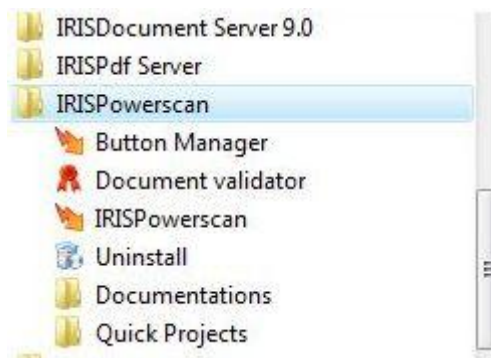
Verifying scanned documents

In the previous section we mentioned that IRIS Powerscan verifies the integrity of its scanned images at every step of the workflow, up to the export and archiving.

Note, however, that the integrity of the scanned images can also be checked outside IRIS Powerscan, after export, by means of the **Document Validator**. This way, other parties, like your Accounting department for instance, also have the possibility to check the integrity, provided they have a .cer or .p7b version of the certificate you used to sign the documents.

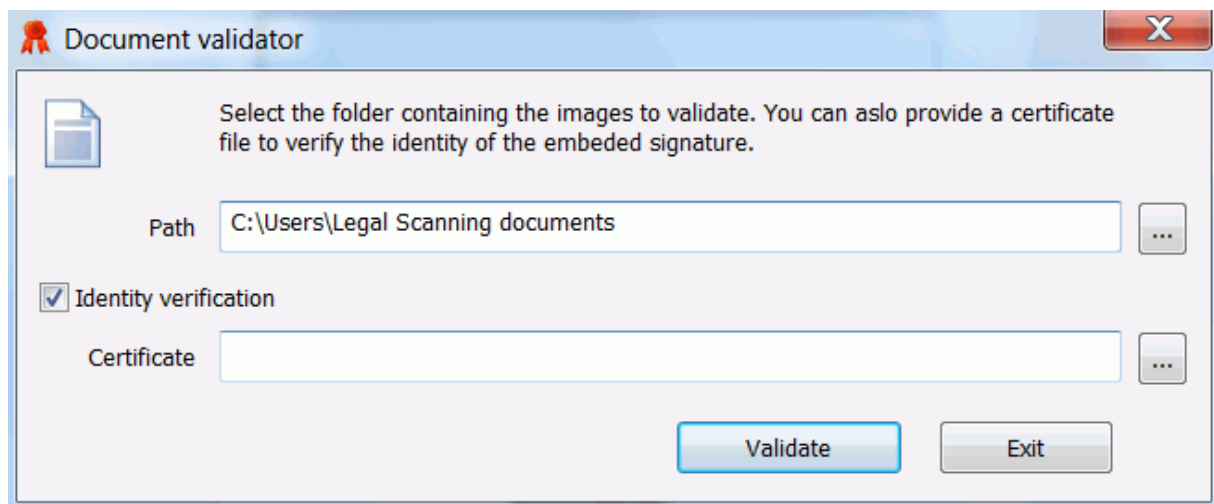
To verify documents by means of the Document Validator:

- From the Windows **Start** menu go to **All Programs > IRIS Powerscan > Document Validator**.



- Browse for the document folder you want to verify.

The Document Validator is able to verify an entire folder of scanned documents at once.



- Then browse for the certificate the user used to sign the documents.
- Click **Validate** to verify the integrity of the images in the folder.

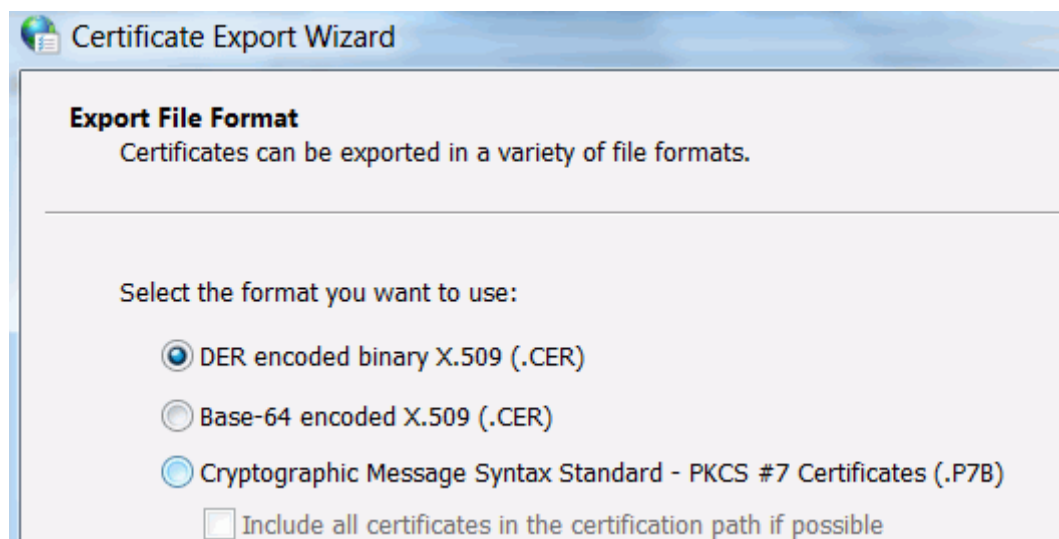
Note: in case you have obtained the PKCS #12 certificate from the user, you first need to convert it into a .cer or .p7b certificate.

To do so:

From the Windows **Start** menu go to **Control Panel>Internet Options**.

Click the **Content** tab and then click **Certificates**.

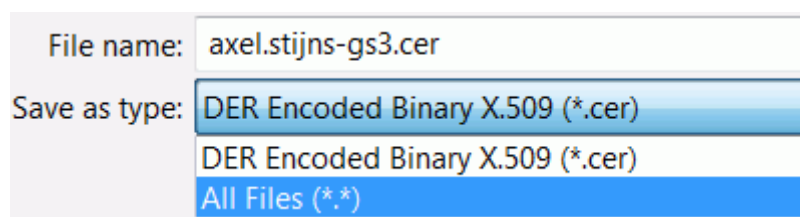
Click **Export**, and then click **Next** until you reach the **Certificate File Format** window.



Select one of the three supported types and click **Next**.

Now **Browse** for the certificate you obtained from the user, then click **Save** to save it in the selected format.

Tip: should the certificate not be visible, then select **All files**. Now select the certificate and set the type back to .cer.



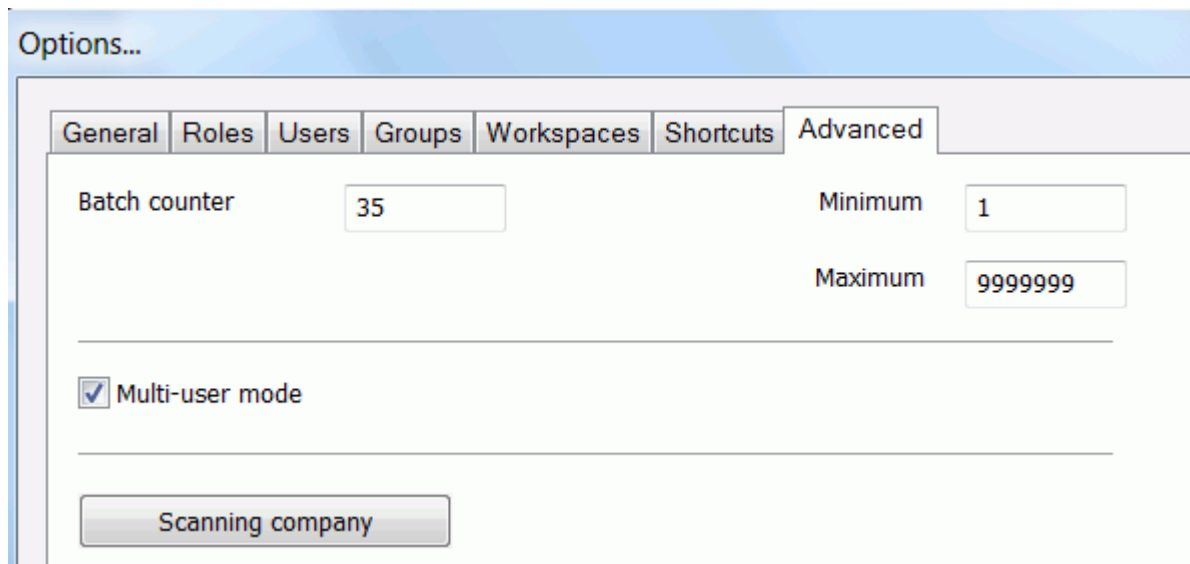
Additional certificate verification

IRIS Powerscan offers an advanced function to check the revocation status of certificates by means of an OCSP (Online Certificate Status Protocol).

The certificates used for signing documents are issued by a Certificate Authority (CA). In some cases the Certificate Authority is forced to revoke the valid status of certificates. Such cases include a change of name (for example, requiring to change the subject of a certificate due to an employee's change of name), change of association between subject and CA (for example, when an employee terminates employment with an organization), and compromise or suspected compromise of the corresponding private key.

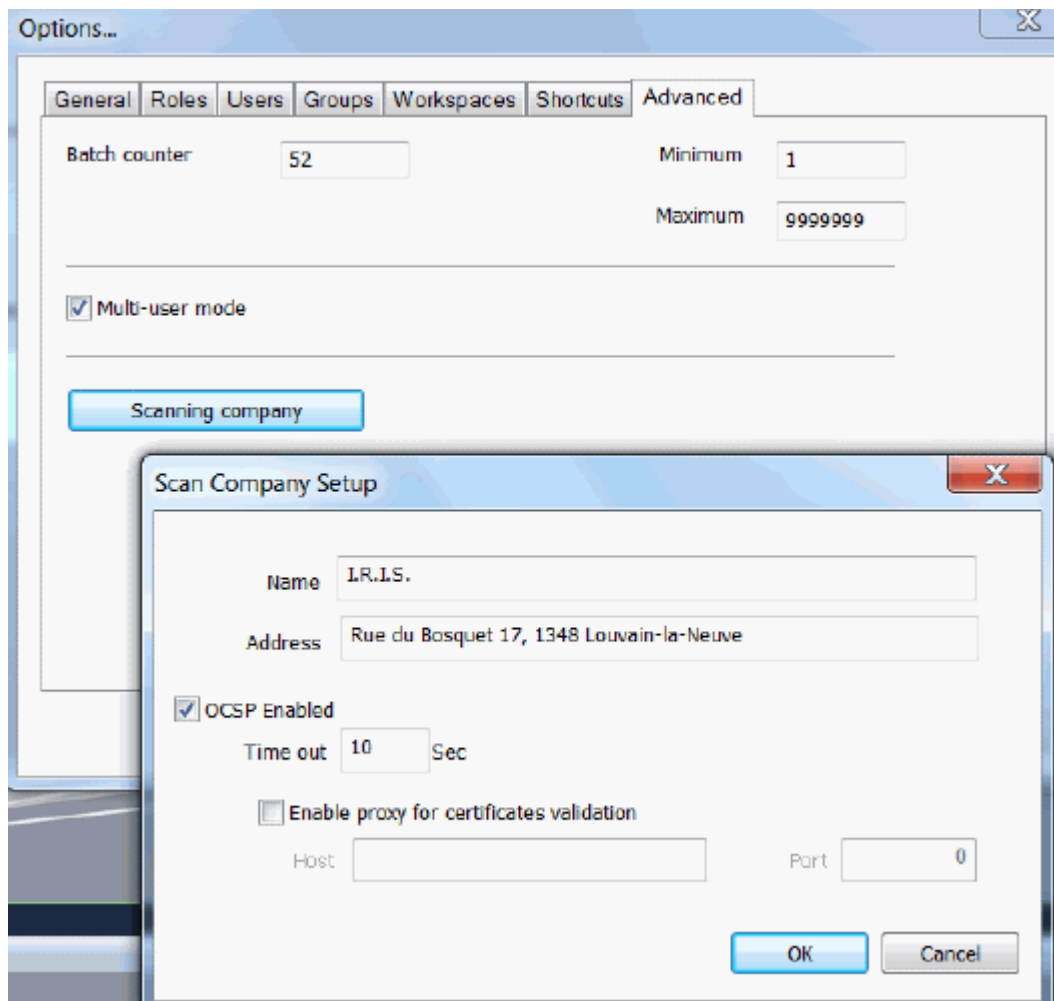
Therefore, it is useful to check the status by means of an OCSP:

- Start IRIS Powerscan from the Windows **Start** menu.
- In the **Settings** menu, click **Options**.
- Go to the **Advanced** tab and click **Scanning company**.



- Provide the scan company name and address.

This info should be the same as the one you use in your certificate.



- Select **OCSP Enabled** and **Enable proxy for certificates validation**.
- Enter the proxy server to use of certificate validation and click **OK**.
- Next time you scan documents in Legal Scanning mode the revocation status of the certificates will be checked.

SharedDrive add-on

Introduction

The **Shared Drive add-on** allows you to share IRIS Powerscan configurations (including projects, security settings and scanner settings) and batches on a shared drive.

This add-on is useful if you are using multiple instances of IRIS Powerscan on multiple network computers: each time the administrator changes the IRIS Powerscan configuration he can export his configuration to the shared drive, from which the other users can import it into their system. This way you can ensure that all IRIS Powerscan users on the connected work stations use exactly the same configuration.

Sharing possibilities

The SharedDrive add-on offers two sharing options: you can share entire **projects**, which contain complete configurations of IRIS Powerscan, or you can share **batches**, in case you want other users to work them.

Note, however, that only the Administrator has the possibility to share projects.

Benefits

Thanks to the **SharedDrive add-on** it is no longer necessary to configure each IRIS Powerscan station separately. Every scanning station can be synchronized automatically from a central location, i.e. the shared configuration.

How does the SharedDrive add-on work?

The schematic below provides an overview of how configuration sharing can be used in an IRIS Powerscan workflow.

1. Define the configuration settings & shared drive

The Admin defines the IPS settings, the sharing settings and the shared drive location.



2. Export the configuration

The Admin exports the configuration in a configuration file. The configuration is ready to be shared by other users.



3. Import and automatic synchronization

When a user starts IPS on his work station, the updated configuration file is imported automatically. So, the synchronization between the workstation and the shared drive is automatic.

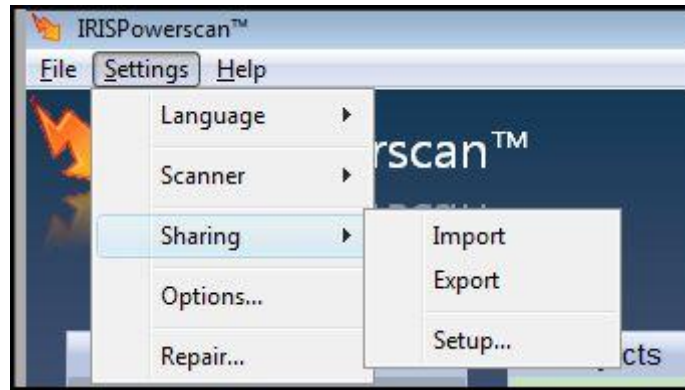
Using the SharedDrive add-on

Sharing projects (for Administrators only)

Before you can export projects you must first define the shared driver server to which the projects will be exported and you must define the sharing settings.

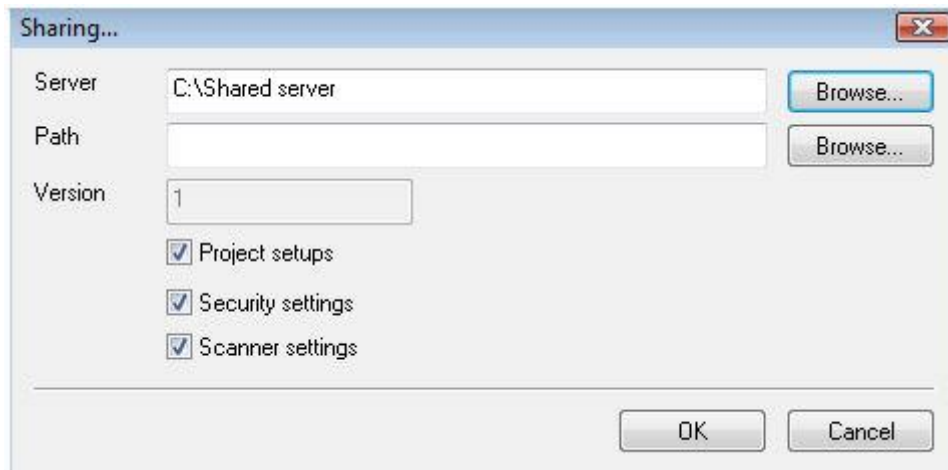
To do so:

- Start IRIS Powerscan from the Windows **Start** menu.
- Then go to **Settings > Sharing > Setup**.



- Click the **Browse** button to search for the **Server** on which the shared drive is located.
- Then click the **Browse** button next to **Path** to indicate the specific path of the shared drive. This is where you will export the projects that you have created in the Projects section of IRIS Powerscan.

Note: disregard the **Open** button at this time. It is used to import existing configuration files (.ips files). This function is explained in the section **Importing shared projects** below.



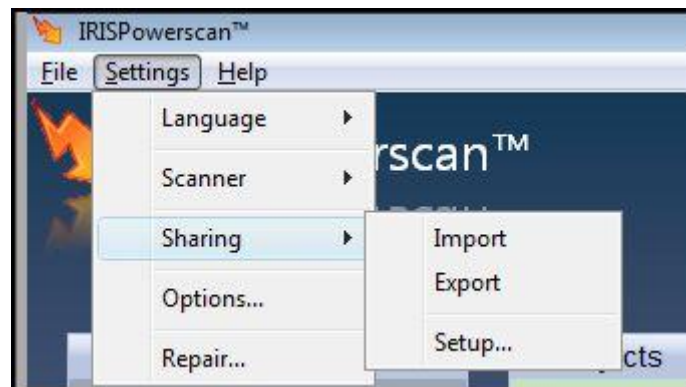
- Define which settings of the projects you want to share:
 - **Project setups:** the Project Setup consists of all the configuration options you have in the Scanning, Indexing and Processing section of IRIS Powerscan.
 - **Security settings:** this option allows you to share the security settings of your projects.
 - **Scanner setups:** this option allows you to share the scanner configuration of your projects.
- **Version:** the version field is filled in automatically. This function indicates which version of a project is being imported or exported.

Once you have configured these settings you can proceed to exporting project.

Exporting projects

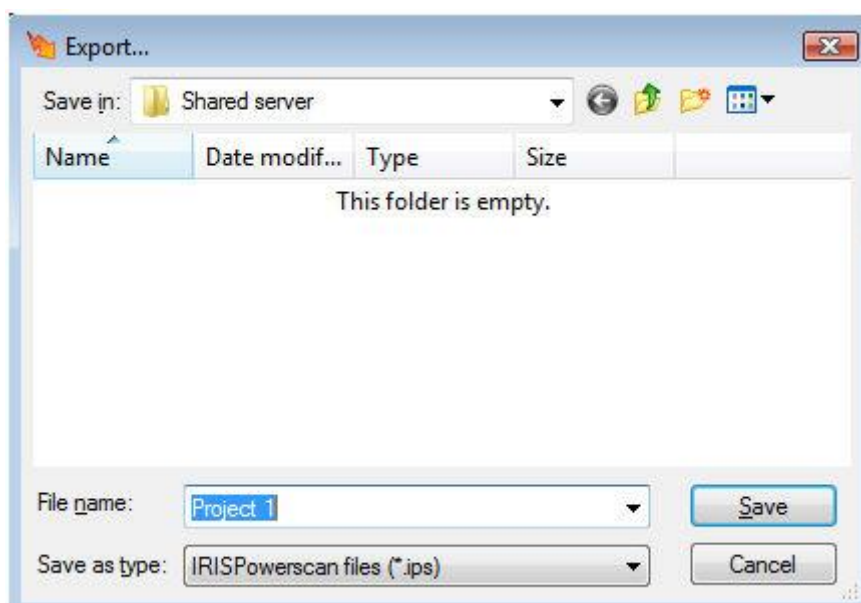
To export all the existing projects:

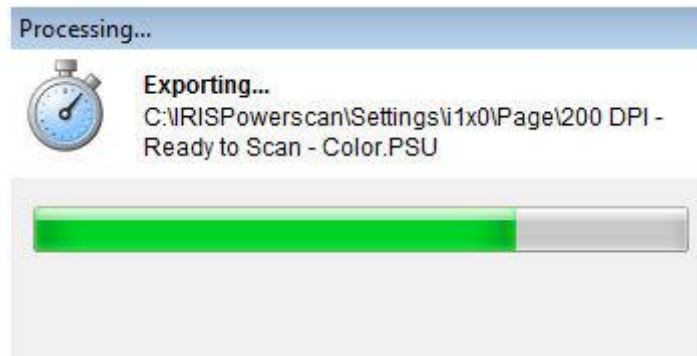
- Start IRIS Powerscan from the Windows **Start** menu.
- Go to the **Settings** menu > **Sharing** > **Export**.



- Indicate the shared drive server path, then name the configuration file and click **Save**.

Your projects will be saved as a single .ips configuration file.

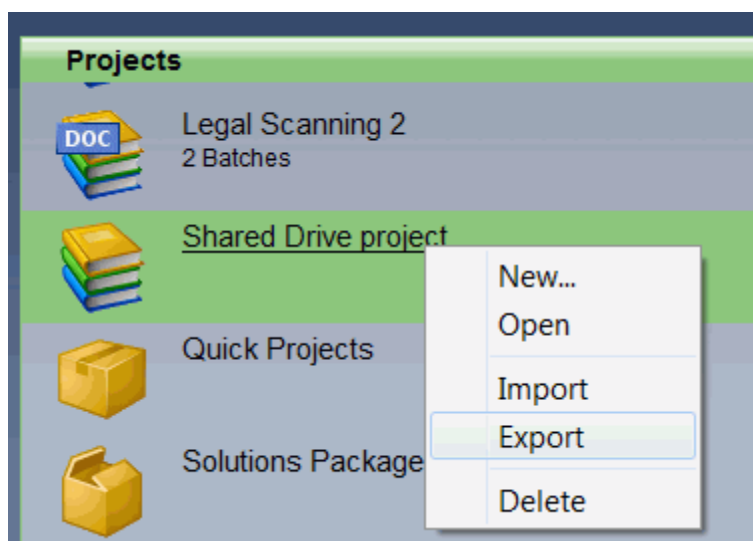




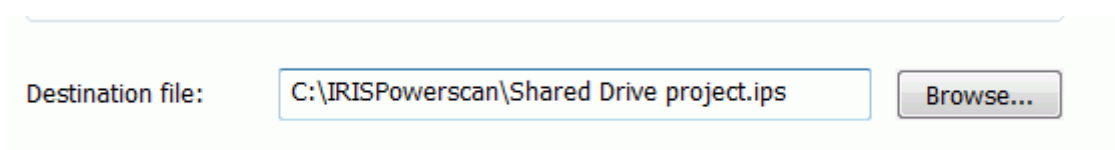
Important note: each time you modify a project and you want to export it again, make sure that you **select the same .ips configuration file** to export it to. A new version of the file indicating the updated version, e.g. **Project1_2**, will be created automatically. If you change the name or do not select the same .ips configuration file, then IRIS Powerscan will not realize it is an update and the version history will be lost.

To export a single project:

- Right-click a project in the **Projects** section of IRIS Powerscan.
- Then click **Export**.



- Then select the path of the shared drive server and name the .ips configuration file.



Importing shared projects

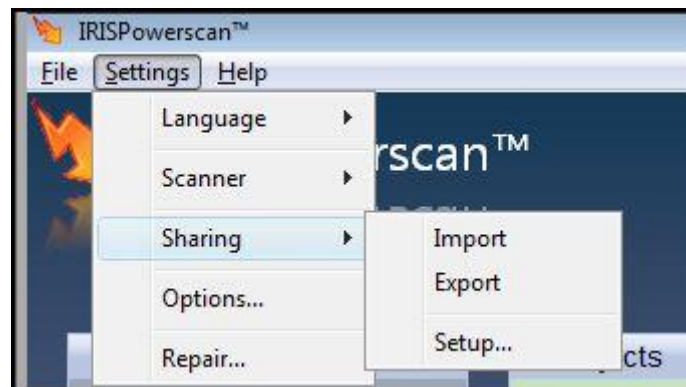
Once your projects have been exported to the shared drive, they can be imported by other users.

Note, however, that users need to have the right to import projects. This right must be activated in their user role. To learn how to check or add user rights, see the section **Modifying user rights**.

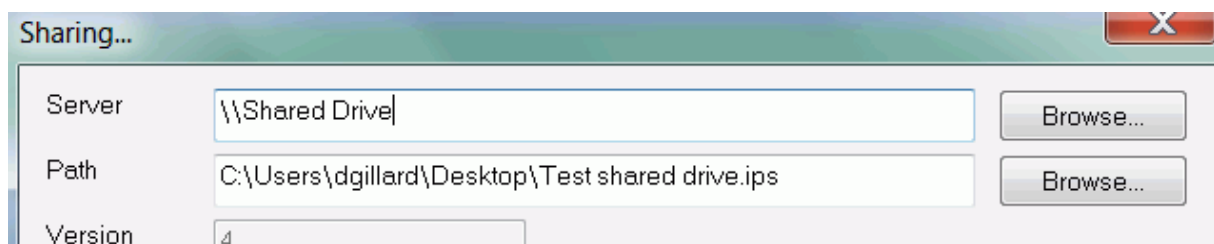
There are 3 ways to import shared projects into IRIS Powerscan: you can import them automatically, manually or directly from the shared drive server.

1. Importing shared projects automatically:

- In IRIS Powerscan go to **Settings>Sharing>Setup**.



- Click the **Browse** button next to **Path** and select the .ips configuration file you want to import.



- Next time you open IRIS Powerscan this project will be loaded automatically.

2. Importing projects manually:

- In IRIS Powerscan go to **Settings>Sharing>Import**.
- Select the .ips configuration file to import from the shared drive, then click **OK**.

3. Importing projects directly from the shared drive:

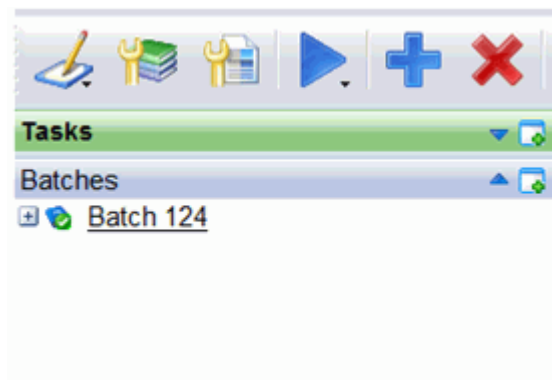
- Access the shared drive server via Windows Explorer.
- Double-click the .ips configuration file you want to import. IRIS Powerscan starts and loads the configuration file.

Sharing batches

To share a batch you scanned in IRIS Powerscan:

- Select the batch you want to share.

Note that you can share only one batch at a time.



- Then click the **Save**, **Save as** or **Send to** button on the main toolbar.



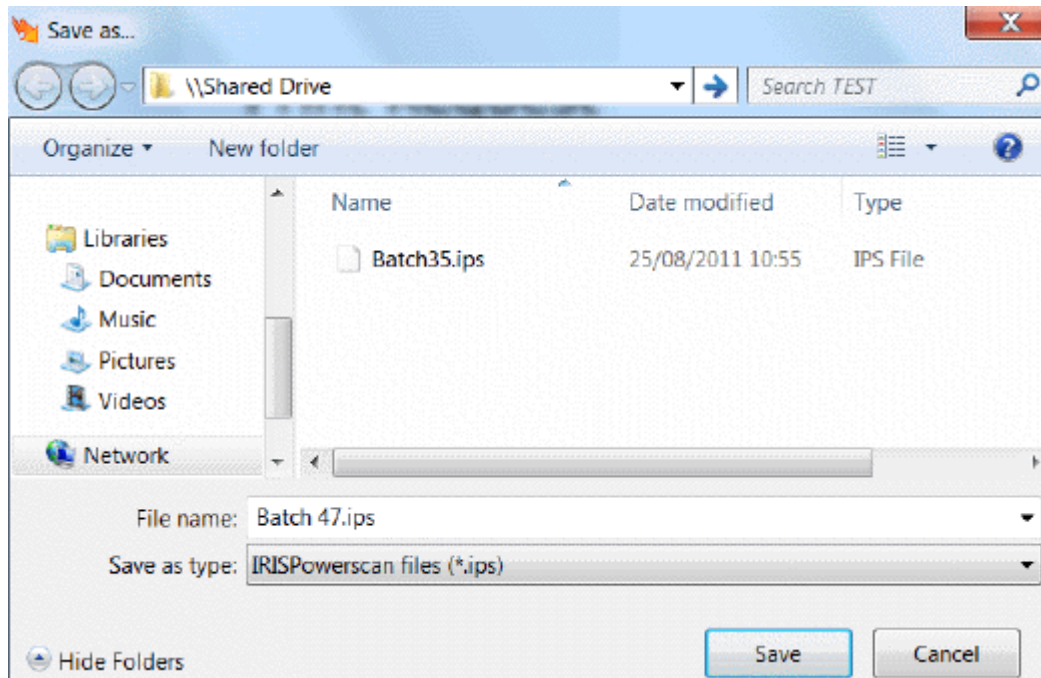
The buttons are only available on the main toolbar if the SharedDrive add-on has been registered. Each of these buttons has a very specific function:



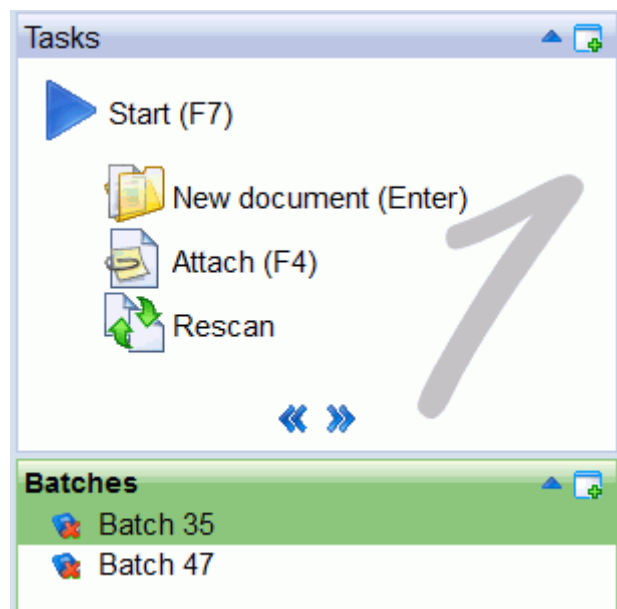
Save as: use this button to save your batch **for the first time** to the shared drive. Select the path of the shared drive, then click **Save**. The batch will be saved as .ips file, for instance Batch 47.ips.

Important note: it is strongly recommended not to change the name of the batch, since users have the possibility to make modifications to batches and save an updated version. If another

name is used during the export of an updated batch then the version history is lost and the batch cannot be exported properly.



Note that the batch you export will no longer be accessible from the IRIS Powerscan interface. This is to avoid that more than one user works on the same batch simultaneously. Notice the red cross over the batches you exported.



Open: use this button to open batches that you, or another user saved to the shared drive. Select the batch .ipc file you want to open from the shared drive, then click **Open**.



Save: use this button to save any modifications you made to a shared batch.

Again, a batch you export via the **Save** button is no longer accessible in your IRIS Powerscan interface.



Send to: use this button to send the batch .ips file as e-mail attachment.

Example of batch sharing

The schematic below provides an example of how batch sharing can be used in an IRIS Powerscan workflow.

1. Scanning and Export

One IRIS Powerscan station scans the images.

After scanning the batch is exported to the shared drive.



2. Import and Validation

Another IRIS Powerscan station imports the batch and validates the images.

After validation the batch is again exported to the shared drive.



3. Processing

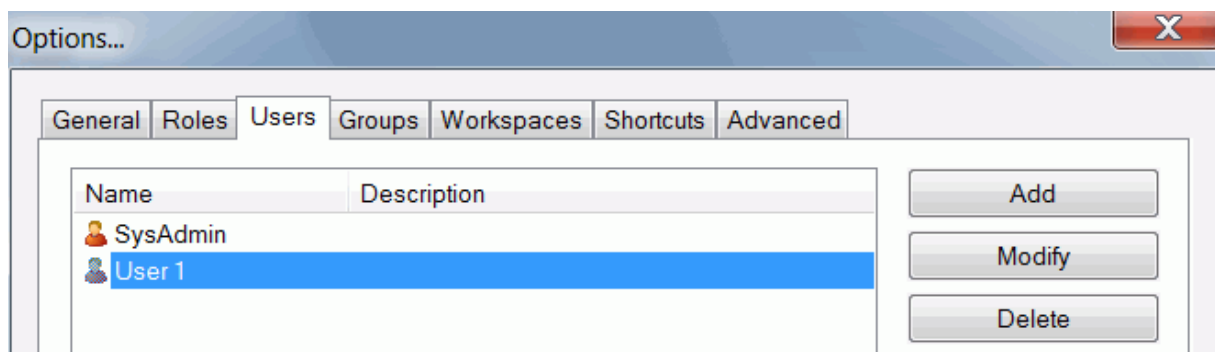
Yet another IRIS Powerscan station can import the validated batch to do the processing.

Modifying user rights

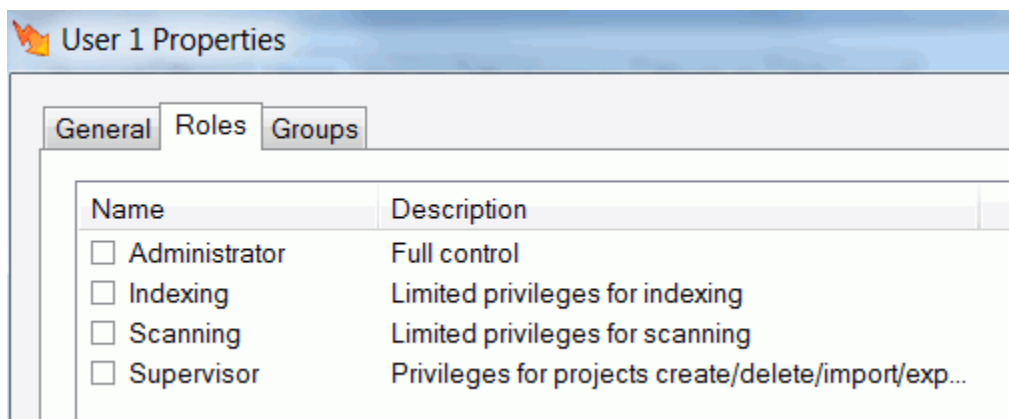
Whether or not users have the right to import shared projects depends on their user **role** - their user profile.

To change user role and modify user rights:

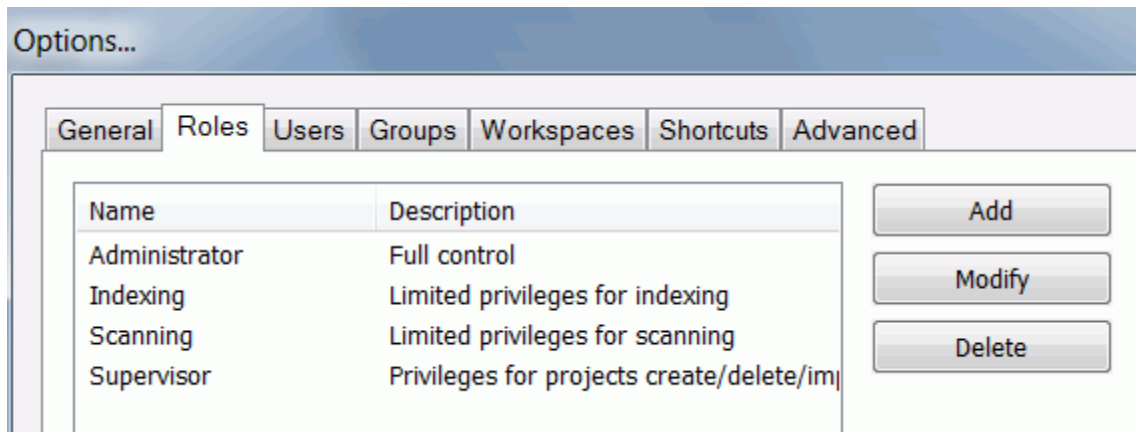
- In the IRIS Powerscan main screen, go to **Settings > Options**.
- Click the **Users** tab and select the user of your choice.



- Then click **Modify** to modify his user rights.
- Click the **Roles** tab and select the required role.



Tip: to see which user rights each role comprises, return to the **Options** menu and click the **Roles** tab.



There you can **Add** new user roles that allow importing projects, or **Modify** existing ones.

