



IRIS Powerscan™ Server

11.0

User Guide

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Canon
CANON GROUP

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IRIS Powerscan™ Server Users's Guide

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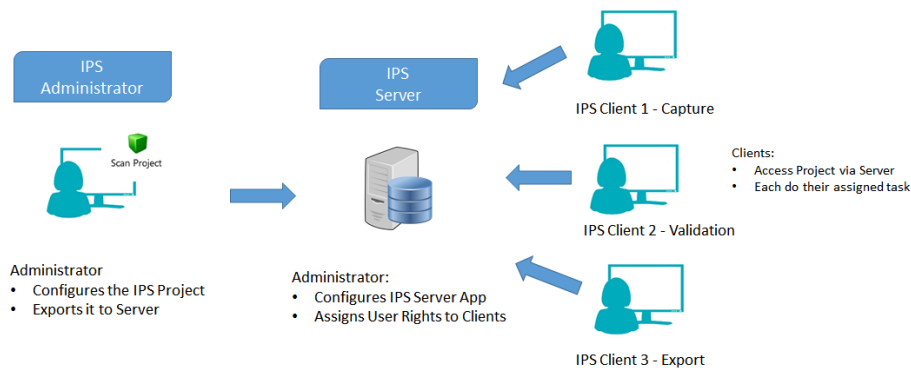
IRIS Powerscan™ Server integrates the following patent-granted I.R.I.S. technologies: US8068684; US8331706; US8666185; JP5501958; US8995780; EP2143039A2; EP14163365.1; BE1022166; BE1022635; US8913836; BE1022630; US8897600; BE1022636; US8811751; US8411940; BE1021013; US9058517; US9183636; US9311558; BE1025006; BE1022562; US9798943; BE1024194; US9836646; BE1024836.

About IRIS Powerscan™ Server

By means of IRIS Powerscan™ Server, Administrators can set up a **Client Server Architecture** between IRIS Powerscan™ Server and multiple IRIS Powerscan™ Workstations - or Clients on the same LAN network. This way the three activities of IRIS Powerscan™ - being **Capture**, **Validation** and **Export** - can be divided over different Clients and you can set up an entire workflow process. Some users take care of the scanning, while others do the index validation and the server does the export (most commonly used).

How does it work?

1. An Administrator configures a Project that different IRIS Powerscan™ Clients will work on.
2. He exports the project from the standalone application and imports it within the IRIS Powerscan™ Server application.
3. He configures the different users and their permissions inside the IRIS Powerscan™ Server application.
4. The users connect their IRIS Powerscan™ Client to the IRIS Powerscan™ Server using the credentials they obtain from the Administrator.



Client-Server overview

IMPORTANT

WARNING: Before modifying a project, make sure that no batches are pending for that project. Failing to process all the batches before changing a project can lead to random errors.

- The IRIS Powerscan™ Server application must be installed on a computer/server to which all required IRIS Powerscan™ Clients have access.
- The IRIS Powerscan™ Server application itself can only be accessed via the computer on which it is installed, or via standard Remote Desktop Connection. There is no remote control or Web control foreseen.
- The Projects that are shared via IRIS Powerscan™ Server **cannot** be modified via the IRIS Powerscan™ Server application or by IRIS Powerscan™ Clients. These Projects are **Read-only**. The only setting in a Project that can be changed are the Scan Source settings.

If other modifications need to be made to a Project, an Administrator must:

- Export the Project from the IRIS Powerscan™ Server and import it to an IRIS Powerscan™ standalone application.

Note: Standalone implies being disconnected from the Server. Even an Administrator cannot modify a Project if his IRIS Powerscan™ application is still connected to IRIS Powerscan™ Server.

- Do the required modifications.

- Export the Project back to the IRIS Powerscan™ Server application.
The original project on the Server will be overwritten if it has not been renamed.
- Restart the required IRIS Powerscan™ Clients again.
The modified version of the Project will now be copied to the Clients.

Note: When working with IPS Server, a Standard Operating Procedure must be in place. The IPS server administrator must be trained and must control the daily production. Some project statuses or batch statuses may require some attention and appropriate actions.

Step 1: Install the IRIS Powerscan™ Server

System Requirements

WARNING about Virtual Machines:

Some virtual machines running on a laptop or small computer may not be usable. Some scanners are not recognized properly and the IRIS Powerscan™ installation may fail if the Virtual Machine is not up to date with the latest Windows updates.

Also note that a Virtual Machine must have at least **4 virtual cores** (or vCPU). Should you need adding cores, make sure you create a VM with the desired number of cores straight from the beginning (indeed, changing the VM's configuration after first deployment can make the VM unstable)

If your virtual machine has vSocket and vCore, you must multiply them to obtain the amount of vCPUs.

IRIS Powerscan™ Server

REQUIREMENTS	OS	CPU	RAM	HDD
Minimum for IPS SERVER	Windows 10, Windows Server 2012 R2, 2016 (64-bit)	At least 4 processors or more. IRIS Powerscan™ will use all available resources. The more resources, the faster the processing.	8 GB	50 GB free hard disk space preferably on a Solid State Disk drive.
Recommended for IPS SERVER	Windows Server 2019 (64-bit)	If they are vCPU, it is highly recommended to have 8. (to have the final value if you have vSocket and vCore, simply multiply the number of vCore per the number of vSocket to get the total amount of vCPU.	16 GB Fast IO is highly recommended	100 GB free hard disk space SSD drives are highly recommended. Fast IO is highly recommended
Network requirements	<ul style="list-style-type: none"> Internet connection The Network infrastructure must be reliable and must have a decent bandwidth. The performance of the IRIS Powerscan™ Client Server is highly dependent on the quality and performance of the network and the server/computers. The Firewall and anti-virus software should block neither the ICMP ping commands, nor the HTTP port on which IRIS Powerscan™ Client Server is set up. 			

IRIS Powerscan™

REQUIREMENTS	OS	CPU	RAM	HDD
Minimum for IPS*	Windows 7, 8, 8.1 (64-bit) Windows Server 2012 R2, 2016, 2019** (64-bit)	2.2 GHz processor	8 GB	10 GB free hard disk space
Recommended for IPS*	Windows 10 (64 bit)	Processor Intel i7 or similar. 2.6 GHz or faster, with at least 4 cores	16 GB	50 GB free hard disk space preferably on a Solid State Disk drive.
Network requirements	Internet connection			

* IPS Standalone, Clients or Unattended

** **WARNING:** you won't be able to use a Scanner if you use IPS on Windows Server OS.

Installing IRIS Powerscan™ Server

Preliminary note:

The IRIS Powerscan™ Server application must be installed on a computer to which the IRIS Powerscan™ Clients have access.

To install IRIS Powerscan™ Server:

- Download the IRIS Powerscan™ package from the I.R.I.S [Partner Portal](#)
- Double-click **IRIS PowerscanServer.msi**
- Select **I agree to the License terms and conditions**.
- Click **Install** and follow the on-screen instructions.
- Click **Close** to finish the installation.

Note: if you want to use the IRIS Powerscan™ Server Service to carry out the Import (Server is selected in the Capture activity), for instance to use IRIS Powerscan™ Server for Watched Folders, you need to have a Speed license (30, 60, 100, 130 or unlimited PPM) on the IRIS Powerscan™ Server. This Speed license comes with a regular IRIS Powerscan™ package. You must select the one that best matches your requirements in terms of import speed, output connector and iHQC PDF compression.

To activate this license, simply follow the **installation and activation** procedure.

Configure IRIS Powerscan™ Server

Start the IRIS Powerscan™ Server Service

The IRIS Powerscan™ Server **Service** should start automatically.

To check if it is started:

- Open the IRIS Powerscan™ Server application.
- If the traffic light icon in the bottom ribbon is green, the service is started.
If the traffic light icon is red, click it to start the service.



WARNING: When setting up your users, groups and projects on the server, we recommend you to stop the IRIS Powerscan™ Server Service. Once all your settings are correct and ready, then you can start the IRIS Powerscan™ Server service.

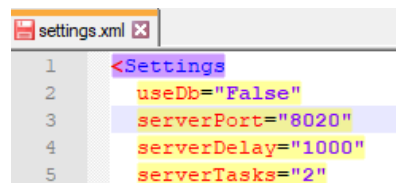
Open the Required Port

By default, TCP port 8080 must be open on the IRIS Powerscan™ Server in order for Clients to connect to the Server.

If that port is used by another application, you can configure IRIS Powerscan™ to use a different one.

To change the port:

- Start the IRIS Powerscan™ Server Service as described above.
- On the computer where IRIS Powerscan™ Server is installed, open a browser and go to %programdata%\IPS11Server\LocalProjects.
- Right-click **settings.xml** and click **Edit**.
- Change the **serverPort** value from 8080 to another one.



- Save the **settings.xml** file.
- Click the traffic lights icon again to stop and then to restart the IRIS Powerscan™ Server Service.

Note: if the default port has been changed, the port information must be communicated to the different IRIS Powerscan™ Clients. They need it in order to connect to the Server.
The default port does not need to be specified.



IRIS Powerscan 11 Server

jsmith.iris.com:8020 Connect...

Step 2: Install the IRIS Powerscan™ Clients

On each computer you want to use as IRIS Powerscan™ Client you need to install an instance of the IRIS Powerscan™ application.

To install IRIS Powerscan™:

- Download the IRIS Powerscan™ package from the I.R.I.S [Partner Portal](#)
- Run the **IRIS Powerscan.msi**.
- Click **Next** and follow the on-screen instructions.
- Click **Finish** to finish the installation.

Tip: you find your activation code in the email you received from I.R.I.S.

Step 3: Configure a Project on the IRIS Powerscan™ standalone application

How to configure a **Project** is explained in the IRIS Powerscan™ **User Guide** and **How To Guide**.

WARNING:

The Project can only be configured in the IRIS Powerscan™ **standalone** application - when it is **disconnected** from the IRIS Powerscan™ Server.

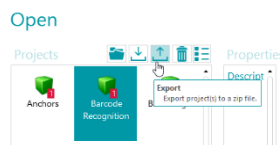
It cannot be configured within the IRIS Powerscan™ Server application or on IRIS Powerscan™ Clients that do not have Administrator rights.

If changes ever need to be made, **export** the Project from the IRIS Powerscan™ Server application and import it again in the IRIS Powerscan™ standalone application, where an Administrator can modify it.

Export the Project

When you are done configuring the Project in the standalone application, export it.

- In the IRIS Powerscan™ standalone application, click **File > Open**.
- Select the Project you want to export.



- Click the up arrow to export the project.
- Store it in a location to which you have access from the IRIS Powerscan™ Server.
The project will be stored as .zip file.

Step 4: Configure the user groups on the IRIS Powerscan™ Server

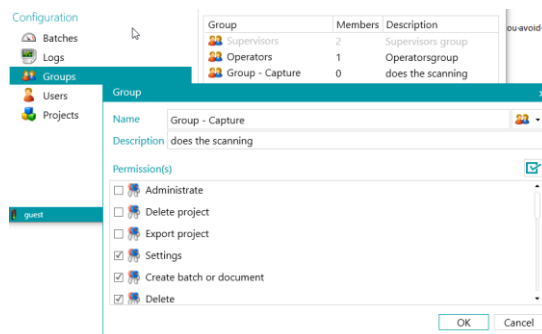
In order for IRIS Powerscan™ Clients to connect to the Server and access shared projects, they need the necessary user permissions and credentials. You can configure the user permissions, assign users to a group and determine their credentials with the IRIS Powerscan™ Server application.

Creating User Groups

The user permissions are defined in the **Groups** section. Each user belonging to the same group has the same permissions. This way you avoid having to configure the permissions for each user separately.

To create a user group:

- Open the IRIS Powerscan™ Server application.
- In the **Home** tab, select **Groups** and click **Create**.
- The new **Group** is added to the **Groups** list.
- Double-click the new group to edit its **Permissions**.
Or select it and click the **Edit** button.



Creating user groups

- Select the required **Permissions** from the list and click **OK**.
 - **Administrate:** user may access the **Users**, **Groups** and **Batches** sections in the IRIS Powerscan™ main application's **Application** menu.

Tip: do not enable this option for Clients.

- **Delete Project:** user may delete projects.
- **Export Project:** user may export projects so they can be used in other workstations or by the IRIS Powerscan™ Server.

Tip: do not enable this option for Clients.

- **Settings:** user may modify the settings of the input source.
- **Create batch or document:** user may create new Documents and Batches.
- **Delete:** user may delete elements.
- **Undelete:** user may undelete Pages that are marked for deletion.
- **Split:** user may split batches and documents.
- **Merge:** user may merge batches and documents.
- **Reorder:** user may reorder the pages.

- **Cut:** user may cut elements.
- **Copy:** user may copy elements.
- **Paste:** user may paste elements.
- **Swap:** user may swap the sides of a Duplex page.
- **Attach:** user may attach pages.
- **Detach:** user may detach pages.
- **Rotate:** user may rotate pages.
- **Crop:** user may crop the size of pages.
- **Fill:** user may fill parts of the pages.
- **Customize:** user may customize the view of the projects.
(by means of the Show/Hide tools on the View tab)
- **Designer:** not relevant in client-server mode. No impact.
- Now you must add at least one User to the Group.

Note that there are also two default groups: **Supervisors** and **Operators**.

The **Supervisors** group has access to all permissions. In other words, Supervisors can do all **configuration actions**. The permissions of the Supervisors group *cannot* be modified.

The **Operators** group is by default allowed to scan and process documents in IRIS Powerscan™ but cannot do advanced configurations. The permissions of the Operators group *can* be modified.

Creating Users

To add a user to a group:

- Select **Users** and click **Create**.

- The new **User** is added to the **Users** list.
- Double-click the new user to edit its **Settings**.
Or select it and click the **Edit** button.
- Enter a **Name** for the new user.
- To apply a password, click **Change password**.
If this is the first time you attribute a password, leave the **Old Password** field empty, enter the password in the **New Password** field, and confirm it.
- To change the default user icon, select another icon from the list.
- If the user is/should be part of a domain, enter the domain in the **Domain** field.
- The **Status** of the new user is by default set to **Active**.
To deactivate the user later on, return to this menu and select **Inactive**.
- Select the interface language from the **Language** list.
When the user logs in, the interface is displayed in the selected language.
- Select the **Unit** in which measurements must be displayed: centimeter, inch or pixel.
- Select the **Group** to which you want to add the user.

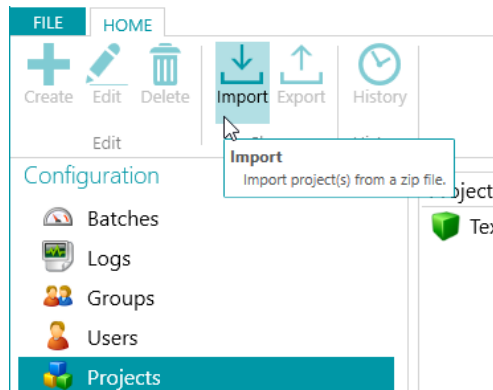
- Once you have created a user in IRIS Powerscan™ Server, he can connect his workstation to the Server and log in using his credentials.

Note that there are 2 default Users in IRIS Powerscan™: **guest** and **SysAdmin**. Both belong to the **Supervisors** group and therefore have all **Permissions**.

Tip: we recommend you to create new groups and new users that best describe your application.

Step 5: Import the Project into the IRIS Powerscan™ Server

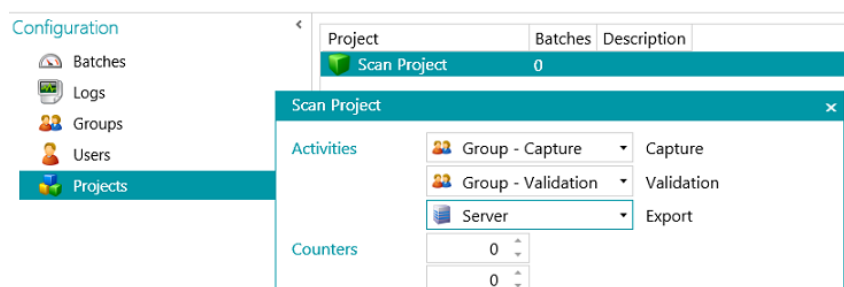
- Start the IRIS Powerscan™ Server application.
- Click **Projects**.
If you are using IRIS Powerscan™ Server application for the first time, the **Projects** list should be empty.
- Click **Import**.
Now browse for the project you exported from the IRIS Powerscan™ standalone application. The project is in the .zip format.
- Then select **Open**.



Determine which User Groups may carry out which activity: Capture, Validation, Export

- In IRIS Powerscan™ Server click **Projects**.
- Double-click the Project you configured.
- Select which activity should be carried out by which User Group.

Note: if you choose **Server** as Group, the activity will be carried out by IRIS Powerscan™ Server in the background, and will not require a user intervention.
We recommend you NOT to assign an activity to **Service**, but instead to a **group** or **server**.



Step 6: Connect Client to the IRIS Powerscan™ Server

In order for users to collaborate on projects that are managed by the IRIS Powerscan™ Server, they must connect their IRIS Powerscan™ Client to the IRIS Powerscan™ Server and log in using the credentials that were specified in the IRIS Powerscan™ Server.

Step 1: Connect an IRIS Powerscan™ Client to the IRIS Powerscan™ Server

- Open the IRIS Powerscan™ Client
- Click **File > Info > Generalities**.
- In the **IRIS Powerscan™ 11 Server** section, enter the address where the IRIS Powerscan™ Server is installed.
For instance jsmith.
- Then click **Connect**.



IRIS Powerscan 11 Server

Connect...

- When the connection is established, click **Restart now** to restart the application.

You can check on the client-server connections in the Users configuration:

FILE

HOME

Create

Edit

Delete

Import

Export

History

Edit

Share

History

Configuration

Batches

Logs

Groups

Users

Projects

User	Active	Status
guest	<input checked="" type="checkbox"/>	
operator	<input checked="" type="checkbox"/>	
SysAdmin	<input checked="" type="checkbox"/>	
G1_User1	<input checked="" type="checkbox"/>	
G1_User2	<input checked="" type="checkbox"/>	
G2_User1	<input checked="" type="checkbox"/>	
G2_User2	<input checked="" type="checkbox"/>	
G3_User1	<input checked="" type="checkbox"/>	
G3_User2	<input checked="" type="checkbox"/>	
G3_User3	<input checked="" type="checkbox"/>	
G3_User4	<input checked="" type="checkbox"/>	
G3_User5	<input checked="" type="checkbox"/>	
G3_User6	<input checked="" type="checkbox"/>	
G3_User7	<input checked="" type="checkbox"/>	
G3_User8	<input checked="" type="checkbox"/>	

Step 2: Log in from the IRIS Powerscan™ Client

- Open the IRIS Powerscan™ Client.
- Click **File > Login**.
- Click **Yes** to restart the application.
- When the application restarts, enter your **Domain\Username** and **Password** and click **OK**.

Login

User name

Password

- Select the Project you want to open.
The Projects that are listed here are the ones managed by the Server.

Note: a Client only sees the Projects to which he has access.

- Carry out the actions for which you have permissions and click **Process** to go to the next step of the process.

Note: when processing heavy batches, it may take some time for the batches to be moved to the next step.

Workflow Example

In this section we provide an **example of workflow** of how different IRIS Powerscan™ Clients can collaborate using a shared project.

In our workflow, Client 1 does the Capture, Client 2 does the Validation, and the Export is done automatically by the Server.

WARNING:

Do not change a project when batches are pending
Stop the [service](#) when changing groups, users or projects.

IRIS Powerscan™ Server Configuration

Create the required user group and user in IRIS Powerscan™ Server

- Add the group "Group - Capture", add "User 1" to the group "Group - Capture" and assign a password.
- Add the group "Group - Validation", add "User 2" to the group "Group - Validation" and assign a password.

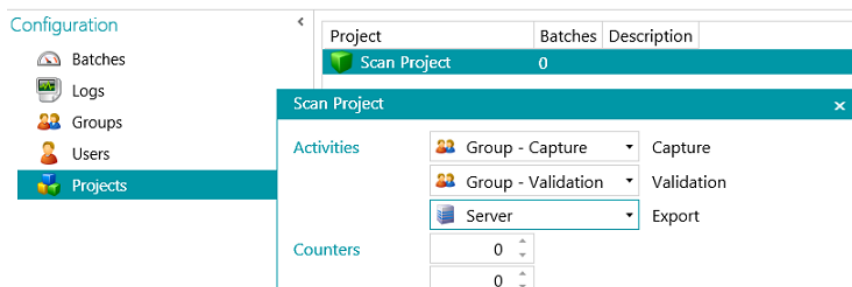
See [Define Groups and Users](#) if necessary.

Share a project on which you want the Clients to collaborate

- Configure the project in the IRIS Powerscan™ standalone application, export the project and import it into the IRIS Powerscan™ Server application.
- Open the imported project in IRIS Powerscan™ Server and specify which activity should be carried out by which User Group.

In our example select:

- Select "Group - Capture" in the **Capture** list.
- Select "Group - Validation" in the **Validation** list.
- Select "Server" in the **Export** list.



- When the configuration is done, click the traffic lights icon in the bottom left corner to start or restart the IRIS Powerscan™ Server Service.



Workflow

User 1: does the Capture

- Start the IRIS Powerscan™ Client.
- Connect the Client to the Server via **File > Info > Generalities**.



IRIS Powerscan 11 Server

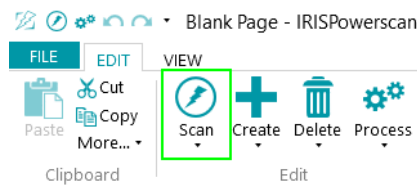
- Go to **File > Login** and enter your credentials.

Login [X]

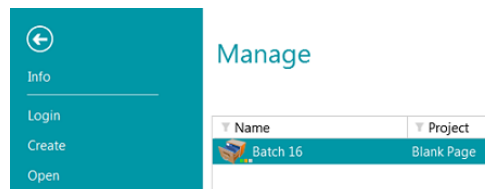
User name

Password

- Open the shared project and click **Scan**.



Tip: to check the status of the batches, go to **File > Manage**. The batches in progress are listed.



Notice the **3 tiny LEDs** next to the Batch icon. They indicate the different steps: Capture, Validation and Export. Each of the LEDs also indicates the status of the corresponding activity in a different color:

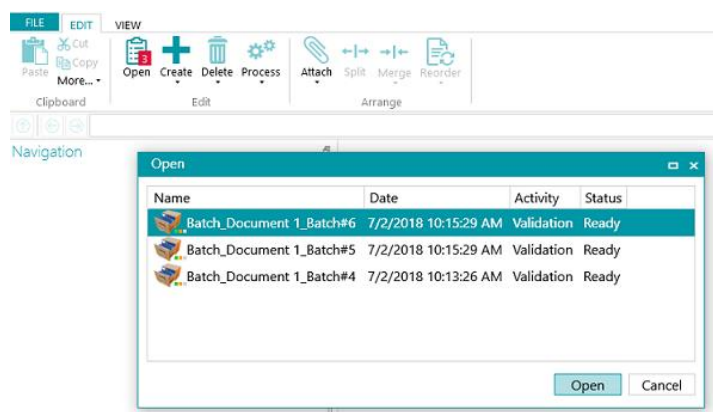
- Grey: activity is not started.
- Orange: ready to be processed.
- Orange (blinking): in progress.
- Green: completed.
- Red: in error.

So a batch with the leds green, orange and grey means the **Capture** is done, the **Validation** is ready to be done and the **Export** is not yet ready.

- When the scanning is done, click **Process**.
The task of User 1 is now completed. The batches are transferred to the IRIS Powerscan™ Server where they are available to User 2 to do the Validation.

User 2: does the Validation

- Start the IRIS Powerscan™ Client.
- Connect the Client to the Server via **File > Info > Generalities**.
- Go to **File > Login** and enter your credentials.
- Open the shared project. You will notice that the batches that were scanned by User 1 are ready for validation.
- Click **Open**, select the batch you want to validate and click **Open**.



- Do the Validation. When you are done, click **Process**. The validated batch will be transferred to the IRIS Powerscan™ Server, where it is exported automatically to the configured destination.

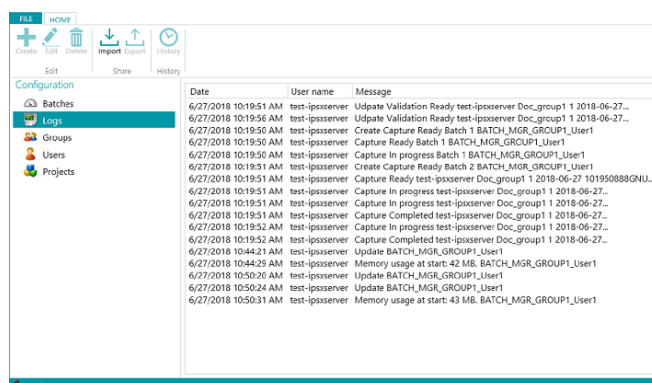
Note: if User 2 does not want to do the validation, he can discard the batch to release it for another User. To do so, click on the arrow below the **Process** button and select **Discard**.



Logs Information

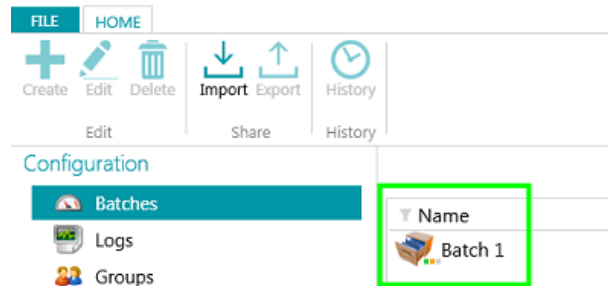
The Administrator can access the **Logs** information via the IRIS Powerscan™ Server application. There you can find the events reporting each Client's actions, their batches and their associated activities.

Note that Clients cannot access these **Server logs**, they can only access the information about their own batches.



Batch Lifecycle Information

- All batches and their status can be checked by the Administrator in the IRIS Powerscan™ Server application via **Home > Batches**



Tips:






Double-click a Batch to display its lifecycle information.
The [3 tiny LEDs](#) meaning.

- The Administrator has the ability to change the status of a batch, or delete a batch in the IRIS Powerscan™ Server, if for instance an error occurred.
To move the batch to a previous step, use the return arrows.

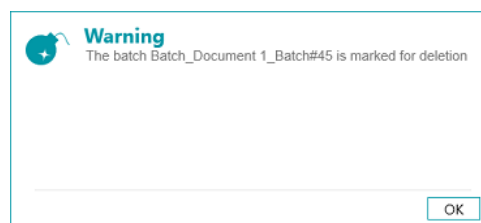


Action buttons (tooltips available in the User Interface)

Administrators can do the following actions:

-  Unlock a batch locked by a Client.
-  Move to validation: move the batch to validation activity.
-  Move to export: move the batch to export activity.
-  Show a batch history.
-  Delete a batch at any stage.

When **Clients** are still logged in and connected to the Server, a warning message is displayed as soon as a checked out batch is deleted or reset on the server. This warning message appears in **Navigation mode**.



Client side: warning message

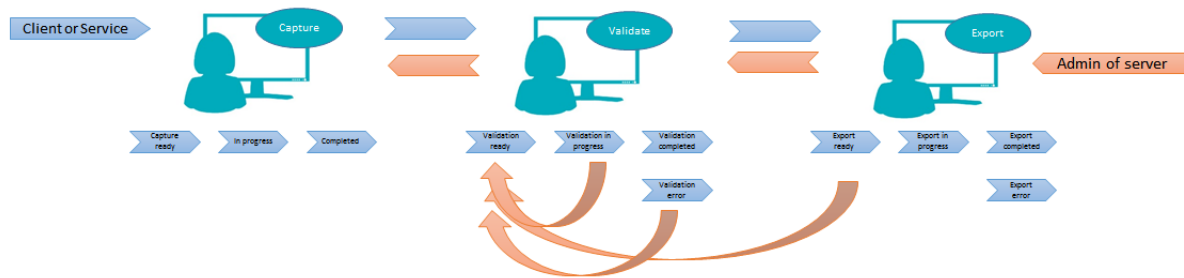
The batch goes back to the previous step and Clients need to perform their task on the batch again.

The Clients, in turn, can do the following actions:

- Delete a batch (provided they have the Administrate Permission).
- Redo the Capture.

- When a Validator opens a batch for validation, that batch will be locked (greyed out) to other clients. If this Validator leaves his computer without completing the validation, the batch will remain in that state until either the Validator returns to finish the job or until the Administrator/Production Manager* unlocks the batch on the Server and resets it to the "**Validation Ready**" state.

* In a **Client-Server Architecture** it is recommended to have a Production Manager who checks the production on a daily basis to guarantee that all batches are correctly processed without errors. In case of errors, he must check what happened, take corrective actions, restart the processing of the batch, restart the validation or ask for a batch rescan.



Example workflow

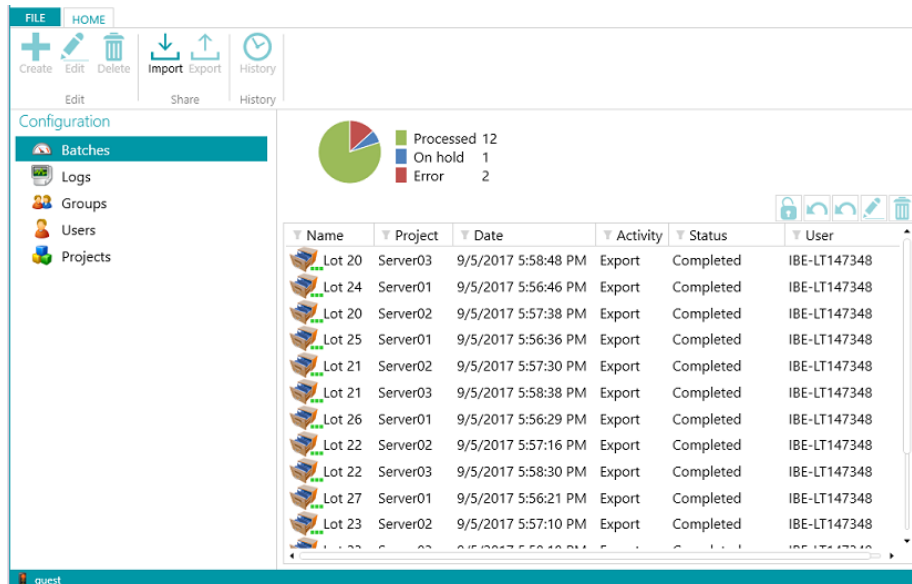
- If a Client fails or cannot see his batches anymore, the batches are not lost. They are stored on the Server as a fail safe mechanism.

WARNING: the server admin has full powers with NO undo possibilities. That means deleting or changing batches, groups or users can lead to data loss if not done carefully and at the right time.

Batch Activity View & Statistics

IRIS Powerscan™ Server brings a new batch activity view and statistics.

The batch activity view tells you the amount of batches that have been processed, or waiting to be processed or in error.



Activity view

In the project view, you can see some statistics for each one of your projects.

Project	Batches	On hold	Error	Processed	BPD	IPM	Avg IPM	IPD	Description
Server01	5	1	0	4	4	143	108	200	
Server02	5	0	1	4	4	126	111	200	
Server03	5	0	1	3	4	94	95	200	

Project view and statistics

Here are the information you can see for each projects (cf. Glossary):

BPD (batches per day)

IPM (images per minute)

IPD (images per day)

Avg IPM (average images per minute)

Reporting and Exporting Server Statistics

Under the **Info > Generalities** tab, you can find the reporting section where you can enter your email settings in order to get notifications when fault or project error occurs.

Under the same section, you can save or reset the server statistics.

Resetting the statistics flushes all *Processed*, *BPD*, *IPM*, *Avg IPM* and *IPD* data

Info

The screenshot shows the 'Generalities' tab selected in the left sidebar. The main content area is titled 'IRIS Powerscan 11 Server' and includes the following sections:

- Program version:** 11.0.0.679
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- Reporting** (indicated by a clock icon):
 - ☒ Send email on error
 - ☒ Batch on error
 - To:** john.smith@mail.com
 - Cc:** (empty field)
 - Host:** (redacted) **Port:** 587
 - User name:** (empty field)
 - Password:** (empty field)
 - Timeout:** 60 **Seconds**
 - ☐ Use SSL?
 - Send test** button
- Statistics** (indicated by a bar chart icon):
 - Last reset:** 6/6/2019 5:17:24 PM
 - Reset** button
 - Export statistics** button

Reporting and Statistics settings

The *Export statistics* button allows the user to save the data in XML format:

```
<Statistics date="9/5/2019">
  <Projects>
    <Project name="Server03" bpd="4" ipd="200" ipm="151" avgIpm="109">
      <Total None="0" OnError="1" Processed="4" OnHold="0" />
    </Project>
    <Project name="Server01" bpd="4" ipd="200" ipm="143" avgIpm="108">
      <Total None="0" OnError="0" Processed="4" OnHold="1" />
    </Project>
    <Project name="Server02" bpd="4" ipd="200" ipm="126" avgIpm="111">
      <Total None="0" OnError="1" Processed="4" OnHold="0" />
    </Project>
  </Projects>
  <Total None="0" OnError="2" Processed="12" OnHold="1" />
</Statistics>
```


Glossary

A

Avg IPM: Average images per minute: takes the last 10 processing speeds in IPM and computes the average value.

B

BPD: Batches per day: counts all processed batches during the last 24 hours.

I

IPD: Images per day: counts all processed images per day.

IPM: Images per minute: is a speed indicator computed during the last processing. It counts all images processed per minute.