



IRISmart Security™

User Guide

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About this Documentation

The aim of this documentation is to help you get up to speed with using IRISmart Security. It covers IRISmart Security's installation and setup, the basic processing steps and the application's commands and working areas.

The descriptions in this documentation are based on the **Windows® 10 Operating System**. All information is subject to change without prior notice.

1. What is IRISmart Security?

IRISmart Security is an easy-to-use **scanning application**. It is a '**Scan to PDF**' solution, a **document classification** solution and a **data extraction** solution for **ID cards and passports**.

1.1 General Features

Scanning

IRISmart Security is compatible with the latest generation of I.R.I.S. scanners and other Twain scanners. It supports simplex and duplex scanning, and also multi-stream scanning (where color and black and white images are scanned simultaneously). Its scanning speed is up to 100 PPM (pages per minute).

In IRISmart Security you can either scan from a scanner or from folders.

Document Separation

All paper documents / electronic files that are scanned in IRISmart Security are **classified** into a logical **Batch > Document > Page** structure.

- **Batch:** a batch is a collection of documents.
- **Document:** a document is a collection of pages.
- **Page:** a page is the scanned equivalent of **one side of a paper sheet**, or the equivalent of **one image** imported into IRISmart Security. A Page is either front or rear. A page may contain multiple streams, i.e. bitonal, color and grayscale.

Blank pages are automatically deleted from the output files. **Note:** when scanning in duplex mode, both sides of the sheet must be blank in order to be identified as a blank page.

Image Processing

The scanned images can be enhanced by IRISmart Security's **Image Processing** features. IRISmart Security can for instance binarize, despeckle, deskew and rotate them. Enhancing scanned documents improves the recognition accuracy and generates documents that are smaller in size and easier to process.

Quality Control

When images have been scanned a full range of tools are available on the **View** tab for post-scanning operations. You can rename them, rearrange them by using split, merge, drag and drop, cut and paste, etc.

Document Indexing and Data Extraction

In IRISmart Security there are 4 default **Index Fields** on document level: **Date**, **Time**, **Comment** and **Folder**. It is not possible to create additional index fields.

The screenshot shows a 'Fields' dialog box with a title bar. Below the title bar, there are two dashed lines with text: '20171204_102035' and 'Misc_20171204_102037_'. Below these, there is a table with four rows and two columns. The first column contains the field names: Date, Time, Comment, and Folder. The second column contains the values: 04.12.2017, 10:20:37, (empty), and Misc. The Date field has a dropdown arrow and a calendar icon. The Time field has a clock icon. The Comment field is empty. The Folder field contains the text 'Misc'.

Field	Value
Date	04.12.2017
Time	10:20:37
Comment	
Folder	Misc

The **Date** and **Time** fields are filled in automatically. The **Comment** and **Folder** fields need to be filled in manually, if you wish to do so. To fill them in, you can either type in a value, use On the Fly OCR or the Double-click Text Selector.

Output Destinations

IRISmart Security can send processed documents to an output folder and to the following Cloud destinations: Box, Dropbox, Evernote, Google Drive, OneDrive and SharePoint.

1.2 Upscaling to the full version of IRISPowerscan

To upscale to the full version of IRISPowerscan you must uninstall IRISmart Security and install IRISPowerscan. Contact I.R.I.S. at www.irislink.com/support for more information.

Note that although both applications can be installed on the same computer they must not be run simultaneously.

2. Installation and Activation

2.1 System Requirements

Minimum System Requirements

- 2.2 GHz processor (64-bit).
- 4 GB RAM.
- 5 GB free hard disk space.

Recommended System Requirements

- Processor Intel i3, i5, i7 or similar. 2.6 GHz or faster (64 bits), with at least 2 cores.
- 8 GB RAM.
- 10 GB free hard disk space, preferably on a Solid State Disk drive.
- Internet connection.

Supported Operating Systems

- Windows 7 (64-bit)
- Windows Server 2012 (64-bit)
- Windows 8 (64-bit)
- Windows 8.1 (64-bit)
- Windows 10 (64-bit) ** recommended

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 IRISmart Security 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.

2.2 Installation Prerequisite

.NET Framework

The **.NET Framework 4.6 (or above)** must be installed on your computer. Please install it if it is not already there. At the time of writing, the .NET 4.6.2 is the latest version. You can simply install it from the Microsoft website.

2.3 Supported Scanners

- IRISmart Security is compatible with virtually any Twain-based Canon and I.R.I.S. scanner as well as with other brands of scanners.
- IRISmart Security is compatible with MFPs thanks to the scan from Folders functionality.

Note: when using a Twain-based scanner, at least **Twain version 1.9 or higher** is required.

2.4 Installing IRISmart Security

- Depending on the version you acquired, download the **IRISmart Security** package from www.irislink.com/downloadcenterpro.
- Go to the location where you downloaded the .zip package and unzip it.
- Double-click **IRISmart Security.msi** to start the installation.
- Read the License Agreement, then select **I accept the terms in the License Agreement** and click **Next**.
- Follow the on-screen instructions until the installation is complete.

2.5 Activating IRISmart Security

Warning: make sure to deactivate the anti-virus software on the computer before you try to activate IRISmart Security. Once the activation is complete you may reactivate the anti-virus software.

- Double-click the IRISmart Security shortcut on the Desktop.



- Enter the **Activation code**.
The activation code was sent to you by email. In case you haven't obtained your activation code yet, contact I.R.I.S. at activation@iriscorporate.com.
- Click **Activate**.
Note that internet access is required. If you don't have internet access do a Manual activation.

- Click **OK** when the code has been accepted.

Manual Activation

- In case the computer on which you are installing IRISmart Security does not have internet access, click **Manual activation**.
- Copy the **Computer ID** and the **Activation code** that was sent to you by email to a computer where you do have internet access.
- Send both codes to activation@iriscorporate.com.
In turn you receive the **License code**.



- Enter the **License code** and click **Activate**.
- Click **OK** when the code has been accepted.

Note: once IRISmart Security has been activated, its serial number can be found in the Application menu. Click **File > Info > Generalities**.

2.6 Configuring your Anti-Virus Software

The anti-virus installed on your PC scrutinizes all the files that are being written on your hard disk. This may dramatically slow down the writing speed of the images being scanned with IRISmart Security or simply prevent IRISmart Security from running. Your target production level may thus not be reached.

In order to avoid such problem, you must properly configure your anti-virus and exclude from the process the list of folders into which your images are being placed. This configuration depends on the anti-virus used. Please refer to your anti-virus manual to define the required settings.

In IRISmart Security, the folders to be excluded are:

- %appdata%\IRISmart Security
- %programdata%\IRISmart Security
- C:\Program Files\IRISmart Security
- C:\Program Files\IRISmart Security\IPSxConsole.exe
- C:\Program Files\IRISmart Security\IRISmart Security Service.exe
- C:\Program Files\IRISmart Security\IRISmart Security.exe

2.7 Uninstalling IRISmart Security

On a **Windows 10 OS**:

- Close IRISmart Security.
- From the Windows Start menu, go to **Settings < Apps < Apps & features**
- Select **IRISmart Security** from the list and click **Uninstall**.
Then follow the on-screen instructions.

2.8 Product Support

To get product support, please visit our website at www.irislink.com/support.

3. The IRISmart Security Interface

3.1 Application menu

The Application menu is used to open default projects, manage your batches, access the info about the software and change the interface language.

To access the Application menu click the **File** tab.

Overview of the Application Menu

Info

The **Info** tab provides general information about the IRISmart Security version installed on your system.

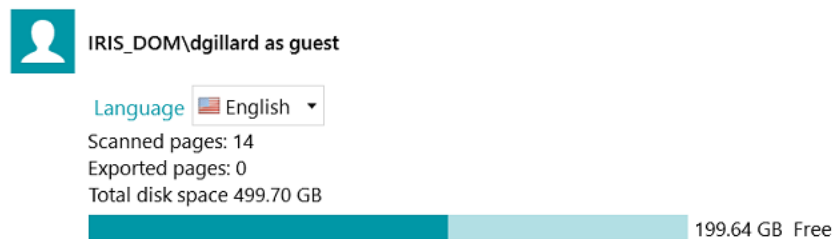
- **Generalities:**

Displays the program version, serial number, etc.

Interface Language

The default interface language of IRISmart Security is the one of your regional settings. If your regional settings language is not supported, English is used in IRISmart Security.

To select a different language, select a language from the list and restart the application.



Reporting (for Advanced Users)

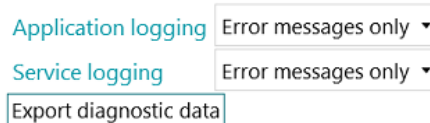
By default IRISmart Security saves **Error messages only** to the **Application log files** and to the **Service log files**. You can also choose to save **Error and warning messages** or save **All messages**.

To **export diagnostic data**, click the corresponding button and select which data you wish to export:

- **Project:** exports the project settings.
- **Image cache:** exports the images that are visible in the Viewer.
- **Logs:** exports Windows Event Logs.



Reporting

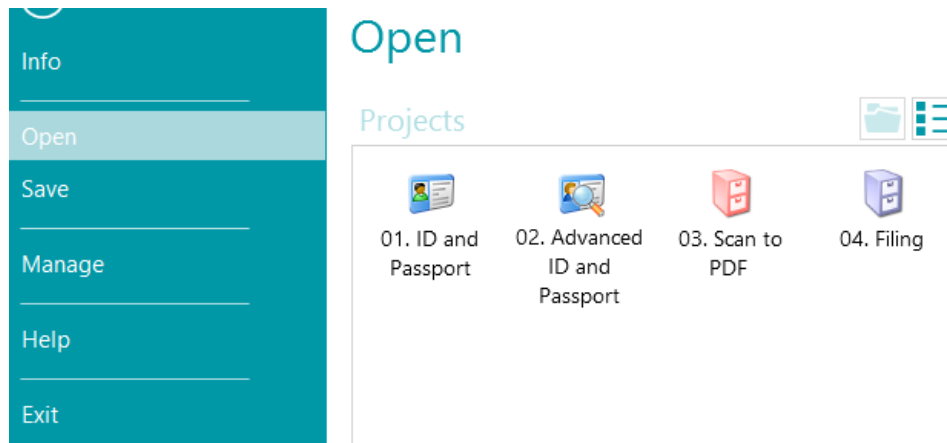


A popup dialog will open and ask you where you want to save the logs.

- **Features:** displays the features that are activated in the current version.
 - Click **Activate** to activate more features.
 - Click **Copy to Clipboard** to copy all license info to the Clipboard. Now you can easily paste it in a mail to contact [Product Support](#) for instance.

Open

On the **Open** tab you can open the projects.



Save

Saves all project settings, closes the Application menu and returns you to the project.

Manage

Allows you to manage the batches in process. See [Manage Documents](#).

Help

Opens the documentation.

3.2. Navigation mode

Navigation mode really is the main working area of IRISmart Security. Navigation mode contains all commands and controls to process documents; in Navigation mode you scan documents, rearrange them, validate their index fields and generate the output files.

Below you find an overview of Navigation mode and its commands.

Tip: many [shortcuts](#) can be used. To view the key tips on the ribbon simply press Alt.

Tip: any changes you make can be undone / redone using the undo / redo buttons on the [Quick Access toolbar](#).

Overview of the Navigation mode

Navigation mode consists of the following elements:

3.2.1 [Quick Access toolbar](#)

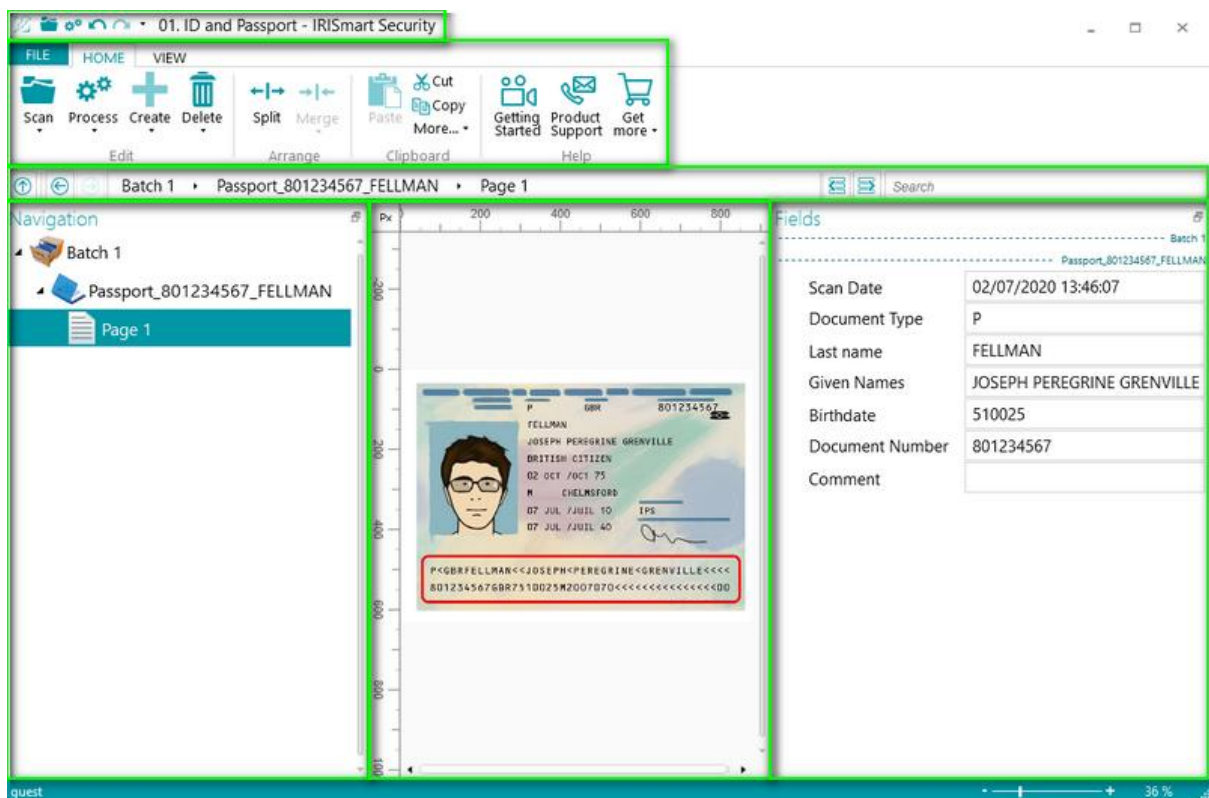
3.2.2 [Main toolbar](#)

3.2.3 [Navigation bar](#)

3.2.4 [Navigation Explorer](#)

3.2.5 [Viewer](#)

3.2.6 [Fields pane](#)



3.2.1 Quick Access toolbar

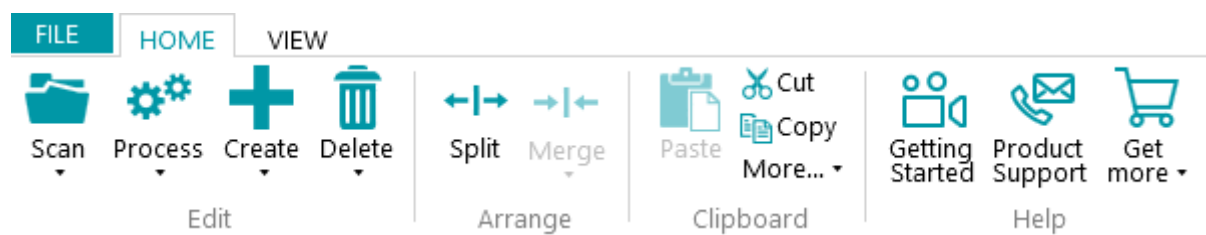
On the Quick Access toolbar you can do the following actions:

- Scan documents
- Process documents
- Undo actions
- Redo actions



3.2.2 Main toolbar

The main toolbar contains all required commands to scan and process documents.



The main toolbar consists of the following tabs:

- [File](#)
- [Home](#)
- [View](#)

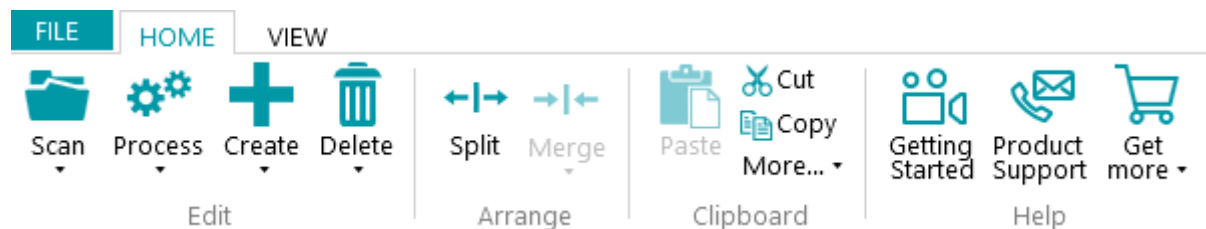
3.2.2.1 File tab

The **File** tab opens the [Application menu](#).



3.2.2.2 Home tab

The **Home** tab is the most important tab in Navigation mode. Its commands allow you to scan and rearrange documents, modify scan settings, create new batches and documents, and export processed documents.



The **Home** tab consists of the following groups:






- **Edit**
- **Arrange**

- **Clipboard**
- **Help**



Note: the commands of the **Home** tab can also be used by means of keyboard shortcuts. Click [here](#) for an overview.

Edit


The commands of the **Edit** group allow you to scan, edit and delete documents.

 <p>Scan</p> <p>▼</p> <p>or</p>  <p>Scan</p> <p>▼</p>	<p>Click Scan to scan documents from a configured input source. The input source may be a scanner or a folder.</p> <p>All documents you scan are by default added behind the last document.</p> <p>To select the input source, click the down arrow beneath Scan and select the required source. Then click Settings to configure the selected input source.</p>
 <p>Process</p> <p>▼</p>	<p>Click Process to have IRISmart Security process your documents.</p>
 <p>Create</p> <p>▼</p>	<p>This command either creates a new Batch or a new Document.</p> <p>Indicate the position in the Navigation Explorer where to add a new batch or document. Then click the down arrow beneath Create and select Batch or Document.</p> <p>Note that the structure batch > document > page is always maintained. This means documents or batches cannot be added between two pages. Nor can batches be added between two documents.</p>
 <p>Delete</p>	<p>To delete pages, documents and batches:</p> <ul style="list-style-type: none"> • Select the element to delete, and then click Delete. • Or right-click an element and click Delete in the Context menu. • Or select an element and press the Delete key. <p>Note that pages are not deleted immediately. Instead they are flagged 'for deletion' by a red cross. This way you can easily undo the deletion in case of a mistake. Pages that are flagged for deletion will not be processed.</p> <p>To undelete a page, first select a page that has been flagged for deletion. Then click the down arrow beneath Delete and click Undelete.</p>




Arrange

 Split	<p>Click Split to split documents or batches.</p> <p>Note: to split a document, select one of its pages and click Split. To split a batch, select one of its documents and click Split.</p>
 Merge	<p>Click Merge to merge two documents or batches.</p> <p>Click the down arrow beneath Merge and indicate whether to merge with the previous batch/document or the next.</p>

Clipboard

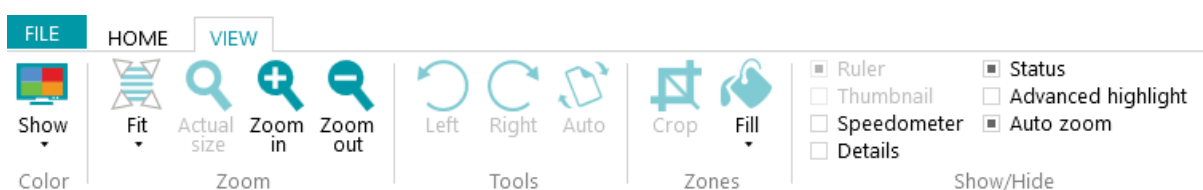
Cut/Copy/Paste	The Clipboard contains the standard Cut , Copy and Paste commands. You can cut pages, documents and batches from the Navigation Explorer or Viewer to the Clipboard and paste them to another location.
Select All	Selects all the pages, documents or batches currently displayed in the viewer.
	Allows you to go directly to the first/last page and the previous/next page.

Help

 <p>Getting Started</p>	<p>This will display a video explaining the basics of this software</p>
 <p>Product Support</p>	<p>This will bring you to the support page of his software</p>
 <p>Get more ▾</p>	<p>This will allow you to search for updates (Update). This will also bring you to the online shop to buy extra features for this software (Refill, Upgrade)</p>

3.2.2.3 View tab

The **View** tab allows you to choose which images should be displayed, adjust the zoom of the displayed pages, rotate them, create data extraction zones, display or hide rulers and other layout tools.




It consists of the following groups:

- **Color**
- **Zoom**
- **Tools**
- **Zones**
- **Show/Hide**





Note: the commands of the **View** tab can also be used by means of keyboard shortcuts. Click [here](#) for an overview.

Color

	<p>The Show tool displays the available streams of the scanned image. You can choose to display the image in:</p> <ul style="list-style-type: none"> • Color • Grayscale • Black and white
---	--




Zoom

(Only available at page level)



	<p>Click the down arrow beneath Fit and select whether to:</p> <ul style="list-style-type: none"> • fit the entire page in the Viewer • fit the page to the width of the Viewer • fit the page to the height of the Viewer
	<p>Click Actual size to display the selected page in its actual size.</p>
	<p>Click Zoom in to zoom in on pages.</p>
	<p>Click Zoom out to zoom out from pages.</p>

Tools

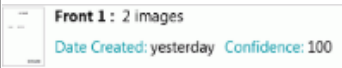
(Only available at page level)

 Left	Click to rotate pages to the left.
 Right	Click to rotate pages to the right.
 Auto	Click to auto-rotate pages.

Zones

 Crop	<p>The Crop tool allows you to crop a page to a certain size.</p> <p>To use it: select a page. In the Viewer draw a frame around the zone to which the page must be cropped. Then click Crop.</p>
 Fill	<p>The Fill tool allows you to cover up parts of a scanned image, to hide confidential information for instance.</p> <p>To use it: select a page. In the Viewer draw a frame around the zone you want to cover up. Then click Fill. Multiple colors are available. Click the down arrow beneath Fill to select one.</p>

Show / Hide

Ruler	<p>Displays a ruler on page level.</p> <p>(Only available at page level)</p>
Thumbnail	<p>Displays a thumbnail of the scanned page in the top left corner of the Viewer, allowing easy navigation.</p> <p>(Only available at page level)</p>
Speedometer	Displays a scanning speed indicator when scanning documents.
Details	<p>Displays details about the scanned image, such as the scan date, at the bottom of the screen.</p> 
Status	Displays the status of the scanned image at the bottom of the screen.
Advanced highlight	Highlight the searching area
Auto zoom	Fit zoom to extraction zone

3.2.3 Navigation bar

The **Navigation bar** allows easy navigation between the batches, documents and pages.

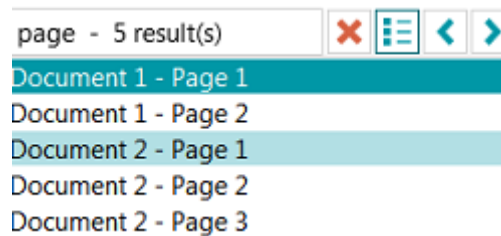


In the **Search** section of the Navigation bar you do text searches inside the current project.

Note that IRISmart Security searches for matching results within the batches and documents in the **Navigation Explorer** and within the **index fields**. It does not search the text inside the scanned images.

To do a search:

- Click inside the **Search** field.
- Type in the word you want to search and press **Enter**.
- The number of matches is displayed in the **Search** section.
- Click the list icon to display all search results.
Or use the arrows to toggle between the results.



- Click the red cross to end the search and start a new one.

3.2.4 Navigation Explorer

The Navigation Explorer displays the hierarchical structure of the scans: batches, documents and pages.

Warning: in IRISmart Security, a page corresponds to **one side** of a scanned paper sheet. It is either a front side or a rear side. This makes it much easier to delete front sides and rear sides separately.

In the Navigation Explorer you can navigate across the different elements, rearrange them with Cut and Paste, Drag and Drop, and Split and Merge operations.

Tip: right-click inside the Navigation Explorer to display its Context menu.

Tip: right-click and select **Expand all** to display each element, or select **Collapse all** to get an overview of all batches.

For more information on this see **Scan Documents** > [Check Scanned Documents](#) and [Rearrange Scanned Documents](#).

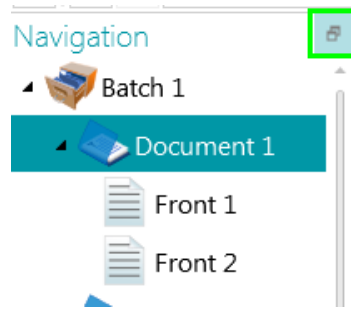
The Navigation Explorer can be resized horizontally and is also dockable.

To resize the pane:

- Drag the divider to a different position.

To detach the pane:

- Click the Windows icon in the top right corner.



- Click **Detach**.
The Navigation Explorer pane can now be moved to a different location.
- To restore its original position, click the X icon.

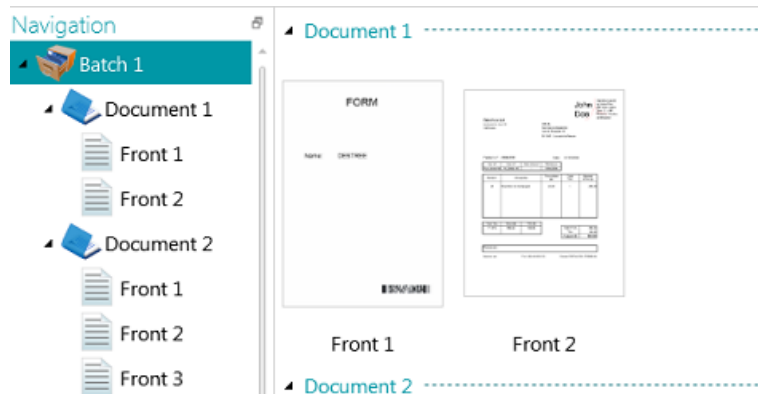
To hide the pane:

- Click the Windows icon and then click **Hide**.
- To make it reappear again click the Windows icon and click **Show**.

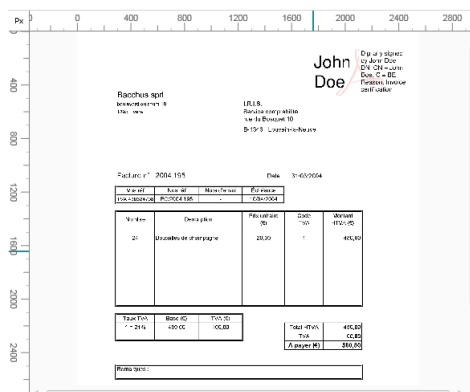
3.2.5 Viewer

The Viewer in Navigation mode displays the scanned batches, documents and pages.

When you select a batch, the underlying documents and pages are displayed as thumbnails.



When you select a page in the Navigation Explorer, the entire page is displayed as shown in the image below. Now you can edit the image using the commands of the [View tab](#).



3.2.6 Fields pane

The **Fields** pane displays the index fields.

In the **Filing** project the index fields are: **Date**, **Time**, **Comment** and **Folder**.

In the **Scan to PDF** project there is just one index field: **Folder**.

The index fields have specific colors:

- Correct values are marked in white.
- Manually modified fields are marked in yellow.
- Incorrect fields are marked in red.
- Incorrect fields that have been corrected and validated are marked in green.

The **Search** function allows you to search for text throughout the index fields.

Dockable pane

This Fields pane is now dockable:

- Click the Windows icon in the top right corner.



The screenshot shows a dockable pane titled "Fields" with a close icon in the top right corner. Below the title bar, there are two dashed lines with identifiers: "20170725_180021" and "Misc_20170725_180021_". The main area of the pane contains four fields:

Date	25/07/2017	▼	15
Time	18:00:21		
Comment			
Folder	Misc		

- Click **Detach**.
The Fields pane can now be moved to a different location.
- To restore its original position, click the X icon.
- To hide the **Fields** pane, click the Windows icon and then click **Hide**. To make it reappear again click the Windows icon and click **Show**.

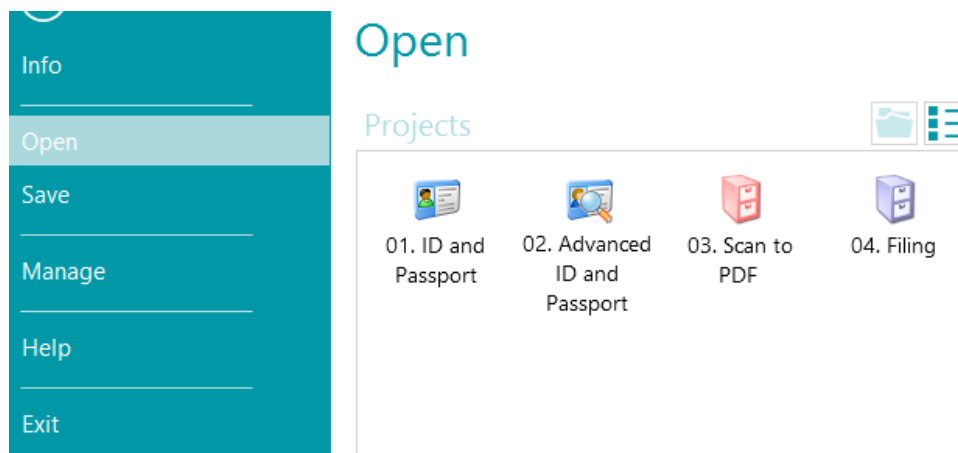
4. Getting Started

- Double-click the IRISmart Security shortcut on the Desktop.



- When you start IRISmart Security for the first time, you are prompted to open one of the projects.
 - **01. ID and Passport:** Extract the **key MRZ information** from ID cards and passports: Document type, Last name, First name, Date of birth and Document number. During export, a daily folder is created containing an Excel file listing all the information, and the scanned images under .tif format.
 - **02. Advanced ID and Passport:** Extract the **key MRZ information** (see project 01), while capturing the following **additional data**: Project 01 + Issuing country code, Expiry date, and Nationality. During export, a daily folder is created containing an Excel file listing all the information, and the scanned images under .tif format.
 - **03. Scan to PDF:** Rename automatically your scanned documents (paper or file), while specifying the export folder where they are individually archived using the compressed fully searchable PDF file format.
 - **04. Filing:** Classify automatically, based on a predefined naming convention, each scanned document (paper or file) within the right matching folder tree for efficient retrieval.

Note that it is not possible to create other projects in IRISmart Security.



Main Processing Steps

Documents go through **three main steps** when being processed in IRISmart Security:

1. Capture

The **Capture** can be done by means of a **scanner** or by scanning from **folders**.

You can also drag-and-drop documents from a file folder or from your e-mail application to a project.

2. Validation

When documents have been scanned they are displayed in **Navigation mode**, where a full range of tools are available for post-scanning operations. You can now validate the images and their index fields.

3. Process

When the documents and their index fields have been validated they are ready to be exported.

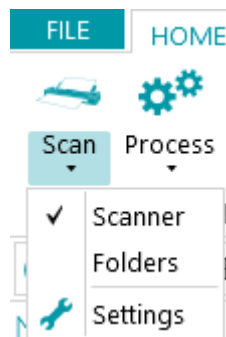
4.1 Select a Scan Source

Once you have opened one of the projects the Navigation mode is displayed. You can now select a Scan Source.

- Click the down arrow beneath **Scan** and select **Scanner** or **Folders**.

IRISmart Security is compatible with virtually any Twain-based scanner that uses Twain version 1.9 and higher.

Warning: before you try to use a scanner in combination with IRISmart Security, make sure the scanner is powered on and its driver is installed on your system.



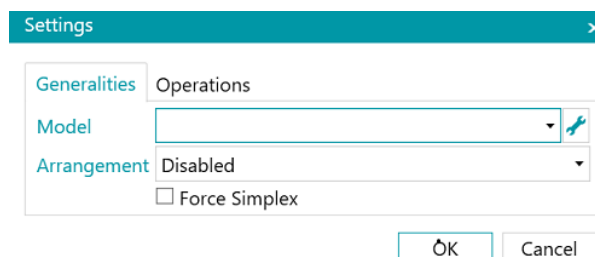
- Click the down arrow beneath **Scan** again and click **Settings** to configure the scanner settings or folder settings.
Note that the settings are saved automatically.

4.1.1 Scanner Settings

Model

- Click the down arrow in the **Model** list to select the scanner model.

Note: if the list is empty, click the Settings icon (wrench) and select a different Twain source. If this list is also empty there are no scanners configured on your system and you first need to install one.

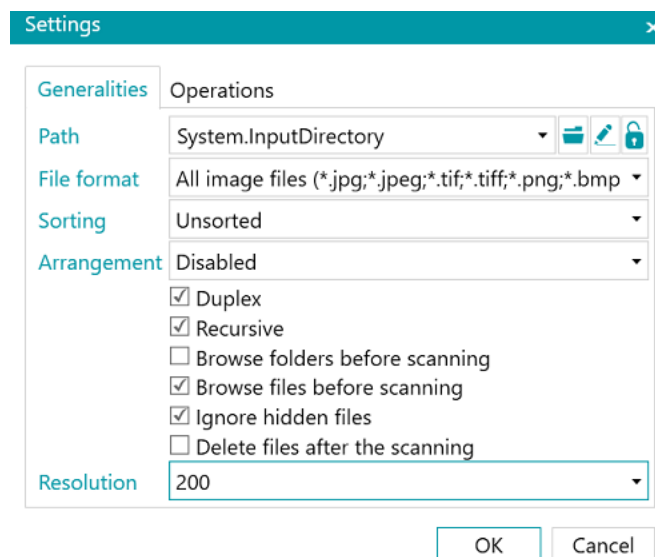


Arrangement

- Select how you wish to split or merge the documents coming from the scanner in the **Arrangement** drop-down list:
 - **Disabled:** the pages will not be split.
 - **Split long edge:** splits pages along the long edge of the page.
 - **Split vertically:** splits pages vertically.
 - **Split horizontally:** splits pages horizontally.
 - **Fold and Split horizontally:** folds and splits A3 pages horizontally into two A4 pages.
 - **Merge long edge:** merges two subsequent pages along the long edge of the pages.
 - **Merge vertically:** merges two subsequent pages vertically.
 - **Merge horizontally:** merges two subsequent pages horizontally.
- If you want the scanner to scan one-sidedly only, select **Force Simplex**.

Note: on the **Operations** tab you can select the Image Processing Operations you want to apply. These operations are the same whether you are using a scanner or scanning from folders. They are discussed below.

4.1.2 Folder Settings



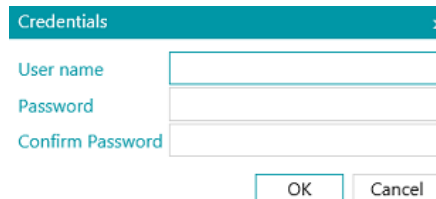
Path

- Click the browse icon (📁) to select the scan folder.
- To customize the expression click the pencil icon (✎) to open the Expression Editor.

Warning: when customizing the expression, make sure to put '+' and '\"' between the different elements.

Note that you can also use fixed values between double quotation marks. For example "C:\Images".

- If the folder you want to scan from is protected by a password, click the padlock icon (🔒).
 - Enter your (domain) **User name**. E.g. IRIS_DOM\MyName.
 - Enter your **Password**.
 - **Confirm** the password, and click **OK**.



File Format

IRISmart Security by default searches for all files that end with the extensions *.jpg, *.jpeg, *.tif, *.tiff, *.png, *.bmp and *.pdf.

Sorting

Select how the scanned files must be sorted: by name, creation date, modification date or unsorted.

Arrangement

Select how you wish to split or merge the documents coming from the scanner in the **Arrangement** drop-down list:

- **Disabled**: pages will not be split.
- **Split long edge**: splits pages along the long edge of the page.
- **Split vertically**: splits pages vertically.
- **Split horizontally**: splits pages horizontally.
- **Fold and Split horizontally (IPS9)**: folds and splits A3 pages horizontally into two A4 pages.
- **Merge long edge**: merges two subsequent pages along the long edge of the pages.
- **Merge vertically**: merges two subsequent pages vertically.
- **Merge horizontally**: merges two subsequent pages horizontally.

Other options

- Select **Duplex** to make IRISmart Security process the uneven pages as front pages and the even pages as rear pages. Select this option when using a duplex scanner.
- Select **Recursive** to make IRISmart Security also process the files in the subfolders of the selected input folder.
- **Browse folders before scanning**: you are prompted to indicate the input folder each time you click **Scan**.
- **Browse files before scanning**: you are prompted to select one or more files each time you click **Scan**.
- **Ignore hidden files**: when selected, hidden files will not be scanned.
- **Delete files after scanning**: when selected, the files will be deleted after scanning.

Resolution

When importing PDF files you can select the **Resolution** in which they will be imported. You can select a resolution ranging from 100 DPI to 1200 DPI. Note that a resolution of 300 DPI is generally recommended.

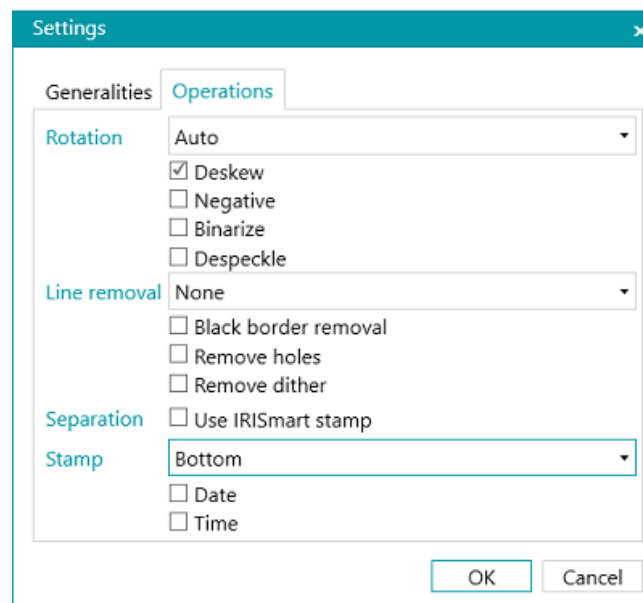
This option does *not* apply to image files nor does it change the resolution of your scanner.

Note: on the **Operations** tab you can select the Image Processing Operations you want to apply. These operations are the same whether you are using a scanner or scanning from folders. They are discussed below.

4.1.3 Operations

IRISmart Security offers a wide range of image processing features, which aim to obtain the best possible scan results. After all, the higher the quality of the scans, the higher the processing accuracy will be.

- Click the **Operations** tab to access them.



Rotation

Rotate can rotate scanned documents by 90°, 180° and 270° degrees or automatically.

Deskew

Deskew deskewes images that were scanned skewed.

Negative

Negative inverts the colors of the scanned documents.

Binarize

Binarize turns color and grayscale images into binary (black-and-white) images on which IRISmart Security then executes its image processing operations.

Binarize can therefore only be applied to color and grayscale images, not to black-and-white images.

Despeckle

Despeckle can only be applied to bitonal images. Despeckling removes little parasitic dots that may appear on your documents.

Line Removal

Line removal removes lines from scanned images.

Note: it only works on bitonal images.

This operation is able to remove horizontal lines, vertical lines or both.

Black Border Removal

Black border removal removes black borders (or dark surroundings) from bitonal images.

Remove holes

Removes punch holes from images.

This operation can be applied to color, grayscale and black-and-white images.

Warning: your scanner should generate black punch holes in order for them to be removed correctly. Removing whitish punch holes is not supported.

Tip: if your scanner also has a Punch hole removal option, choose where you want to enable it: in your scanner settings or in IRISmart Security, but don't activate both.

Remove dither

Removes unwanted dither (noise) from images.

This operation can only be applied to black-and-white images. So if you are scanning in color, make sure to use the **Binarize** operation first.

Separation

The separation based on the IRISmart stamp can be enabled or disabled.

The main goal of this separation method is to avoid having to insert blank pages to separate your documents.

Warning: Enabling this method may decrease the overall speed by 2 to 4 Page Per Minute.

Tip: the stamp should be correctly applied without too much skew and on a white background. Stamps without enough ink or with pits and voids may not be well recognized.

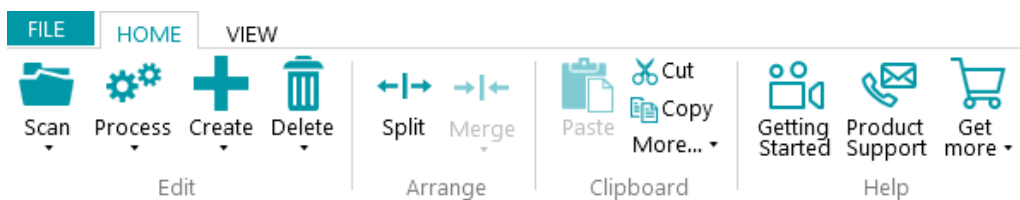
Stamp

A stamp showing the current date and/or time can be printed on top or bottom of each imported page.

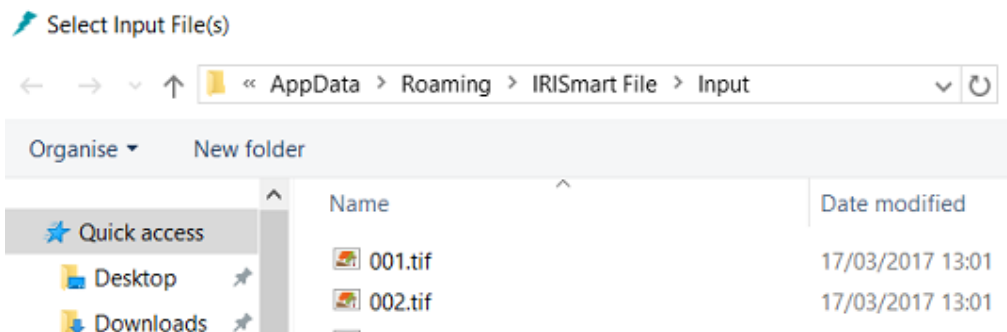
4.2 Scan Documents

When you have selected a [Scan Source](#) and configured its settings you can scan your documents inside one of the projects.

- Click **Scan** to start scanning.



If you selected **Folders** as Scan Source the input folder opens in which you can select the files you want to import.

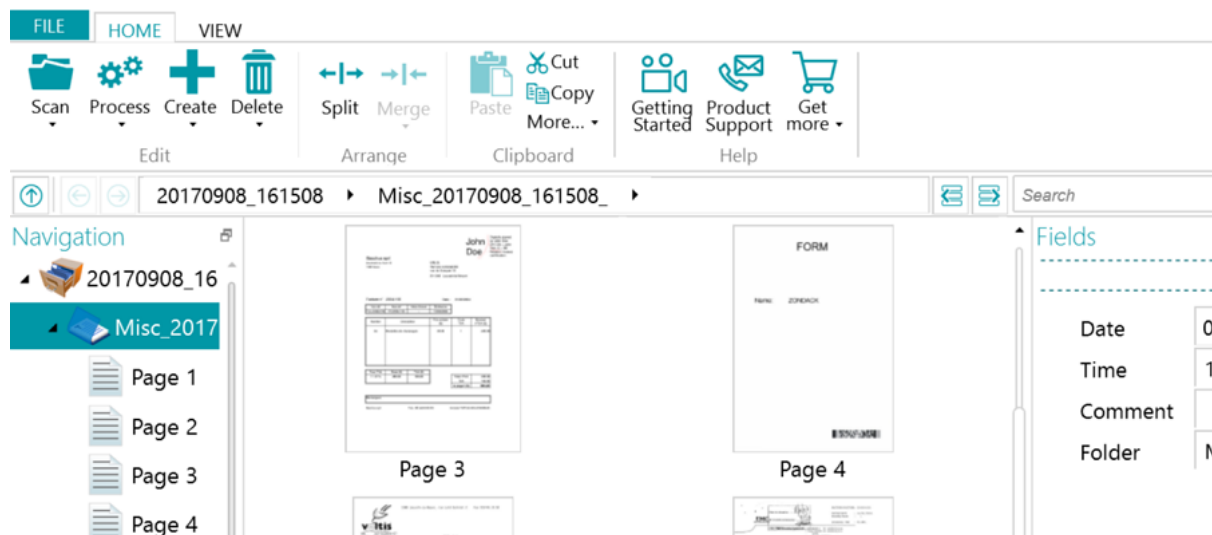


- Your documents are divided into batches, documents and pages.
- A new document is started each time IRISmart Security detects a blank page or an IRISmart stamp if enabled in **Settings\Operations**.

Blank pages are automatically flagged for deletion.

The stamp may be located anywhere on the page. Note however that in order to obtain good recognition results the stamp must have been correctly printed. If there is not enough ink in your printer all the details of the stamp may not be printed correctly and the stamp will not be read correctly by IRISmart Security.

Note: when scanning in Duplex mode both sides of a page must be blank in order for it to be flagged for deletion.



In the **Filing** project, each **batch** is named using the following format:

ScanDate(YYYYMMDD)_ScanTime(HHMMSS). Each **document** is named using the following format: <Company>_ScanDate(YYYYMMDD)_ScanTime(HHMMSS)<Comments>. As you can see, the value of the **Folder** field is used as prefix, and the value of the **Comment** field is used as suffix. To rename a document, enter a new value in the **Folder** and/or **Comment** field and press Enter. The document will be renamed.

In the **Scan to PDF** project, each **batch** is called Batch_n and each **document** is called Document_n. Note that the document counter continues across the different batches. To rename a batch or document, right-click it and select **Rename**. Then type in the required value.

4.2.1 Check Scanned Documents

Multi-stream images

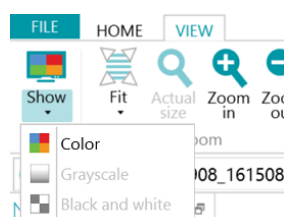
If your scanner generates multi-stream images - meaning a color, black-and-white and/or grayscale version of the same scan - the multi-stream images are also maintained in IRISmart Security.

Click a document to view the underlying pages. Pages that contain multi-stream images are indicated by slight shadow underneath them.



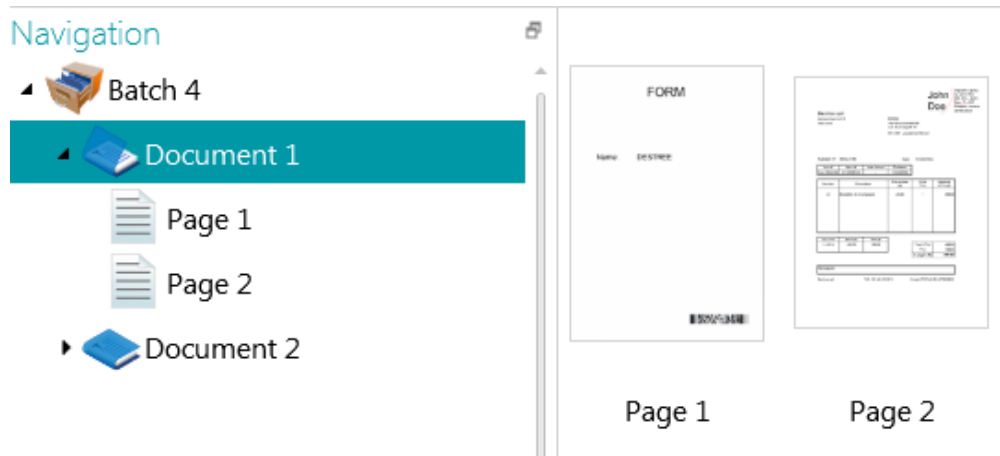
To switch between the different streams:

- Click the **View** tab and click the down arrow beneath **Show**.
- Then select the required stream.



Duplex images

If you are using a duplex scanner and the **Duplex** function is activated in IRISmart Security, IRISmart Security alternates between front sides and rear sides correctly.



4.2.2 Rearrange Scanned Documents

Scanned documents can be rearranged in several ways in Navigation mode:

- Rearrange them in the Navigation Explorer.
- Rearrange them in the Viewer.
- Use the Navigation bar for easy navigation.

Pages can be moved to different documents and batches. Documents can be moved to different batches. And batches can be switched from position.

Note however that the structure batch > document > page must always be maintained.

The following operations are available both in the Navigation Explorer and in the Viewer:

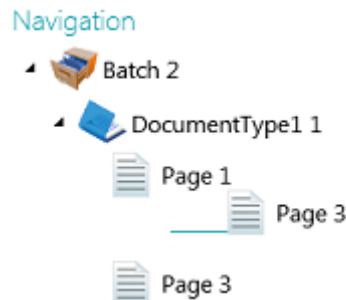
- Drag-and-drop
- Cut-and-paste
- Split and Merge
- Reorder elements
- Manually create new batches and documents
- Rotate Pages

You can also:

- Crop pages
- Fill up parts of scanned pages, in case of confidential information for instance.

Drag-and-Drop documents

The batches, documents and pages can be dragged and dropped to other positions, both in the Navigation Explorer and in the Viewer.



Cut, Copy and Paste documents

The batches, documents and pages can also be moved to another position by means of Cut and Paste.

- Right-click the element you want to move, and click **Cut** or **Copy**.
- Point the cursor to the position where you want to paste the element, and click **Paste**.

Split and Merge documents

Batches and Documents can also be split or merged with neighboring batches and documents respectively.

To split a batch/document:

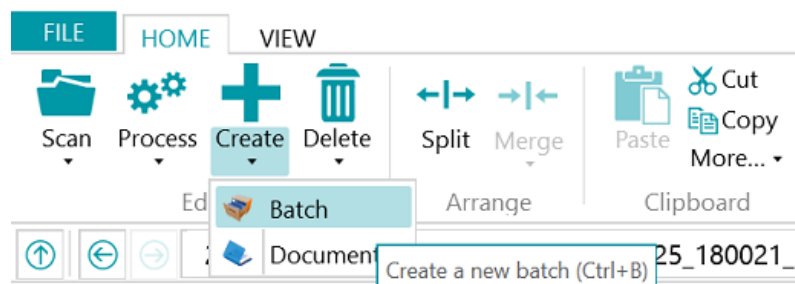
- Select it and click **Split** on the **Home** tab.
- Or right-click it and select **Split**.

To merge batches/documents:

- Select the batch/document you want to merge with the next batch/document, and click **Merge** on the **Home** tab.
- Or right-click it and select **Merge**.

Manually create a new batch/document

- Point the cursor to the position where you want to create a new batch/document.
Note: new batches are always inserted at the end of the previous batch, not in the middle of documents.
- Click the down arrow beneath **Create** on the **Home** tab.



- Select **Batch** or **Document**.
- Name the batch / document.
- **Start scanning** is selected by default.
When the new batch / document is created IRISmart Security automatically starts scanning.

Rotate pages

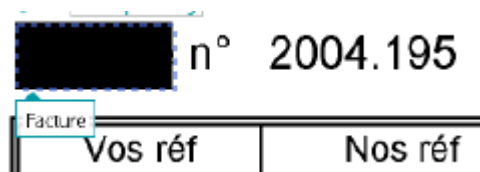
- Select a page you want to rotate.
- Click the **View** tab and select one of the rotation options.

Crop pages

- Select a page you want to crop.
- Draw a frame around the area to which you want to crop the page.
- On the **View** tab, click **Crop**.

Fill pages

- Select a page on which you want to cover up certain parts.
- Draw a frame around the area you want to cover up.
- On the **View** tab, click the down arrow below **Fill** to select a fill color.
- Then click **Fill**.



4.3 Validate Index Fields

Four index fields are created by default in the **Filing** project: Date, Time, Comment and Folder. In **Scan to PDF** there is just one index field: **Folder**.

Note that in IRISmart Security it is not possible to create additional index fields.

The image shows two side-by-side screenshots of the 'Fields' section in the software interface. The left screenshot, titled 'Index fields in Filing', shows a table with four rows: Date (04.12.2017), Time (10:20:37), Comment (empty), and Folder (Misc). The right screenshot, titled 'Index fields in Scan to PDF', shows a single row for Folder (Misc). Both screenshots have a dashed line above the fields and a blue 'Fields' header.

Index fields in Filing		Index fields in Scan to PDF	
Date	04.12.2017	Folder	Misc
Time	10:20:37		
Comment			
Folder	Misc		

In the **Filing** project, each **batch** is named using the following format:

ScanDate(YYYYMMDD)_ScanTime(HHMMSS). Each **document** is named using the following format: <Company>_ScanDate(YYYYMMDD)_ScanTime(HHMMSS)<Comments>. As you can see, the value of the **Folder** field is used as prefix, and the value of the **Comment** field is used as suffix. To rename a document, enter a new value in the **Folder** and/or **Comment** field and press Enter. The document will be renamed.

In the **Scan to PDF** project, each **batch** is called Batch_n and each **document** is called Document_n.

Note that the document counter continues across the different batches. To rename a batch or document, right-click it and select **Rename**. Then type in the required value.

Colors of index fields

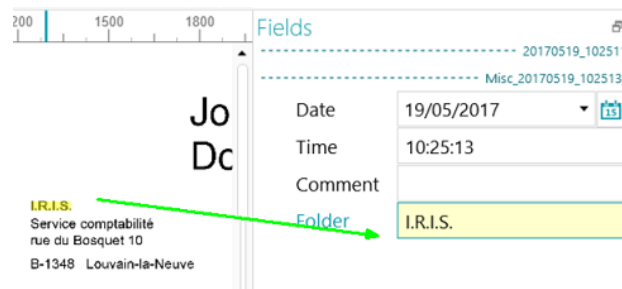
- Correct values are marked in white.
- Manually modified fields are marked in yellow.
- Incorrect fields are marked in red.
- Incorrect fields that have been corrected are marked in green.

To switch between index fields:

- Press the Tab key to go to the next index field.
- Press Shift + Tab to go the previous field.

To modify an index field:

- Manually type in a new value.
- Use drag and drop OCR: click inside the index field, then draw a data extraction zone (text or barcode) on the image in the Viewer.
The content of the zone will be filled in in the index field.
- Use the Double-click Text Selector: click inside the index field, then double-click a word in the image to add to the index field. Or Ctrl-double-click to enter an entire line of text.



To undo/redo operations:

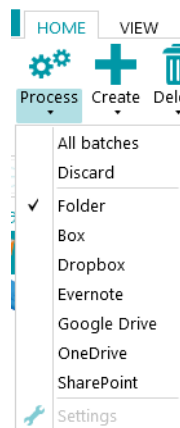
- Use the undo/redo arrows on the [Quick Access toolbar](#).

To validate an index field:

- Simply press Enter.

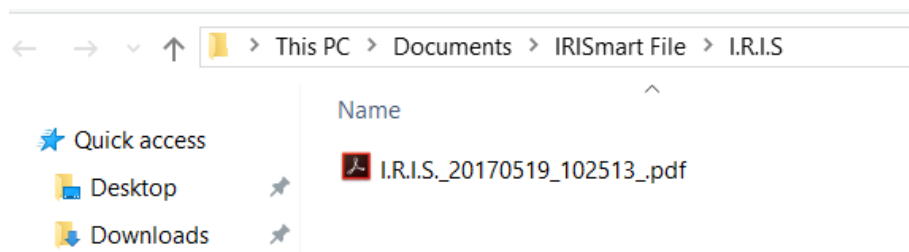
4.4 Process Documents

- When you are done scanning and validating your documents, click the down button beneath **Process** and select the destination of your choice.



- Then click **Settings** to configure the destination.

Note: when you select **Folder** the **Settings** button is unavailable. The documents are always sent to the **IRISmart Security** folder in your **Documents** folder.

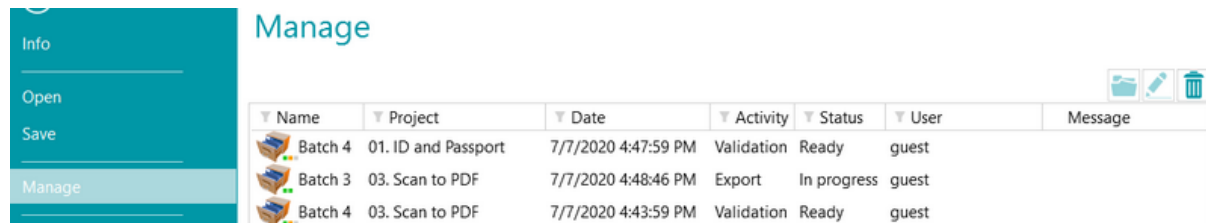


- In the authentication window that opens enter your username and password and sign in.
- When the configuration is done, click **Process**.
The processed documents are converted into compressed, searchable PDF files. The compressed PDF files IRISmart Security generates are PDF iHQC Level II - Medium quality.

4.5 Manage Documents

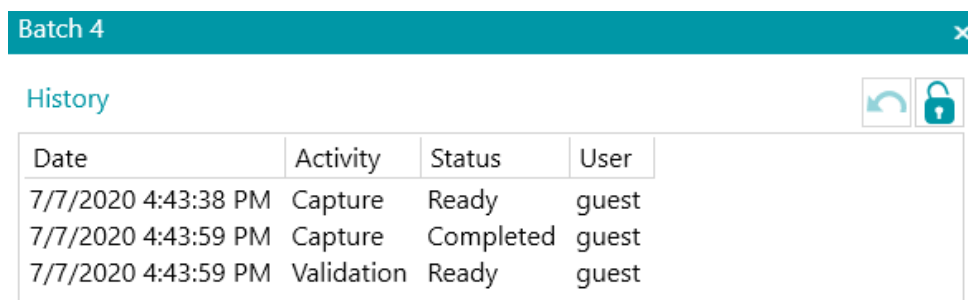
During processing, the status of the batches in process can be checked in the Application menu. To do so, click **File > Manage**.

There you get an overview of which batches are being processed, in which project, what their status is, which activity has been carried out on them, etc.



Checking the history of batches

- Select a batch and click the **History** icon .



Unlocking batches

When a user executes an activity on a batch, the current batch is locked until the user exports it. In case a batch should stay locked, it can be unlocked manually:



- Right-click the batch you want to unlock.
- Then click **Unlock**.

Note however that this feature is meant as a recovery method. It should only be used for diagnostic purposes and not in standard procedures.

If the unlock feature is unavailable, this means the batch has already been unlocked.

Resending batches

When a batch has the status "On Error", which means some errors have been encountered, the user can retry the processing:

- Select a batch and click the **History** icon .
- Select the required activity from the list.
- Click the retry icon .

The status of the batch is now changed to "Ready" and the batch can be processed again in Navigation mode.

Browsing batches

This function allows you to open the batch directly in the right project when you are in a different project.

- Click the browse icon to open the corresponding project and import the selected batch.
- Or right-click the batch and select **Open**.

If the browse function is unavailable, this means you have no batches in process in other projects, or the batches are still locked.

Deleting batches

- Select a batch you want to delete.
- Click the delete icon to delete the selected batch.
- Or right-click a batch and select **Delete**.

5. ID and Passport Processing

5.1 Introduction

IRISmart Security fully exploits data from **ID cards and passports** thanks to the **MRZ recognition** placed on many passports & ID cards. **MRZ** stands for **machine-readable zones**.

During export, a daily folder is created containing an Excel file listing all the information, and the scanned images under .tif format.

Two projects are dedicated to this particular purpose: **01. ID and Passport** and **02. Advanced ID and Passport**.

Warning: Driving licenses are *not* recognized, but index fields can be filled in [manually](#).

5.2 Process ID and Passports

The steps of the ID and Passports scanning process are similar to the ones of the other two projects. Only the steps that differ are discussed here.

1. Select the ID and Passport project

There are 2 different ID and Passport projects that allow you to extract data from **official ID documents (based on MRZ information)**.

01. ID and Passport

Extracts the **key data** and saves them per date in the same folder.

- The doc name is Passport_document#_LASTNAME or Id_Card_document#_LASTNAME
- During processing, a **daily folder** is created. This folder contains a central **Excel file** (with automatic indexing of the extracted metadata), and the **scanned images under .TIF format**. The name of the folder and the Excel file is the date (YYYYMMDD). The name of the image files is YYYYMMDD_Passport_Document#_LASTNAME.tif. All the same day exports are appended to the Excel file within the same folder.
- The daily folder is saved in Documents\IRISmart Security\01. ID and Passport\

02. Advanced ID and Passport

Extracts **key and advanced data**, and saves them per date in the same folder.

- The doc name is Passport_document#_LASTNAME or Id_Card_document#_LASTNAME
- During processing, a **daily folder** is created. This folder contains a central **Excel file** (with automatic indexing of the extracted metadata), and the **scanned images under .TIF format**. The name of the folder and the Excel file is the date (YYYYMMDD). The name of the image files is YYYYMMDD_Passport_Document#_LASTNAME.tif. All the same day exports are appended to the Excel file within the same folder.
- The daily folder is saved in Documents\IRISmart Security\02. Advanced ID and Passport\

2. Select a Scan Source

See Getting Started > [Select a Scan Source](#).

3. Scan Documents

See Getting Started > [Scan Documents](#).

4. Validate Index Fields

The index fields are defined and created by default in those two projects and filled in **automatically** if recognized.

The **key data** are:

- Scan Date
- Document type (**I** for ID card and **P** for Passport)
- Last name/Surname
- Given names
- Birthdate
- Document number
- Comment: free text zone

The **advanced data** are:

- Issuing Country Code
- Hash 1
- Optional Data 1
- Hash 2
- Sex
- Expiry Date
- Hash 3
- Nationality
- Optional Data 2
- Final Hash
- Comment 1: free text zone
- Comment 2: free text zone

Colors of index fields

- Correct values are marked in white.
- Manually modified fields are marked in yellow.
- Incorrect fields are marked in red.
- Incorrect fields that have been corrected are marked in green.

Warning: Should automatic recognition fails, you can always encode data manually. E.g. **Driving licenses** are *not* recognized, but index fields can be filled in manually.

To **manually** encode or modify an index field:

- Manually **type in** a new value.

- Use **drag and drop OCR**: click inside the index field, then draw a data extraction zone (text or barcode) on the image in the Viewer.
The content of the zone will be filled in in the index field.
- Use the **Double-click Text Selector**: click inside the index field, then double-click a word in the image to add to the index field. Or Ctrl-double-click to enter an entire line of text.

To validate an index field:

- Simply press **Enter**.

To switch between index fields:

- Press the Tab key to go to the next index field.
- Press Shift + Tab to go the previous field.

To undo/redo operations:

- Use the undo/redo arrows on the [Quick Access toolbar](#).

5. Process Documents

When you are done scanning and validating your documents, click **Process**.

The daily folder is saved in Documents\IRISmart Security\.

6. Manage Documents

See Getting Started > [Manage Documents](#).

6. Keyboard Shortcuts

The following shortcuts can be used in IRISmart Security.

Navigation

Home tab	Alt + H
View tab	Alt + V
Next field	Tab
Previous field	Shift + Tab
Next invalid field	Ctrl + Tab
Previous invalid field	Ctrl + Shift + Tab
Go to page	Ctrl + G
Up	BackSpace
First image	Alt + Home
Last image	Alt + End
Previous image	Alt + Up
Next image	Alt + Down
Search previous text	Shift + F3
Search next text	F3
Move up (Navigation Explorer)	up arrow
Move down (Navigation Explorer)	down arrow
Browse backward (previous element in history)	Alt + left arrow
Browse forward (next element in history)	Alt + right arrow
Expand	Ctrl + *
Expand all	Ctrl + Shift + *
Collapse	Ctrl + /
Collapse all	Ctrl + Shift + /
Open the Open section (of the Application menu)	Ctrl + O
Open the Manage section (of the Application menu)	Ctrl + M

Commands

Help	F1
Display key tips	Alt
Quick access toolbar	Alt + digit or letter in commands order
Save	Ctrl + S
Cut	Ctrl + X
Cancel Cut	Escape
Copy	Ctrl + C
Paste	Ctrl + V
Quiet delete	Shift + Delete or Delete
Undelete	Ctrl + Delete
Redo	Ctrl + Y
Undo	Ctrl + Z
Scan	F4
Stop Scan	Shift + F4
Settings	F6
Split	F7
Merge	Shift + F7
Merge previous	Ctrl + F7
Merge next	Ctrl + F8
Delete	Delete
Export	F9
Zoom In	Ctrl + Num+
Zoom Out	Ctrl + Num-
Zoom fit page	Ctrl + Num .
Zoom actual size	Ctrl + Num 0
Display 1 page in the Viewer	1
Display 2 pages in the Viewer	2
Display 4 pages in the Viewer	4
Display 8 pages in the Viewer	8
Rotate Left	Ctrl + L
Rotate Right	Ctrl + R

Auto rotate	Alt + A
Create document	Ctrl + D
Create batch	Ctrl+ B
Rename	F2

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Documentation version 2.1

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