Batch Scan to eMail

Revised 5/27/2009

Batch Scan to eMail

Batch Scan to email is designed to increase productivity by allowing a user to fill the document feeder of a copier or scanner with documents that need to be emailed to separate email addresses. Batch Scan to eMail will automatically separate the document based upon the contents of a barcode cover page and email the document to the recipients email address contained on the separator page.

System Requirements

- SMTP Account
- Visual Basic 6.0 SP5: Run-Time Redistribution Pack - automatically installed at setup
- Microsoft Windows XP or Vista
- A copier, with the option to scan to a file folder on a network or a scanner with software that can produce a 200, 300 or 400 dpi multi-page G4 tiff image
- Java - setup will search for Java if it is not found the user will be prompted to download and install it.

Setup

Setup should only take a few minutes and is easy to do; however, if assistance is needed Contact eDocfile Inc.

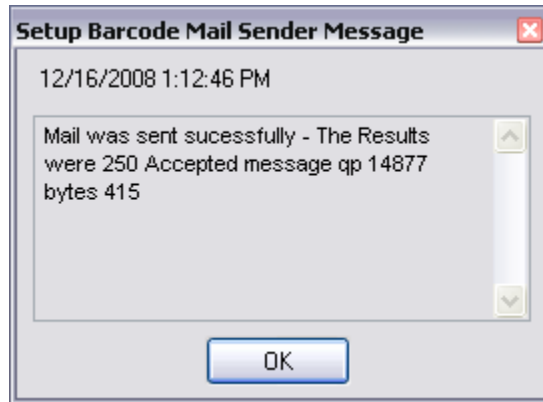To begin open the program and click on "Setup"
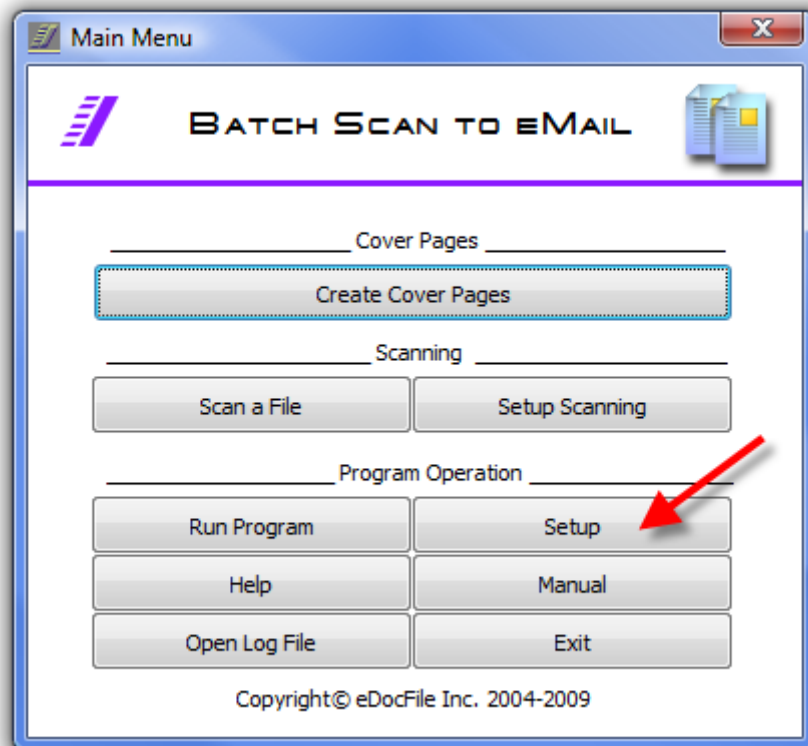
A new window will open

Enter the following settings

1. From Address - this is the person's email address that will appear in the return address line

2. From Name - this is the name that will appear in the sent from line

3. Mail Server - this is the SMTP server

4. SMTP User ID - this is the mail users ID

5. SMTP Password - this is the password for the mail account

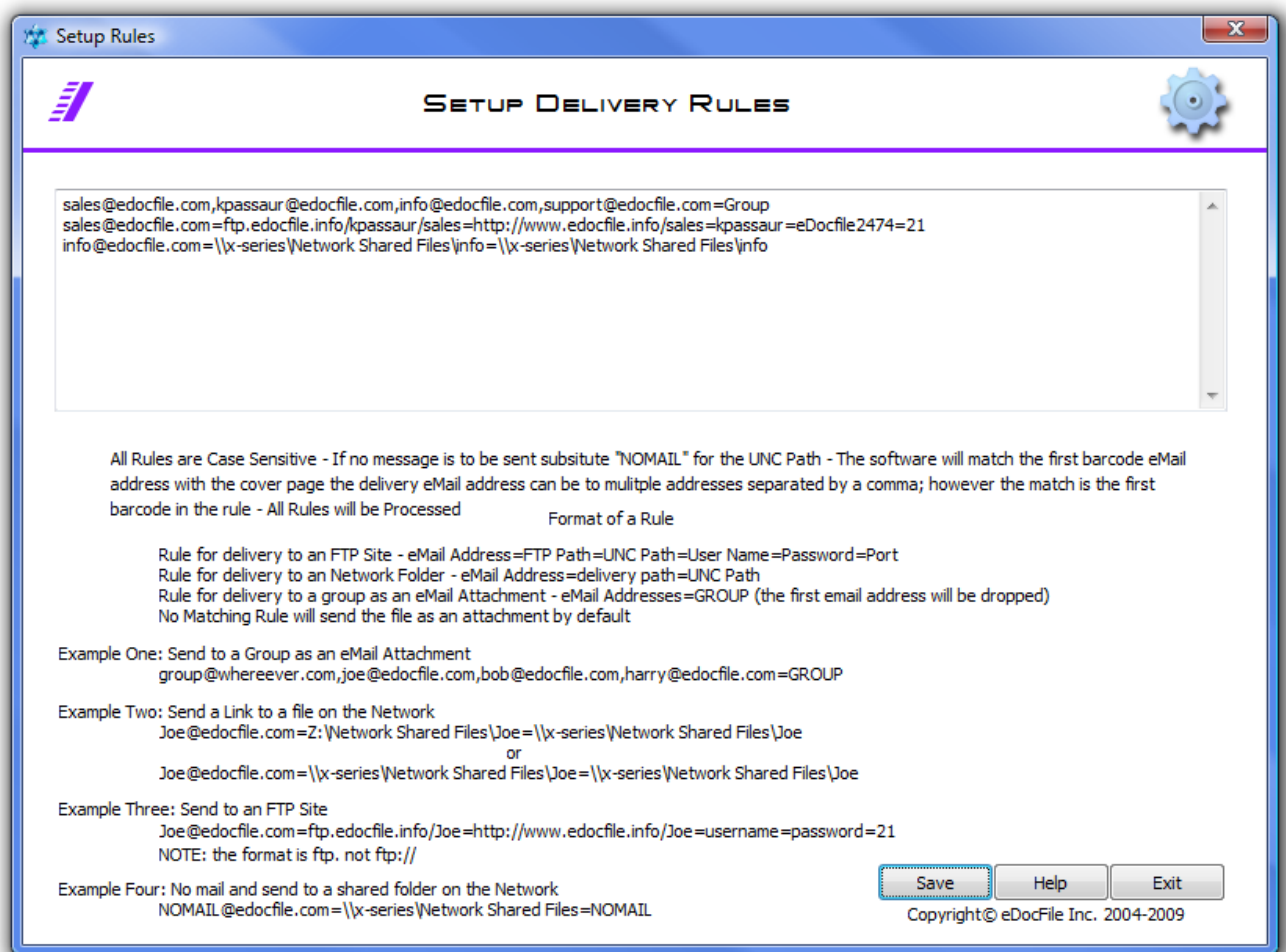6. Enter the Port to be used for Mail it is usually 25 or 80

7. If SMTP Authentication is required, place a check mark in this box

8. Enter a Subject line for the eMail message

9. Enter the path to a text file that will contain the message body. This file must be a plain text file with no formatting.

10. Enter the folder that is going to be monitored for multi-page tiff images - this is the output folder from your copier. All images must be multi-page tiff images with G3 or G4 compression. If a different format is desired, please contact eDocfile with a test image.

11. Automatically Detect Page Size and Resolution - This allows the user to process files with cover pages of different sizes and resolutions. For instance, if some were printed on A4 paper and others on Legal or Letter size paper the locations of barcodes could still be determined. If it is unchecked the Image Resolution and Cover Page Paper Size will have to be set. Please note that the resolution of the images still must me either 200, 300 or 400 dpi and that the rotation either needs to be landscape or rotate 90 degrees clockwise.

12. For manual processing set the resolution of the scanned file, either 200, 300, or 400 dpi can be used. These are the Only Resolutions Supported. If a different resolution is required use Custom Page Settings

13. Set the Cover Page Paper Size. The choices are Letter, Legal or A4. If a different Cover Page Paper Size is required use Custom Page Settings.

14. Set the Rotation of the file, if the bar code is on the top set it at zero. If the copier cannot output the file in the portrait mode scan the file so that the bar code is on the left requiring 90 degree rotation to the right and use the "Right 90" setting.

15. Place a check mark in this box to use a custom page settings file. The custom page setting file contains the location of the barcodes and the rotation settings on non-standard page sizes. Placing a check mark in this box over rides manual and automatic settings.

16. Place a check in this box to save a copy of the file attachment with the log file in C:\barcodeemail\logfiles. Please note these files need to be manually removed.

17. If the file attachment should be a PDF place a check in this box, it left unchecked it will be sent as a tiff file.

18. Click on this button to setup delivery rules

19. Place a check mark in this box to apply delivery rules, if left unchecked all files will be sent as an attachment

20. Place a check mark in this box to save a copy of every file that comes in to be processed

21. If saving an archive copy of each incoming file, enter the folder to save it in.

22. Test Mail, Help, Save and Exit do as the name implies.

When finished entering the settings click on "Test"

Setup Barcode Mail Sender Message

12/16/2008 1:12:46 PM

Mail was sent sucessfully - The Results were 250 Accepted message qp 14877 bytes 415

OK

If the mail setting were entered correctly this message will appear. If the test was not successful check the settings and test it again until it is correct. When it is successful click on Save to return to the Main Menu.

Setup Rules

Setup Rules

SETUP DELIVERY RULES

sales@edocfile.com,kpassaur@edocfile.com,info@edocfile.com,support@edocfile.com=Group
sales@edocfile.com=ftp.edocfile.info/kpassaur/sales=http://www.edocfile.info/sales=kpassaur=eDocfile2474=21
info@edocfile.com=\\x-series\Network Shared Files\info=\\x-series\Network Shared Files\info

All Rules are Case Sensitive - If no message is to be sent subsitute "NOMAIL" for the UNC Path - The software will match the first barcode eMail address with the cover page the delivery eMail address can be to mulitple addresses separated by a comma; however the match is the first barcode in the rule - All Rules will be Processed

Format of a Rule

Rule for delivery to an FTP Site - eMail Address=FTP Path=UNC Path=User Name=Password=Port
Rule for delivery to an Network Folder - eMail Address=delivery path=UNC Path
Rule for delivery to a group as an eMail Attachment - eMail Addresses=GROUP (the first email address will be dropped)
No Matching Rule will send the file as an attachment by default

Example One: Send to a Group as an eMail Attachment
group@whereever.com,joe@edocfile.com,bob@edocfile.com,harry@edocfile.com=GROUP

Example Two: Send a Link to a file on the Network
Joe@edocfile.com=Z:\Network Shared Files\Joe=\\x-series\Network Shared Files\Joe
or
Joe@edocfile.com=\\x-series\Network Shared Files\Joe=\\x-series\Network Shared Files\Joe

Example Three: Send to an FTP Site
Joe@edocfile.com=ftp.edocfile.info/Joe=http://www.edocfile.info/Joe=username=password=21
NOTE: the format is ftp. not ftp://

Example Four: No mail and send to a shared folder on the Network
NOMAIL@edocfile.com=\\x-series\Network Shared Files=NOMAIL

Save   Help   Exit

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Rules work as follows:

The email address on the cover page is read and it is matched to the first part of the rule. This process continues until all rules are processed. This means if the same email address is used twice the rules will be applied twice.

If no matching rule is found, the file will be sent as an email attachment to the address on the cover page. If a file is just to be delivered and no email message entered substitute NOMAIL for the UNC path.

If the file is to be sent to multiple addresses the first email address in the destination must match the barcode on the cover page and it will be delivered to all email addresses until the "=" equals sign is found. When using multiple addresses separate them with a "," comma with no spaces. The exception to this is if the file is to be attached and sent to a group, in which case destination would be the word "Group" and the first email address would be skipped.

Basic Format of a Rule:

Email address" =" destination" =" link (if to an ftp site follow with"=" User Name "=" Password"="Port)

Examples:

Example One - Send as an email attachment

Enter nothing, as by default if there is no matching rule the file will automatically be sent as an attachment

Example Two: Send a Link to a file on the network

Rule format : email address=file path=UNC path for link
Joe@edocfile.com=Z:\Network Shared Files\Joe=\\x-series\Network Shared Files\Joe
Or
Joe@edocfile.com=\\x-series\Network Shared Files\Joe=\\x-series\Network Shared Files\Joe

Example Three: Send to an FTP Site with a link in the email

Rule format : email address=ftp site=UNC path for link=User Name=Password=Port
Joe@edocfile.com=ftp.edocfile.info/Joe=http://www.edocfile.info/Joe=username=password=21
(NOTE it is ftp. not ftp://)

Example Four: No mail and send to a shared folder on the Network

Rule Format: eMail Address=file Path=NOMAIL
NOMAIL@edocfile.com=\\x-series\Network Shared Files=NOMAIL

Example Five: Send a Link to a group of email addresses when the file is on an FTP site

Rule format : email address(s)=ftp site=UNC path for link=User Name=Password=Port
The cover page will be to sales@edocfile.com
sales@edocfile.com,tom@edocfile.com,dick@edocfile.com,harry@edocfile.com=ftp.edocfile.info/Joe=http://www.edocfile.info/Joe=username=password=21
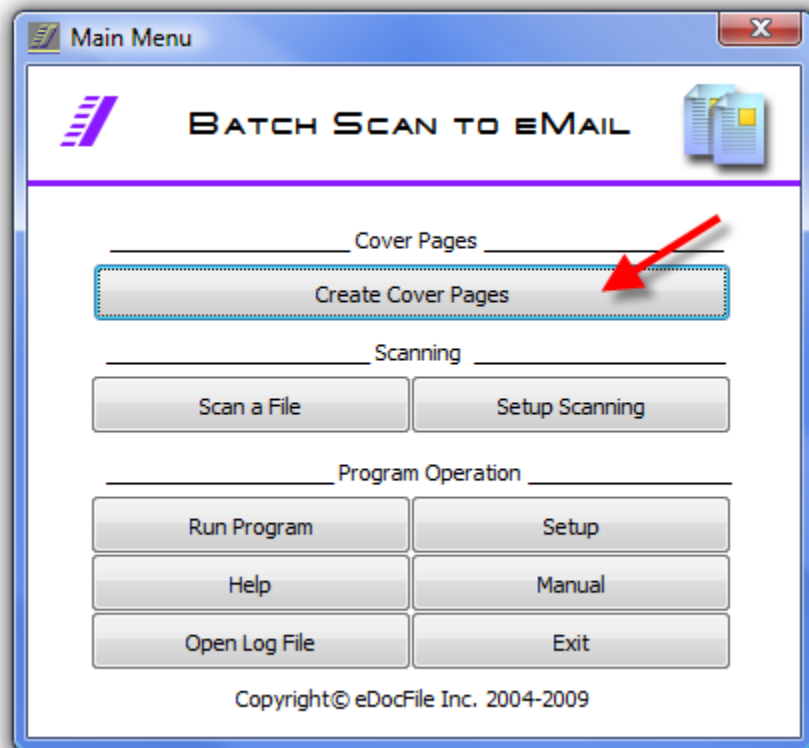(NOTE it is ftp. not ftp://)

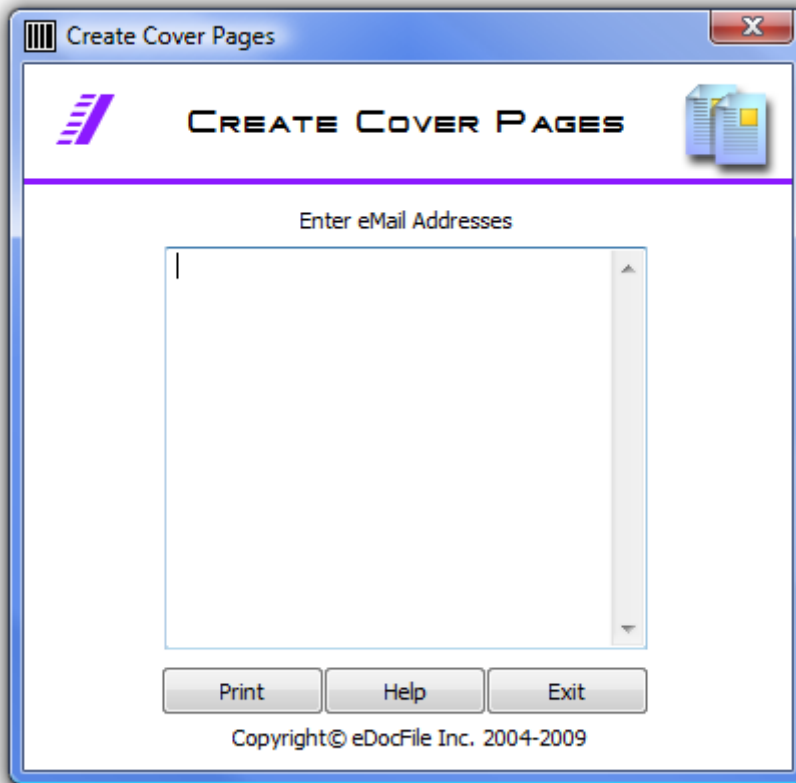### Example Six: Send as an attachment to a group of email addresses
Rule format : email address(s)=Group
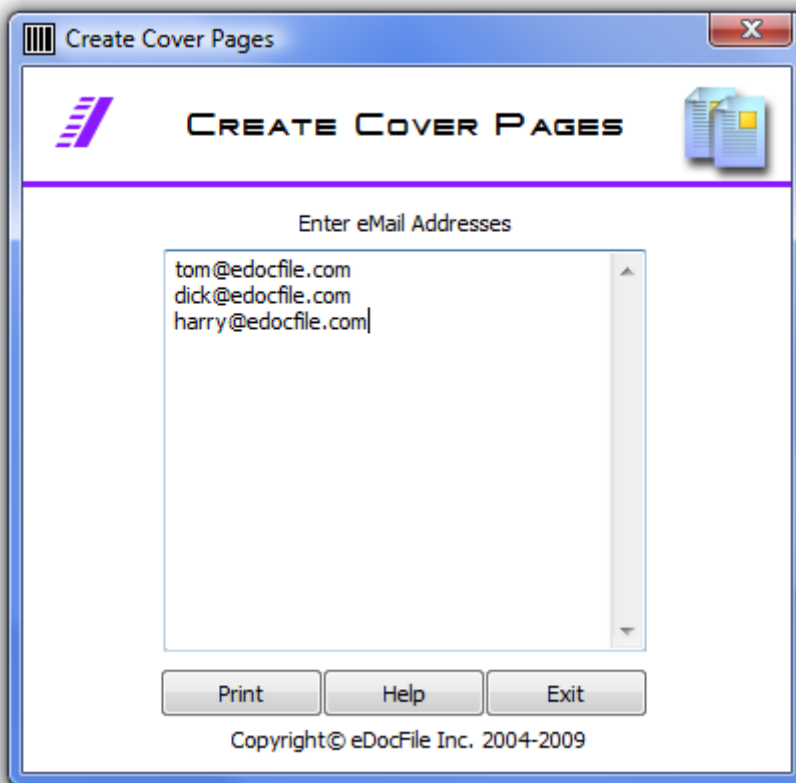noone@edocfile.com,tom@edocfile.com,dick@edocfile.com,harry@edocfile.com=GROUP
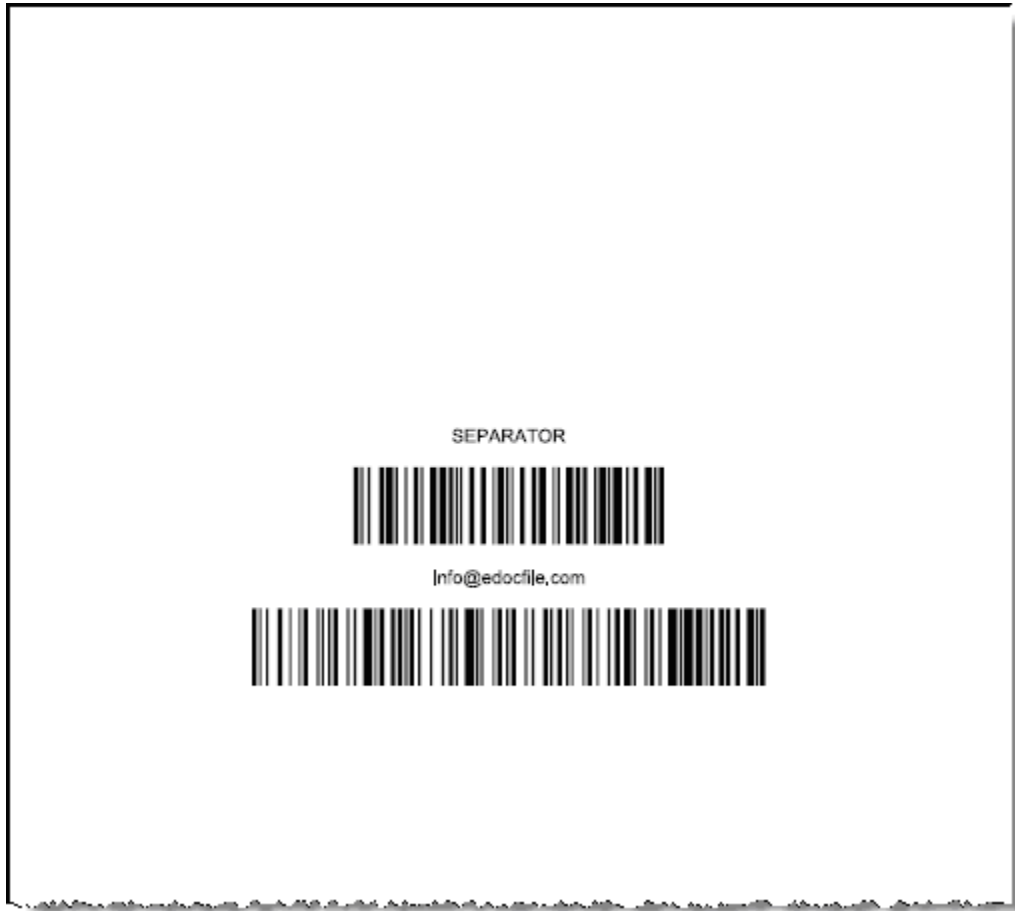
Creating Cover Pages

Begin by clicking on "Create Cover Pages" from the Main Menu.

The Create Cover Pages menu will open.

Enter the recipients email address or copy and paste a list in,and click on "Print" when finished. The cover pages will be sent directly to the default printer.

Running the Program

If using a copier with a scan option:

Scan the file with a copier to the monitored file folder as a multi-page black and white 300 dpi image G4 Tif image ((MMR ITU-T) (CCITT T.6)).Open the folder and then the file and confirm that it is in the vertical position with the barcodes at the top of the page. If the page is displayed in a landscape mode change the copier settings to produce a portrait image or leave it rotated with the barcodes rotated left 90 degrees.

If using a scanner:

Use the programs scanner interface or:
Scan with your favorite software to a file folder producing a multi-page black and white 300 dpi image G4 Tif image ((MMR ITU-T) (CCITT T.6)). Once the file is finished scanning open it to confirm that it is in a portrait position with the barcodes at the top of the page. Save the file to the monitored folder. Do not scan directly into the monitored folder.

To run the program, from the Main Menu click on "Run Program"
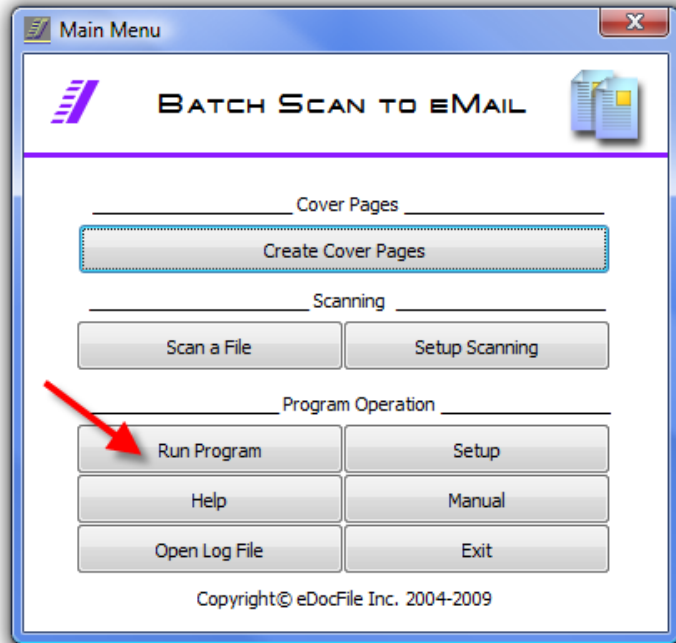
a flashing Icon will appear in the Systray showing the program is running.

To stop the program click on "Shut Down" from the Main Menu.
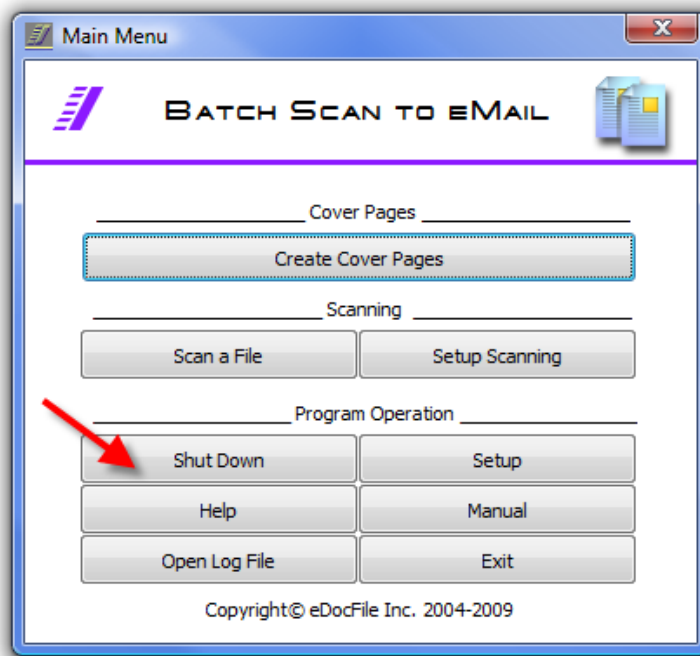
Scanning Setup
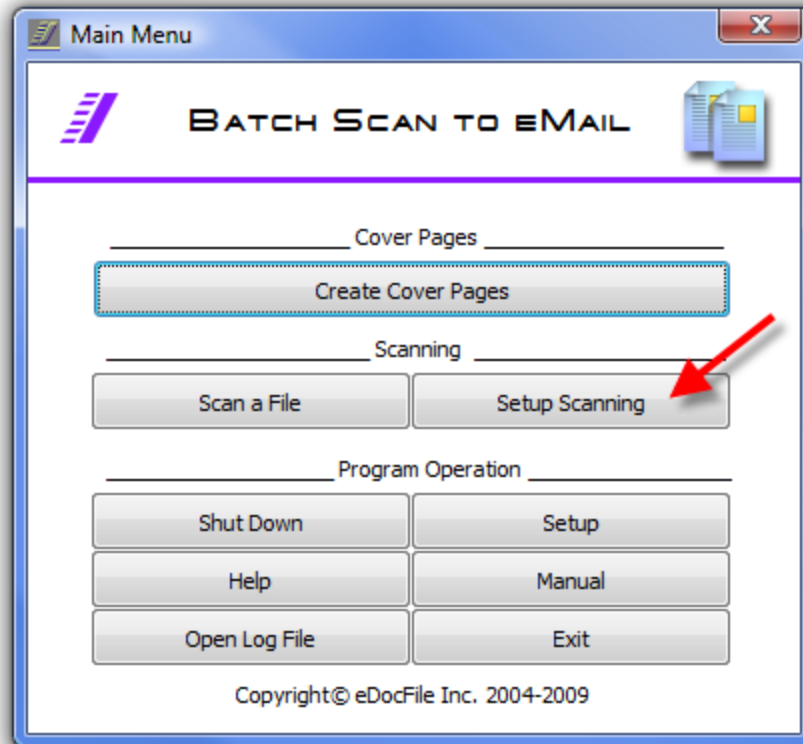
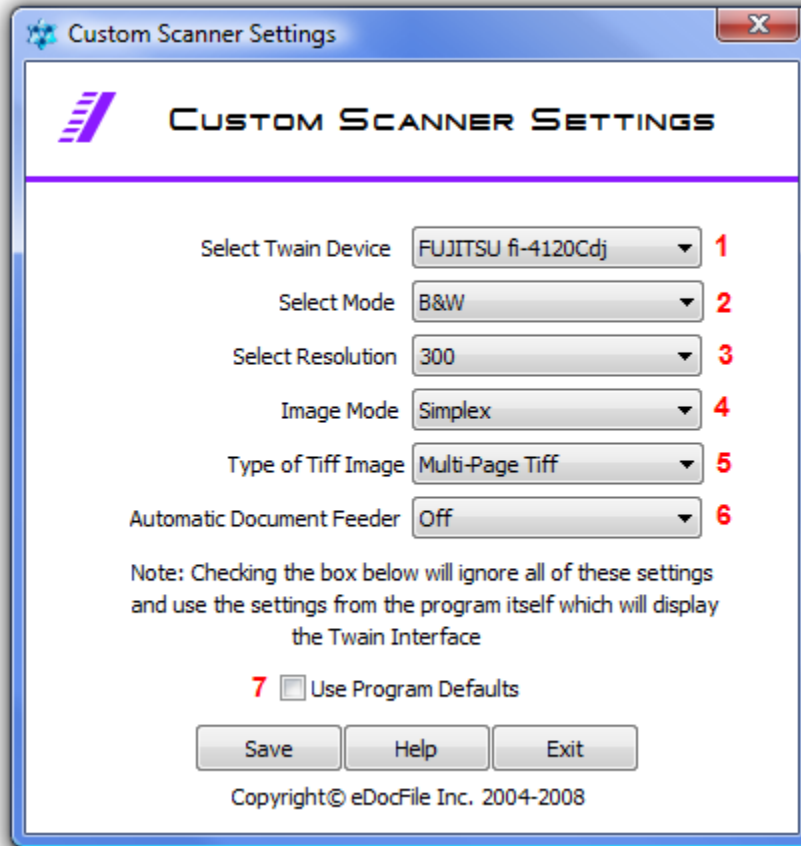Click on "Setup Scanning" from the Main Menu.
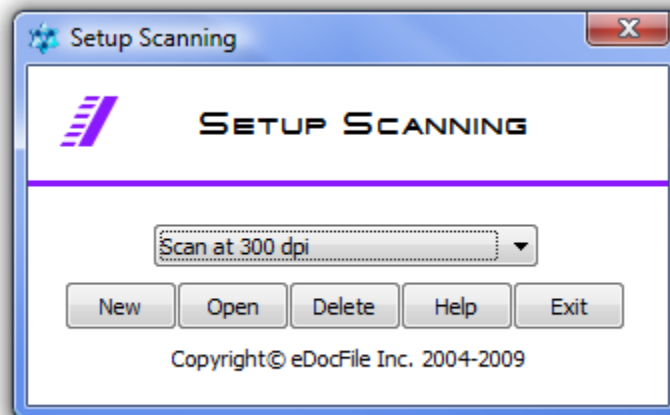
Click on "New" from the Setup Scanning Menu.

Confirm

Update TWAIN Device List?

Yes   No

Click on Yes to update the Scanner List

Searching for Devices

Please Wait

Searching for Twain Devices

The software will search for installed TWAIN Devices, once completed it will display the Custom Scanner Settings Window.

1. Select the Scanner to be used
2. Select Mode - either B&W or Grayscale (B&W is recommended)
3. Select the resolution (for best results use 300)
4. Select whether the documents are simplex or duplex
5. Select whether the documents are single or multi-page
6. Select whether the automatic document feeder should be used if available
7. Place a check mark to have the scanner interface open with these settings

   When finished selecting settings click on "Save"
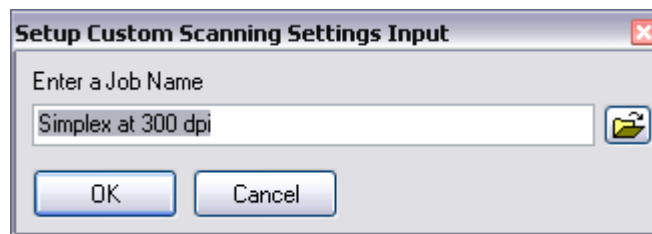
Enter a name for these settings. These settings can be used for a number of different jobs. So the naming should relate to the settings or a familiar document type. For instance if invoices are scanned at 300 dpi as a multi-page TIFF image. The job should be named "Invoices" or Multi-Page 300dpi.

Scanning Files

Batch Scan to eMail has an easy to use scanner interface that has been designed to eliminate errors and increase productively. To begin scanning click on Scan a File from the Main Menu.
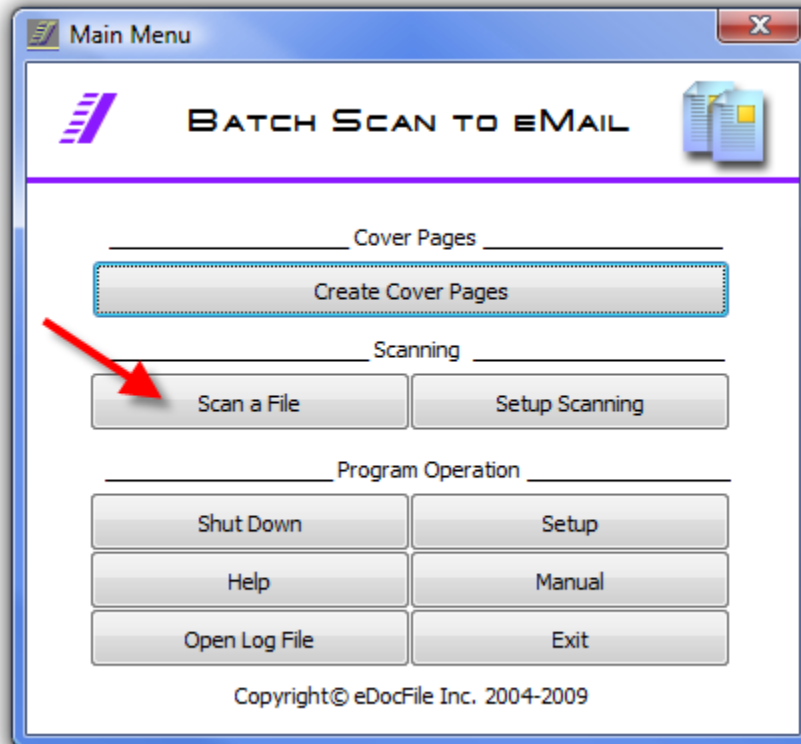

The "Scan a File" menu will appear.
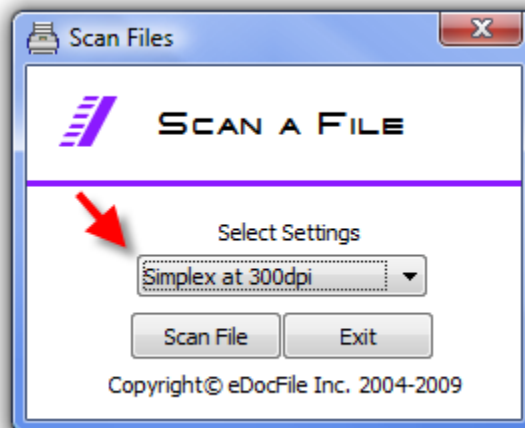
Select the setting to use from the drop down list and click on "Scan File". At this point the scanner will be activated. If the scanner has an automatic document feeder and it is set to "ON" in the scanning setup, no user interface will be shown. The document will just pass through the scanner.
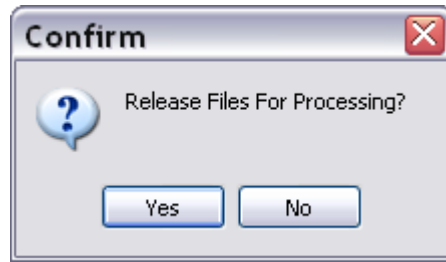
Once scanned, the user will be presented with a window prompting to release the files for processing. If they went through correctly, without double feeds etc. the user clicks on yes and they will be sent to the folder that is monitored for input images.

If they did not go through correctly click on "NO" and rescan them.
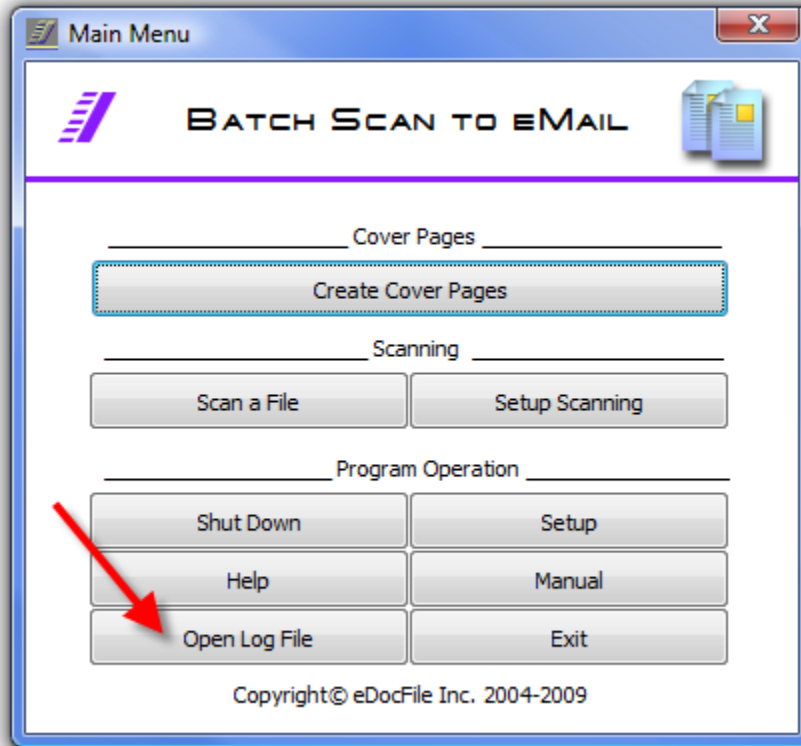
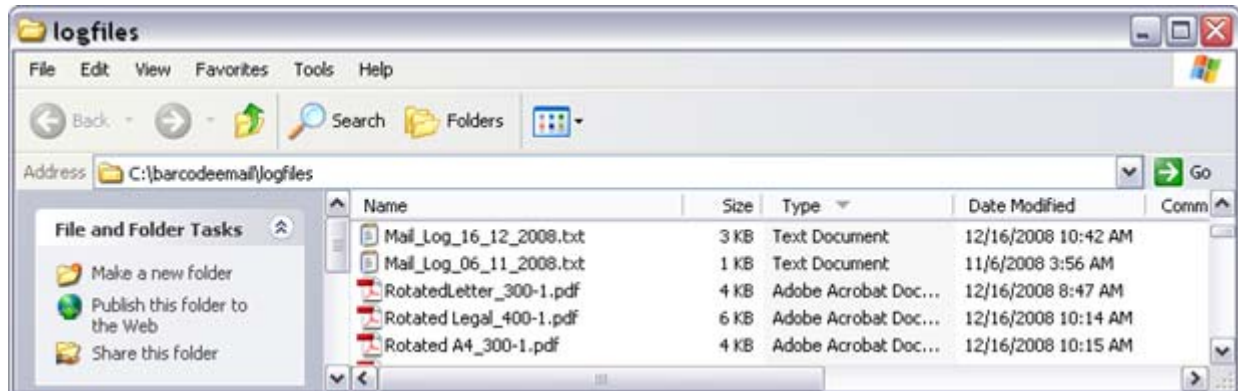Once finished with a file the "Scan a File" menu will reappear.
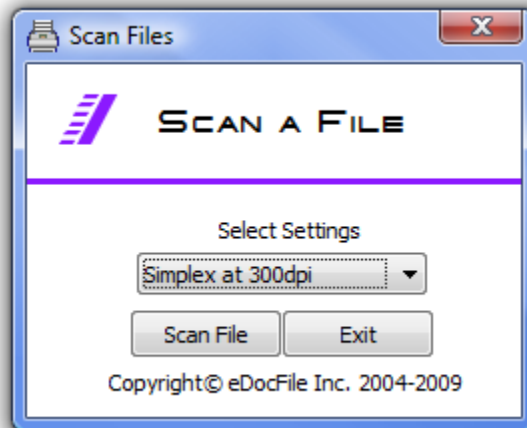
Click on "Exit" when done.

Log Files

Batch Scan to eMail keeps a log of the eMails sent and if desired a copy of the attachment. To open the log click on "Open Log File" from the Main Menu.

The folder will open containing the log files.

The log file is created daily and is in the format of "Mail_Log"_"day_"month"_"year".txt

Custom Page Settings

On the rare occasion that the document cannot be scanned at 200, 300, or 400 dpi on letter, legal or A4 paper a custom settings file can be created to locate and read the bar code. Please note if you would like to skip this please contact eDocfile and have a sample non-confidential file that can be used for testing and we will do it for you.

Begin clicking on Start \ Run and then entering "C:\barcodeemail\bcPlacement.exe"
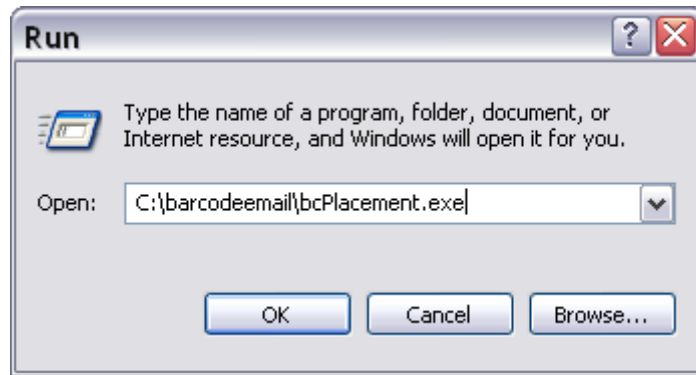
And clicking on "OK"

The Barcode splitter template creator will open.
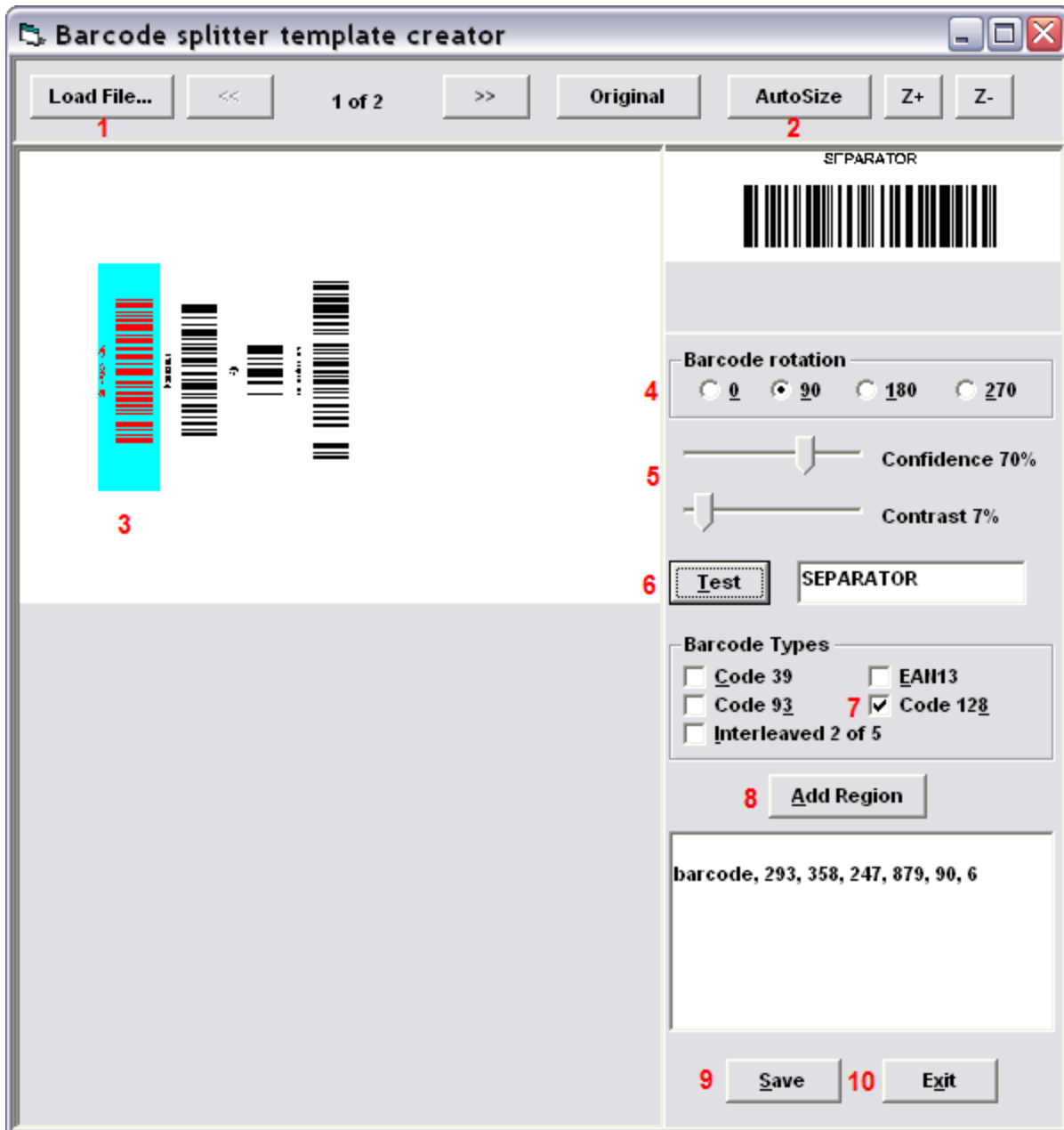
Follow these steps:

1. Click on "Load File…" and browse to the sample cover page to be setup.

2. Click on "AutoSize" to fit the image in the Window. The "Z+" and "Z-" can be used with the scroll bars as well if necessary to get a better view of the image.

3. Hold down the left mouse button and draw a box around the top barcode on the page.

4. Select the rotation of the page, in this example it need to be rotated 90 degrees to be upright, so 90 is selected.

5. Adjust the Confidence level and Contrast if necessary. The confidence level should be set between 70 - 80. It is next to impossible to get over 80 even with files that are printed virtually.

6. Click on "Test" and "SEPARATOR" should appear as the result. If it does not, change the confidence level, contrast or area.

7. Uncheck "Code 39" and place a check in the box next to "Code 128"

8. Click on "Add Region" and the settings for the barcode will appear in the box below. Repeat steps 3 and 6 each time adding the region until all four barcodes are read.

9. Click on save and save the file to C:\barcodeemail\CPSSettings\custom.ini
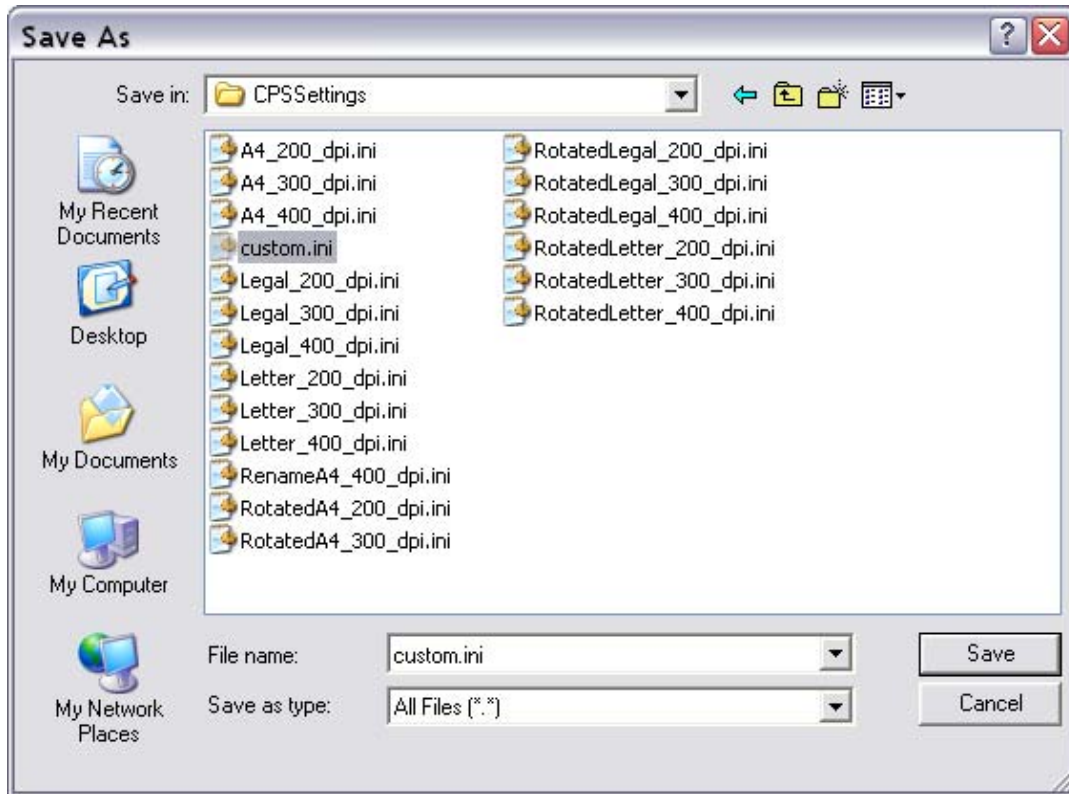
Once Saved click on Exit

The settings can now be used in the setup.

Support

For assistance with the registered or trial version contact:

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