

USER GUIDE

GARGANTUA INTELLISCAN

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ABOUT GARGANTUA INTELLISCAN

IntelliScan is an optional Gargantua module installed on client workstations. It allows automating the input and classification of great amounts of documents through scan or importation into Gargantua databases.

With Gargantua Administration Tool, an administrator can create IntelliScan jobs - settings that automate the input of a specific document type.

For every IntelliScan job, the administrator needs to specify:

- The form used for indexation, which corresponds to the scanned or imported document type, (for example, "Bill");
- The document input mode - scan or import;
- Possible scanner configuration;
- The indexation type - manual or automatic using an OCR or ADP/ADR model;
- The destination folders of the documents in the database.

For more information about IntelliScan jobs administration, refer to the "09-06. Admin Gargantua 7 - BG - IntelliScan" documentation.

Once the IntelliScan jobs are created, you can launch the Gargantua IntelliScan module. After logging in, you can select a job fitting the type of documents to be imported or scanned.

When the job is finished, the documents will be available in Gargantua Web client.

INSTALLING GARGANTUA INTELLISCAN

ADP/ADR JOBS - INSTALLING FLEXICAPTURE ENGINE

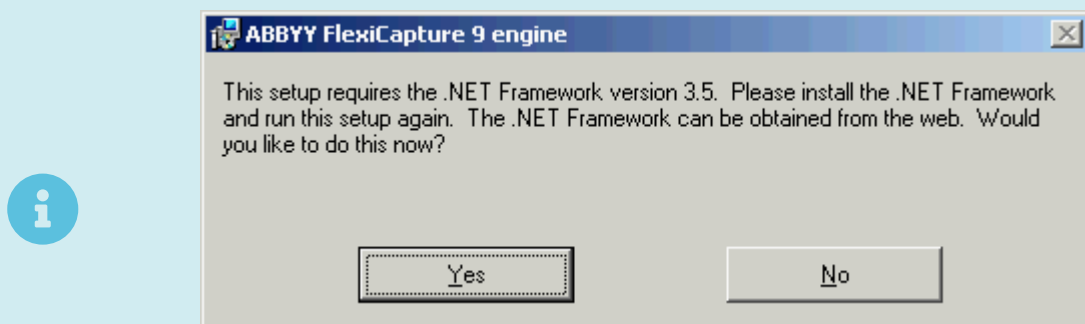
If you want to execute jobs using ADP/ADR (Automatic Document Processing/Recognition), you need to install ABBYY FlexiCapture Engine **before** the IntelliScan module.

If you do not want to execute jobs using ADP/ADR, you can proceed directly to the IntelliScan module installation (see [below](#)).

To install ABBYY FlexiCapture Engine, proceed as follows:

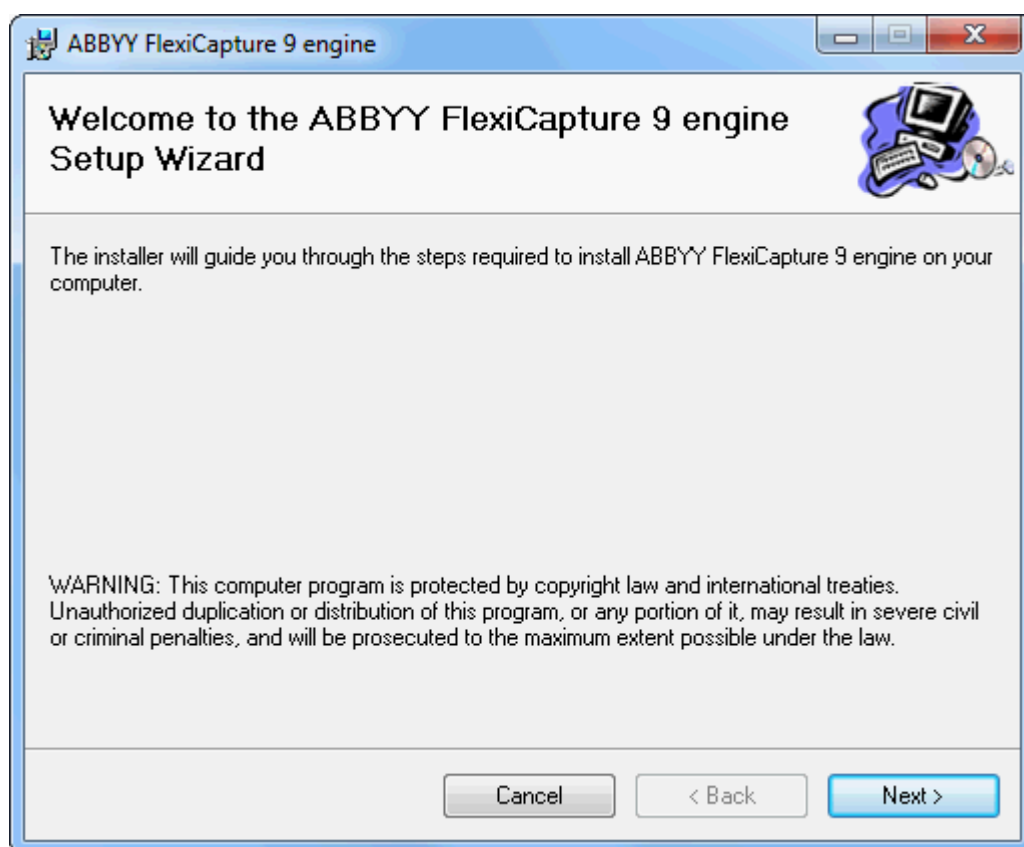
1. Double-click on the `siatel-flexicapture-v9.msi` file provided by SIATEL.

The following message may display:



Click “Yes”. You will be redirected to the Microsoft website. Download and install .NET Framework 3.5 SP1, then run the ABBY Flexicapture Engine installation one more time.

The **ABBYY FlexiCapture 9 engine** installation wizard opens:



2. Click **Next**.

The **Select Installation Folder** screen displays.

3. In the **Folder** field, leave the default installation folder (recommended) or choose another one by clicking on **Browse**.
4. Select the **Everyone** option, which specifies that all the users who use this computer will be able to use the tool, and click **Next**.

The **Confirm Installation** screen displays.

5. Click **Next** to confirm the installation.

The **Installing ABBYY FlexiCapture Engine** screen showing a progress bar displays.

6. Wait until the installation is finished, and click **Next**.

The **Installation Complete** screen displays.

7. Click **Close**.
8. In the Windows **Start** menu, go to **Control panel** > **Programs and features** and make sure the **ABBYY FlexiCapture 9 Engine** program displays in the list.

The installation is complete.



You need to insert the FlexiCapture 9.0 dongle provided by SIATEL in a USB port each time you execute a job using ADP/ADR.

INSTALLING THE GARGANTUA INTELLISCAN MODULE

To install the IntelliScan module on a computer where scan operations will be performed, proceed as follows:

1. Copy to your computer the `siatel-is-setup.msi` setup file provided by SIATEL.
2. Double-click it to launch it.

The SIATEL IntelliScan installation wizard starts.



3. Click **Next**.

The **Select Installation Folder** screen displays.

4. In the **Folder** field, leave the default installation folder (recommended) or choose another one clicking on **Browse**.
5. Select the **Everyone** option, which specifies that all the users who use this computer will be able to use the tool, then click **Next**.

The **Confirm Installation** screen displays.

6. Click **Next** to confirm the installation.

The **Installing SIATEL IntelliScan** screen showing a progress bar displays.

7. Wait until the installation is finished, and click **Next**.

The **Installation Complete** screen displays.

8. Click **Close**.

The IntelliScan module is now installed on your computer. A shortcut icon is now available on your desktop.

STARTING GARGANTUA INTELLISCAN

Once installed, Gargantua IntelliScan is available in: **Start** menu > **All programs** > **SIATEL** > **Gargantua IntelliScan**. A shortcut icon is also available on the desktop.

1. Start Gargantua IntelliScan from the programs list or from the desktop shortcut.

The connection dialog displays.



2. Enter your Gargantua user name and password, and the server URL, and click **OK**.



To use Gargantua IntelliScan, you need to have the corresponding access right. If you do not have enough access rights, contact the administrator.

The Gargantua IntelliScan screen displays.

3. Only the jobs corresponding to scanners connected to the computer display.

If no scanner is connected to the computer, no job displays. Connect the scanner, and click the **Refresh** button located at the bottom of the screen.

The list of available IntelliScan jobs display. The name of the Gargantua database to which each job is associated is indicated in brackets.



The job names preceded by “()” have been developed in JavaScript language to fulfill specific needs.*

The jobs using ADP/ADR (Document Automatic reading/Reconnaissance) do not display automatically. If you want to use them, perform steps 4 to 7. Otherwise, the procedure is complete.

4. Click the **Options** button.

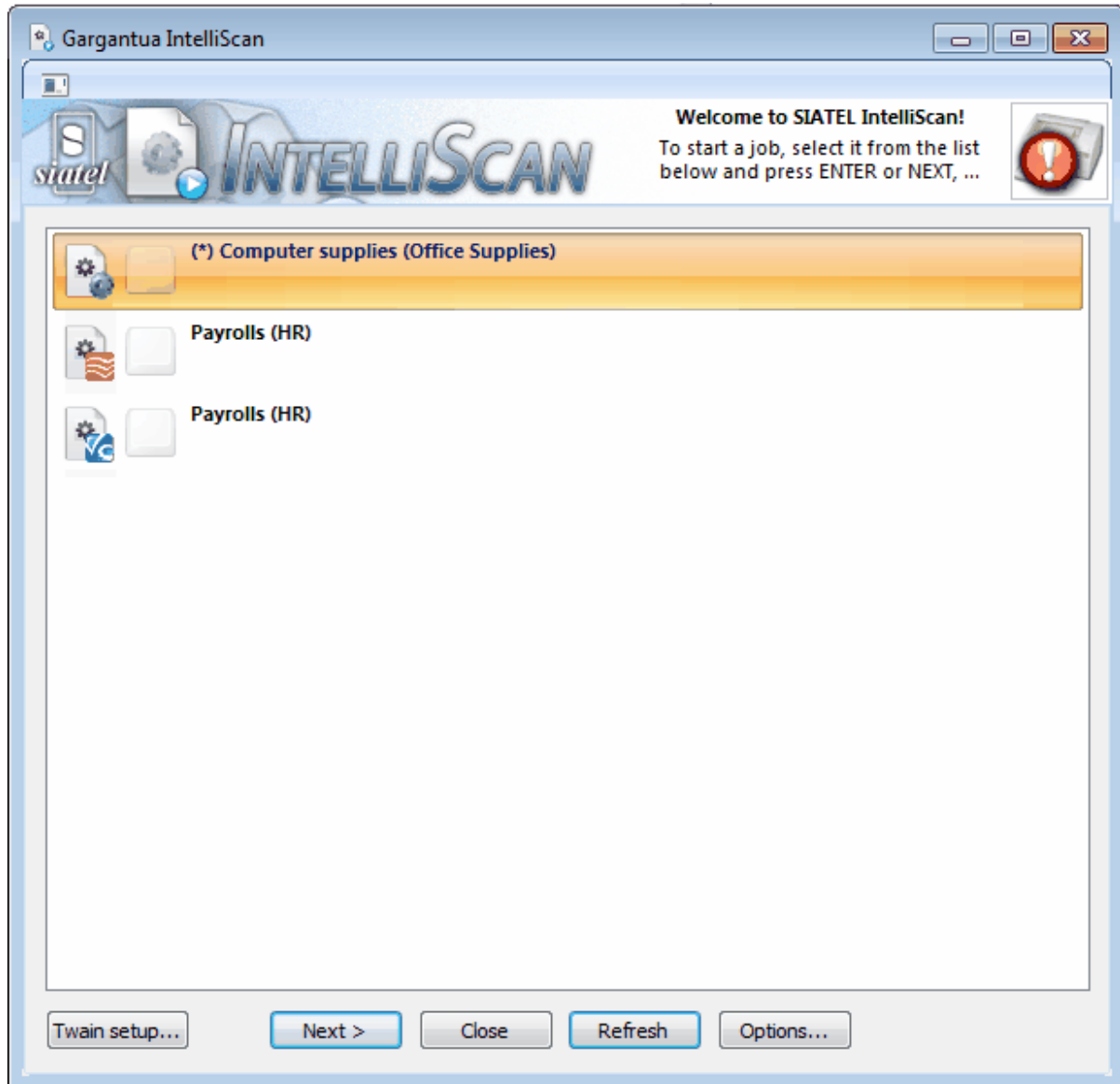
The **Options** screen displays.

5. In the **Jobs** tab, check the **ADP/ADR** checkbox.
6. In the **FlexiCapture** tab, modify if necessary the installation path indicated for the ABBYY FlexiCapture Engine.
7. Click **OK**.

The jobs using ADP/ADR display.

GARGANTUA INTELLISCAN INTERFACE

The Gargantua IntelliScan interface is as follows:



- At the top of the screen, there is a list of all the available IntelliScan jobs. The possible icons are:
 -  Standard IntelliScan job;
 -  IntelliScan job using ADP/ADR;
 -  Non-recognized files processing job, always associated to a ADP/ADR job. When performing jobs of this type, all the non-recognized documents (located in a specific folder) will be processed again; then, the user will be able to enter the missing values and to correct

the invalid values.



If a blue icon job displays and the corresponding red icon job does not, it means that the scanner assigned to this job has not been detected by IntelliScan.

- At the bottom of the screen, the following buttons are available:
 - **Twain driver** - If the scanner you chose in the job configuration is not a Panasonic scanner, you will need to use a “Twain” generic driver to make IntelliScan work with this scanner. Click the button to choose the installed “Twain” generic driver (available on the scanner manufacturer website).



This type of driver does not allow you to use automatic attribute filling jobs (barcode separator sheet and ADP/ADR).

- **Next** - Click this button to go to the next step of the selected job.
- **Close** - Click this button to quit Gargantua IntelliScan.
- **Refresh** - Click this button to refresh the jobs list (for example, if their configuration has been modified or if you have connected a new scanner).
- **Options** - Click this button to open the **Options** screen (see [below](#)).

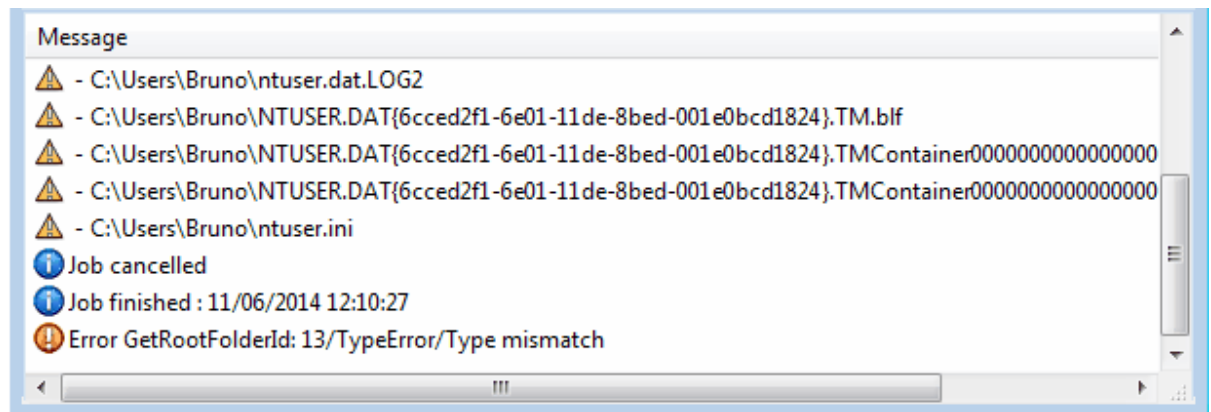
OPTIONS

Click the **Options** button to configure Gargantua IntelliScan.

“GENERAL” TAB

Configure the following options :

- **Only during job execution** - Select this option if you want the **Message** pane, which displays a history of the performed operations, to display at the bottom of the IntelliScan screen only during job executions (default).
- **Always visible** - Select this option if you want the **Message** pane to display at the bottom of the IntelliScan screen permanently:



The history is deleted every time you close Gargantua IntelliScan.

- **Display checkbox to remember attribute values** - Select this option to display a checkbox on the right side of the attribute names during attribute validation step (see [below](#)). This checkbox allows you to remember the entered attribute value and to restore it in further executions of the same job:

The form displays the following attributes and their values:

- name: ☐ alester_perm
- employee's name: ☐ Amanda
- employee's surname: ☐ Lester
- contract type: ☐ permanent
- year: ☐ 1 2013



This feature is not available for date type system attributes.

“FLEXICAPTURE” TAB

The options in the FlexiCapture tab allow you to configure ABBYY FlexiCapture Engine if you execute jobs using ADP/ADR (Automatic Document Processing/Reading):

- **User interface language** - Select the language you want for the IntelliScan interface.
- **Image rotation** - Select the rotation type you want to apply to images processed by the job.
- **Document orientation** - Select the orientation of the pages processed by the job.
- **Black & white conversion** - Select this option to convert in black & white the pages processed by the job.
- **Remove small flaws from images** - Select this option to automatically clean small flaws of the images.
- **FlexiCapture engine path** - Modify if necessary the ABBYY FlexiCapture Engine path.

“JOBS” TAB

Checkboxes in the **Jobs** tab allow you to choose which type of job to execute with IntelliScan. The unchecked types will not display in the jobs list.

You can choose between the following types:

- **Import** - Check this checkbox for import jobs to display in the list.
- **Scan** - Check this checkbox for scan jobs to display in the list.
- **E-mail** - Check this checkbox for e-mail import jobs to display in the list.
- **Scripts** - Check this checkbox for jobs developed in JavaScript language for specific needs to display in the list.
- **ADP/ADR** - Check this checkbox for jobs using ADP/ADR to display in the list.

INTELLISCAN JOBS EXECUTION

The IntelliScan jobs execution (displayed windows, actions to perform) depends on their configuration.

This user guide describes all the steps a job can contain and, for each step, all the windows that can display. When executing a job, you may not get all the windows described in this guide, or you may get them in a different order.

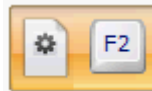
STARTING A JOB - TAKING THE NEXT STEP

Before starting an IntelliScan job, put the documents to be scanned in the scanner, if necessary.

To start a job, you can:

- Click the job, and then **Next**;
- Click the job, and then press the Enter key;
- Double-click the job;
- Use a keyboard shortcut; to assign a function key (F1 to F12) to a job so you can start it by pressing this key, proceed as follows:
 1. Click a job to select it.
 2. Hold down the Ctrl key and press the function key you want to assign to the job.

The shortcut key displays next to the job:

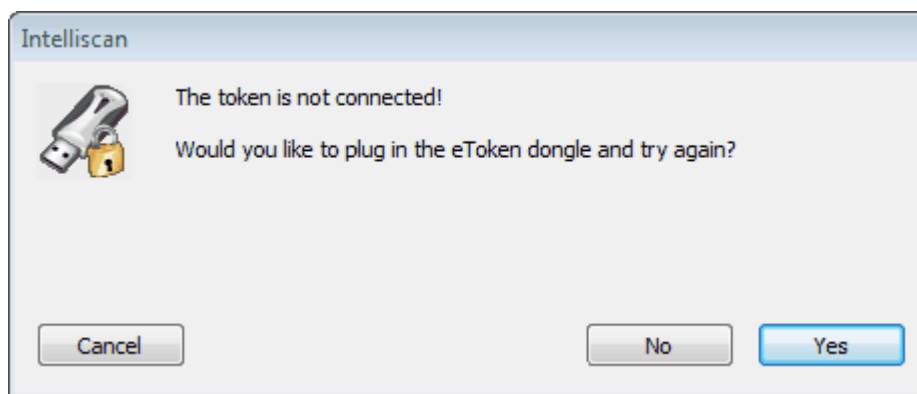


3. You can modify the keyboard shortcut as many times as you want.

APPLYING A SIGNATURE

If your administrator has enabled document sign, when you start a job you are prompted to take the following steps:

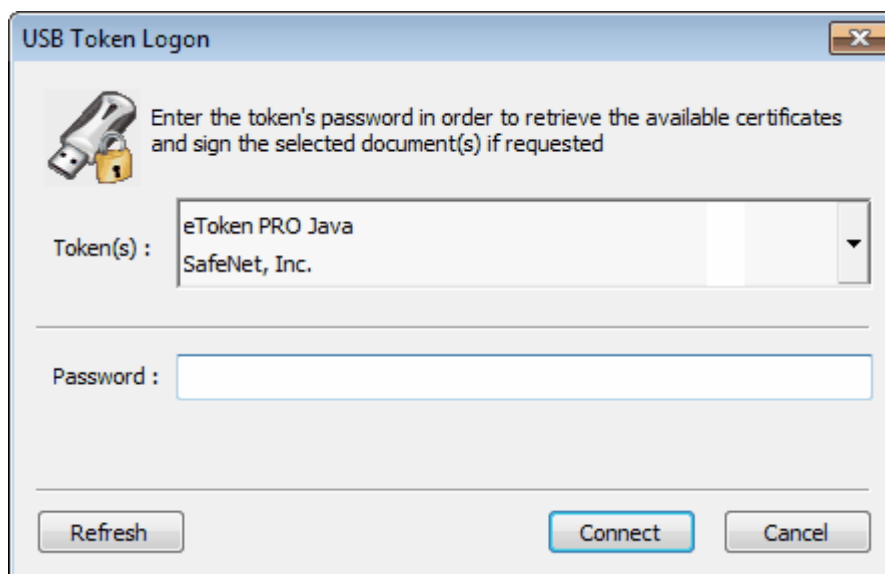
1. You may get the following error message:



In this case, proceed as follows:

- If you have an eToken dongle containing a certificate, plug it in a USB port of your computer, and click **Yes**.
- If you do not have an eToken dongle containing a certificate, and **your administrator has chosen not to make the signature step compulsory**, you can click **No**. Another dialog will display, asking you if you want to continue with the IntelliScan job execution without using a signature. Click **Yes**.

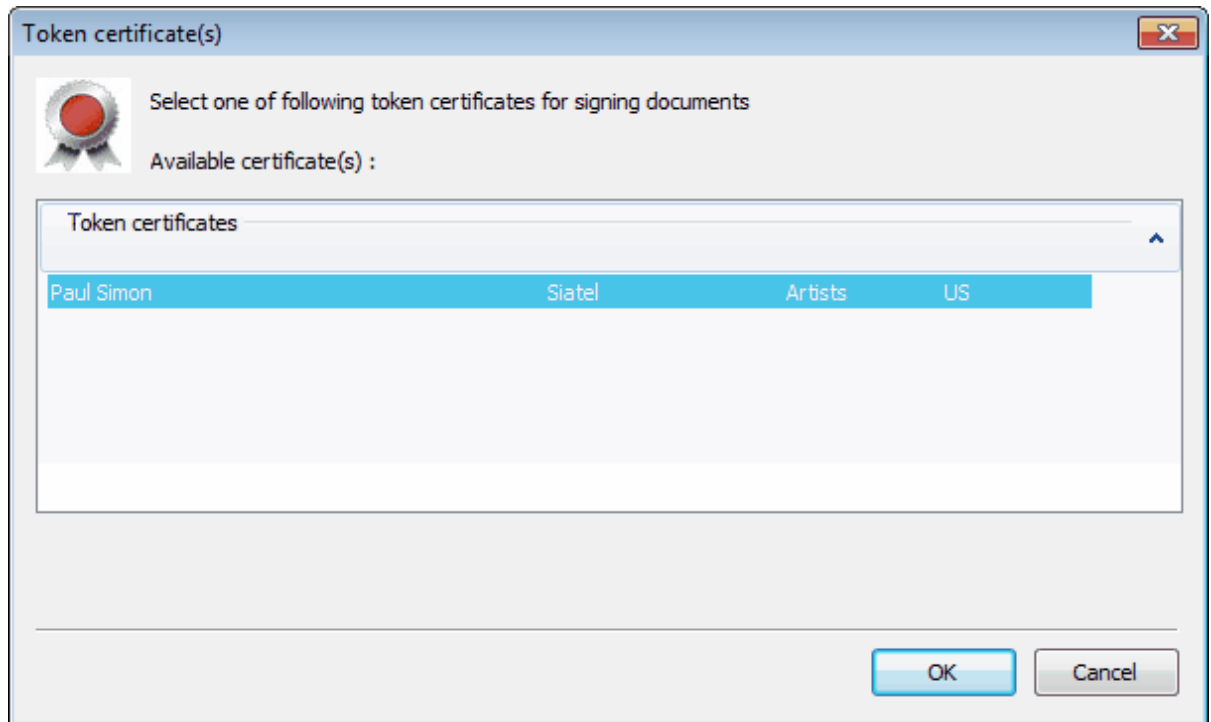
2. The **USB Token Logon** screen displays:



Proceed as follows:

- Enter the certificate password, and click **Connect**.
- If you do not know the password, and **your administrator has chosen not to make the signature step compulsory**, you can click **Cancel**. Another dialog will display, asking you if you want to continue with the IntelliScan job execution without using a signature. Click **Yes**.

3. The **Token certificate(s)** screen displays:



Proceed as follows:

1. Click the line of the certificate you want to use.
2. Click **OK**.

ENTERING OR VALIDATING ATTRIBUTES

Form display allows you to enter the attribute values and/or to monitor automatically entered values. The form displays twice during the job execution if the administrator has enabled manual attribute filling and validation.

Forms can have many different layouts. See below an example of customized form with entered attribute values:

The screenshot shows a software window titled "Gargantua IntelliScan" with a sub-header "Payrolls (manual) (HR)". The main form area is titled "Personal file" and contains several input fields with pre-filled values:

- label: ☐ [icon] 55596734 - JOHNSON Jack
- ID: ☐ [icon] 55596734
- Date of birth: ☐ [calendar icon] 14/04/1931
- Name: ☐ [icon] Johnson
- Surname: ☐ [icon] Jack
- Service: ☐ [icon] Communication
- Job title: ☐ [icon] Publisher

At the bottom of the form are two buttons: "Next>" and "Cancel". A "Reset" button is located in the top right corner of the form area.



You can press the Tab key to go to the next attribute. The tabulation order is determined during the form design.

Depending on the configuration selected by your administrator, one of the following validation modes is available:

- If the **Next** and **Cancel** buttons are available, you are in [manual mode](#).
- If the **Search**, **Cancel**, and possibly **New folder** buttons are available, you are in [search mode](#).
- In automatic search mode, the attribute validation step is performed automatically. You directly get the [target folder selection](#) step.

MANUAL MODE

The manual mode of the attribute validation step allows you to enter the attribute values, or to check that they

are filled automatically.



The attributes with a red background need to be filled compulsorily to allow you to continue with the job execution, as they contain essential information that can, for example, define a view composition. If the red background does not disappear once you have filled an attribute, it means that the entered data type does not correspond to this attribute (example: Birth date = 53).

Enter or monitor the attribute values, then click **Next**.

At the end of the job, new final objects will be created in the Gargantua database.

SEARCH MODE

The search mode of the attribute validation step allows you to search an existing target folder having its attributes already defined.

Two situations are possible:

- If you consider that a folder suitable to the IntelliScan job documents already exists, proceed as follows:

1. Fill the fields allowing you to search the existing folder.



Depending on the configuration set by your administrator, the values you enter in the form can be used to update the target folder form. If you leave a field blank, the existing value will be conserved.

2. Click the **Search** button.

The [target folder selection](#) screen displays. Follow the procedure corresponding to this step

- If you consider that there are no folders suitable to the IntelliScan job documents, proceed as follows:

1. Fill the form fields.



The attributes with a red background need to be filled compulsorily to allow you to continue with the job execution, as they contain essential information that can, for example, define a view composition. If the red background does not disappear once you have filled an attribute, it means that the entered data type does not correspond to this attribute (example: Date of birth = 53).

2. Click the **New folder** button.

SELECTING A TARGET FOLDER

The target folder selection screen displays only in the search or automatic search modes:

The screenshot shows the 'Gargantua IntelliScan' application window. The title bar includes standard Windows controls (minimize, maximize, close). Below the title bar is a header area with the 'statel INTELLISCAN' logo on the left and a printer icon on the right. The main content area displays the text 'Payrolls (manual) (HR)' at the top right. A message box with a gear icon states: 'Please select a target from the list below and press NEXT to advance. Press BACK to change the search parametters or CANCEL to cancel the job.' Below this message is a table with two columns: 'Label' and 'Service'. The first row contains 'CTY' under 'Label' and 'Accounting' under 'Service', and this row is highlighted with a blue background. There are several empty rows below the first one. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button has a blue border, while the others have grey borders.

Two situations are possible:

- If a folder in the list is appropriate, click the corresponding line, and then **Next**.

The selected folder is used as target folder for the IntelliScan job documents.

- If none of the folders in the list is appropriate, click the **Back** button, fill the form fields if necessary, and then click the **New folder** button.

A new folder is created at the end of the IntelliScan job. Its form includes the values entered at this step.

IMPORTING DOCUMENTS

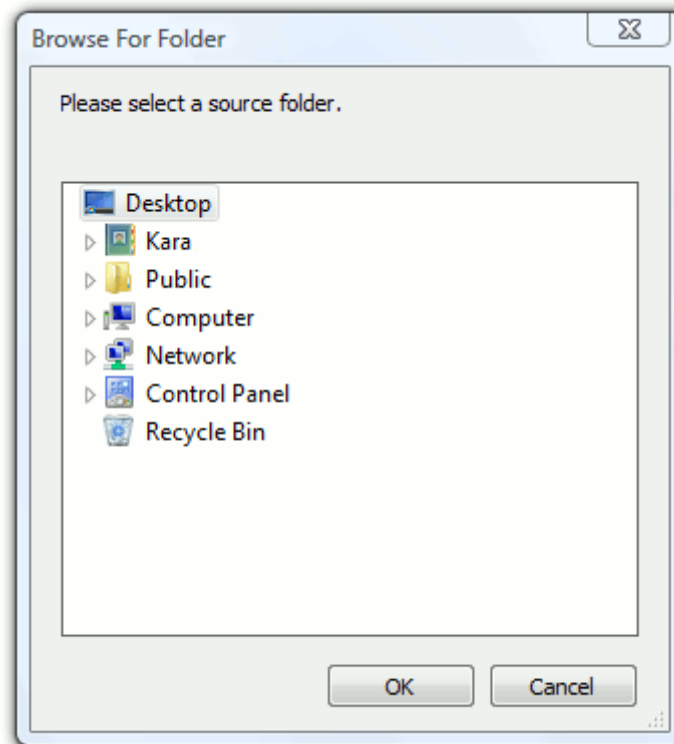
The following windows display only if the document input mode is import.

“BROWSE FOR FOLDER” WINDOW

The **Browse For Folder** window displays only if the administrator has selected the folder import in the IntelliScan

job configuration.

It allows you to select a folder to import the documents it contains:



Select the folder where the documents to be imported are located, and click **OK**.

The folders are imported. Depending on the job configuration, the content of the sub-folders, if any, is also imported. The number of imported files displays in the **Message** pane (see [above](#)).

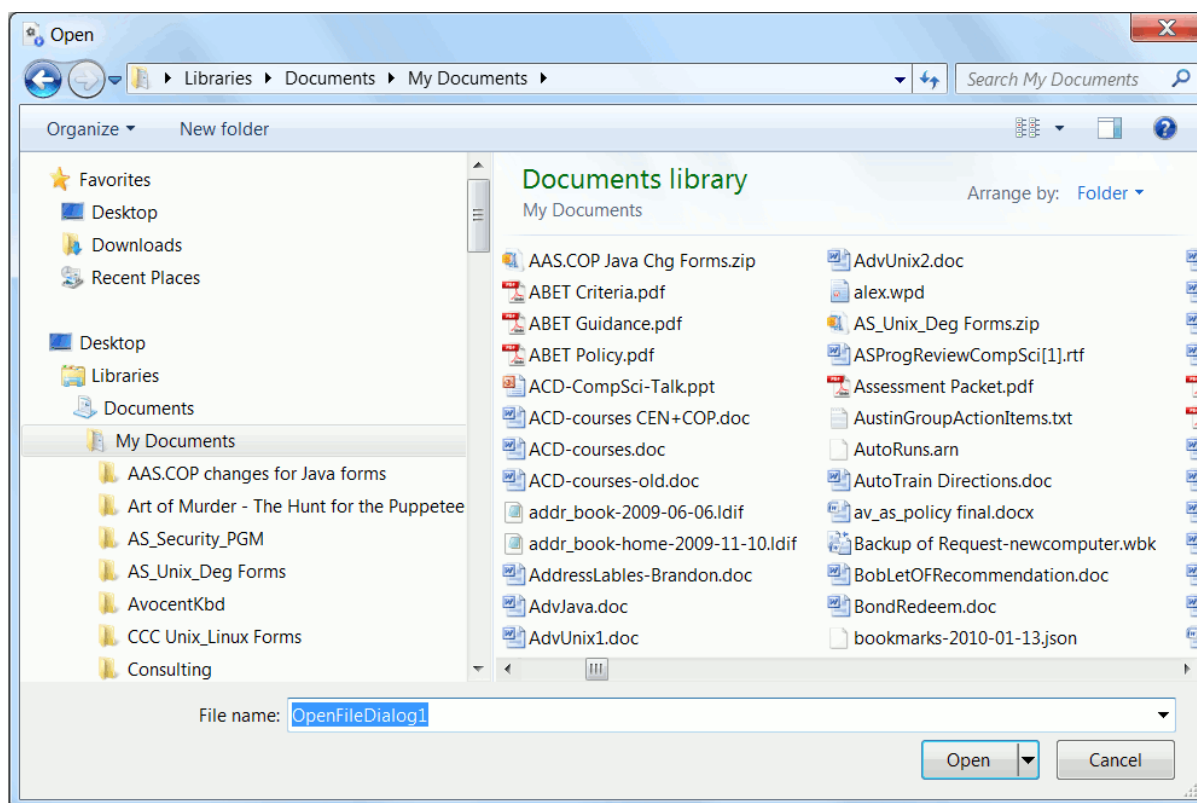


The structure (folders/sub-folders) is not restored in the folder tree of the Gargantua database.

“OPEN” WINDOW

The **Open** window displays only if the administrator has selected folder import in the IntelliScan job configuration.

It allows you to select one or more documents to be imported:



Select the documents to be imported, and click **Open**.

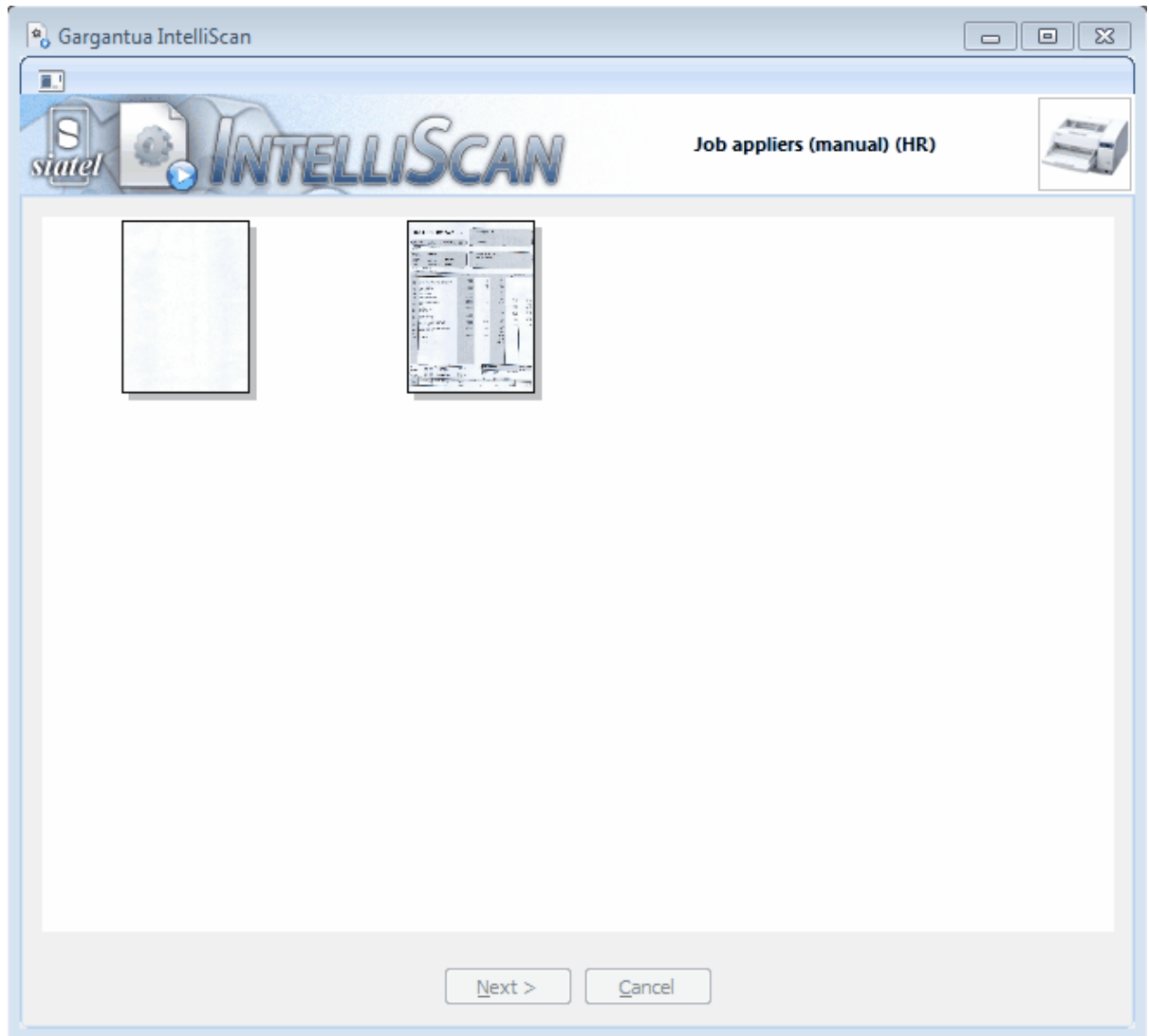


Restrictions on file types may have been set by the administrator (for example, he may have only allowed to import PDF files).

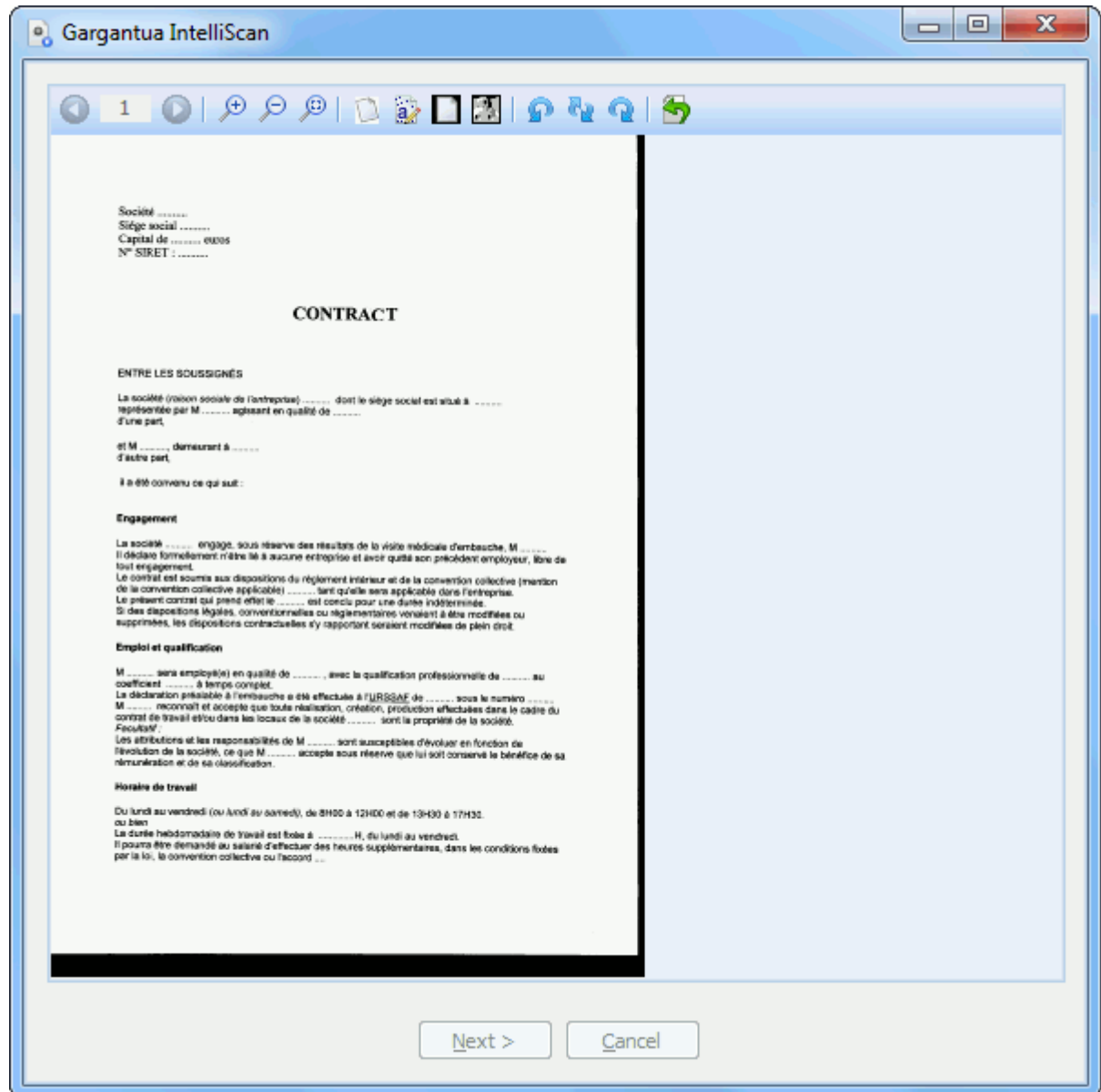
SCANNING DOCUMENTS

If the selected document input mode for the job is scan, a preview of the documents displays, depending on on the job configuration, either as thumbnails set aside ones from the others, or as a sequence of full size previews. The preview lasts as long as the scan does.

- Thumbnail preview:



- Full size preview:

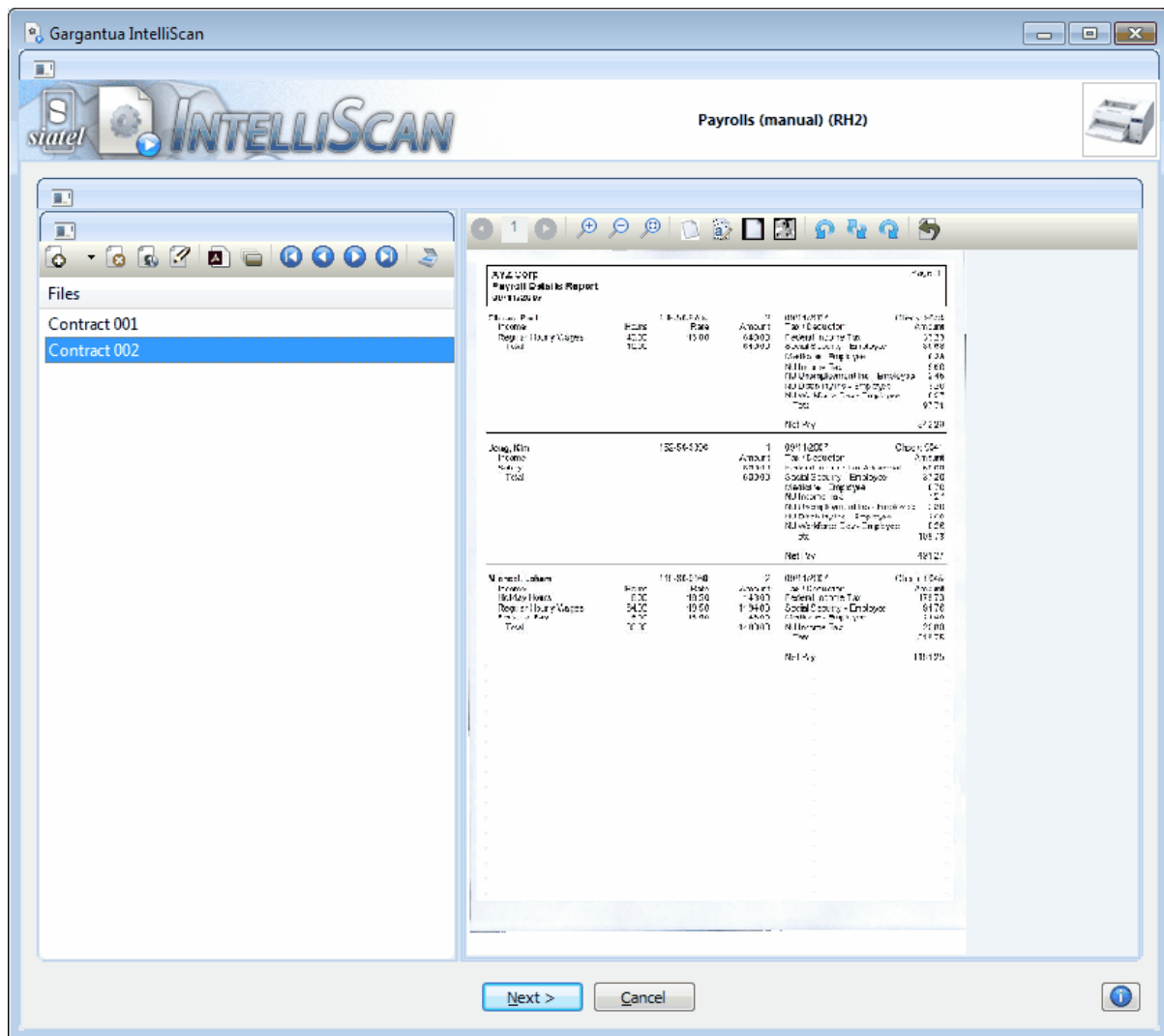


VALIDATING FILES

The file validation screen allows you to:

- View easily the imported or scanned documents (zoom...);
- Edit the images (skew, rotate...);
- Delete, replace, rename documents;
- Scan or import new documents.

The file validation interface is as follows:



The following commands are available for the files list:

- **Add files** - Put the documents in the scanner (if needed) and click the button to import or scan documents. The default settings set by the administrator will apply unless you change them using the tool before scanning a new document.
- **Delete files** - Select one or more files, and click the button to delete them.
- **Replace file** - Select the file to be replaced, put the new document in the scanner if needed, and click the button to replace the selected file by the new one. If the new document is to be scanned, the default settings set by the administrator will apply unless you change them using the tool.
- **Rename** - Select a file, and click the button to rename it.
- **First file, Previous file, Next file, Last file** - Click these buttons to browse through the documents in the order they display in the list.



You can also use the up and down arrow keys on your keyboard to go to the next or the previous document, and the Page up and Page down keys to go to the first or the last document respectively.

- **Scanner settings** - Click this button to modify the scanner settings before performing a new scan, if necessary.

The edition and viewing tools change depending on the type of the file. For text files, no edition is possible. The following commands are available in the preview:

- **Previous page, Next page** - Click these buttons to browse through the pages of a multipage TIFF file (.tif with several pages) or multipage PDF file (.pdf with several pages) file. You can click the arrows to go to the next or the previous page, and you can also enter the number of the page you want in the middle field, then press Enter to display it.
- **Zoom in** - Click this button to display a larger image of the document. Click as many times as you need to keep zooming in.
- **Zoom out** - Click this button to display a smaller image of the document. Click as many times as you need to keep zooming out.
- **Zoom reset** - Click this button to display the whole image.
- **Skew** - Click this button to skew an image that has not been scanned perfectly straight.
- **Despeck** - Click this button to clean the isolated black dots that may appear on a white page, and vice versa.
- **Black contours** - Click this button to erase the black contours that may appear around the image of a scanned document.
- **Auto levels** - Click this button to perform automatically the necessary settings to improve the quality of the image.
- **Rotate 90°, Rotate 180°, Rotate 270°** - Click this buttons to rotate the image 90°, 180° or 270° anti-clockwise.
- **Draft** - Click this button to display the document with all its features, such as hidden table grid lines, hidden text (comments...), etc.
- **Normal** - Click this button to display the document without borders nor separation between pages. This tool is meant for Office or text documents.
- **Preview** - Click this button to display the document page by page with their borders. This tool is meant for Office or text documents.
- **Original size** - Click this button to display a full size view of the document, as it was scanned. This tool is meant for Office or text documents.
- **Fit to window** - Click this button to adapt the display size of the document to the size of the window.
- **Fit to width** - Click this button to adapt the display size of the document to the width of the window.
- **Restore the original image** - Click this button to undo all the changes performed using the image edition tools on the selected files.

VALIDATING ADP/ADR RECOGNITION

The following screen only displays in jobs using ADP/ADR.

After the document input step (for both import and scan), a window allowing you to validate the ADP/ADR automatic recognition displays. This step allows you to check that the documents have been associated to the right model, and that the filled attribute values are correct:

The areas where information has been extracted are framed in green in the preview.

To validate the ADP/ADR automatic recognition, proceed as follows:

1. In the left frame, double-click the icon of the page to be processed.

The corresponding form and preview display in the right frames.

2. In the middle frame, click one of the form fields.

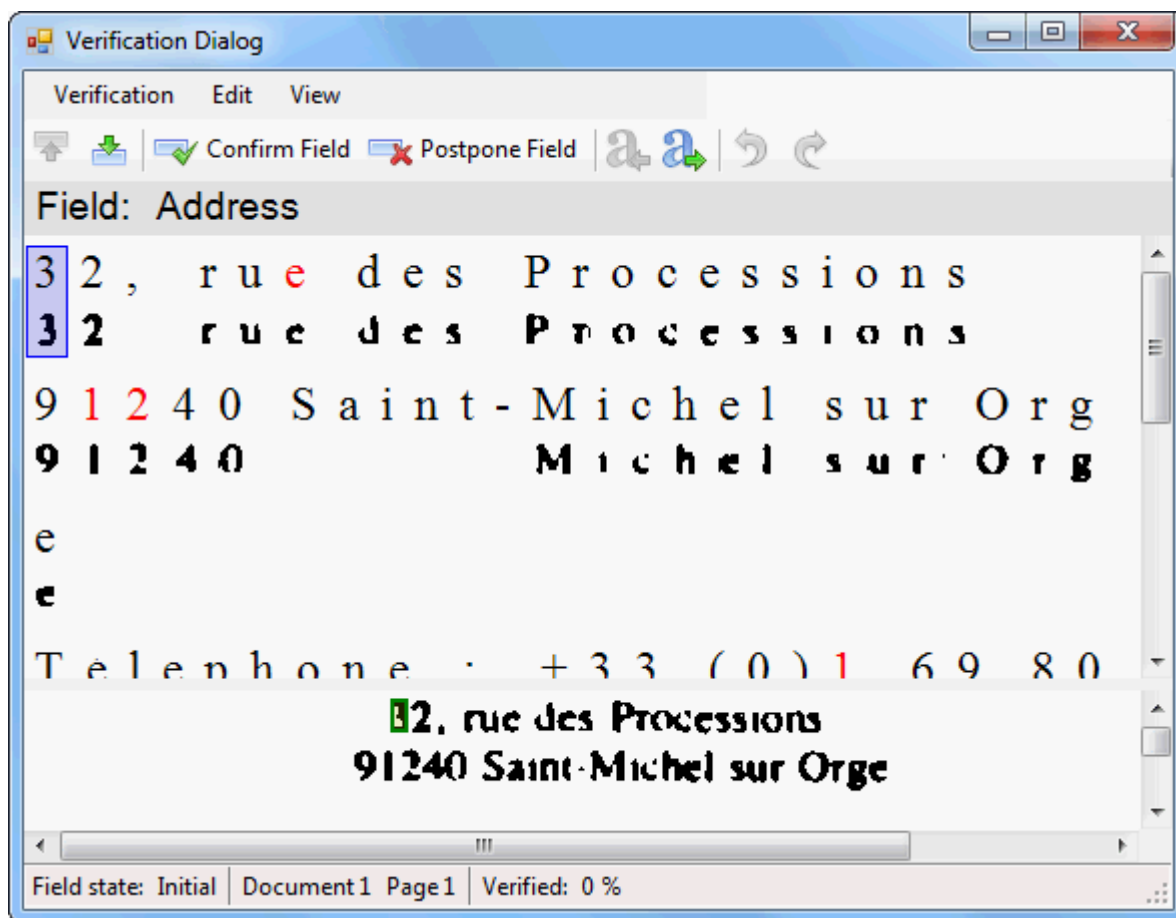
In the preview, the area corresponding to this field is framed with a thicker green line.

3. Check the contents of the fields against what you can read in the preview. In case of mistakes, you can either enter a new value in the form field, or resize or move the green frame over the preview to locate it on the correct value.
4. Click **Next**.

A dialog displays, asking you whether you want to proceed to the verification of the possible misrecognized fields.

5. Click **Yes**.

If there are any fields with misrecognized characters, a window allowing you to validate them displays:



6. If the extracted value is correct, click the **Postpone Field** button. Otherwise, you can correct it directly by entering the new value, and clicking the **Confirm Field** button.
7. Repeat this operation for each field having misrecognized characters.
8. Click **Next**.

END OF THE JOB

At the end of a job, depending on the configuration, different behaviors are possible:

- Return to the jobs list;
- Start the job automatically (loop execution);
- Display a confirmation message to restart the job.

TROUBLESHOOTING

- **You cannot log in to IntelliScan.**
 - Make sure the entered server IP address is correct. By default, its format is `http://[server IP address]:8080/siatel-web/`. If you do not know it, contact your administrator.
 - To use Gargantua IntelliScan, you need to have the corresponding access right. If you do not have enough access rights, contact the administrator.
- **No jobs display./The IntelliScan job you want to execute does not display.**
 - Make sure you have connected and turned on the scanner corresponding to the IntelliScan job. The scanner model to be used is set by the administrator when configuring the IntelliScan job.
 - To be able to see an IntelliScan job, you need to be assigned to this job and to the corresponding Gargantua database. Ask your administrator to proceed to the necessary assignments.
 - For an IntelliScan job to display in Gargantua IntelliScan, it has to be deployed using Gargantua Administration Tool. Ask your administrator to deploy the job.
 - If it is an ADP/ADR job, make sure you have installed ABBYY FlexiCapture Engine, and enabled the ADP/ADR option in the **Jobs** tab of the **Options** window.
 - Make sure the checkbox corresponding to the type of job you want to execute is checked in the **Jobs** tab of the **Options** window.
- **An error occurs at the end of the job execution.**
 - To execute an IntelliScan job, you need to have writing rights on the job's target folder. If you do not have enough access rights, ask your administrator to grant you new access rights or to change the corresponding security profile.