User's Guide

VersaIMAGE
VersaCAR
VersaView

Version **6**

VersaImage Software Corporation

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Part 1

Getting Started

Introduction to VersaCAR/VersaIMAGE

1

Welcome to VersaCAR™ for Windows, VersaIMAGE™ or VersaVIEW™!

This family of products, brought to you by VersaIMAGE Software Corporation, provides you with a complete hybrid document storage and retrieval system.

VersaCAR for Windows is a full featured networked or stand alone PC Microsoft Windows based microfilm CAR indexing and retrieval system *which may be expanded at any time to include electronic image management.* External database information from other computer systems can be utilized using VersaCAR's easy to use import and export utility. VersaCAR for Windows includes a request spooler for processing microfilm print requests from end users over a network. Requested document prints are routed via VersaCAR to fax, mail or internal mail facilities for distribution. Microfilm scanners may be used in conjunction with VersaCAR to produce scanned microfilm images for fax, print, E mail and image storage (TIFF G4) off-line (on-line with VersaCAR-PLUS and VersaIMAGE).

VersaCAR for Windows contains software drivers for popular micrographics cameras and most micrographics retrieval controllers on the market. Depending on the sophistication of these controllers, *VersaCAR may* provide *some* or fully automatic film control. *VersaCAR* offers a user friendly application generator for unlimited applications and a fully functioning auxiliary microfilm controller keyboard which is displayed on the computer monitor screen.

VersaSCAN II is an additional software module which is available for manual or automatic filming including Bar Code recognition with automatic indexing right into VersaCAR's database. Two types of Bar Code systems are available: 1. Full RS-232C control or 2. Keyboard Wedge type interfaces. Currently available for: Minolta DAR 2800/Alos 42 cameras, Minolta 1600, Canofile 100 and others.

VersaIMAGE for Microfilm: Extends VersaCAR for Windows to allow electronic image input from microfilm scanners. Full microfilm (Roll/Frame) and electronic image (TIFF Group-4) management is maintained. *VersaIMAGE* may be used with all ISIS compatible microfilm scanners. The system may be configured to limit microfilm retrievals to *first time only events.* Because microfilm scanners scan all images, be it for fax, print, image view or data entry purposes, all such *scanned* images may be stored and cross referenced in the *VersaIMAGE* database. Thus *VersaIMAGE* allows continued conversion of microfilm images to digital images in normal daily use. Significant time savings can be achieved with the elimination of microfilm retrievals of the same image(s) in the future. External images and data may be imported and exported by the system.

Automatic Film Conversion Mode: This mode allows automatic scanning of microfilm rolls. Entire rolls or sections of rolls may be scanned and / or printed (for quality control purposes) by range. file blips or via manual intervention. The use of intelligent microfilm controllers is required in order to perform these automatic scanning functions.

Automatic electronic file folder generation: Certain microfilm controllers (Canon FS-1&2, Minolta MARS 3 & 4, 3M PageSearch, Kodak IMT 350, Bell & Howell IMAGE SEARCH/VISCO, etc.) have the ability *to respond* back to VersaIMAGE with file/page information. VersaMAGE is then able to *automatically create electronic file folders* on multi level, blipped microfilm with automatic insertion of scanned images into appropriate new electronic folders. Most **unblipped microfilm** may also be converted automatically with the addition of a microfilm controller and an image / page sensor on the microfilm screen.

Hybrid VersaIMAGE for Paper, or Paper and Microfilm scanning and retrieval applications: Extends VersaCAR for Windows to allow electronic image input from ISIS compatible paper scanners with full microfilm (Roll/Frame) and electronic image (single and multi image TIFF Group-4) management. Single or batch scanning modes with batch cards are supported. External indices are easily appended to image files with VersaIMAGE's append module. VersaIMAGE allows optional image input from microfilm scanners as well as paper scanners and external image and data files. Image indexing from predetermined bar code or OCR "zoom" zones and automated re-scan management increases indexing productivity. For image distribution from active microfilm applications VersaIMAGE offers full microfilm image edit functions with integrated Fax/E-Mail image management.

VersaVIEW is an inexpensive image viewer which allows the expansion of VersaIMAGE users on a network or stand alone PC systems. It can be used on the same network or off-line on independent PC systems for later import of images and corresponding data into VersaIMAGE data bases.

Summary:

VersaIMAGE is the true fully hybrid image management solution which arrived from the microfilm management sector. Microfilm has been effectively used to manage large paper files for over twenty years. This thorough experience in dealing with paper and microfilm records is readily apparent to the VersaIMAGE user. **VersaIMAGE provides excellent flexibility and top records management performance at a very reasonable price.**

The founders of VersaIMAGE Software have significant experience in the imaging industry. Micrographics experience was gained through the invention, development, sale and distribution of VISCO—industry's first microprocessor-controlled microfilm controller—in 1975. Many VISCO intelligent microfilm controllers for Canon, Minolta, Bell & Howell, 3M and Kodak are still in active use today around the world. The development of several major electronic imaging service bureaus rounded out this experience in the last 20 years, resulting in the development of CAR, service bureau, and check retrieval management software products for both microfilm and electronic imaging applications.

Features

VersaCAR is an extremely flexible program. It adapts to your organization's needs and accommodates everything from a single user running a computer that is directly attached to a microfilm reader to a multi-user system with microfilm libraries in remote locations. The image integration capabilities provided by VersaIMAGE provides further flexibility by keeping copies of your documents at your fingertips.

	VersaCAR	VersaImage	VersaView
INDEXING:			
Indexing at Microfilm Reader	✓□	✓	
Indexing at Microfilm Camera	✓□	✓	
Indexing from Paper	✓□	✓	
Indexing Images		✓	
Automatic Scanner Indexing		✓	
Bar Code Indexing	Hardware	Software	
OCR Indexing		✓	
DOCUMENT RETRIEVAL:			
Exact, Starts With, Contains Text Searching	✓□	✓□	✓
Wild Card Text Search		✓□	✓
Numeric Range Search	✓□	✓□	✓
Date Range Search	✓□	✓□	✓
Reader/Printer Print	✓□	✓	
Document Image Print		✓□	✓
Document Image Faxing		✓□	✓
Document e-mail		✓□	✓
Retrieval Requests	✓□	✓□	✓
IMPORT/EXPORT:			
Flat Ascii Import	✓□	✓	
Comma Separated Import	✓□	✓	
Flat Ascii Export	✓□	✓	
Comma Separated Export	✓□	✓	
Image Import		✓	
IMAGING FEATURES:			
Multi Level TIFF support		✓□	✓
Document Rotate		✓□	✓
Document Deskew		✓□	✓
ISIS Film Scanner Support		✓	
ISIS Paper Scanner Support		✓	
TWAIN Support avail. 2003			
OTHER FEATURES:			
Multi-level Security System	✓□	✓□	✓
QC Module to easily correct entry errors	✓□	✓	
Database Creation	✓□	✓□	✓
Database Compact	✓□	✓□	✓
Database Repair	✓□	✓□	✓
CD Pre-Mastering		✓	
Online Help	✓□	✓□	✓
VersaScan II Option availability	✓□	✓	

System Requirements

VersaCAR, VersaImage and VersaView can run on either a single-user system or on a network. Basic system requirements are:

VersaCAR for Windows	VersaIMAGE / VersaView
486 or above IBM PC or compatible	Pentium PC recommended
32 MB RAM	256 MB RAM
200 MB hard drive	500 MB for average systems (1GB or more for larger systems)
High density floppy drive, CD for Win-95, 97, 98, NT	CD for Viewing, CD-R, DVD-R.
Windows™ 3.1 Windows for Work Groups™ or Windows 95, 97, 98, NT™	Windows 98, ME, NT™, 2000, XP-PRO
VGA monitor	Super VGA monitor or higher resolution.

Peripherals

- Microfilm reader/printer with controller interface (see Appendix for a list of supported devices)
- Microfilm camera with controller interface (see Appendix for a list of supported devices)
- Laser printer (must be a Windows supported device)
- ISIS or TWAIN paper and microfilm scanners
- Fax and e-mail (must be Windows supported)
- CD-R and DVD devices (VersaIMAGE provides pre-mastering of data files)

Support

VersaIMAGE Corporation offers SITE LICENSE PLUS Service. This enables you to call our support line between 9:00 AM and 5:00 PM Eastern Standard Time. You will also receive all upgrades to your software on an annual basis:

Additionally, you may purchase on-line modem support. This permits VersaIMAGE support personnel to call directly into your computer and allows for a more timely resolution of problems than standard telephone support.

Installing the Software

2

The VersaCAR/VersaImage/VersaView software programs are self-initializing. You need not run the program from the **Start Menu**. Even if you have never used Windows before, you should be able to do it easily. If you are unfamiliar with Windows, the next few paragraphs should help you get started. If you have used Windows before, you can skip them.

You will see two kinds of “cursors” on the screen during the installation process:

Mouse Pointer **Insertion Point**

The mouse pointer is for selecting items or actions. Just use your mouse to move the mouse pointer to the items you want to select and click the first (left) button.

The insertion point is found in text boxes, which are used for entering information. When you see an insertion point in a text box, you can type information in that box. If you need to enter or change information in a text box and don’t see an insertion point, move the mouse pointer to the box and click.

If there is already information in the box, or if you made an error in the information you have typed, you can change it. Use → and ← to move your insertion point (or just click the place you want to be with your mouse). To delete characters, use Del to delete the character in front of your insertion point or use backspace to delete the character behind it.

Running the Setup Program

Single-user installation

Insert your VersaCar/VersaImage/VersaView CD into your CD-ROM drive and wait for the installation screen to appear.

1. In the Versa 32 Installation window click on **Install VersaImage 32 Single User.**
2. After reading the **Welcome**, screen select Next.
3. Enter your user information and select Next.
4. Check the box for **Install Demoblue Database** and select the destination folder where you would like your VersaCar/VersaImage/VersaView software installed.
5. Select Next**.**
6. In the **Backup Replaced Files** window select Yes and choose the destination directory where you would like to create the backup file.
7. Select Next.
8. Select Next again to begin installation.
9. When installation is complete, select Finish to begin using the program.

Network installation (from workstation to server)—recommended for all Novell/NT installs

Insert your VersaCar/VersaImage/Versaview CD into your CD-ROM drive and wait for the installation screen to appear.

1. In the **Versa 32 Installation** window click on **Install Versa 32 Network.**
2. After reading the **Welcome** screen select Next**.**
3. In the **Choose Destination Location** screen, select **Remote Install (Workstation to Server)**.
4. Select **Map a Network Drive** and do the following:
   - Select the **Network Drive** where you would like your software installed on the server.
   - Select the path from the **Directories Window** and click OK**.**
5. In the **Choose Destination Location** window, select Browse. In the dropdown box select the mapped drive and path you selected in step 4.
6. Select Next.
7. Select the type of network you will be installing on.
8. Select Next.
9. Select Next again to begin installation. (This will install the VERSAIMG.EXE on your server.)
   - If you selected installation to a **Novell Server**, follow the instructions in the **Novell Installations Only!** window.
   - If you selected installation to an **NT Server** follow the instructions in the **Windows NT Installations Only!** window.
10. When installation is complete, select Next.

Licensing

Installation of a network license (NT installations only)

1. Take your VersaCar/Image CD to the server.
2. In the **Versa 32 Installation** window, select **Install a Network License**.
3. In the **Choose Destination Location** window, select Browse.
4. Select the directory where the Versaimg.EXE is located (e.g. **C:\Versaimg\Ivision**).
5. Click OK.
6. Click Next.
7. Click Finish.
8. Return to the workstation to complete the installation and follow the instructions for **Workstation Licensing.**

Workstation licensing

1. At the workstation, enter **Explorer** and do the following:
   - Double click on the newly mapped network drive.

- Double-click the **Versaimg** folder.
- Locate the **SetViNet.EXE** and double-click.

2. In the **Versa 32 First Time Installation Window**, select **Yes.**
3. Click Next.
4. After reading the **Welcome** window, click Next.
5. In the **Display Registration Window,** enter your user information.
6. Select Next.
7. In the **Backup** window, select **Yes** to **Create a Backup.**
8. Click Next.
9. Click Next to begin installation of **Workstation License**.
10. When install is complete, select Finish.

Running your VersaCAR\Image program

1. Double click the **VersaImage 32** icon.
2. You will be supplied with an 18- digit **Site Code**.
3. Call the Support number supplied for your **Site Key**.
4. After entering your **Site Key**, select **Authorize.**
5. You are now fully licensed to run **VersaCAR\Image.**

Walking through Windows

3

This chapter is designed for people who are new to the Windows environment. It covers all the basic functions and features of Windows you will need to run your application. If you are new to Windows, or if you do not use Windows programs very often, you will find many helpful hints in this chapter. If you are already a Windows “pro,” you can skip this chapter.

Basic Mousemanship

If you did your own software installation, you have already mastered a number of mousing basics. However, even if you are a total novice, it probably only took you about 30 seconds when you first saw the Windows main screen to figure out that the arrow on the screen is the mouse pointer and that it moves whenever you move the mouse. If you are new to mousing, you may want to move it around some so you can get the feel of it.

Your mouse has two buttons—a primary button, which is the left button and a secondary button, which is the right one. In this manual, we will refer to them simply as your left mouse button or right mouse button. Sometimes, for brevity’s sake, we may tell you to left-click (instead of “click your left mouse button”) or right-click (instead of “click your right mouse button”). For most functions in VersaImage, VersaCAR, or VersaView, all you need is your primary or left button. A few special operations will require both buttons. You will be told what those are in the instructions for these operations. In this manual, unless you are told otherwise, you can assume that when you are told to simply “click your mouse” or “click a button”, we mean the primary or left button.

> ***Note:*** *By default, the primary button is the left one, but lefties can swap them through the Windows control panel so that they can use the index finger of their left hand on the primary button if they want (consult your Windows documentation if you want to do this).*

You select the actions you want to perform by simply pointing the mouse pointer at a “button” or “field” or “selection” on the screen and clicking the button. Most of the time a single click is all you need. Sometimes you will need to use a double-click. For some actions, you will need to hold the mouse button down and “drag” your mouse to make a selection. You will, of course, still need to use the keyboard occasionally to enter data as mice have a limited vocabulary. However, we promise to leave the letters on the keys and we won't tell if you use only two fingers.

The instructions in the rest of this chapter contain (among other things) hints for using the mouse in your Windows operations. You really don’t have to know anything more about mousing than you find in this chapter to run VersaImage, VersaCAR, or VersaView. If you are an old keyboard artist who’s afraid of mice, don’t despair. After a few point and click operations, you’ll start to feel like an old pro. However, if you prefer to key, we will also provide you with some keyboard information. Actually, most real “power users” learn both and use the mouse and keyboard interchangeably—whichever is most efficient for the operation they are performing at the time.

Starting a Windows Application

Your Windows main screen is referred to as your desktop. Usually, your desktop contains a number of icons that are shortcuts to applications you run often. Some programs create these shortcuts automatically. You can also create them yourself (we’ll discuss this later). At the bottom of the screen is a task bar. In the bottom left corner, you will see a Start button. The Start button is used to access the programs in your system.

To start an application

1. Click Start to display the **Start** menu.

2. Move your mouse to **Programs** and the **Program** menu will magically appear.

3. Move the mouse to the application group in the list that contains your application (e.g., VersaIMAGE Software Corporation). The menu for the application group will appear.

4. Click your mouse on the program name.

The Application Window

When you access VersaImage, VersaCAR, or VersaView, its main screen will appear. This is referred to in Windows "talk" as the *application window*. Applications can run in a window or in full screen mode. When they run in a window, the application window is somewhat smaller than the screen and you will be able to see your desktop and other application windows. When an application runs in full screen mode, it occupies the whole screen.

All application windows have a title bar at the top of the screen and usually a menu bar just under the title bar. Nowadays, most application windows also have a tool bar. The other attributes vary with the application.

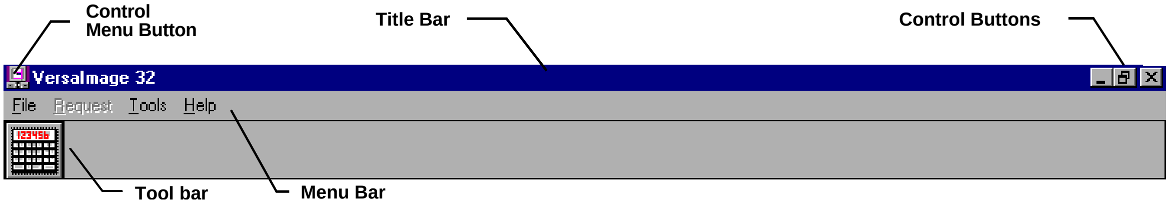


Fig. 3.1. **Program Manager** title bar

The title bar buttons

The title bar (see fig. 3.1) contains the name of the program. In addition to the program name, you see several buttons. You could find out what these buttons do by trial and error. However, if you want to avoid some puzzling surprises, you may want to read the information below:

_	Minimizes the application. When you minimize an application, it disappears from the screen but its name will still be displayed in the task bar at the bottom of the screen. To restore the application, just double-click on its "button" in the task bar.
🗗	Switches from full screen to a window. Most people prefer to run their applications in "full screen" mode, so many applications open automatically with a full screen display. This button will only appear if you are using a full screen display.
□	Switches the application to a full screen display. This button will appear only if you are running your application in a window.
✕	Closes (i.e., exits from) the application.

In the upper left corner is the VersaImage icon. Clicking on it opens the control menu. To select one of the options on the control menu, just "point and click." The options on this menu are explained briefly below so that you'll know what you are getting into if you select one.

The control menu

The control menu (fig. 3.2) contains commands that control your application window display:

Restore	Changes application to a window size. This command performs the same actions as 🗗.

Move	Permits you to move an application window with your keyboard (will say more about moving windows later).
Size	Lets you size the application window with your keyboard (more on this later also).
Maximize	Enlarges your application window to full screen display. This command performs the same actions as □.
Minimize	Minimizes your application. This command performs the same action as _.
Close	Closes the application window. This command performs the same action as ✕.

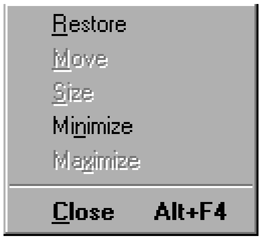


Fig. 3.2. Control menu

The control menu is primarily designed for people who prefer to use the keyboard. With this menu, you can perform all of the actions the title bar buttons perform:

- To open the control menu, press Alt. Then press the space bar.
- To select an operation, press the underlined letter in the command or use ↑ and ↓ to move the highlight to the selection and press Enter.

If you are a new user, you will not need the control menu often as most of the operations can be done with your mouse. However, you can open the menu and make your selections with your mouse if you prefer.

Switching Among Applications

One of the real reasons for using Windows is that it allows you to run several applications at once and to switch back and forth among them. You could, for example, be writing a letter to a customer in your word processor program, switch to VersaImage or VersaCAR to retrieve and view a related document, then switch back to your word processor and finish the letter.

All of the applications you are running will be displayed on “buttons” on the task bar at the bottom of your screen. The button for the active task will appear to be pushed in. You can switch from application to application with your mouse or with the keyboard.

▸ To switch applications with your mouse

Click on the application’s “button” on the task bar.

▸ To switch applications with the keyboard

1. Press Alt + Esc. You will move to another “button” on the task bar.
2. Continue pressing Alt + Esc until you reach the button for the application you want.
3. Press Enter. The application will be activated in the state you last left it (window or full screen).

Menus

Windows menus can be one of two types—*menu bars* or *drop-down menus*. Menus are used in Windows programs to select the operations you want to perform. When you make a selection from a menu, one of three things can happen:

- A dialog box will be displayed.
- Another menu will be displayed.
- The operation you selected will be performed.

Menu bars

When you first request VersaImage or VersaCAR (or any application for that matter), you will see a *menu bar* at the top of the screen. Menu bars offer you a set of options to select from.

To select from a menu bar with your mouse

1. Move the pointer to the selection you want.
2. Click the left mouse button once to make your selection. The menu will drop down.

To select from a menu bar with the keyboard

1. Press Alt to move to the menu bar.
2. Use → and ← to move the highlight to the menu selection you want and press Enter. The menu will drop down.

Drop-down menus

Drop-down menus are used to display submenu functions. They often appear when you make a choice from a menu bar. They may also appear when you make a choice from another drop-down menu:

- When a menu item has a submenu, you will see a ▶ at the right of the box (see Preferences in fig. 3.3). When you click on one of these items, the submenu will "cascade" from the item you selected and be displayed next to it (see Maintenance in fig. 3.3). If a drop-down menu item has a submenu, another ▶ will appear on its right.
- When a menu item has an ellipsis (…) after it (see New Database in fig. 3.3), this means that it opens a dialog box.
- If no ▶ or … is displayed, the selection will perform an action.
- If an item is "grayed out," it is "inactive" and not currently available. For example, some options cannot be selected until you open a database, so those items are grayed out until you select one.

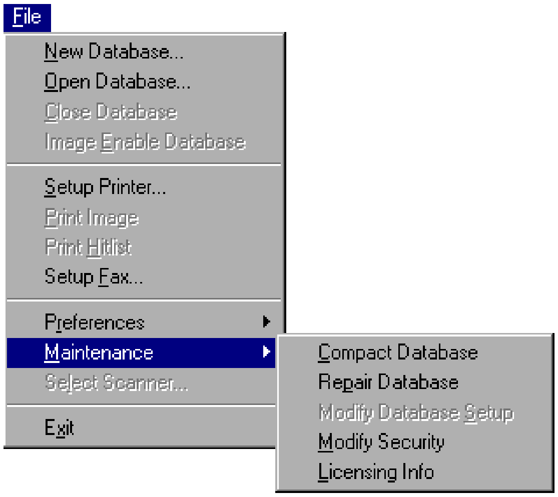

File
New Database...
Open Database...
Close Database
Image Enable Database
Setup Printer...
Print Image
Print Hitlist
Setup Fax...
Preferences
Maintenance
Select Scanner...
Exit
Compact Database
Repair Database
Modify Database Setup
Modify Security
Licensing Info

Fig. 3.3. A drop-down menu

To select from a drop-down menu with your mouse

1. Move the pointer to the selection you want.
2. Click the left mouse button.

To select from a drop-down menu with the keyboard

1. Use ↑ and ↓ to move the highlight to your selection.
2. Press Enter.

DOS-style menu selection

If you are an old DOS user, you probably got used to making menu selections by typing the underlined (or capitalized) letter in the menu command you want to select. Years ago (perhaps you even remember) it used to always be the first letter. Then, as applications became more complex, it got difficult to think of commands that began with a different letter and were still "logical," so capitalizing and, later, underlining became the norm. The Windows environment kept this convention as an option so, if you are used to it, or if you would just prefer to use this type of keyboard selection, you can do so.

▸ **To use DOS-style menu selection**

1. Press Alt to activate the menu bar.
2. Type the underlined letter—e.g., **F** for **File**—of each command you want to select.
    - To select **Compact Database** from the menu displayed in fig. 3.3, you would press **F M C**.
    - To select **Repair Database** from the menu displayed in fig. 3.3, you would press **F M P**.

Dialog Boxes

Many operations are performed through dialog boxes. Menu options often call dialog boxes. Sometimes an option in a dialog box will open another dialog box. Dialog boxes are "mini" windows with their own title bars. They may also have control buttons. Dialog boxes contain structures known in programmer's jargon as "controls". They are used to get input from you and consist of text boxes, various kinds of list boxes, and various types of buttons. In the next few sections, we will explain how each of these "controls" work. Once you become familiar with them, you will be able to use just about any Windows dialog box without further instruction.

Dialog boxes also contain a mythical beast know as a "position cursor." To select from a list, enter text in a text box, or activate an option, the position cursor must be positioned on that item. Unfortunately, the "shape" of the position cursor varies with the type of control, so we'll try to give you some clues in the instructions below as to what you will see for each type.

Text Boxes

Text boxes are used for entering data in dialog boxes. If a text box already contains data, you can make changes to it. In a text box, the position cursor becomes an insertion point (fig. 3.4). If the box already contains text, the text will be highlighted (fig. 3.5) and the insertion point will be positioned at the end of the highlight.

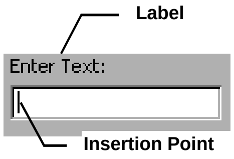


Fig. 3.4. Empty text box

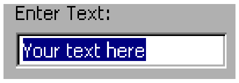

Enter Text:
Your text here

Fig. 3.5. Filled text box

▸ **To move the insertion point**

The following keys are used to move the insertion point in a text box:

←	Moves the insertion point to the left one character.
→	Moves the insertion point to the right one character.
Ctrl + ←	Moves the insertion point to the left one word.
Ctrl + →	Moves the insertion point to the right one word.
Home	Moves the insertion point to the beginning of your entry.
End	Moves the insertion point to the end of your entry.

> ***Note:*** *You can always position the insertion point by pointing the mouse at the place you want to be and clicking it once.*

To enter or change text in a text box, you must move your position cursor to the text box. You can do either with the mouse or from the keyboard.

To move your position cursor with your mouse

1. Move your mouse pointer to the box.
2. Click your mouse.

To move your position cursor with the keyboard

1. Use Tab to move forward or Shift + Tab to move backward among the items.
2. When you see the insertion point or highlighted text in the box, your position cursor is in the box.

> ***Hint:*** *Unless you are an absolute klutz on the keyboard, you will probably find it easier in dialog boxes with several text boxes to use* Tab *to move from box to box and the keyboard keys to place your insertion point, etc., instead of the mouse. That way you won't have to take your hands off the keyboard all the time.*

Entering text

To enter text in an empty box, just type it in. If the information in the box is highlighted (fig. 3.5) and you type new text, your new text will replace the old text. If you want to edit the highlighted text instead of replacing it, press ← or → or click your mouse in the box.

Basic editing

With a few simple inserting and deleting techniques you can easily modify your text entries to correct mistakes or make changes to default information.

To insert characters into the existing text

1. Move the insertion point to the place where you want to insert the characters.
2. Type the characters in. The text in front will move right.

To delete text

Use any of the following keys:

Del	Deletes the character in front of your insertion point. Everything else moves left. To delete several characters at once, just hold the key down.
Back Space	Erases the character to the left of your insertion point. To erase several characters at once, hold the key down.
Ctrl + Del	Deletes all characters to the right of your insertion point. If you move the insertion point to the beginning of the field, you can erase the whole field.

Advanced editing

Simply inserting and deleting characters is often enough for minor edits. However, for more efficient operation, you may want to try some of these advanced editing techniques after you are more familiar with Windows.

Selecting text

All of the advanced editing techniques are based on text selection, so you must know how to select parts of your text entry before you can use them.

To select text with your mouse

1. Place the mouse pointer in front of the first character you want to select.

2. Press the left mouse button and hold it down.
3. Keeping the button pressed, drag the mouse pointer to the last character you want to select (you can select in either direction). Then release the button.

▶ To select text with the keyboard

1. Use ← and → to move the insertion point to the first character you want to select.
2. Hold Shift down and use ← and → to move the highlight and select your text. (Use Ctrl with the arrow keys to select an entire word.)
3. Release Shift.

▶ To “deselect” text with your mouse

Click the mouse elsewhere in the field.

▶ To “deselect” text with the keyboard

Press an arrow key (make sure Shift is released).

Deleting and replacing text

▶ To replace or remove text

1. Select the characters you want to remove.
2. Do one of the following:
   - Type the “replacement text.” The selected text will be deleted and replaced by the text you are typing.
   - Press Del to delete the selected text without replacing it.

Cutting, copying, and pasting

You can cut and paste text in dialog text boxes just like you can in a word processor. After you “cut” your text, you can paste it anywhere in the text box, in another text box in the dialog box, or even in another dialog box. The “cut” text remains on the Windows “clipboard” so you can paste it in as often as you want until you cut another piece of text to the clipboard.

You can also copy text without cutting it to paste it in another place. Since the text you copy is placed on the Windows clipboard, you can past it in any text box in either this or another dialog box (or in another window program that accepts text for that matter).

▶ To cut and paste text

1. Select the text you want to move.
2. Press Shift + Del to remove the text and copy it to the clipboard.
3. Move the insertion point to the place you want to put the text and press Shift + Ins to insert the text.

▶ To copy and paste text

1. Select the text.
2. Press Ctrl + C to copy the text to the clipboard.
3. Move the insertion point to the place you want to paste the text and press Shift + Ins.

Caution: *All Windows programs use the same clipboard. Therefore, if you leave VersaImage or VersaCAR and copy an item to the clipboard in another application, it will replace your VersaImage/VersaCAR text on the clipboard. If you come back to VersaImage or VersaCAR and try to paste cut or copied text in a dialog text box, the last text you placed on the clipboard will appear and not the text you originally copied in VersaImage or VersaCAR. Fortunately, if you find you have placed an entire paragraph from your word processor into a text box, you can easily undo it (see below).*

Undoing edits

Windows dialog boxes allow you to undo your last edit (with some limitations). This is very handy if you realize that you accidentally wiped out an entry or made changes you didn't want (or accidentally pasted in a spreadsheet or 20 pages of a document from your word processor).

To undo your last edit

Press Ctrl + Z before doing anything else. This will do any of the following:

- Restore a selection you have cut or deleted.
- Remove a selection you have pasted.
- Remove characters you have inserted as long as you have not moved your insertion point.
- Restore characters you have deleted individually as long as you have not moved your insertion point.

You should note, however, that, once you have left the text box (i.e., moved your position cursor), undo will no longer work.

List Boxes

List boxes allow you to make a selection from a list of items or options. They are easily recognized because they contain a list of items. Sometimes the items in a list box will change depending on a previous item you have selected. For example, in the **Open** dialog box (which we will discuss in detail in Chapter 4), the list of folders will change if you select a different drive and the list of files will change when you select a different folder.

Selecting an item

In a list box, the position cursor is technically a highlight in "reverse video" (see fig. 3.6). Unfortunately, it is rather invisible because the selected item is *always* highlighted—even when you are not positioned in the box! For this reason, selecting from a list with a mouse is usually easiest, because you do not have to move your position cursor to the box first.

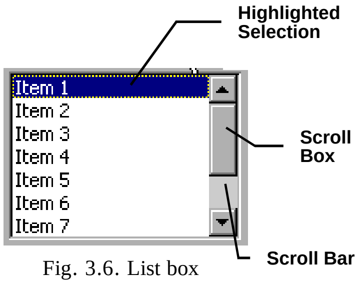


Fig. 3.6. List box

To select from a list box with your mouse

1. Move the pointer to the selection you want.
2. Click your left mouse button. The highlight will move to that item to show that it is selected.

To select from a list box with the keyboard

1. Use Tab or Shift + Tab to move the position cursor to the box.
2. Use ↓ and ↑ to move the highlight to your selection. (If the ↓ and ↑ do not work, your position cursor is not in the list box.)
3. Press Tab to leave the box.

Scrolling

Some list boxes may have a list that is too long for the box. If a list contains more items than can be displayed in a box, you may use the scroll bar at the side of the box (see fig. 3.6). The s*croll box* (sometimes called an “elevator”) in the middle tells you approximately how much of the list or text is displayed and what part of the list is displayed. If it is at the top, you are at the beginning of the list. If it is in the middle, you are in the middle of the list.

▸ **To scroll through the selections with your mouse**

1. Place the pointer on the arrow in the scroll bar that scrolls in the direction you want to go.
2. Do either of the following:
   - To scroll continuously, press the left mouse button and hold it down. The list will scroll in the direction you selected. When you want to stop, release the mouse button.
   - To scroll one item at a time, click the mouse on the arrow. Each time you click, you will move down (or up) one line.

Note that the highlight does not move with you when you scroll. It remains on the last selection. The selection will not change unless you click on another with your mouse.

▸ **To scroll through the list from the keyboard**

Use the ↑ and ↓ keys:

- To scroll continuously, hold the key down which scrolls in the direction you want to go. When you want to stop, release the key.
- To scroll one item at a time, just press the key. Each time you press the key, you will move down (or up) one line.

When you use the ↑ and ↓ keys, the highlight moves with you so you can simply make your selection by pressing Tab.

> ***Note:*** *You can also scroll through a list by positioning your mouse pointer on the scroll box, holding your mouse button down and dragging the scroll box. This is particularly efficient for long lists.*

Combo Boxes

Combo boxes are a combination of list and text boxes (see fig. 3.7). They allow you to either select from the list or type something else in the box. Combo boxes have a “text box” on top for entering values and a list box below for selecting values. When you first open a dialog box, the text box will usually be blank, although it may contain a default value.

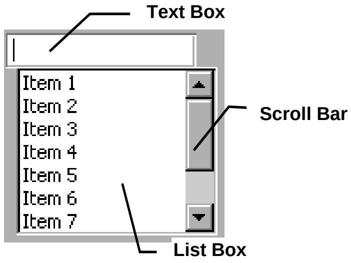


Fig. 3.7. Combo box

Selecting an item from the list

The list box operates fundamentally like a standard list box.

▸ **To select from the combo box with your mouse**

1. Move the mouse pointer to the item in the list you want to select. Use the scroll bar if necessary to look for the item you want, just like you would in a standard list box.
2. Click your mouse button to select the item. Your selection will be highlighted and will also be placed in the text box (see fig. 3.8).

▸ To select from a combo box with the keyboard

1. Use Tab to move to the combo box. When your position cursor is in the box, you will see an insertion point.
2. Press Tab to move from the text box to the list box.
3. Use the ↑ and ↓ to move the highlight to the item you want to select. As you scroll thought the list with the arrow keys, the item that is currently selected will be displayed in the text box (fig. 3.8).
4. Press Tab to leave the box.

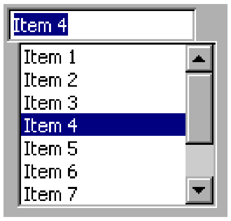


Fig. 3.8. Combo box with item selected

Entering an item in the text box

The combo box text box operates like a standard text box. To enter or edit text you use the same editing keys to move the insertion point. You can delete, replace, cut, copy, and paste text just as you can in a standard text box.

▸ To enter text in a combo text box

1. Move the position cursor to the text box by doing either of the following:
   - Click the box with your mouse.
   - Use Tab and Shift + Tab.

   When you see the insertion point, you are positioned in the text box.
2. Type your entry or edit the entry in the box.

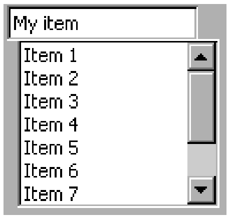


Fig. 3.9. Combo box with text entered

> ***Note:*** *When your own text is entered in the box, there will be no highlight in the list box as no item is selected (see fig. 3.9).*

Drop-down Lists

Drop-down lists are another type of list box and are often used when several list boxes are needed and there is not room for all of them. They appear as a single field with ▼ at the right (see fig. 3.10). They may either be standard list boxes or combo boxes. Standard list boxes will display the current value. Combo boxes may be blank if there is no current value.

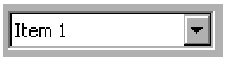


Fig. 3.10. Closed drop-down list box

Selecting from a drop-down list

▸ To select an item from a drop-down list with your mouse

1. Click on ▼ and the list will appear (see fig. 3.11). The current selection will be displayed in the field and will also be highlighted.
2. Move the pointer to your selection. Use the scroll bar if necessary to find the item you want, just as you would with a standard list box (see page 15).
3. Click your mouse button. The box will close and your selection will be displayed in the field.

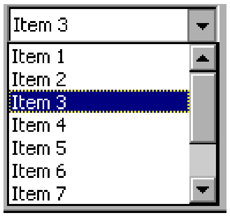


Fig. 3.11. Open drop-down list box

Selecting from a drop-down list with the keyboard

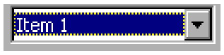


Fig. 3.12. Drop-down box with highlight

1. Press Tab to move the position cursor to the box. When the position cursor is in the box, you will see one of the following:
    - A highlighted selection (fig. 3.12) if the box contains an entry or selection.
    - An insertion point if it is an empty combo box.
2. Press the ↓ key to open the box.
3. Use the ↑ and ↓ keys to find your selection.
4. Press Tab. The box will close and your selection will appear in the field.

> ***Note:*** *Some drop-down lists do not open when you use the arrow keys. You can still scroll through the list and make your selection without opening the box. However, if you want to see the whole list first, you will need to click on* ▼ *with your mouse.*

Entering a value

If the drop-down box is a combo box, you will also be able to type your own value in. You do not need to open the box to do so.

To enter a value in a drop-down combo list

1. Either click on the box with your mouse or use Tab to move the position cursor to the box. You will see one of the following:
    - An insertion point in an empty box.
    - A highlight with an insertion point at the end in a box with text.
2. Enter or edit the text just as you would a regular text box (see page 11). The same function keys are valid and you can insert delete, replace, cut, copy, and paste text just as you can in a text box.

Push Buttons

Push buttons (sometimes called “command” buttons) are used to select actions and appear in all dialog boxes. In fact, sometimes it seems as if Windows programs run on push buttons. The name of the action the button performs appears on the button. The standard buttons used are OK, Cancel, and Close:

OK	“Approves” what you have entered or selected in the dialog box. What happens after you click OK depends on the operation. Sometimes the box may simply close and perform an operation. Sometimes it may display a dialog box for another action or a message.
Cancel	Cancels the current operation and takes you back to the previous level. It does not cancel everything you have done, only whatever you did in the dialog box you press it from.
Close	Closes the box without doing anything else except what you have already done while the box was open.

In addition to the above, there are a number of custom buttons that are used for dialog-specific actions. These vary from box to box. Many of the dialog boxes in VersaImage, VersaCAR, and VersaView have custom buttons.

Some buttons perform an action immediately when they are pushed. Others may display an additional dialog box. Those that display dialog boxes have an ellipsis (…) after the label.

To select a push button with your mouse

1. Move the mouse pointer to the button.
2. Click your mouse and the action will be performed.

To select a push button with the keyboard

1. Use Tab to move the position cursor to the button. When your position cursor is on the button, you will see a dotted line around the button (fig. 3.13).
2. Press Enter and the action will be performed.

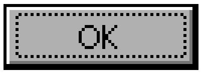


Fig. 3.13. Push button with position cursor

> ***Hint:*** *When you open a dialog box, one of the push buttons (usually* OK*) will be selected as the default button. It will be highlighted and will appear brighter than the others. You can activate that button by just pressing* Enter *even though the position cursor is not on it.*

Option groups and "radio" buttons

Option groups present you with a choice of several items (see fig. 3.14). Option buttons, which are round circles, allow you to select only one item out of the group. In an option group, one button is always pressed or selected. This button will have a • in its center and is the current value for the group. When another is selected, the one that is currently selected will be "deselected." Option buttons are sometimes called "radio" buttons because they work like selection buttons on a radio—when you "press" a new selection, the old one pops out.

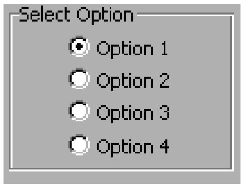


Fig. 3.14. Option buttons

To select an option with your mouse

1. Move the pointer to the circle or the item name.
2. Click your mouse. A • will appear in the center of the circle.

To select an option with the keyboard

1. Use Tab to move the position cursor to the group. When you arrive, the position cursor (which is a box) will appear around the label of the selected item (see fig. 3.15).
2. Use ↑ and ↓ to move the position cursor to the item you want.
3. Press Tab to leave the option group.

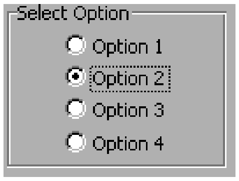


Fig. 3.15. Option button with position cursor

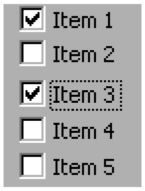
> ***Note:*** *Some option groups may not have a group label or a group box. They still operate the same way.*

Check boxes

Check boxes are square and operate individually, although they may appear to be part of a group. They are much like option buttons except that you can select (or deselect) each individual box. You may "check" as many as apply.

▸ **To select a check box with your mouse**

1. Position your mouse pointer on the box or item you want to select or deselect.
2. Click your mouse:
   - If the item was unselected, a "✓" will appear to show that it has been selected (see fig. 3.16).
   - If the item was previously selected, the "✓" will be removed.



☑ Item 1
☐ Item 2
☑ Item 3
☐ Item 4
☐ Item 5

Fig. 3.16. Check boxes

▸ **To select a check box with the keyboard**

1. Use Tab to move your position cursor to the item you want to select or deselect. When you are positioned on the item, you will see a box, which is the position cursor, around the item label (fig. 3.16).
2. Press the space bar:
   - If the item was unselected, an "✓" will appear (see fig. 3.16) to show that it has been selected.
   - If the item was previously selected, the "✓" will be removed.

Moving Around in a Dialog Box

If you have read all of the above information on dialog boxes, you probably have a good idea of how to move around from item to item. Often, it is easiest to just use your mouse and point and click. However, there are many times, particularly when you have a number of text boxes to fill in, when even die-hard mousers will want to use the keyboard. To summarize, let's review what you have already learned:

1. To move from item to item, use Tab:
   - Press Tab to move the position cursor forward to the next item.
   - Press Shift + Tab to move the position cursor backward to the previous item.
2. To move through a list of items (e.g., a list box or an option group), use the ↑ and ↓ keys.

By the way, the "next" item may not always be the next physical item but instead may be the item the programmer thought was the next "logical" one to fill in or push. Sometimes the "logic" is merely the order in which the programmer defined them. (VersaImage and VersaCAR's, of course, are always logical.)

There is also a "short cut" way to move from item to item, although it does not necessarily apply to all items. You may notice that, in some boxes, the item labels will have underlined letters. If this is the case, you can move directly to the item via the keyboard by simply typing the letter, just as you can for menu selection. If an item does not have an underlined letter, this will not work. You will have to use Tab or the mouse.

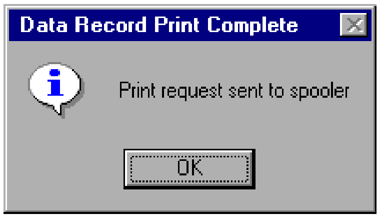
Active and Inactive Items

Dialog boxes often contain items or options that are activated or displayed only under certain conditions, just like menus. These elements are made "inactive" and are activated only when a particular option is selected. Inactive items generally appear "grayed out" and nothing will happen when you click on their boxes. Whenever you see a field or selection that is grayed out, that means that it is not applicable under current conditions. An item that is inactive when a dialog box opens may become active because of an option you have chosen or vice versa.

Due to the dynamic nature of dialog boxes, the options you select may not only activate or deactivate other elements in the box. They may also change the items that are actually displayed. As a result of a selection, the items in a list box may change or new items (such as additional text boxes or option groups) may appear. Do not be alarmed if the display changes because you select an option. It is doing what it is supposed to do. If you feel uneasy about what you see on the screen, just press Cancel. Then check the instructions for the dialog box in the manual or in on-line help.

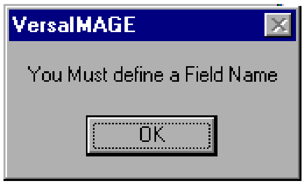
Message Boxes

Message boxes are special dialog boxes that contain only a message and push buttons for your response. Status messages, which report the progress or completion of an action (fig. 3.17), and error messages, which report errors in your input (fig. 3.18), are for information only and have only an OK button.



Print request sent to spooler

Fig. 3.17. Message box with status message

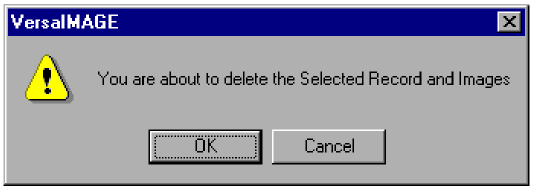


You Must define a Field Name

Fig. 3.18. Typical error message

When you click OK, the box will close and you will return to the application. If the message was an error message, you will generally return to the dialog box where you made the error so that you can correct it before you continue. You must correct your input before you can close the dialog box with an OK. You can, however, always use Cancel to cancel the operation.

Other message boxes may require your confirmation (see fig. 3.19) and will have buttons such as Cancel, Yes, or No. They appear before an action that is to be performed makes a crucial alteration to your data or your system. If you do not give your confirmation, the operation is terminated.



You are about to delete the Selected Record and Images

Fig. 3.19. Confirmation message

Moving Your Windows Around

You can move an open dialog box, message box, or window anywhere you want on the screen. You may find this convenient when you have more than one open window on the screen or when you want to move a dialog box out of the way so that you can see something on the main screen or in a box that is underneath.

▸ To move a window

1. Place the mouse pointer in the title bar.
2. Press the left mouse button and hold it down.
3. Keeping it pressed, drag the pointer. As you drag your mouse, an outline of the dialog box will move with you on the screen.
4. When the outline is where you want the window to be, release the mouse button. The box will move to that position.

VersaImage/VersaCAR Basics

4

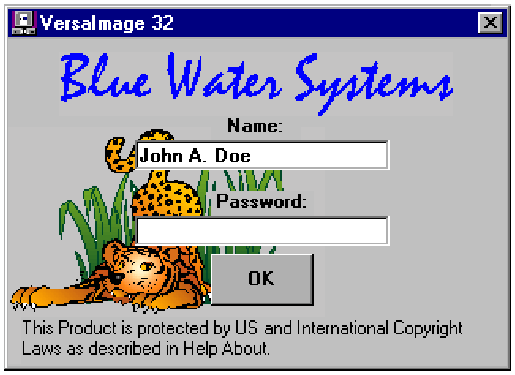
If you know how Windows works, you will have no trouble running VersaImage or its siblings VersaCAR or VersaView. Most of the controls and other features on the screen will be familiar to you. This chapter will give you an overview of the main features and functions of your application screen. You should be familiar with all the information presented here before you try to run your application.

Starting the Program

You start your application from the Windows **Start** menu. If you want, you can place a shortcut to the application on your desktop. Then all you need to do is click on the shortcut icon to run the program. If you use this application a lot, this is a good idea.

▸ To start the application from the Start menu

1. Click the Start button in the bottom left corner of the screen.
2. Select **Programs** from the **Start** menu.
3. Select **VersaIMAGE Software** from the **Programs** menu.
4. Double-click on your application name (**VersaImage 32, VersaCAR 32,** or **VersaView 32**) in the **VersaIMAGE Software** group.
5. The sign-on dialog box (fig. 4.1) will appear in the middle of your screen:
   - If your system is set up to use passwords, **Name** and **Password** fields will appear in the dialog box. Enter your sign-on name and password. Then click OK.
   - If your system does not use passwords, the **Name** and **Password** fields will not be present in the dialog box. Just click OK to start the application.



Name: John A. Doe

This Product is protected by US and International Copyright Laws as described in Help About.

Fig. 4.1. Sign-on dialog box for a password-enabled system

> *Note: For security reasons, your password will not appear on the screen when you type it. Instead, you will see a * for each letter.*

6. After you click OK, the main application window (fig. 4.2 on page 22) will appear.

▸ To place a shortcut on your desktop

1. Click Start to display the **Start** menu.
2. Select **Settings** from the **Start** menu and double-click on **Taskbar**.
3. In the **Taskbar Properties** dialog box, click on the **Start Menu** tab.
4. Click Advanced and a Windows **Explorer** screen will appear.
5. In the left pane, double-click on **Programs**. Then double-click on **Image Vision**.

6. In the right pane, click your right mouse button on the application name (**VersaImage 32**, **VersaCAR 32,** or **VersaView 32**). A "popup" or "context" menu will appear.
7. Click **Copy** on the context menu.
8. Move your mouse pointer to your desktop and click your right mouse button again.
9. Click **Paste Shortcut** to place the icon on your desktop.

Note: *You can drag this icon to any position you want on your desktop.*

To start your application from your desktop

1. Double-click on the shortcut icon. The sign-on dialog box will appear.
2. Sign on to your application the same way you would if you started from the **Start** menu.

Application Window Features

On the application screen (see fig. 4.2) you will see the following:

- At the top of the screen are the standard Windows *title bar* and *menu bar*.
- Directly under the menu bar is the *tool* bar. The tool bar will contain buttons that are used for starting frequently performed functions.
- At the bottom of the screen is the status bar, which is used for displaying reader and camera statuses. (VersaView does not have a status bar.)

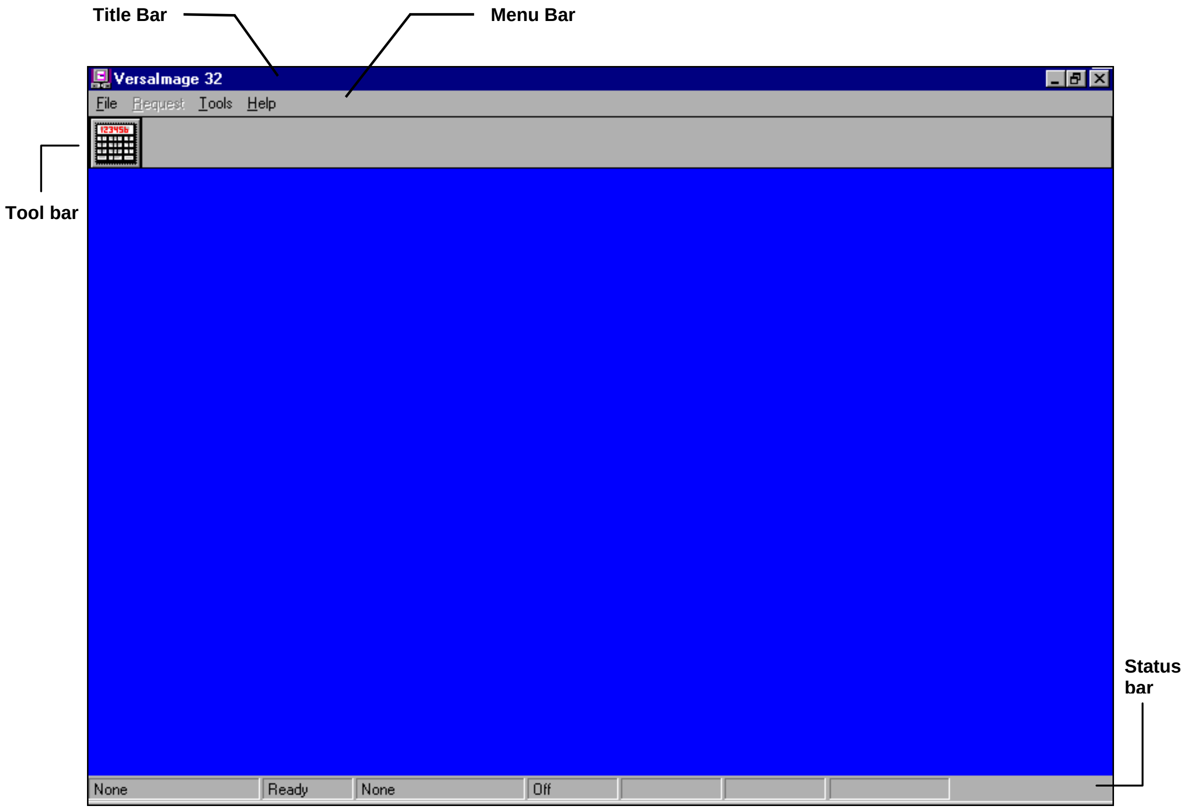
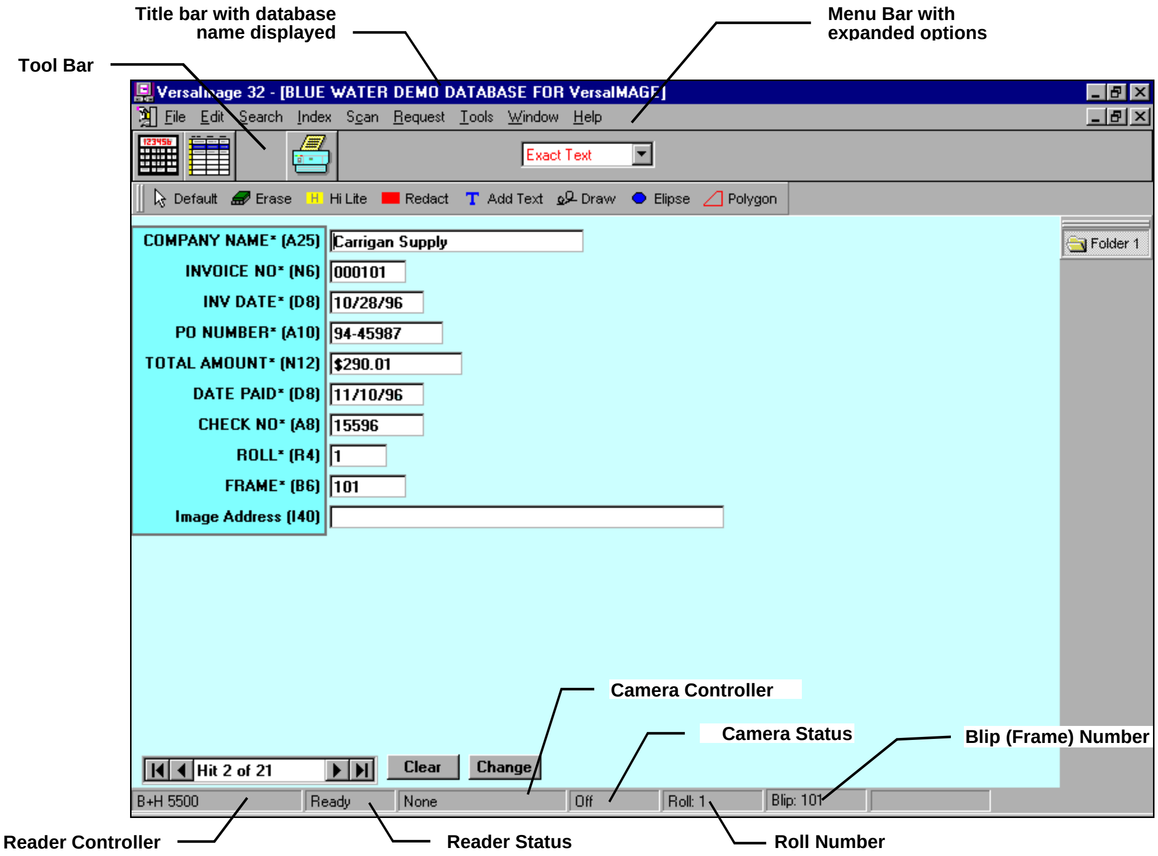


Fig. 4.2. Initial application screen


Title bar with database name displayed
Menu Bar with expanded options
Tool Bar
VersaImage 32 - [BLUE WATER DEMO DATABASE FOR VersaIMAGE]
File Edit Search Index Scan Request Tools Window Help
Exact Text
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Folder 1
Camera Controller
Camera Status
Blip (Frame) Number
Hit 2 of 21
Clear
Change
Reader Controller
Reader Status
Roll Number

COMPANY NAME* (A25) Carrigan Supply
INVOICE NO* (N6) 000101
INV DATE* (D8) 10/28/96
PO NUMBER* (A10) 94-45987
TOTAL AMOUNT* (N12) $290.01
DATE PAID* (D8) 11/10/96
CHECK NO* (A8) 15596
ROLL* (R4) 1
FRAME* (B6) 101
Image Address (I40)

B+H 5500 | Ready | None | Off | Roll: 1 | Blip: 101

Fig. 4.3. Application screen with database and record loaded

Menu and title bar

When you open a database, the database name will appear in the title bar in addition to the program name, and additional options will appear on the menu (see fig. 4.3). Each of these menu options contains a menu of commands and functions. If a menu or menu option does not apply to the current database or operation, it will be grayed out. For example, if the database is not enabled for images, **Scan** will be grayed out. Some options will be grayed out because they are not available in the product you are using or because your security level does not give you access to them.

Note: Some items on the menu are for VersaImage only and will always be grayed out in VersaCAR and VersaView.

The tool bar

The buttons available on the tool bar depend on what functions are available at the time. When you first start your application, the tool bar will only contain one button as shown in fig. 4.2. After you load a database, several more buttons will appear (see fig. 4.3). Depending on the option you have chosen and the database you have loaded, other buttons may appear. If your database is enabled for scanned images, an additional tool bar that contains annotation tools for drawing and highlighting images will appear. If a button you expect to see disappears or does not appear, it is because that function is currently not available. It will reappear again when the function is enabled.

Tool bar buttons usually contain icons that represent the action they perform. When you position your mouse pointer on a tool bar button, a “tool tip” will appear below it to tell you what the button is used for. To execute the function performed by the button, click your mouse.

Status bar

The status bar in VersaImage and VersaCAR is used to display your reader and camera status. These fields are not applicable when you are using a paper scanner. VersaView will not have a status bar since it does not support microfilm controllers. Fig. 4.3 shows what is displayed in each area of the status bar:

Reader controller	The name of your reader controller.
Reader status	The current status of your reader.
Camera controller	The name of your camera controller.
Camera status	The current status of your camera.
Roll	The number of the roll you are currently reading or filming.
Blip	The number of the frame where your reader is positioned or the frame you have just filmed.

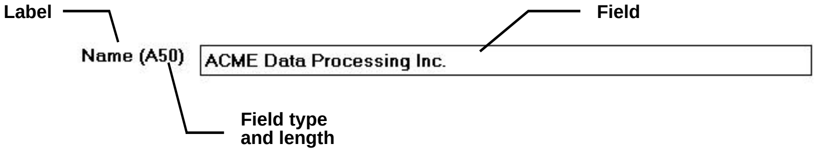
The first time you run your application, both the reader controller and the camera controller will read **None**. After you configure your system as instructed in Chapter 5, the name of your controller will appear. More will be said about the status display and the roll and frame numbers later.

The Screen Area

The screen area is used for displaying your database information. You will use the screen to search your databases and to index your film and images. Scanned images associated with your records will also be displayed on the screen.

Screen fields

The screen fields appear as rectangular boxes. They are used for entering and displaying data from the fields in your databases:



The fields displayed will be the ones you define for your database. Each database will have its own set of fields. (More will be said about defining databases in Chapter 7.) Each field has a label that tells you what is entered in the field. Included in the label is the field type and maximum length:

A	**Alphanumeric.** Will accept virtually any character.
N	**Numeric.** Will accept only numbers. Decimal points may be entered if the format permits but no other characters. The entered values will be displayed in the proper format (e.g., with $ or correct number of decimal places).
D	**Date.** Displayed as MM/DD/YY. May be entered in either *MM/DD/YY* or *Month Day Year* format.
R	**Roll number field.** Alphanumeric.
B	**Blip or frame field.** Must be numeric and in the correct format for the type of database you are displaying.

Entering information in screen fields is much like entering values in text boxes in Windows dialog boxes (see Chapter 3). All of the same function and control keys described in Chapter 3 work in the screen fields. You may enter, delete, replace and insert text, and copy text from one field to another. To leave a field and move to the next field, you press **Tab** just as you do to go from item to item in Windows dialog boxes. **Shift** + **Tab** backs up to previous fields.

> ***Note:*** *If you are not sure how to do some of these functions in Windows text boxes but skipped Chapter 3 because you are already a Windows user, you may want to return to page 11 and read about text boxes anyway, even if you do not need to read the rest of the chapter.*

Other controls

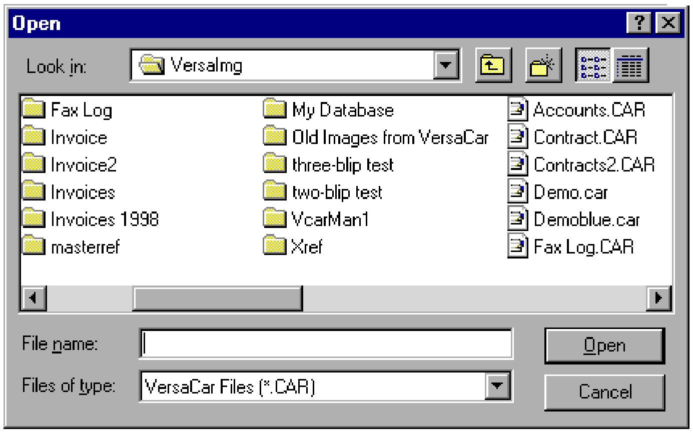
VersaImage and VersaCAR use some of the same “controls” you see in dialog boxes in their application windows. Push buttons, for example (see fig. 4.3), are used for performing many standard functions. In fig. 4.3 you also see a drop-down list box in the middle of the tool bar. You will also see “list-like” screens with scroll bars, etc. In general, if you see an item that looks like a familiar control from a Windows dialog box, you can expect it to function in the same way.

Common Dialog Boxes

VersaImage, VersaCAR, and VersaView make use of the Windows **Open** and **Save** common dialog boxes. These dialog boxes are common to many applications and function fundamentally alike across applications. While some applications add a few additional “bells and whistles”, such as additional push buttons, etc., the basic components always work the same way. (Sometimes the box title will be different, but it will essentially be the same box.) Because these boxes are used so often in VersaImage, VersaCAR, and VersaView, it is important that you know how they operate (if you already know how they work, you can skip to page 28).

Open dialogs

The **Open** box (fig. 4.4) is used for selecting and opening data files. VersaImage, VersaCAR, and VersaView use it to open databases and other files that are needed, such as selecting a file for an import.



Look in: VersaImg

Fax Log
Invoice
Invoice2
Invoices
Invoices 1998
masterref
My Database
Old Images from VersaCar
three-blip test
two-blip test
VcarMan1
Xref
Accounts.CAR
Contract.CAR
Contracts2.CAR
Demo.car
Demoblue.car
Fax Log.CAR

File name:

Files of type: VersaCar Files (*.CAR)

Fig. 4.4. **Open** dialog box

The box contains the following:

"Look in" field	The **Look in** field displays the current folder or, in some cases, the current drive. They used to always be called directories, but now we mostly call them folders. (You can still call them directories if you want.) The default folder for VersaImage is **VersaImg**. This field also contains a drop-down list that shows the complete path to the current folder and all the accessible drives for your computer.
List of folders and files	The list of folders and files contains the contents of the current folder. Items with a folder in front of it are folders. The others are files.
"File name" field	If a file is selected, its name will be displayed in this box. Otherwise, it will be blank.You can also use this box to type all or part of a file name you are looking for to narrow down your search.
"Files of type" list	**Files of Type** is a drop-down list box that contains a list of the file types that are legal for the operation. In cases where more than one file type is legal, selecting the one you want to see is a good way to reduce the size of long lists.

To open a file

1. Find the folder where your file is located:
    - To open a folder in the current directory, double-click the 📁 in the list.
    - To back up to the previous folder, click the 📁 tool at the top of the box.
    - To go to a different drive, click the ▼ by the **Look in** field to display the list of available drives for your computer and click the drive you want.
2. After you find the folder, locate the file in the list.
3. Either double-click on the file or highlight the file and click Open.

To narrow down the list to a specific file type

1. Click the ▼ to open the **Files of Type** drop-down list.
2. Select the file type from the list.
3. When the list box closes, the list of files will be narrowed down to the selected type.

To narrow down the list to a specific extension

1. Click the ▼ to open the **Files of Type** drop-down list.
2. Select the **All Files** option.
3. Enter a * followed by the extension you want to search for in the **File Name** field. For example, if the data file you want to import has the extension .DAT, you would enter the following:

   *.DAT

4. Click Open or press Enter to narrow down the list.

To look for a specific file name, regardless of extension

1. Click the ▼ to open the **Files of Type** drop-down list.
2. Select the **All Files** option.
3. Enter the file name followed by .* in the **File Name** field. For example, if the data file you want to import has the name Invoices, you would enter the following:

   Invoices.*

4. Click **Open** or press **Enter**.

▸ To look for a file that starts with a specific character or characters

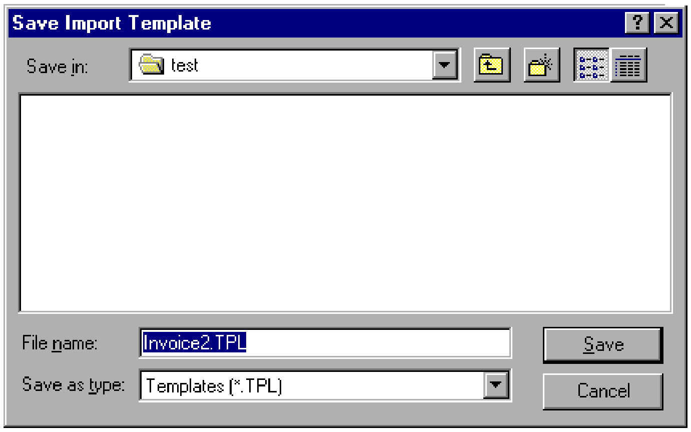
1. Click the ▼ to open the **Files of Type** drop-down list.
2. Select the **All Files** option.
3. Enter the starting character or characters of the file name, followed by *.*:

   pr*.*

4. Click **Open** or press **Enter**.

Save dialogs

The **Save** dialog box (fig. 4.5) is used for such things as creating new databases, saving import templates, or designating the database you want to export to in the **Export** function. Its controls are identical to the **Open** box. Variations on this box are used for other operations.



Save Import Template

Save in: test

File name: Invoice2.TPL

Save as type: Templates (*.TPL)

Fig. 4.5. **Save** dialog box

The box contains the following:

“Save in” field	The **Save in** field displays the current folder or, in some cases, the current drive. The folder shown here is the folder where your file will be saved. This field also contains a drop-down list that shows the complete path to the current folder and all the accessible drives for your computer.
List of folders and files	The list of folders and files contains the contents of the current folder. Items with a folder in front of it are folders. The others are files. If there is nothing in the folder, the list will be blank.
“File name” field	You enter the name for the file in this box. Windows 95 and Windows NT support file names of any length. Spaces are permitted.
“Files of type” list	**Files of Type** is a drop-down list box that contains a list of the file types that are legal for the operation. Unlike some “save as” functions in other applications, in VersaImage this field does not determine the type of file that will be written. That is determined by the option you selected. For example, if you selected to **Export** to a **Flat ASCII File**, your file will be saved as a flat ASCII file, regardless of what you choose in this box or what extension you apply.

▸ To save a file

1. Find the folder where you want to save the file:
   - To open a folder in the current directory, double-click the 📁 in the list.

- To back up to the previous folder, click the ⤴ tool at the top of the box.
- To go to a different drive, click the ▾ by the **Save in** field to display the list of available drives available for your computer and click the drive you want.

2. Do one of the following to enter the file name:
   - To save a new file, the name of the file. You do not need to enter the extension unless **All Files** is selected as the list type.
   - To overwrite an existing file, select the file from the list.
3. Click Save.

⚠ *Important:* *Do NOT change the extension if there is only one file type listed or VersaImage may not recognize it. As a general rule, you should not apply an extension other than those listed unless **All Files** is one of the available file types.*

▶ **To create a new folder**

1. Find the folder where you want to place the new folder:
   - To open a folder in the current directory, double-click the 📁 in the list.
   - To back up to the previous folder, click the ⤴ tool at the top of the box.
   - To go to a different drive, click the ▾ by the **Save** field to display the list of available drives available for your computer and click the drive you want.
2. Click the 📁 tool at the top of the box. A new folder with the name **New Folder** will be placed in the list:

New Folder

3. The box around the folder name works like a text box. The name **New Folder** will be highlighted and your insertion point will be in the box:
   - Start typing the name for your new folder and it will replace "**New Folder**".
   - Press Enter when you finish.
4. Double-click the new 📁 to select it and it will appear in the **Save in** box.

On-line Help

VersaImage/VersaCAR uses Windows on-line **Help** to give you quick reference to information you many have forgotten so you don't have to look it up in the manual. If you prefer to learn on line instead of reading the manual, you will find most of the instructions in this manual adapted for use on line. You are probably already familiar with Windows **Help** but, just in case you aren't, we'll give you some basic instructions and point out a few of its standard features and also some of its special features that VersaImage and VersaCAR take advantage of.

Starting Help

To invoke help, so the following:

1. Select **Help** from the menu bar
2. Select **Help on VersaImage 32** from the **Help** menu.

You can also access the **Help** screen directly by pressing F1.

When you access help, you will see a dialog box with 3 tabs:

Contents	Displays the table of contents
Index	Displays the index.
Find	Accesses the full text search feature

Using the table of contents

The table of contents organizes your help topics much like a manual. To use the table of contents, click the **Contents** tab.

1. Each 📕 contains a group of related topics.
2. When you double-click on the 📕 it will 📖 and display its contents. It may contain a list of topics or more 📕. You can open these additional 📕s the same way.
3. To go to a topic in the table of contents, double-click on the topic.
4. To close a 📖, just double-click on it.

Using the index

The index is like the index in a book. It is the place to go when you want to find out what information there is on a specific item. You search by "keyword" rather than topic name. To use the index, click the **Index** tab.

When you select a keyword from an index, a list of help topics related to that keyword will be displayed for you to choose from. To select from the index, do the following:

1. Type the first few letters of the word or phrase you are looking for in the text box at top of the index. The index will scroll to that location.
2. Find the keyword you want from the ones listed and double-click on it.
3. If there is only one related topic, you will go directly to that topic. If there is more than one topic, all topics associated with that keyword will be displayed for you to select from.
4. Some keywords have a large number of topics associated with them. These topics will be subdivided into "second level" keywords so you can zero in on the topic you want more quickly.

[Rest of instructions will be added when on-line help is completed]

Exiting from the Application

To exit from the program, do the following:

1. Select **File** from the menu bar.
2. Select **Exit** from the **File** menu.

When you exit, any open databases will be closed automatically, so you don't have to close them first. However, you may have to close open dialog boxes before you can access the menu.

***Hint:** For a faster exit, use the ☒ button in the application title bar.*

Configuring Your System

5

Before you can run VersaImage, VersaCAR, or VersaView, you will need to set up some general system parameters. You will need to let the program know what hardware peripherals you will be using and set up your system default directory for your files. If you are using passwords for security and have more than one user, you will also need to set up your system security.

Configuring Your Peripherals

Your hardware peripherals that interface to the program may include any or all of the following:

Peripheral	**VersaImage**	**VersaCAR**	**VersaView**
Microfilm reader/printer	☑	☑	
Microfilm camera	☑	☑	
Microfilm scanner	☑		
Paper Scanner	☑		
Laser or inkjet printer	☑	☑	☑
Fax modem software	☑		☑
E-mail software	☑		

Before you configure your peripherals, you should know what options are available and how to set them up to run with a computer. Since these programs support a number of different devices, there are a variety of options and consequently a variety of instructions. Therefore, we won't clutter up the main manual (which is supposed to be relatively generic) with specifics regarding all of them. The readers, cameras, and scanners supported at the time of release are documented in the hardware supplement manual that accompanies your product. This information is also available on line. Documentation for any additional devices supported will be provided at the time you purchase your software. Laser and inkjet printers and fax modems use the standard Windows drivers. If a device runs under Windows, it will run with VersaImage, VersaCAR, or VersaView.

After your devices are properly set up to work with your computer, you can configure them to work with VersaImage, VersaCAR, or VersaView. Configuration is merely a matter of telling the application what devices you are using and which options you are using for each. Your configuration options are found on either the **File** menu or the **Preferences** menu, which is accessed from the **File** menu (fig. 5.1).

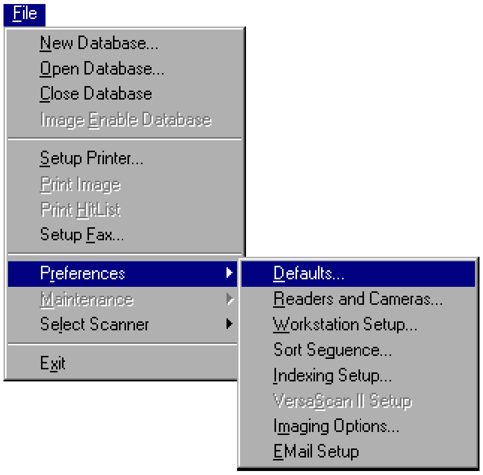

File
New Database...
Open Database...
Close Database
Image Enable Database
Setup Printer...
Print Image
Print HitList
Setup Fax...
Preferences
Maintenance
Select Scanner
Exit
Defaults...
Readers and Cameras...
Workstation Setup...
Sort Sequence...
Indexing Setup...
VersaScan II Setup
Imaging Options...
EMail Setup

Fig. 5.1. **File** drop-down menu with **Preferences** menu

Setting up your reader/printer

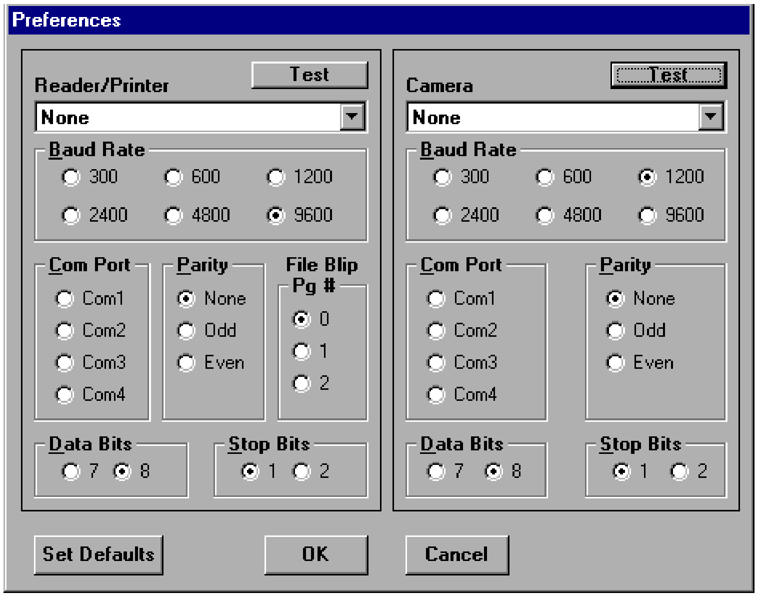
Before you configure your reader/printer, you must make sure that it is set up to run with a computer. Then you must enter the communications parameters in your VersaImage or VersaCAR application. The documentation provided in the hardware supplement should contain the information you need to set up your reader.

To configure your reader/printer

1. Select **File** from the main menu.

2. Select **Preferences** from the **File** menu and the **Preferences** menu will drop down.

3. Select **Readers and Cameras** from the **Preferences** menu. A dialog box for entering reader and camera information (fig. 5.2) will appear.



Reader/Printer: None ▾
Baud Rate: ○ 300 ○ 600 ○ 1200 ○ 2400 ○ 4800 ● 9600
Com Port: ○ Com1 ○ Com2 ○ Com3 ○ Com4
Parity: ● None ○ Odd ○ Even
File Blip Pg #: ● 0 ○ 1 ○ 2
Data Bits: ○ 7 ● 8
Stop Bits: ● 1 ○ 2

Camera: None ▾
Baud Rate: ○ 300 ○ 600 ● 1200 ○ 2400 ○ 4800 ○ 9600
Com Port: ○ Com1 ○ Com2 ○ Com3 ○ Com4
Parity: ● None ○ Odd ○ Even
Data Bits: ○ 7 ● 8
Stop Bits: ● 1 ○ 2

Fig. 5.2. Reader/camera preferences

4. Note that there are two sides to the dialog box—one for your reader and one for your camera. On the **Reader/Printer** side, enter the following:

   - Click on the ▾ to display the **Reader/Printer** drop-down list. Use ↓ to scroll through the list until you find your reader/printer controller. Then press Enter.

Note: Only the controllers in the list are supported. You must have one of the listed controllers and an RS232 interface in order for your reader/printer to work with this system.

   - Select the correct value for your equipment from each of the following boxes:

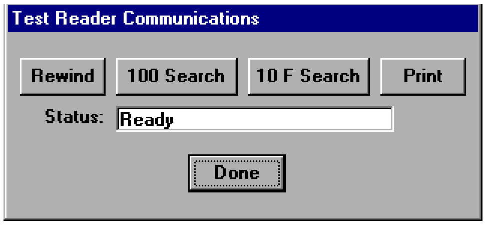
Baud Rate
Com Port
Parity
Data bits
Stop Bits

*Note: When you select a reader printer controller, the **Parity**, **Data Bits** and **Stop Bits** are preset to the defaults for that controller. The baud rate will default to 9600.*

5. Click the Test button (located near the top of the box). The test box shown in fig. 5.3 will appear:

   - The status in the **Status** box should read "**Ready**." If it reads "**Busy/Off-line**", there is no communication between your reader and the system. Recheck your setup parameters.

   - If the reader is **Ready**, use the buttons in the box to test your reader:



Status: Ready

Fig. 5.3. Reader test box

100 Search	Searches for frame 100. Use this for single-level film.
10 F Search	Searches for the 10th "file" blip. Use this for two-level film.
Rewind	Rewinds the film.
Print	Prints a frame.

- When you have finished testing, press Done. If your reader did not respond to the tests, check your setup and communications parameters again. If they appear to be correct, check your reader/printer manual.

6. When your reader is set up, do one of the following:
   - If you have a camera, follow the instructions below to set up your camera.
   - If you do not have a camera, or if you are not ready to set up your camera yet, click OK to save your reader setup and close the box.

Hint: *You can also access the dialog box for reader and camera setup without going through the menu by moving your mouse pointer to the status bar and clicking your right mouse button.*

Setting up your camera

Before you configure your camera, you must make sure that the hardware is set up to run with VersaImage or VersaCAR. Then you must enter the communications parameters in your application. The documentation provided in the hardware supplement should contain the information you need to set up your camera.

▸ To configure your camera

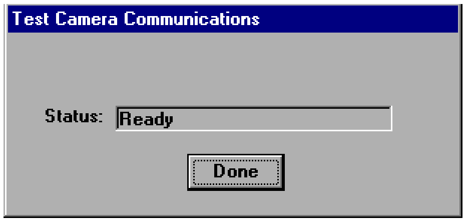
1. Select **File** from the main menu.
2. Select **Preferences** from the **File** menu and the **Preferences** menu will drop down.
3. Select **Readers and Cameras** from the **Preferences** menu. The **Preferences** dialog box for entering reader and camera information (fig. 5.2) will appear.
4. Enter the information about your camera on the **Camera** (right) side of the box:
   - Click on the ▾ to display the **Camera** drop-down list. Use ↓ to scroll through the list until you find your camera controller. Then press Enter.

Note: *You must have one of the listed controllers and an RS232 interface in order for your camera to work with VersaImage/VersaCAR.*

   - Select the correct value for your equipment from each of the following boxes:

     Baud Rate
     Com Port
     Parity
     Data bits
     Stop Bits

5. Click the Test button at the top of the box and the test box shown in fig. 5.4 will appear:
   - If the status in the **Status** box reads "**Ready**", the camera is communicating.
   - If the status is anything else, there is no communication. Check your setup and communications parameters again. If they appear to be correct, check your camera manual.



Status: Ready

Fig. 5.4. Camera test

6. When you have finished testing, click **Done**.

7. After your camera is set up, click **OK** to save your setup and close the box.

Setting up your scanner

VersaImage supports most ISIS-compatible scanners. The ISIS drivers are generally available from the scanner manufacturer. If you are unable to locate an ISIS driver for your scanner, contact Image Vision Corporation for assistance. Set up your scanner for use with VersaImage as directed in the scanner manual. If you have communications problems, refer to your scanner manual. After you set up your scanner, you will need to tell VersaImage which scanner you are using.

▸ To select your scanner

1. Select **Select Scanner** from the **File** menu.

2. Click on **Select ISIS Scanner** and a dialog box listing the available ISIS scanners will appear (usually, there will only be one).

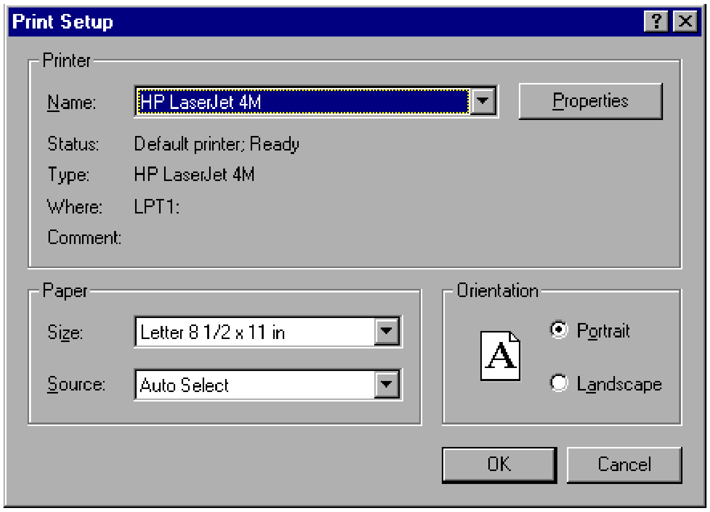
3. Highlight the name of your scanner in the list and click **OK**.

Setting up your printer and fax

You can use your laser or inkjet printer to print database information and, if you are image enabled, scanned images. If you are image enabled, you can also send the images directly to your fax modem. Your printer and fax modem use standard Windows drivers. If they are already installed, you will not need to install and configure them again. However, you do need to let VersaImage know what they are.

> ***Note:*** *If you do not have a fax modem, or if you do not want to use your fax modem with the program, you can use the "fax" option to set up an alternate printer. In this case, your image would print on your primary printer when you select* ***Print Image*** *and on your alternate printer when you select* ***Fax****.*

Both the printer setup and the fax setup functions use the **Print Setup** dialog box (fig. 5.5).



Name: HP LaserJet 4M
Status: Default printer; Ready
Type: HP LaserJet 4M
Where: LPT1:
Comment:
Size: Letter 8 1/2 x 11 in
Source: Auto Select
● Portrait
○ Landscape

Fig. 5.5. **Print Setup** dialog box. Used for setting up your printer and your fax.

▶ To set up your printer

1. Select **File** from the main menu.
2. Select **Setup Printer**. The **Print Setup** dialog will appear.
3. The **Print Setup** dialog box will display your current system default printer as the **Default Printer**. To select another device, do the following:
    - Click ▼ from the **Name** drop-down list box to display the list of currently installed printers.
    - Double-click on the name of the printer you want to select in the list.

> ***Note:*** *If your printer is not in the list, it is not installed in Windows. You will have to do that first before you can set it up in this program. Consult your Windows documentation or your printer manual.*

4. Set your usual defaults for the following options. Generally, these will be:

Paper Size	8½" by 11"
Source	The tray or bin where you generally load your paper for this printer
Orientation	Portrait

5. To check and/or change other printer properties, click Properties to display the **Properties** dialog for your printer. In most cases, the settings you usually use should be OK.

> ***Important:*** *The printer you select will become the default printer for your system. If you make changes to your printer options, it will affect printer setup for your other applications as well. Therefore, if you use a different default printer or need to run differently for other applications, you will need to change your printer setup when you run those applications and restore this setup when you run VersaImage.*

6. When you have completed your setup, click OK.

▶ To set up your fax modem

1. Select **File** from the main menu.
2. Select **Setup Fax**. The **Print Setup** dialog will appear.
3. Select your fax modem from the **Name** drop-down list box:
    - Click ▼ to display the list.
    - Double-click on the name of your fax modem.

> ***Note:*** *If your fax modem is not in the list, it is not installed in Windows. You will have to do that first before you can set it up in this program. Consult your fax documentation.*

4. Set your usual defaults for the following options. Generally, these will be:

Paper Size	8½" by 11"
Orientation	Portrait

5. To check and/or change other properties for your fax, click Properties to display the **Properties** dialog. You may need to change these settings for VersaImage.
6. When you have completed your setup, click OK.

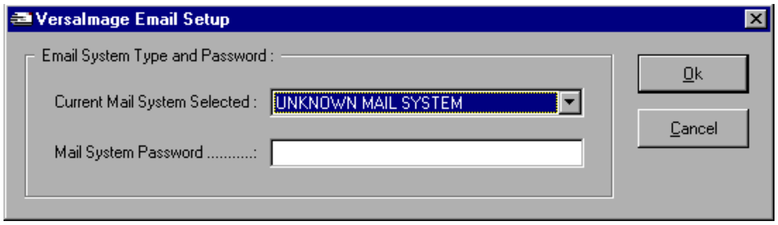
> ***Note:*** *Changes you make to your fax modem properties only affect VersaImage. They do not affect your general fax setup or your fax setup in other applications.*

Setting up your E-mail system

VersaCAR can be configured to interface with a number of E-mail systems. This allows you to E-mail scanned images as attachments directly from VersaImage. To use this option, you must use one of the supported E-mail systems.

To set up your E-mail

1. Select **Preferences** from the **File** menu.
2. Select **EMail Setup** from the **Preferences** menu. The **E-mail Setup** dialog (fig. 5.6) will appear.


VersaImage Email Setup
Email System Type and Password :
Mail System Password ....:
Ok
Cancel

Current Mail System Selected : UNKNOWN MAIL SYSTEM

Fig. 5.6. **E-mail Setup** dialog box

3. Select your E-mail system from the **Current Mail System Selected** list box.
   - Click ▼ to display the list.
   - Double-click on the name of your E-mail system.
4. Enter your E-mail system password in the **Mail System Password** field.
5. Click OK.

> ***Note:*** *If your E-mail system is not listed, you cannot use it directly from VersaImage.*

Setting Up System Security

The **Modify System Security** option permits you to establish and maintain system security by establishing security levels and entering passwords for all users. If you opted to use passwords when you installed your software, you will have already entered your system administrator password. If you are the only user, you will not have to do any more setup at present. However, you may want to change your password occasionally. If you did not elect to use passwords when you ran setup, you can do so at any time through this function. You can also disable the password option if you change your mind and do not want to use them.

We highly recommend that you use passwords for multi-user systems and that you protect your databases by assigning users to security levels that limit the functions they can do. We also recommend passwords for single-user systems where other people have access to your machine. Passwords and security levels can only be changed by users with system administrator security level clearance through the **Modify Security** option. The **Modify Security** option is accessed from the **Maintenance** menu.

> ***Note:*** *The* ***Maintenance*** *menu cannot be accessed unless all databases are closed.*

Enabling and disabling the password option

You can enable the password option at any time. You can also disable it if you do not want to use it, even if you have already assigned passwords.

To enable or disable the password option

1. Close any open databases and select **Maintenance** from the **File** menu.

2. Select **Modify Security** (see fig. 5.7) from the **Maintenance** menu. If you have not enabled passwords, the dialog box shown in fig. 5.8 will be displayed. Otherwise, the dialog box shown in fig. 5.9 (page 38) will appear.

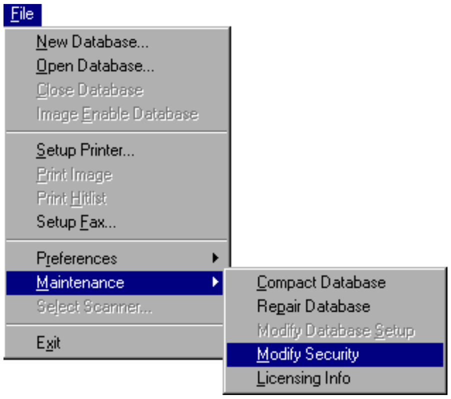

File
New Database...
Open Database...
Close Database
Image Enable Database
Setup Printer...
Print Image
Print Hitlist
Setup Fax...
Preferences
Maintenance
Select Scanner...
Exit
Compact Database
Repair Database
Modify Database Setup
Modify Security
Licensing Info

Fig. 5.7. Selecting the **Modify Security** option

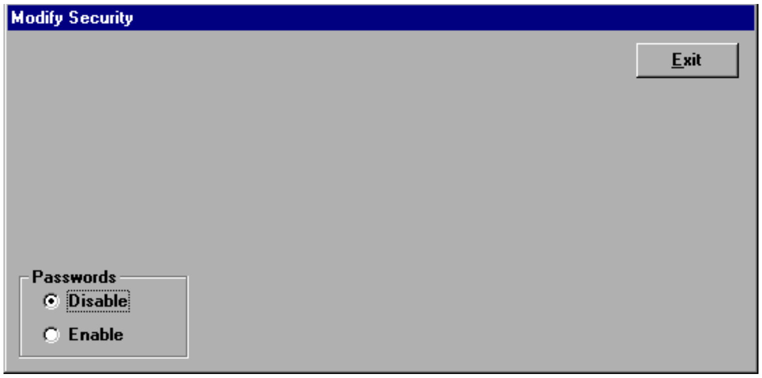

Modify Security
Exit
Passwords
Disable
Enable

Fig. 5.8. **Modify Security** dialog box with passwords disabled

3. In the lower left hand corner are two option buttons:

Disable	Disables passwords.
Enable	Enables passwords.

4. The current option will be selected. To change it, click on the other option. The screen will change accordingly.

5. To exit from the box, press Exit.

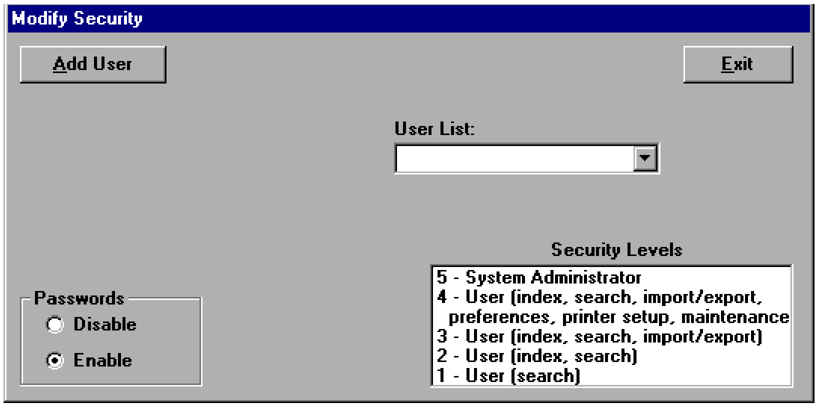
Important: *If you just enabled passwords for the first time, you should add your password and your user passwords NOW (see instructions below) before you exit from this dialog box. When passwords are enabled, only authorized users will be able to sign on to the system.*

Adding users and passwords

If you have enabled passwords, no one will be able to sign on to the system unless they are "registered" by you through the **Modify Security** option. To sign on, they will need to enter both their user names and their passwords. Once signed on, they will only be able to use the functions that are permitted by their security level. Since only the system administrator has access to the **Modify Security** function, you will need to keep track of the passwords you assign to your users so that you can modify them periodically. You can either determine the passwords yourself or have your users tell you what password they want to use. (The latter is a better idea because they will more likely remember them.) If you want to do that, you can always add your users now with "blank" passwords and enter their security levels. Then you can add their actual passwords later through the **Change Password** option after consulting them later.

▸ To add a user

1. Exit from any databases you have open. Then select **Maintenance** from the **File** menu.
2. Select **Modify Security** to display the **Modify Security** dialog (fig. 5.9). Your current user list will appear in the **User List** drop-down list box.

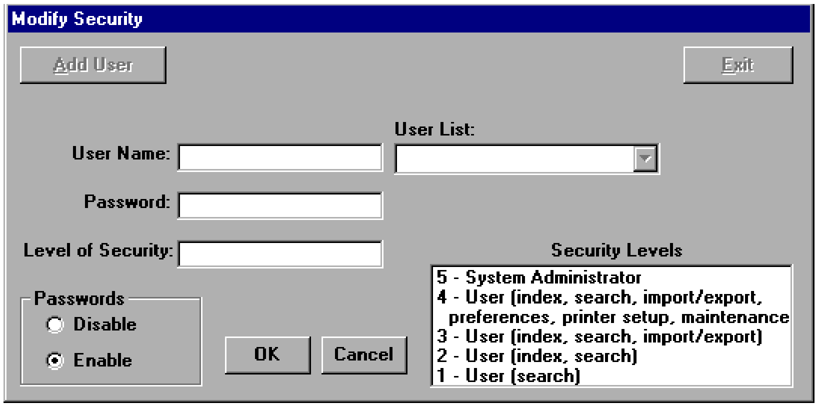

Modify Security
Add User
Exit
User List:
Security Levels
Passwords

○ Disable
● Enable

5 - System Administrator
4 - User (index, search, import/export, preferences, printer setup, maintenance
3 - User (index, search, import/export)
2 - User (index, search)
1 - User (search)

Fig. 5.9. **Modify Security** dialog with passwords enabled

3. Press Add User and text boxes for entering the user security information will appear (see fig. 5.10).


Modify Security
Add User
Exit
User List:
User Name:
Password:
Level of Security:
Security Levels
Passwords
OK
Cancel

○ Disable
● Enable

5 - System Administrator
4 - User (index, search, import/export, preferences, printer setup, maintenance
3 - User (index, search, import/export)
2 - User (index, search)
1 - User (search)

Fig. 5.10. **Modify Security** dialog - **Add User** option

4. Enter a one-word sign-on name for the user in the **User Name** box (e.g., last name, initials, name/initial combination).
5. In the **Password** box, enter the password.
6. In the **Level of Security** box, enter the number of the security level you are assigning:

5	System administrator
4	All functions except security
3	All functions except maintenance and setup functions
2	Index and search only
1	Search only

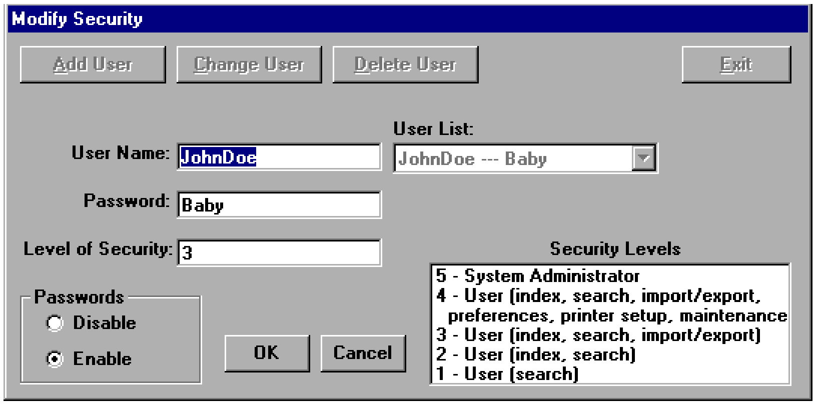
7. Click OK to save the information and add the user.

Modifying user information

The **Change User** option allows you to change user names, passwords, and security levels. Passwords should be changed periodically to protect system security in case they fall into unauthorized hands. You can also change their security level through this option if the need arises. The **Delete User** option permits you to remove users that are no longer authorized to use the system.

▸ To change user security information

1. Exit from any databases you have open. Then select **Maintenance** from the **File** menu.
2. Select **Modify Security** from the **Maintenance** menu to display the **Modify Security** dialog.
3. Press the ▼ next to the **User List** and click on the user you wish to change. The Change User and Delete User push buttons will appear in the dialog box.
4. Click Change User and the current information for the selected user will appear (fig. 5.11).



User Name: JohnDoe

User List: JohnDoe --- Baby

Password: Baby

Level of Security: 3

Passwords
○ Disable
● Enable

Security Levels
5 - System Administrator
4 - User (index, search, import/export, preferences, printer setup, maintenance
3 - User (index, search, import/export)
2 - User (index, search)
1 - User (search)

Fig. 5.11. **Change User** option

5. Enter your changes to the user name, password, or security level.
6. Click OK to save the information and update the user.

▸ To delete a user

1. Exit from any databases you have open. Then select **Maintenance** from the **File** menu.
2. Select **Modify Security** from the **Maintenance** menu to display the **Modify Security** dialog.
3. Press the ▼ next to the **User List** and click on the user you wish to delete. Change User and Delete User push buttons will appear in the dialog box.
4. Click Delete User and the current information for the selected user will appear (fig. 5.11).
5. Click OK to delete the user from the list.

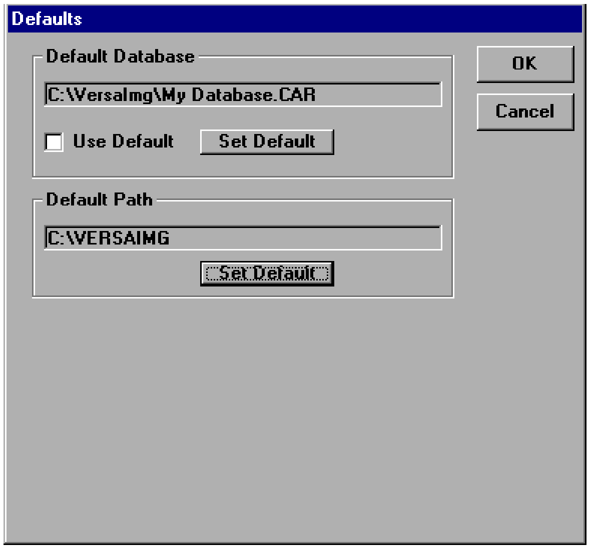
> ***Warning:** The **Delete User** and **Change User** options look identical. Make sure you have the selected the correct option. No confirmation message will be displayed when you delete a user. The user will just be removed from the list. If you delete someone by mistake, simply add the information again through the **Add User** option.*

Setting the Default System Path

The last thing you need to do to finish up your system setup is enter your default system path. The path you enter will be the drive and directory (folder) where your databases and other files will be written unless you specifically select another location at the time. By default it is set to the **VersaImg** directory. If you don't want to change it, you do not need to do anything. However, if you want your files stored elsewhere, you will find it more convenient to set the default system path to that directory.

▸ To change the default path

1. Select **Preferences** from the **File** menu.
2. Select **Defaults** from the **Preferences** menu. The **Defaults** dialog box (fig. 5.12) will appear.

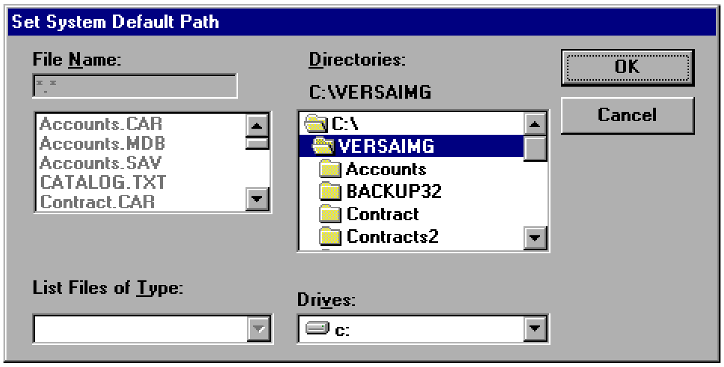


Default Database: C:\VersaImg\My Database.CAR

☐ Use Default

Default Path: C:\VERSAIMG

Fig. 5.12. **Defaults** dialog box



File Name: *.*

Accounts.CAR
Accounts.MDB
Accounts.SAV
CATALOG.TXT
Contract.CAR

Directories: C:\VERSAIMG

C:\
VERSAIMG
Accounts
BACKUP32
Contract
Contracts2

Drives: c:

Fig. 5.13. **Set System Default Path** dialog box

3. In the **Default Path** box, press Set Default. The **Set System Default Path** dialog box (fig. 5.13) will open.
4. Select the drive where your folder is located from the **Drives** list box.
5. Select the folder you want to use from the **Directories** list box.
6. Click OK to set your path and you will return to the **Defaults** dialog box. The path you set will be displayed under **Default Path**.

> ***Note:*** *The folder you want to use must be created* BEFORE *you select it as your default path. You cannot create folders "on the fly" as you can with the standard* ***Open*** *dialog boxes usually used in Windows 95. If you have not already done so, create the folder through Windows* ***Explorer****.*

Part 2
Databases

About Databases 6

Your database is your link to your indexed documents. How they are linked depends on whether you are indexing microfilm documents or paper documents:

- You index your microfilm documents to your database by roll and frame numbers. The record can optionally be linked to a scanned image of the document (or set of documents).
- You index your paper documents to scanned images. The index record is associated with the image file name.

A database in VersaImage can contain both types of documents. VersaCAR supports microfilm indexes only.

Database Records

The database record links your film frame or scanned image to searchable data. You can define whatever fields you want for your record.

All databases should contain the following:

- The field or fields you want to search for the document with. You can have as many of these as you want.
- Whatever additional fields you want to include for information purposes.

Databases that are to be indexed to roll film must contain roll and blip (frame number) fields. These fields are used to associate the record with the specific film frame. They are filled in automatically when you index your film. These values can also be imported if you have already indexed your film in another CAR system. Non-film databases do not use these fields.

Databases that include images must be image enabled. This can be done either when you create your database or from the **File** menu. When a database is image enabled, a field for the image file name and path is added to the record. This field is filled in automatically when you index your images.

Placing records in your database

There are a number of different ways to place index records in your databases.

If you are indexing roll film, you have these options:

- If you are currently using VersaCAR for DOS, you can simply import your DOS databases.
- If your microfilm is already indexed to a database (CAR system), you can create a matching VersaImage or VersaCAR database, then import pertinent data from your existing database. The data must be in either a flat ASCII file or a comma-separated file. The records can contain a roll number and a frame number.
- If you have a database that already contains the data you want for the record, you can import the data from the database (same qualifications as above) and then index them to your documents at either your reader or at the camera.
- You can create and index your database from scratch at either your reader or your camera.

In all cases, if you have VersaImage and microfilm scanning capabilities, images can be associated with each record. This enables faster and more versatile viewing or printing because you do not have to be at the microfilm reader to access them.

If you are indexing paper documents, you have these options:

- If you have a database that already contains the data you want for the record, you can import the data from database. Then you can scan your documents and link the images to your database. The data must be in either a flat ASCII file or a comma-separated file.
- If you have the images stored but no data records associated with them, you can import the images and then enter the data.
- If you have both a database and stored images but they are not linked, you can import both and then link them.
- You can create your database from scratch and then scan and link the images.
- You can scan and index the images in one step on a folder-by-folder basis.

Most likely, you will be using more than one method to index your documents in the lifetime of your system. You might, for example, import as much data as you can for your currently stored documents. Then, for new documents, you might create your records as you scan or photograph them. The options are yours to choose from. Select the ones that work best for you.

Types of Indexes

There are two basic ways to associate index records with documents:

- Each document can be associated with a record.
- Documents can be grouped into subgroups where one record is associated with a group.

The way this is done depends on whether you are indexing film or paper or both. You can have the following types of databases:

- Standard film databases, where all records in the database are indexed to roll film. They may or may not have scanned images.
- Standard paper document databases, where all records in the database are indexed to scanned images.
- Hybrid databases, which contain both film and paper indexing.
- Master reference databases, which contain a table of master records with common identification data and a reference table containing the records for the indexed documents. These indexes can be film only, paper only, or hybrid.

Film indexes

When you index film, the type of indexing you use depends on your film type. VersaImage and VersaCAR support the following types of indexing:

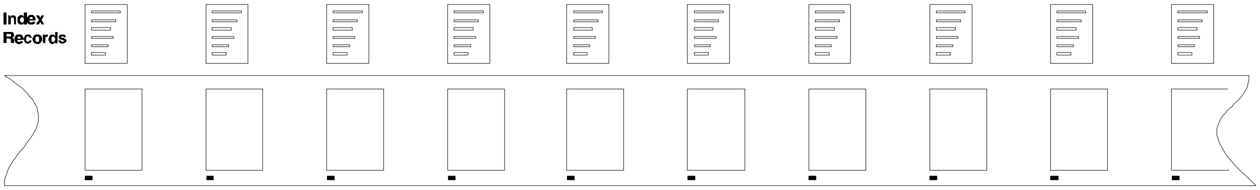
- Single-level indexing where you index every frame. This is the standard method for film with single-level blips.
- Single-level indexing where frames are grouped into logical subgroups. This method simulates two-level indexing for film with single-level blips by indexing only the first frame of each logical group.
- Two-level indexing. This is the standard method for film with two-level blips.
- Three-level indexing. This is the standard method for film with three-level blips.

If your documents are primarily one-page documents that are not related to each other, single-level indexing with one record per frame is generally best. If your documents are generally multi-page documents or if you have groups of documents that are related to one another, either two-level indexing or, if you do not have two-level film capabilities, single-level indexing with subgroups is best. Image Vision generally does not recommend three-level indexing. However, if your application requires it, VersaImage and VersaCAR will handle three-level indexing schemes.

A more detailed description of each of the above options is given below. If you do not index film at all, you may want to skip to “Paper Document Indexes” on page 46.

Single-level indexing

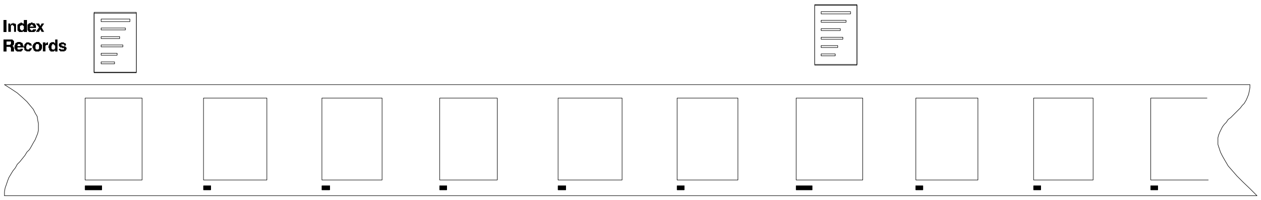
If you index each frame, you will fill in a database record each time the film stops on a frame:



You search the film on a frame-by-frame basis to find the document you are looking for. If you are image enabled and scan your images into VersaImage, the individual document image will be displayed for each record.

Two-level indexing

To do true two-level indexing, you must have film that has two levels of blips—a “file” blip and a “page” blip. You must also have a reader that can support two-level indexing. In two-level indexing, each frame with a file blip has a record in the database. This frame is generally the start of a file or subgroup of related documents:

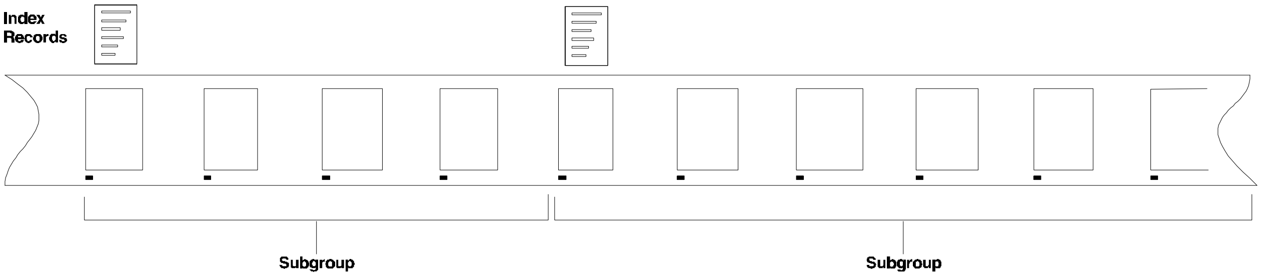


When you search your database, you will search for the index record for the subgroup where your document is located. You then locate the document you want on film by “paging” through the group of documents on your reader. If you have scanned images for the roll, thumbnail images of the documents in the subgroup will be displayed and you will be able to zoom in on the one you want.

> ***Note:*** *It is also possible to index “pages” within a “file.” More will be said about how to do this in Chapter 17.*

Single-level indexing with subgroups

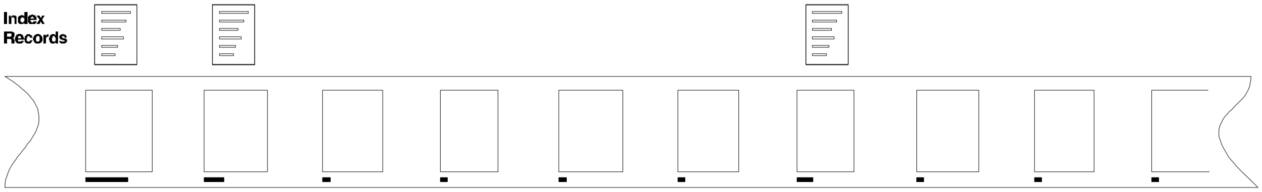
This method of indexing simulates two-level indexing for film with only single-level blips. When your film is shot, your documents are grouped into logical subgroups. You then add a database record for the first frame of each group:



When you search your database, you search for the index record for the subgroup and page through the documents in the group.

Three-level indexing

For three-level indexing, you must have film that has three levels of blips—a "batch" blip, a "file" blip, and a "page" blip. You must also have a reader that can support three-level indexing. In standard three-level indexing, each frame with a batch blip and each frame with a file blip have records in the database. The file blip is generally the start of a file or subgroup of related documents and the batch blip is generally a group of related files:



When you search your database, you will search for the index record for the group (batch blip) or subgroup (file blip) where your document is located. You can then locate the document you want on film by paging through the documents on your reader. If you have scanned images for the roll, thumbnail images of the documents in the subgroup will be displayed and you will be able to zoom in on the one you want.

With three-level film, you also have the option of indexing batch blips only. In this scheme, you would have an index record for each batch blip.

Note: It is also possible to index individual pages. More will be said about how to do this in Chapter 17.

Paper document indexes

When you index paper documents or other non-film images, you have the following options:

- Single-page TIFF images where you index each page
- Single-page TIFF images with images grouped in "folders", which allows you to group single TIFF pages as one document
- Multi-page TIFF images

Single-page images without folders

When you index single-page images individually, each image has a record. You search for the image on a record-by-record basis. Each image will be displayed with its associated record.

Single-page images with folder files

When you group the images into folder files, each group has an index record. You search for a document by searching for the record. All pages in the group will be displayed with the record.

Multi-page TIFF files

Multi-page TIFF images store the separate pages of a document in one file. There is a record for each file. You search the database on a record-by-record basis. All pages in the file will be displayed with the record.

Note: *With manual intervention, you can create folders in databases with single images to accommodate the occasional multi-page document.*

Hybrid indexes

VersaImage can fully support hybrid indexing schemes where you combine both film and non-film indexing in the same database. They can be as simple as single-page records, each of which are indexed to either film or paper, to a complex scheme, which places images scanned from film and images scanned from paper in the same folder file. Before you design a hybrid indexing scheme, you should understand how both film and paper indexing work.

Master reference indexes

The master reference index can be film, paper, or hybrid. These databases consist of a master record table, which contains a master record for each document set and a reference table, where the documents are indexed and linked to the master records. Master records contain information that applies to the document set. The document index records contain information specific to the document. There can be any number of document index records linked to a single master record. (In database jargon, this is referred to as a one-to-many relationship.) A bank's lending department might, for example, create a master record for each loan and add an index record for each document required for the loan. A hospital medical records department might create a master record for a patient, then link all documents related to a patient's stay (admission forms, insurance provider information, discharge form, etc.) to the master record.

A linking field (e.g., a loan number, a patient ID, a case number) links the individual document records in the reference table to the master record. When you search a master reference database, you search for the master record you want. When the master record is retrieved, all documents associated with it in the reference table are retrieved for it so you can select the ones you want to view.

Because of its two-table structure, master reference indexing lends itself nicely to hybrid indexing. This is far and away the best scheme to use if you have sets of related documents you want to group together that come from different sources. A big advantage of this database over standard multi-level indexing is that your group of documents does not have to be indexed at the same time. You can index documents from roll film one day, index scanned images from one department (e.g., loan applications) on another, and add supporting information at a different time—all to the same master records. Each document, regardless of source or length, can (and usually does) have an index record. This is less "messy" than placing several documents of varying lengths in a single folder. While individual "page" records can be added for the latter, retrieval is generally easier and cleaner with the master reference setup.

Database Files

When you create your database, several files and folders are created. Unless you specify another location, they are placed in your default directory. A VersaImage database has the following:

- A .CAR file, which contains your field definitions.
- An .MDB file, which contains your data records and other processing record information.
- A folder for image files if the database is image enabled.

Because it does not support scanned images, VersaCAR will not have an image folder. It will, however, have both a .CAR file and an .MDB file. Do not delete either of these files or the image folder or try to change or create them other than through VersaImage or VersaCAR. If either the .CAR file or the .MDB file is missing, you will not be able to open your database. If your image folder or any of its contents is removed, you will not be able to retrieve all or part of your images. If you try to change or create these files outside of VersaImage or VersaCAR, unpredictable results may occur.

What to Do Next

What you do next depends on how you plan to create your database:

- If you are importing your databases from VersaCAR for DOS, you do not need to define your database in advance. Your database will be defined for you automatically when you import it. Go directly to Chapter 9.
- For all other databases, you will first need to define your database. Go to Chapter 7.

Defining a Database

7

Unless you are importing your database from VersaCAR for DOS, your first step in indexing will be to define your database. In order to create your database, you will first need to decide which type of indexing you are using. If you have not yet read Chapter 6, which explains your options, you should do so before you follow the instructions in this chapter.

> ***Note:*** *If you plan to create a master reference database, you will find specific instructions in Chapter 8. You should, however, read this chapter first to learn the basics of database creation before you try to create a master reference database.*

Determining What Fields You Need

Because you cannot change your data field definitions or their order after you have created your database, you should give careful thought to how you want them defined.

What fields to include

What you include is mostly up to you. Here are some general guidelines:

- At the very least, you will need the fields you want to use to search for the record. In an invoice file, for example, you would probably want to be able to look up by either customer name or invoice number. You might also want to be able to screen by date.
- Databases for indexing roll film (including "hybrid" databases) must include roll and blip number (frame number) fields. These fields are not needed for databases that are strictly "non-film."
- Other information about the document that further identifies it or gives information about its contents may be included as needed.
- For your own benefit, the combination of fields you end up with should uniquely identify the record.

If you are going to import data from either a flat file or a comma-separated file, you will probably want to duplicate the fields in that file. However, you do not have to use all of them, only those that will be of value in finding and retrieving or identifying your documents. You should, however, know the sizes of the fields you are going to import because, if the field is larger than the one you define, you will not be able to import it.

> ***Note:*** *The* ***Image Address*** *field will be added automatically to your record if you image enable the database. Do not add this field yourself.*

Field order

The order in which you define your fields is the order in which they will appear on the screen for searching. Therefore, you need to decide what you want to see first. In general, you should select the most commonly searched field as the first field, the second most commonly searched field as the second, etc. Fields that are almost never searched should be placed at the end. By arranging your fields in such a manner, you will eliminate the need for excessive tabbing by the persons who use the database.

The field order can be changed for indexing purposes so data entry while indexing is not an issue. Your primary purpose is information retrieval and you should arrange your fields in a way that is efficient for the users who will be retrieving the documents.

Entering Your Database Parameters

Your first step in creating a database will be to enter the parameters that describe the database.

To define your database parameters

1. From the **File** menu, select **New Database**. The **New Database** dialog box (fig. 7.1) will appear.

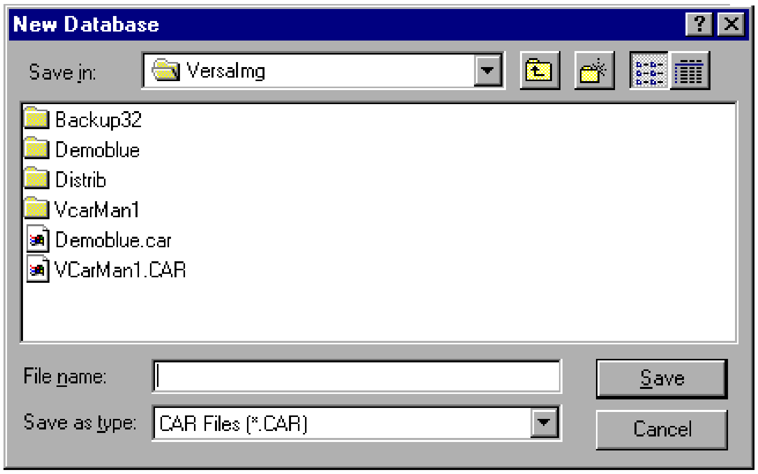


Fig. 7.1. **New Database** dialog box

2. Select the folder where you want the database to be located. Make sure it appears in the **Save in** field at the top of the box.

> ***Note:*** *This dialog box is a standard Windows 95* ***Save*** *dialog. If you do not know how to select a folder, refer to page 27 in Chapter 4.*

3. Enter the name of your database in the **File name** field. You do not need to enter an extension. The .CAR extension will be added automatically.
4. Click Save and the **Create Master Table** dialog box (fig. 7.2) will appear.
5. Enter a name for your database in the **Title** field that helps you identify the contents of the database. You can use your file name or you can enter a more descriptive name if you wish. This title will be displayed in the Windows title bar when you open the database.
6. If you are indexing film, select the type of film you will be indexing:

1 Level	If you are indexing film with single-level blips.
2 Level	If you are indexing film with two blip levels.
3 Level	If you have film with three blip levels.

> ***Note:*** *This field is ignored if you are indexing paper so, if your database is strictly non-film, just leave it at level 1.*

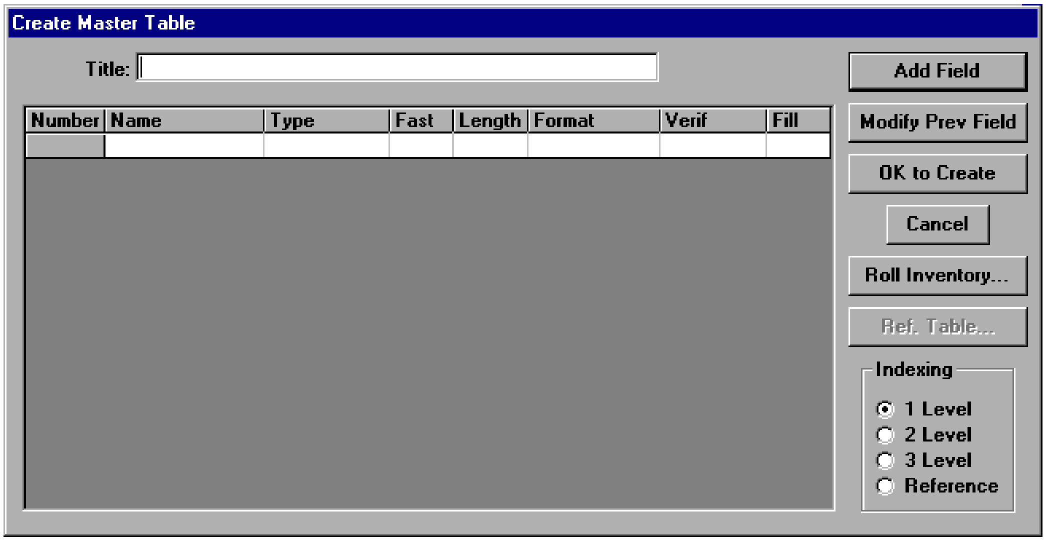

Create Master Table
Title:
Number
Name
Type
Fast
Length
Format
Verif
Fill
Add Field
Modify Prev Field
OK to Create
Cancel
Roll Inventory...
Ref. Table...
Indexing
● 1 Level
○ 2 Level
○ 3 Level
○ Reference

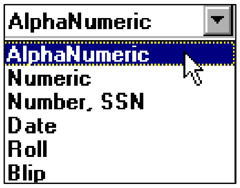
Fig. 7.2. **Create Master Table** dialog box

Defining Your Database Fields

Once you have defined your database parameters, you are ready to define your database fields.

▸ To define a database field

1. Click Add Field and the **Add Field Definition** dialog box (fig. 7.3) will appear.
2. Enter the **Field Name**. It can be up to 30 characters long and must begin with a letter.
3. Press the ▼ and select a field type from the drop-down list:


AlphaNumeric
AlphaNumeric
Numeric
Number, SSN
Date
Roll
Blip

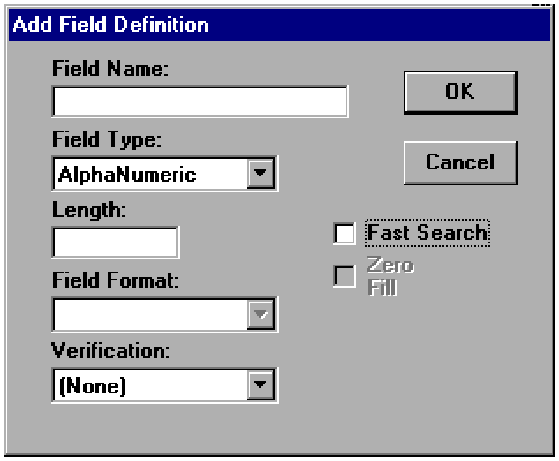

Add Field Definition
Field Name:
OK
Field Type:
Cancel
AlphaNumeric
Length:
☐ Fast Search
☐ Zero Fill
Field Format:
Verification:
(None)

Fig. 7.3. **Add Field Definition** dialog box

AlphaNumeric	All characters accepted.
Numeric	Numbers only.
Number, SSN	Social Security Numbers in NNN-NN-NNNN format.
Date	Date field in MM/DD/YY format (or YYYY if Windows is configured for four-digit years).
Roll	Roll number. Your record must have a roll field to enable microfilm controller functions.
Blip	Blip field (frame number). Your record must have a blip field to enable the microfilm controller functions.

4. For **AlphaNumeric**, **Numeric**, and **Roll** fields, you must enter a field length. Automatic field lengths will be entered for **Numeric**, **SSN** (9), **Date** (8), and **Blip** (six characters for single-level indexes, 13 for two-level, and 20 for three-level).

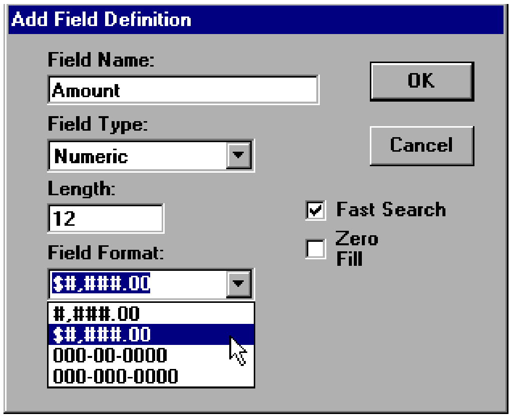
5. If you selected **Numeric** as your type, you may want to define a specific field format. You can do either of the following:

   - Press ▼ from the **Field Format** drop-down list box (fig. 7.4) and select one of the four types:

#,###.00	Comma separators, two decimal places.
$#,###.00	Monetary amount with dollar sign.
000-00-0000	Social security format.
000-000-0000	Phone number format.

   - Enter your own format definition using Microsoft's numeric picture conventions. For further information, refer to Appendix C.

   If you do not enter a format, standard integer (i.e., no decimal places) with no commas will be assumed.



Add Field Definition

Field Name: Amount

Field Type: Numeric

Length: 12

Field Format: $#,###.00

#,###.00
$#,###.00
000-00-0000
000-000-0000

☑ Fast Search

☐ Zero Fill

Fig. 7.4. **Add Field** dialog box with field type list

6. You may optionally add data entry verification to any field. Select the type you want from the **Verificaton** list box:

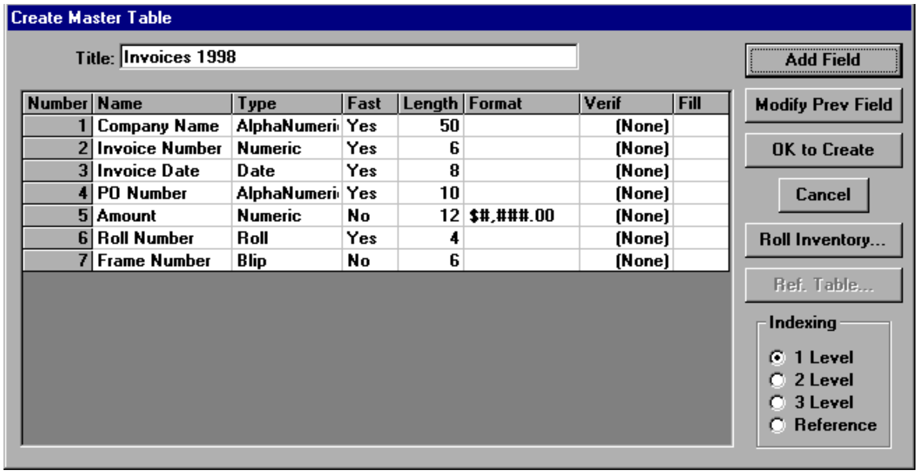
Dbl Key	Double-key verification. When a field has this attribute, the value must be entered twice and both entries must match before it is accepted.
Mod10	Mod 10 check-digit verification. When a field has this attribute, the number must internally verify according to Module 10 check-digit rules. The last digit is calculated based on the previous digits.

7. If you want a "fast search" on the field, check the **Fast Search** check box. A fast search provides much quicker access to your records. However, because of the table it builds, it takes up more disk space. So, if space is at a premium, you will want to confine this attribute to only the fields you will usually search on.

> ***Note:*** *To help speed up the* ***QC*** *function and the* ***Export*** *function, the* ***Roll*** *field should be designated as a fast search field.*

8. If you are defining a **Numeric** field and want the field to be zero-filled, check the **Zero Fill** check box.

9. Click OK and the box will close. The field you have just added will be displayed in the **Create Master Table** box (fig. 7.5).



Create Master Table

Title: Invoices 1998

Number	Name	Type	Fast	Length	Format	Verif	Fill
1	Company Name	AlphaNumeri	Yes	50		(None)	
2	Invoice Number	Numeric	Yes	6		(None)	
3	Invoice Date	Date	Yes	8		(None)	
4	PO Number	AlphaNumeri	Yes	10		(None)	
5	Amount	Numeric	No	12	$#,###.00	(None)	
6	Roll Number	Roll	Yes	4		(None)	
7	Frame Number	Blip	No	6		(None)	

Indexing

● 1 Level
○ 2 Level
○ 3 Level
○ Reference

Fig. 7.5. **Create New Database** dialog box showing entered fields

Modifying and Deleting Fields

You can always modify or delete your last entry. It is important to note, however, that you cannot modify or delete any field but the last field. If you find you need to make changes to another field, you will need to delete all of the entries that appear after that field, modify the field, and then add the fields you deleted again.

To modify a field

1. Click Modify Prev Field and the **Add Field Definition** box will be redisplayed with the information you entered in the last line.
2. Make whatever changes you want to make to your definition.
3. Click OK to place your changes in the line on the screen.

To delete a field

1. Click Modify Prev Field and the **Add Field Definition** box will be redisplayed with the information you entered in the last line.
2. Click Cancel to delete the field.

Completing Your Database Definition

When you finish defining your fields, you will need to save your database. Be sure you have defined all the fields you need because, once you have created a database, you will not be able to add or delete fields.

To save your database

1. Click OK to Create.
2. If you did not include **Roll** and **Blip** fields, a message will inform you that microfilm access will be disabled. Click on one of the following:

   OK If you intended to create a non-film database.

   Cancel If you left these fields out by mistake and wanted to add them before you save your database.

Warning: *You cannot add* ***Roll*** *and* ***Blip*** *fields after your database is created.*

3. Before your database is saved, you will see a confirmation message:

   Are You Sure?

   Press one of the following:

   Yes To create your database.

   No To return to the Create Master Table dialog box and make changes or additions to your definition.

4. After you give your confirmation to create the database, you will be asked whether or not you want to image enable the database. Select one of the following:

   Yes If your database is going to include images.

   No If your database is not going to include images.

Note: *You can always image enable a database later from the* ***File*** *menu.*

Your Next Step

After your database is created, you are ready to populate it. Since there are so many different ways to do this, the chapter you go to next depends on what you want to do:

- If you are going to import a data file, go to Chapter 10.
- If you are going to enter your records while you index your film, go to Chapter 16.
- If you are importing images to index or plan to scan images to index, go to Chapter 11 and read about images. This chapter will direct you to the chapters you need for your next operation.

Defining a Master Reference Database

8

Master reference databases are a special type of database that allows you to index a number of different document types to a single master record. A mortgage application, for example, contains a number of different forms. You could create a master record for each application and then index each document as a separate record linked to the master record. When you search for a document in a master reference database, you would first look for the master record. Then you would retrieve the document you want to see for that record.

The documents you attach to a master reference record can be from either film or paper and can be either single- or multi-page documents. This chapter assumes that you have read Chapters 6 and 7, are familiar with the different indexing options available, and know how to define a standard database. If you have not read these chapters, you should do so before you try to create a master reference database.

Determining What Fields You Need

A master reference database consists of two tables. The master table contains the master records and the reference table contains the document index records. You need to define both the fields for your master record table and the fields for the reference table when the database is created. You cannot change your data field definitions or their order after you have created your database.

The master record

The master record should contain the basic identification information for the group of documents. You should include all fields that you may want to search for the master record on. Here are some ideas:

- Loan number, case number, or other type of identification number
- Name of person or organization associated with the document group
- Social security number or tax ID
- Date

You might also want to include other general information, such as address information, loan amount, or other data you might want available when you consult the document records. This information will remain displayed for all documents in the record.

Note: *You may want to import the master data from either a flat ASCII or a comma-separated file. If you do, make sure you know the sizes of the fields you are going to import from because, if the field is larger than the one you define, you will not be able to import it.*

The link field

One field in the master record must be designated as the link to the reference table where the document records are stored. The link field will be placed in each reference table record automatically. The link value of the associated master record will be placed in the link field of each document record. VersaImage uses this value to find the document records linked to a given master record.

The link field value must be unique to each master record. It is recommended that this field be numeric. Good candidates are loan numbers, case numbers, etc. If your master record does not contain any numeric fields, you may want to create an “artificial” record number field for linking.

The document index records

The document index records should contain identification data for the specific document. Although the contents is up to you, at the very least, you should probably include the following:

- Document identification number or other unique identifier for the type of document.
- Document name or title (advisable unless the numeric identifiers are as well known as Form 1040!)
- Document date
- Roll and blip numbers (required for databases that will contain indexes to roll film)

You can safely skip the roll and blip numbers if you do not index roll film. If you index roll film at all, it is probably best to include them, even if you don't think you will need them.

> ***Note:** The **Image Address** field will be added automatically to your record if you image enable the database. Do not add this field yourself.*

Field order

The order in which you define your fields is the order in which they will appear on the screen. As with standard databases, you will be able to rearrange them for indexing if necessary, so you should give primary consideration to arranging them for efficient searching. Usually, you will want to place your link field first since it is the unique master record identifier. However, if it is not a field that is usually searched on, you may want to place another one in that position.

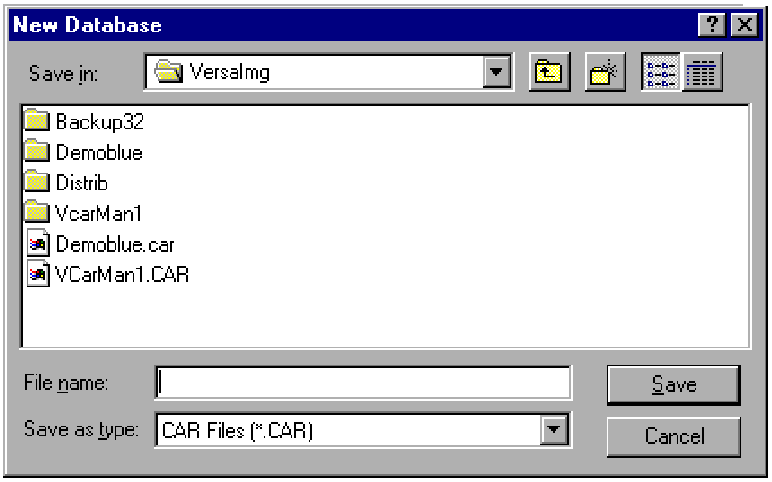
Your document records are selected for viewing from a table display screen. The table fields are placed in the order in which they are defined in your database. Therefore, you should place the fields by which the document can be most easily identified as your first fields.

Entering Your Database Parameters

Your first step in creating your database will be to enter the parameters that identify it as a master reference database.

To define your database parameters

1. From the **File** menu, select **New Database**. The **New Database** dialog box (fig. 8.1) will appear.



New Database

Save in: VersaImg

File name:

Save as type: CAR Files (*.CAR)

Fig. 8.1. **New Database** dialog box

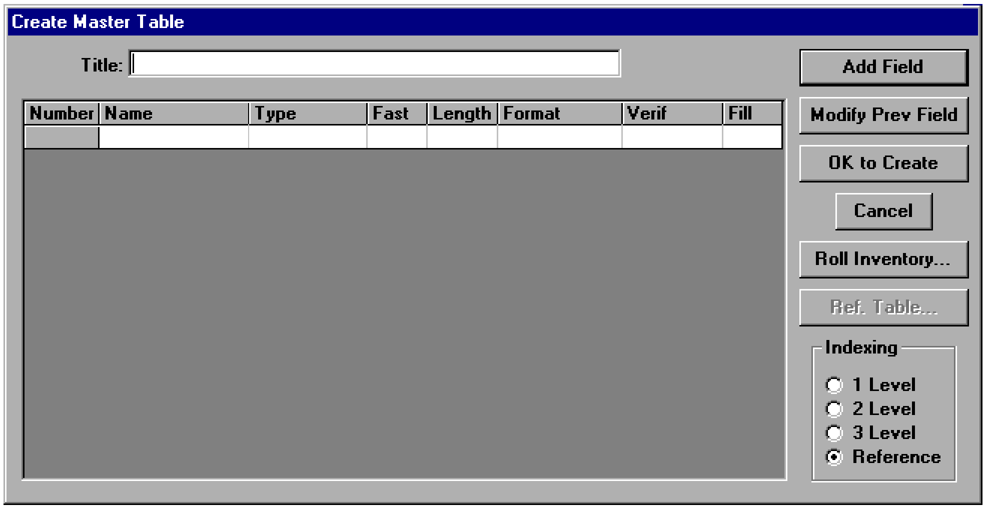

Create Master Table
Title:
Number
Name
Type
Fast
Length
Format
Verif
Fill
Add Field
Modify Prev Field
OK to Create
Cancel
Roll Inventory...
Ref. Table...
Indexing
○ 1 Level
○ 2 Level
○ 3 Level
● Reference

Fig. 8.2. **Create Master Table** dialog box with the **Reference** option selected

2. Select the folder where you want the database to be located. Make sure it appears in the **Save in** field at the top of the box.

3. Enter the name of your database in the **File name** field. You do not need to enter an extension. The .CAR extension will be added automatically.

4. Click **Save** and the **Create Master Table** dialog box (fig. 8.2) will appear.

5. Enter a name for your database in the **Title** field that helps you identify the contents of the database. You can use your file name or you can enter a more descriptive name if you wish. This title will be displayed in the Windows title bar when you open the database.

6. Select **Reference** as the database type from the **Indexing** options.

Defining Your Master Record Fields

Once you have defined your database parameters, you are ready to define the fields for your master record. Make sure that you include a link field in your definition. Do not include roll or blip number fields. While you are defining your table, you may modify or delete the last field. Be sure, however, to complete all necessary modifications *before* you define the reference table.

> ***Note:*** *We are assuming that you read Chapter 7 and already know how to define a database field, so we will skip some of the details here. More detailed information can be found on page 51.*

▸ To define a database field

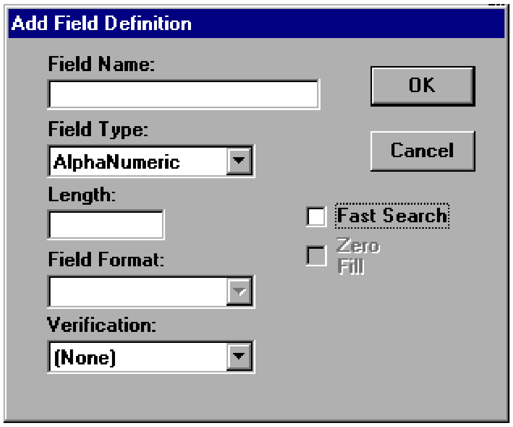
1. Click **Add Field** and the **Add Field Definition** dialog box (fig. 8.3) will appear.

2. Enter the **Field Name**.

3. Press the ▾ and select **Field Type** from the drop-down list.

4. Enter the **Length** for **Numeric and Alphanumeric** fields. Automatic field lengths will be entered for **Numeric**, **SSN** and **Date** fields.

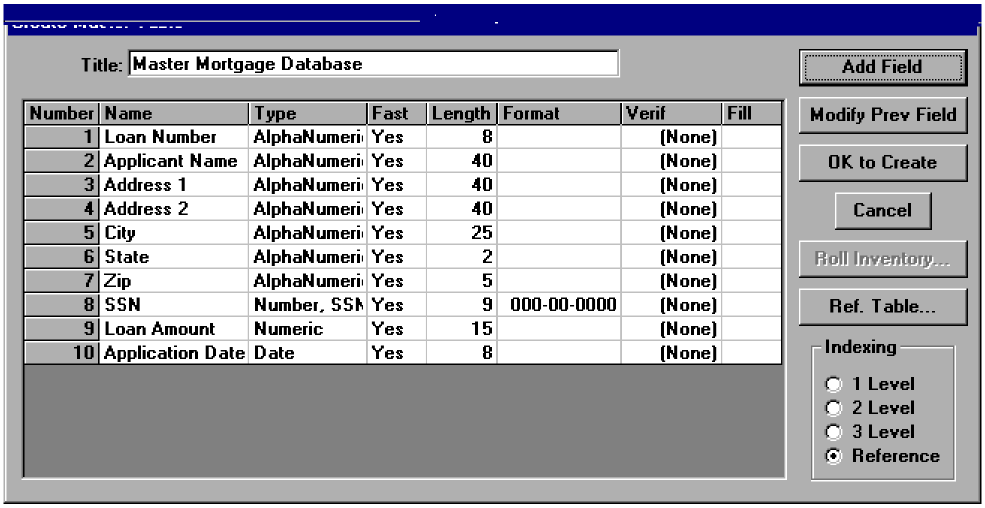
5. Enter any of the optional fields you want to apply to your data field:


Add Field Definition
Field Name:
OK
Cancel
Field Type:
Length:
☐ Fast Search
☐ Zero Fill
Field Format:
Verification:

Field Type: AlphaNumeric

Verification: (None)

Fig. 8.3. **Add Field Definition** dialog box



Title: Master Mortgage Database

Number	Name	Type	Fast	Length	Format	Verif	Fill
1	Loan Number	AlphaNumeri	Yes	8		(None)	
2	Applicant Name	AlphaNumeri	Yes	40		(None)	
3	Address 1	AlphaNumeri	Yes	40		(None)	
4	Address 2	AlphaNumeri	Yes	40		(None)	
5	City	AlphaNumeri	Yes	25		(None)	
6	State	AlphaNumeri	Yes	2		(None)	
7	Zip	AlphaNumeri	Yes	5		(None)	
8	SSN	Number, SS	Yes	9	000-00-0000	(None)	
9	Loan Amount	Numeric	Yes	15		(None)	
10	Application Date	Date	Yes	8		(None)	

Indexing
○ 1 Level
○ 2 Level
○ 3 Level
● Reference

Fig. 8.4. A typical set of fields for a master table

- **Field Format** and **Zero Fill** can be applied to numeric fields only.
- **Verification** and **Fast Search** are can be applied to any field.

For detailed information on the above, refer to page 51 in Chapter 7.

6. Click OK when you finish and the definition will be added to the table.

To modify your last field

1. Click Modify Prev Field and the **Add Field Definition** box will be redisplayed with the information you entered in the last field.
2. Make whatever changes you want to make to your definition.
3. Click OK to place your changes in the line on the screen.

To delete your last field

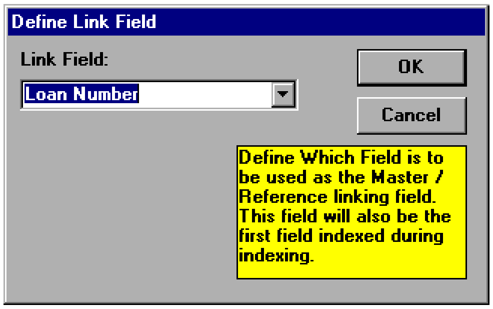
1. Click Modify Prev Field and the **Add Field Definition** box will be redisplayed with the information you entered in the last line.
2. Click Cancel to delete the field.

Defining Your Reference Table

Once you have defined your master table fields, you can define and complete your reference table. Make sure you have defined all fields in your master table first. Unpredictable results may occur when you add or change fields in the master table after completing your reference table.

To define your reference table

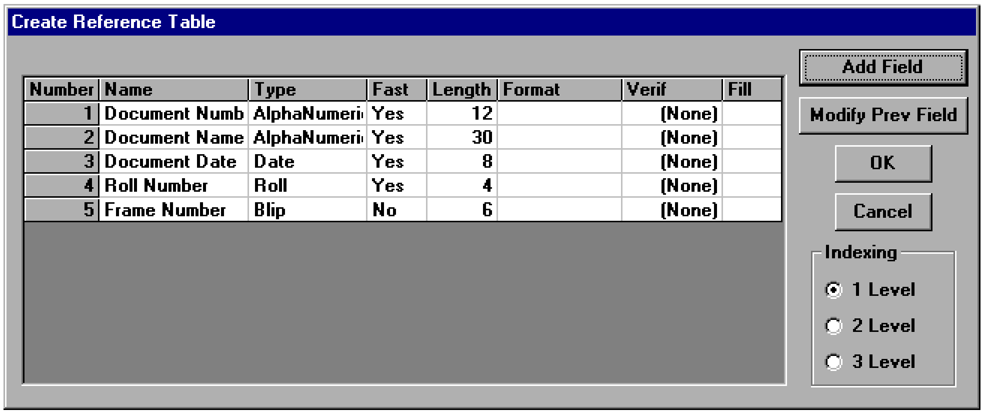
1. Click the Ref. Table button in the **Create Master Table** dialog box. A dialog box (fig. 8.5) will appear so you can select your link field.
2. The link field connects the document records in the reference table to the master table record. Select the field you want to use from the **Link Field** list box.



Link Field: Loan Number

Define Which Field is to be used as the Master / Reference linking field. This field will also be the first field indexed during indexing.

Fig. 8.5. **Define Link Field** dialog



Number	Name	Type	Fast	Length	Format	Verif	Fill
1	Document Numb	AlphaNumeri	Yes	12		(None)	
2	Document Name	AlphaNumeri	Yes	30		(None)	
3	Document Date	Date	Yes	8		(None)	
4	Roll Number	Roll	Yes	4		(None)	
5	Frame Number	Blip	No	6		(None)	

Indexing
● 1 Level
○ 2 Level
○ 3 Level

Fig. 8.6. **Create Reference Table** dialog box with document record fields entered

3. Click OK and the **Create Reference Table** dialog box (fig. 8.6) will appear.
4. If you will be indexing roll film for this database, select the type of film you will be indexing:

1 Level	If you are indexing film with single-level blips.
2 Level	If you are indexing film with two blip levels.
3 Level	If you have film with three blip levels.

> ***Note:*** *This field is ignored if you are indexing paper so, if your database is strictly non-film, just leave it at level 1.*

Adding Your Reference Table Fields

Your reference table fields to define your document records are added in the same way as you added your master record fields. If you are indexing film in your database, don't forget to add **Roll** and **Blip** fields. As with master records, you can modify or delete the last field in the table. Make sure that you complete all necessary modifications before you close this dialog and return to the **Create Master Table** dialog.

To define a reference table data field

1. Click Add Field and the **Add Field Definition** dialog box will appear.
2. Enter the **Field Name** and select the **Field Type**.
3. Enter the **Field Length** for **AlphaNumeric**, **Numeric**, and **Roll** fields. Automatic field lengths will be entered for **Numeric**, **SSN**, **Date**, and **Blip** fields.
4. Enter whichever of the optional fields apply.

> ***Note:*** *To help speed up the* ***QC*** *function and the* ***Export*** *function, the* ***Roll*** *field should be designated as a fast search field.*

5. Click OK and the box will close. The field you have just added will be displayed in the **Create Reference Table** box (fig. 8.6).

Completing Your Database Definition

When you finish defining your reference table fields, you will need to save your database. Make sure you have defined all the fields you need for your document index record before you leave the **Create Reference Table** dialog.

▸ To save your database

1. Click OK in the **Create Reference Table** dialog box to save the reference table and return to the **Create Master Table** dialog box.

2. If you did not include **Roll** and **Blip** fields in your document records, a message will inform you that microfilm access will be disabled. Click on one of the following:

OK	If you intended to create a non-film database.
Cancel	If you left these fields out by mistake and wanted to add them before you leave the reference table dialog.

Warning: *You cannot add* ***Roll*** *and* ***Blip*** *fields after your database is created.*

3. Click OK to Create in the **Create Master Table** database to save your database.

4. Before your database is saved, you will see a confirmation message:

Are You Sure?

Click Yes to create your database.

5. You will be asked whether or not you want to image enable the database. Select one of the following:

Yes	If your database is going to include images.
No	If your database is not going to include images.

Note: *You can always image enable a database later from the* ***File*** *menu.*

Your Next Step

After your database is created, you are ready to index. Since there are so many different ways to do this, the chapter you go to next depends on what you want to do:

- If you are going to import your master data record from a data file, go to Chapter 10.
- If you are indexing film only and will not be scanning images, go to Chapter 16.
- If you are importing images to index or plan to scan and index your images, go to Chapter 11 and read about images. This chapter will direct you to the chapters you need for your next operation.

9

Importing VersaCAR for DOS Databases

If you have VersaCAR for DOS, you simply import and go. You don't even have to define a database first. VersaCAR for Windows takes care of everything! You can start using your database immediately. This feature enables seamless integration with VersaCAR 32. If you have upgraded to VersaImage and have a film scanner, you can add such features as scanned images to your existing database after you import it.

Importing Your Data

To import your VersaCAR for DOS databases, your VersaCAR for DOS databases must be either on the same machine or accessible from your network.

▸ To import a VersaCAR for DOS database

1. Select **Tools** from the main menu bar. Then select **Import** from the **Tools** menu (fig. 9.1). (Actually, it's the only one you can select without a database open.)

2. When the **Import** menu pops out, select **VersaCAR for DOS**, which once again is the only thing you can select.

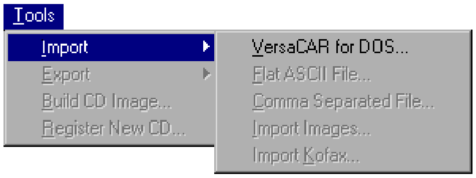
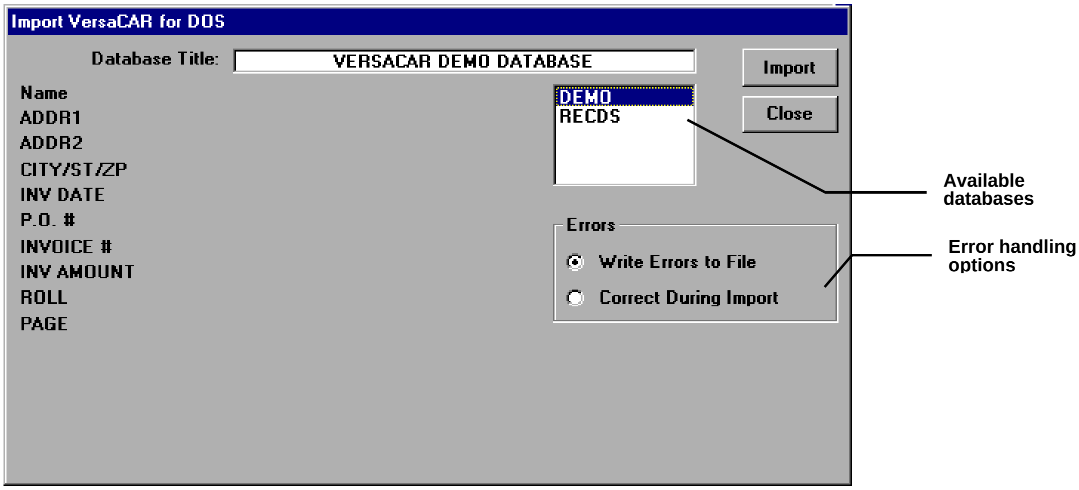


Fig. 9.1. **Import** menu

3. The **Open** dialog box will appear on the screen. Navigate to the folder where your VersaCAR for DOS databases are stored.

4. In the list of files displayed, you will see one called CATALOG.TXT. Select **CATALOG.TXT** and click OK. Immediately, the **Import VersaCAR for DOS** dialog box (fig. 9.2) will appear:



Import VersaCAR for DOS

Database Title: VERSACAR DEMO DATABASE

Name
ADDR1
ADDR2
CITY/ST/ZP
INV DATE
P.O. #
INVOICE #
INV AMOUNT
ROLL
PAGE

DEMO
RECDS

Errors
● Write Errors to File
○ Correct During Import

Available databases

Error handling options

Fig. 9.2. **Import VersaCAR for DOS** dialog box

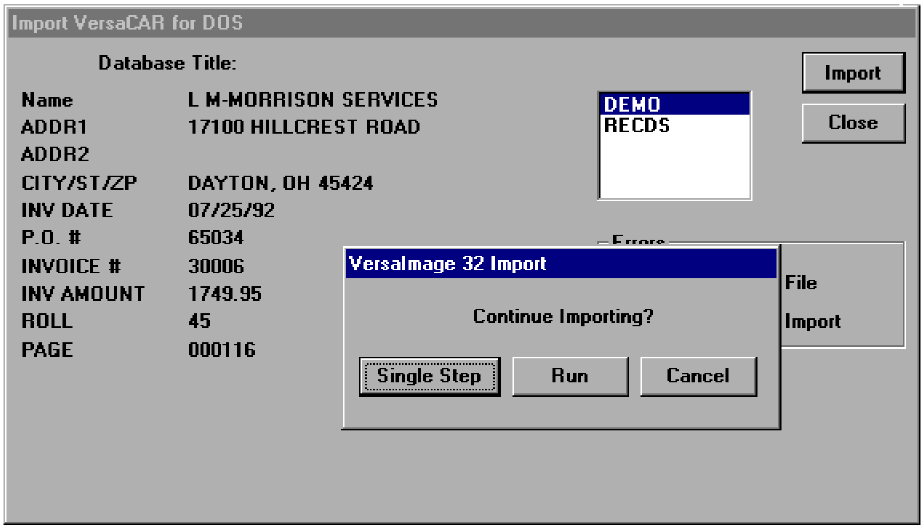
- On the right side, you will see the available import options.
- On the left side, you will see the record fields for the first available option.

5. From the available databases displayed on the right, select the one you want to import. When you select it, its full name will appear in the box and its fields will appear on the left.

6. Select your error handling method:

Write Errors to File	Skips records with errors and writes them to a file.
Correct During Import	Stops for errors during import so you can correct them.

7. Click Import to start the import and import the first record. The record will be displayed in the fields (fig. 9.3). A progress message box at the top of the screen will display the number of records in the file.



Database Title:

Name L M-MORRISON SERVICES
ADDR1 17100 HILLCREST ROAD
ADDR2
CITY/ST/ZP DAYTON, OH 45424
INV DATE 07/25/92
P.O. # 65034
INVOICE # 30006
INV AMOUNT 1749.95
ROLL 45
PAGE 000116

VersaImage 32 Import

Continue Importing?

Fig. 9.3. **Import VersaCAR for DOS** dialog box with first record displayed

8. A message box will appear on top of the dialog box asking you if you want to continue importing. You have three options:

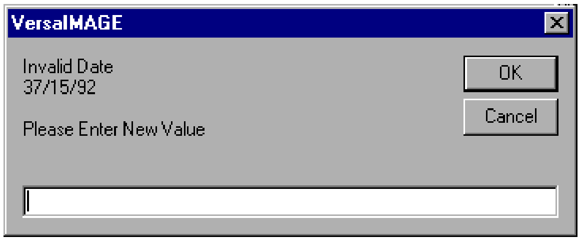
Single Step	Imports records one at a time. Each time you click Single Step, another record will be imported and displayed.
Run	Imports the file without stopping.
Cancel	Cancels the import.

You will probably want to import several records singly to make sure that they are coming in as they should be. Once you are satisfied that the records are OK, you can click Run to start importing the file.

Hint: *If your records are covered by the message box and you want to read them, drag the message box to another position on the screen.*

9. If you decided to correct errors during import, the system will stop every time it encounters an error:

- A dialog box containing the error message and current data will appear (fig. 9.4).
- At the bottom of the box, you will find a text box. Enter your correction in the box.
- Click OK to continue.



Invalid Date
37/15/92

Please Enter New Value

Fig. 9.4. Import error correction box

10. When the import is finished, the **Import** dialog box will close and you will see a completion message:
    - If there were no errors, the message will say so. Your database is imported and ready to go.
    - If there were errors and you elected to have them written to a file, the message will display the number of errors and the names of the error files. Information on handling these errors is given below.

Error Files

If you elected to have your errors written to a file, the import program will write records with errors to a file instead of importing them. There are two error files. Each has the same name as your database. One has the extension .ERR and the other .ERD:

.ERR	Contains the type of error.
.ERD	Contains the raw data record.

You can examine the error files through the Windows **Notepad** application. Just choose **Notepad** from the **Accessories** group and retrieve the file.

You will need to add these records to your database manually. The easiest way to do this is through the **Indexing From Paper** option (Chapter 20). It allows you to enter the complete record including roll and frame numbers. You can also add records through the **QC** function.

What to Do Next

What you do next depends on what else you want to do with your database and what product you are using:

- If you just want use your database as is, go to Chapter 23 for information on searching your database.
- If you want to add more records to your existing database, go to Chapter 16 for information about indexing.
- If you have upgraded to VersaImage and want to add scanned images to your database, go to Chapter 11.

Importing Data from External Databases

10

VersaImage and VersaCAR have built-in functions to import data from three types of data files:

- Flat ASCII files
- Comma-separated files
- Kofax Ascent files

This is particularly time saving if you already have your microfilm indexed to a database or if you have your identification data already entered in a file.

For standard databases, you may import complete index records or you may use the database to retrieve pertinent information, such as identification information, so you don’t have to enter it when you index. Data records that are already indexed to microfilm with roll and frame numbers are “ready to go” as soon as they are imported. Data records that are not already indexed to documents will need to be associated with either roll film or scanned images.

For master reference databases, you can import data for your master record fields. You may also import data for your first document index record if it is in the same database record as your master record data. You cannot import data for additional document records. Your document records can be added to the database and linked to the master record through the indexing function.

Before you import data from an external database file, you must first define a database for your data as explained in Chapter 7. If you have not yet done so, return to that chapter for instructions.

Important: *The file extension of your import file will be changed to .DON after the import is finished. You will need to change it back to its original name if it is accessed by other programs. If you want to avoid this altogether, create a copy of your import file in Windows* ***Explorer****. Either give the file a different name or place it in a different directory.*

Importing from a Comma-separated File or Kofax Ascent File

Comma-separated files and Kofax Ascent files use the same import dialog. The only difference between the two is that Kofax files may be associated with images, which are imported at the same time.

Selecting your files

Your first step is to open the VersaImage or VersaCAR database you want to import your file to. Then you must select your import file.

To open your .CAR database

1. Select **Open Database** from the **File** menu. The **Open** dialog box will appear.
2. Select your database from the **Open** dialog box.
3. Click on Open and the fields you have defined for your record will appear on the screen.

To select a comma-separated file database to import

1. Select **Import** from the **Tools** menu.
2. Select **Comma Separated File** (fig. 10.1) from the **Import** menu. The **Open** dialog box will appear.
3. If your file does not have a .CSV extension, press ▼ to display the drop-down list and select either **Text File** (for .TXT extensions) or **All Files** (for any other extension).
4. Find the folder where your file is located.

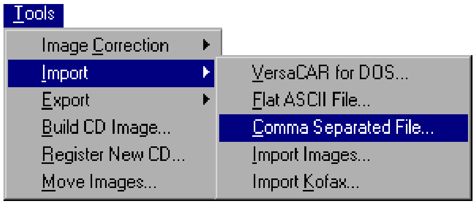
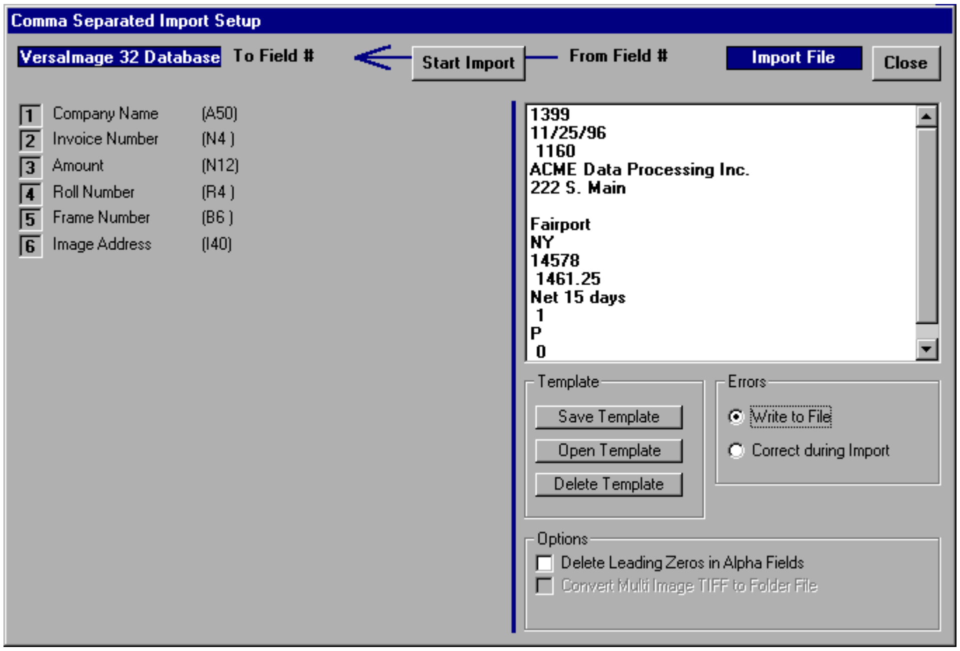

Tools
Image Correction
Import
Export
Build CD Image...
Register New CD...
Move Images...
VersaCAR for DOS...
Flat ASCII File...
Comma Separated File...
Import Images...
Import Kofax...

Fig. 10.1. The **Comma Separated File** option

5. Select your file and click on Open. The **Comma Separated Import Setup** dialog box (fig. 10.2) will appear.


Comma Separated Import Setup
VersaImage 32 Database
To Field #
Start Import
From Field #
Import File
Close
Template
Save Template
Open Template
Delete Template
Errors
Options

1	Company Name	(A50)
2	Invoice Number	(N4)
3	Amount	(N12)
4	Roll Number	(R4)
5	Frame Number	(B6)
6	Image Address	(I40)

```
1399
11/25/96
 1160
ACME Data Processing Inc.
222 S. Main

Fairport
NY
14578
 1461.25
Net 15 days
 1
P
 0
```

● Write to File
○ Correct during Import

☐ Delete Leading Zeros in Alpha Fields
☐ Convert Multi Image TIFF to Folder File

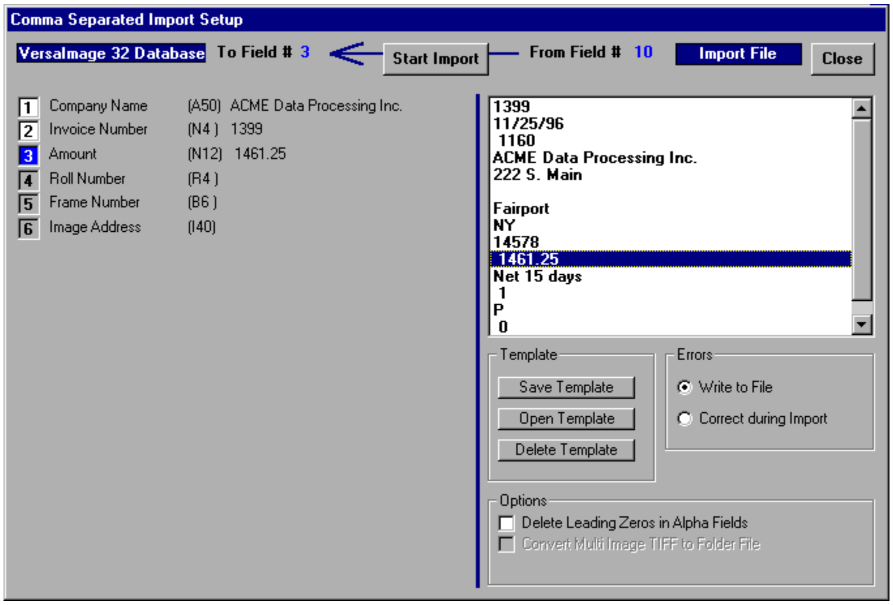
Fig. 10.2. **Comma Separated Import Setup** dialog box. The **Kofax Import Setup** dialog box is identical.

To select a Kofax Ascent file database to import

1. Select **Import** from the **Tools** menu.
2. Select **Import Kofax** from the **Import** menu. The **Open** dialog box will appear.
3. The default file type is **Kofax Ascent File** with the extension .TXT. If your file does not have this extension, press ▼ to display the drop-down list and select **All Files**.
4. Find the folder where your file is located.
5. Select your file and click Open. The **Kofax Import Setup** dialog box will appear. It is identical to the **Comma Separated Import Setup** dialog (fig. 10.2).

Importing your data

Once you have selected your import database, the import procedure is the same for both comma-separated files and Kofax files. On the left side of the dialog box, you will see the fields in the VersaImage or VersaCAR database record. On the right you will see the data from the first record in your import file. A scroll bar will permit you to scroll through the information. To import your data, you will first need to map the fields in your import file to the fields in your .CAR record and select your import options.



1	Company Name	(A50)	ACME Data Processing Inc.
2	Invoice Number	(N4)	1399
3	Amount	(N12)	1461.25
4	Roll Number	(R4)	
5	Frame Number	(B6)	
6	Image Address	(I40)	

1399
11/25/96
1160
ACME Data Processing Inc.
222 S. Main

Fairport
NY
14578
1461.25
Net 15 days
1
P
0

● Write to File
○ Correct during Import

☐ Delete Leading Zeros in Alpha Fields
☐ Convert Multi Image TIFF to Folder File

Fig. 10.3. **Comma Separated Import Setup** dialog showing data selected for import

To map your fields

1. For each field you want to import, do the following:
   - Click on the VersaImage or VersaCAR database field. The number of the field you clicked on will be highlighted.
   - Click on the value in your displayed record that you want to import to that database field. The value will be displayed next to the field on the left.
2. When you finish, your screen will look something like the one shown in fig. 10.3.

> ***Note:*** *You do not have to import all of your fields or fill all of the fields in your database, only the ones that you need.*

To select your import options

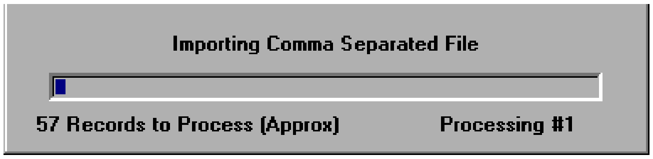
1. Select your error handling method:

Write Errors to File	Skips records with errors and writes them to a file.
Correct During Import	Stops for errors during import so you can correct them.

2. If you want leading zeros in alphanumeric fields deleted upon import, enable **Delete Leading Zeros in Alpha Fields** in the **Options** group.
3. If you are importing Kofax files and want to have your multi-page TIFF images converted to folder files, select **Convert Multi-Image TIFF to Folder File**. (This option will be grayed out for comma-separated files.)

To import your data

1. Click **Start Import** to start importing the file. A processing message at the top of your screen (fig. 10.4) will display the number of records in the file.



Importing Comma Separated File

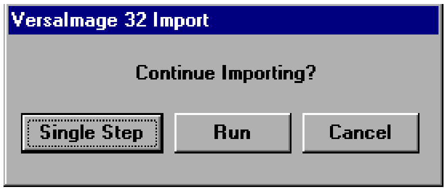
57 Records to Process (Approx)

Processing #1

Fig. 10.4. Import processing message—comma-separated files

2. A message box (fig. 10.5) will appear asking you if you want to continue importing. You have three options:

Single Step	Imports records one at a time. Each time you click Single Step, another record will be imported and displayed.
Run	Imports the file without stopping.
Cancel	Cancels the import.



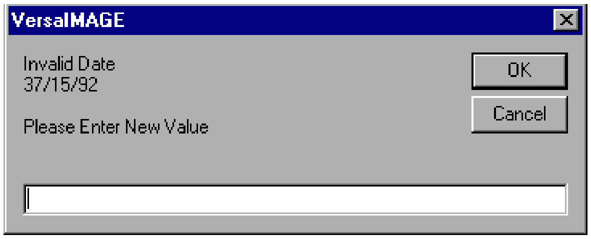
Continue Importing?

Fig. 10.5. Import processing options

You will probably want to import several records singly to make sure that they are coming in as they should. Once you are satisfied that the records are OK, you can click Run to start importing the file.

***Note:** During import, the processing message (fig. 10.4) will show you how much of the file has been processed.*

3. If you decided to correct errors during import, the program will stop every time it encounters an error:
   - A dialog box (fig. 10.6) containing the error and the current field data will appear.
   - At the bottom, you will find a text box. Enter your correction in the box.
   - Click OK to continue.



Invalid Date
37/15/92

Please Enter New Value

Fig. 10.6. Error correction for comma-separated files

4. When the import is finished, the dialog box will close and you will see a completion message:
   - If there were no errors, the message will say so. Go to the chapter for your next step:

Chapter 11	If your database will include images.
Chapter 16	If you will be indexing your database to microfilm.
Chapter 23	If your database does not require indexing.

   - If there were errors and you elected to have them written to a file, the message will display the number of errors and the names of the error files. For error handling information, go to page 72.

***Hint:** If you are importing data from a number of comma-separated files with the same structure, you may want to check out the template function. This function saves your structure as a reusable template. See page 72 for details.*

Importing from a Flat ASCII File

A flat ASCII file is a file where all records are the same length (fixed length record) and all of the field data in each and every record is in the same column position within each record.

Selecting your files

First, you must open the .CAR database you want to import your data into. Then you must select your import file.

▶ To open your database

1. Select **Open Database** from the **File** menu. The **Open** dialog box will appear.
2. Select your database from the **Open** dialog box.
3. Click OK and the fields you have defined for your record will appear on the screen.

▶ To select your import file

1. Select **Import** from the **Tools** menu.
2. Select **Flat ASCII File** (fig. 10.7). The **Open** dialog box will appear.
3. If your file does not have a .TXT extension, press ▼ to display the drop-down list and select **All Files**.
4. Find the folder where your file is located.
5. Select your file from the list and click Open. The dialog box for importing flat files (fig. 10.8) will appear.

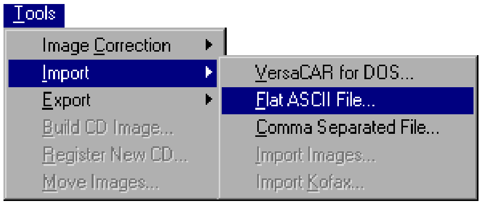
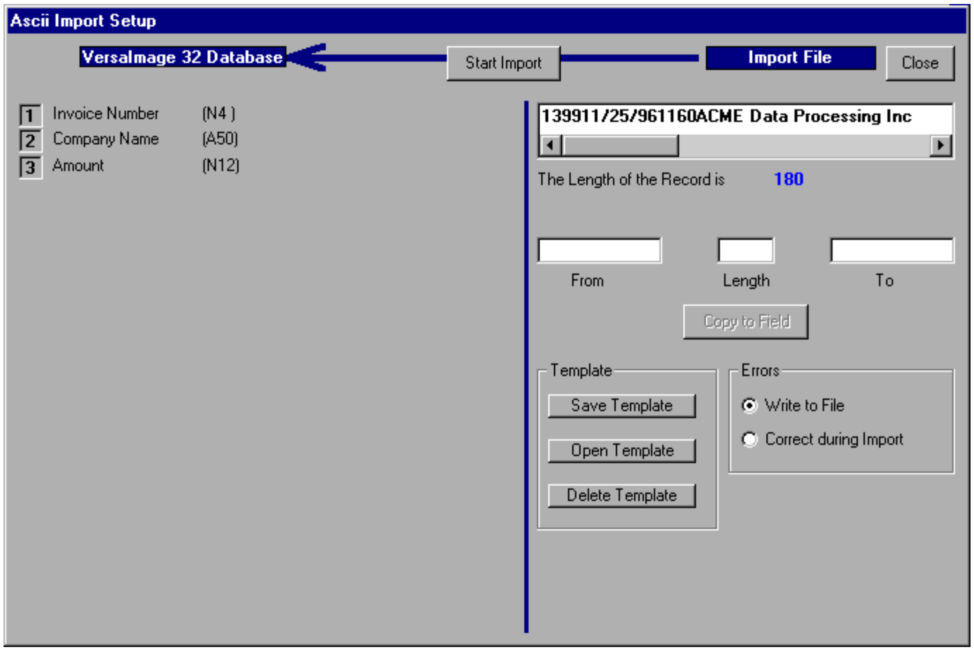

Tools
Image Correction
Import
Export
Build CD Image...
Register New CD...
Move Images...
VersaCAR for DOS...
Flat ASCII File...
Comma Separated File...
Import Images...
Import Kofax...

Fig. 10.7. The **Flat ASCII File** option


Ascii Import Setup
VersaImage 32 Database
Start Import
Import File
Close
From
Length
To
Copy to Field
Template
Save Template
Open Template
Delete Template
Errors
Correct during Import

1 Invoice Number (N4)
2 Company Name (A50)
3 Amount (N12)

139911/25/961160ACME Data Processing Inc

The Length of the Record is 180

● Write to File

Fig. 10.8. Flat ASCII file import screen

Selecting fields to import

The left side of the screen will contain the fields in the .CAR database record. On the right side, the first record in your import file will be displayed in a box at the top. The right side of your screen is used for selecting your fields to import. You select fields by selecting the data that is in that field in the displayed import file record.

There are several methods you can use to select your fields from the record:

- Use your mouse
- Enter the starting position and length
- Enter the starting and ending position

▸ To select the field with your mouse

1. Position your mouse pointer at the start of the field in the record.
2. Hold your mouse button down and drag the pointer until the field is highlighted.
3. When you release the button, the field value will be displayed below the record. Its starting and ending position will be displayed in the **From**, **To**, and **Length** fields.
4. If the value displayed shows that the field length or position is not correct, make corrections by changing the values in the **From**, **To**, and/or **Length** text boxes.

▸ To enter the starting position and field length

1. Position your insertion point in the **From** text box and type the starting position for the field.
2. Press Tab to move to the **Length** text box and enter the field length.
    - The ending position will be calculated automatically and displayed in the **To** text box.
    - The field will be highlighted in the record and the data in the field you selected will be displayed below the record.
3. If the value displayed shows that the field length or position is not correct, make corrections by changing the values in the **From**, **To**, and/or **Length** text boxes.

▸ To enter the starting and ending position

1. Position your insertion point in the **From** text box and type the starting position for the field.
2. Press Tab twice to move to the **To** text box and enter the ending position of the field:
    - The length will be calculated automatically and displayed in the **Length** box.
    - The field will be highlighted in the record and the data in the field you selected will be displayed below the record.
3. If the value displayed shows that the field length or position is not correct, make corrections by changing the values in the **From**, **To**, and/or **Length** text boxes.

> ***Note:*** *Once you get the hang of it, you will find that you can combine these methods for your fastest selection. For example, you might the position the mouse pointer on the first character of the field or select part of the field with your mouse, then type in the length.*

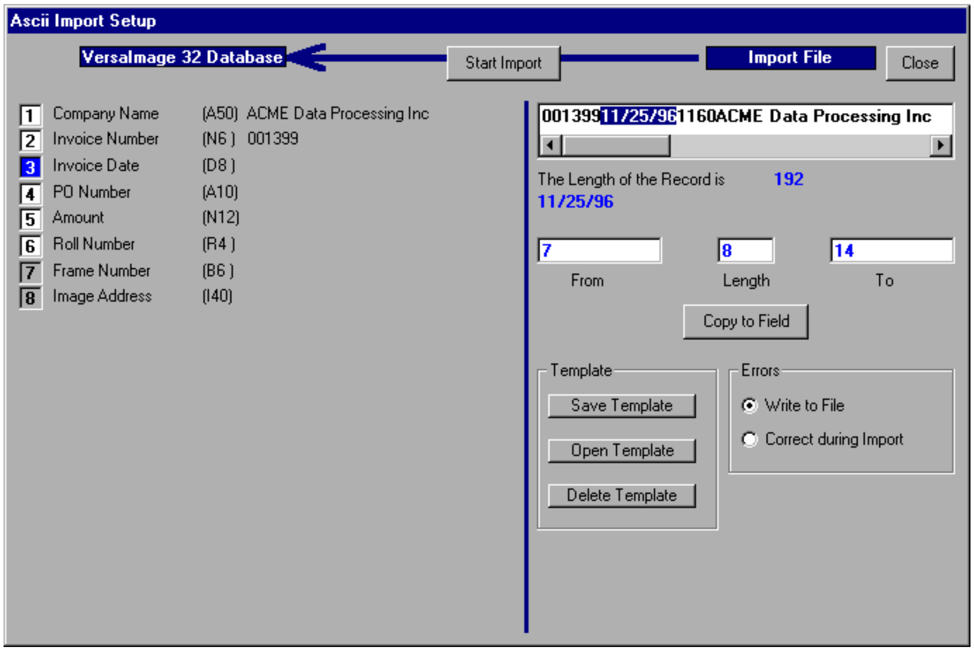
Importing your data

To import your data, you will first need to map the data fields in your import file to the fields in your .CAR file. Then you can import your file.

> ***Note:*** *You do not have to import all of your fields or fill all of the fields in your .CAR database, only the ones that you need.*

▸ To map a data field

1. Select the field from the import file record by using one of the methods described above.
2. Select the field in the VersaImage/VersaCAR database by clicking on it with your mouse.
3. Click Copy to Field and the value in the record field will be displayed next to the database field on the left (see fig. 10.9).


Ascii Import Setup
VersaImage 32 Database
Start Import
Import File
Close
The Length of the Record is
From
Length
To
Copy to Field
Template
Save Template
Open Template
Delete Template
Errors
● Write to File
○ Correct during Import

1 Company Name (A50) ACME Data Processing Inc
2 Invoice Number (N6) 001399
3 Invoice Date (D8)
4 PO Number (A10)
5 Amount (N12)
6 Roll Number (R4)
7 Frame Number (B6)
8 Image Address (I40)

00139911/25/961160ACME Data Processing Inc

The Length of the Record is 192
11/25/96

From: 7
Length: 8
To: 14

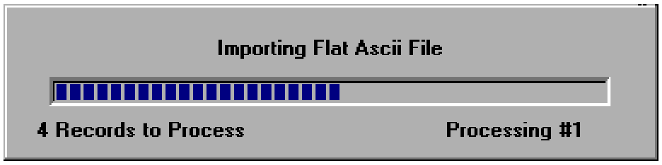
Fig. 10.9. Selecting flat file fields

▸ To import your data

1. Select your error handling method:

Write Errors to File	Skips records with errors and writes them to a file.
Correct During Import	Stops for errors during import so you can correct them.

2. Click **Start Import**. A processing message at the top of your screen (fig. 10.10) will display the number of records in the file.



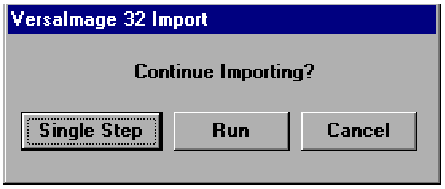
Importing Flat Ascii File

4 Records to Process Processing #1

Fig. 10.10. Import processing message - flat ASCII file

3. A message box (fig. 10.11) will appear asking you if you want to continue importing. You have three options:

Single Step	Imports records one at a time. Each time you click **Single Step**, another record will be imported and displayed.
Run	Imports the file without stopping.
Cancel	Cancels the import.


VersaImage 32 Import
Single Step
Run
Cancel

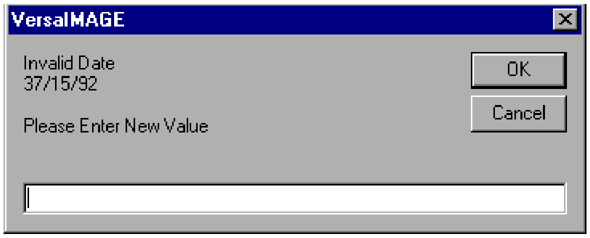
Continue Importing?

Fig. 10.11. Import processing options

You will probably want to import several records singly to make sure that they are coming in as they should be. Once you are satisfied that the records are OK, click **Run** to start importing the file.

> ***Note:*** *During import, the processing message will show you how much of the file has been processed.*

4. If you decided to correct errors during import, the program will stop every time it encounters an error:
   - A dialog box containing the error and current field data will appear (fig. 10.12).
   - At the bottom, you will find a text box. Enter your correction in the box.
   - Click OK to continue.



Invalid Date
37/15/92

Please Enter New Value

Fig. 10.12. Error correction for ASCII files

5. When the import is finished, the dialog box will close and you will see a completion message:
   - If there were no errors, the message will say so. Go to the chapter for your next step:

Chapter 11	If your database will include images.
Chapter 16	If you will be indexing your database to microfilm.
Chapter 23	If your database does not require indexing.

   - If there were errors and you elected to have them written to a file, the message will display the number of errors and the names of the error files. For error handling information, refer to the instructions in the next section.

Hint: *If you are importing data from a number of flat ASCII files with the same structure, you may want to check out the template function. This function saves your structure as a reusable template. See below for details.*

Error Files

If you elected to have your errors written to a file, the import program will write records with errors to a file instead of importing them. There are two error files. Each has the same name as your database. One has the extension .ERR and the other .ERD:

.ERR	Contains the type of error.
.ERD	Contains the raw data record.

You can examine the error files through the Windows **Notepad** application. Just choose **Notepad** from the **Accessories** group and retrieve the file.

You will need to add these records to your database manually. The easiest way to do this is through the **Indexing From Paper** option (Chapter 20). It allows you to enter the complete record including roll and frame numbers.

Templates

The **Template** options (fig. 10.13) allow you to save your import specifications as a "template", which you can then apply to other file imports for databases with the same format. For comma-separated files, it saves the database field number and the corresponding import file field number. For flat ASCII files, it saves the starting position and length for each field being imported.

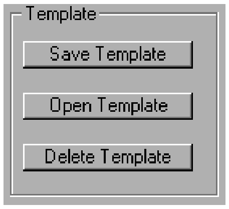


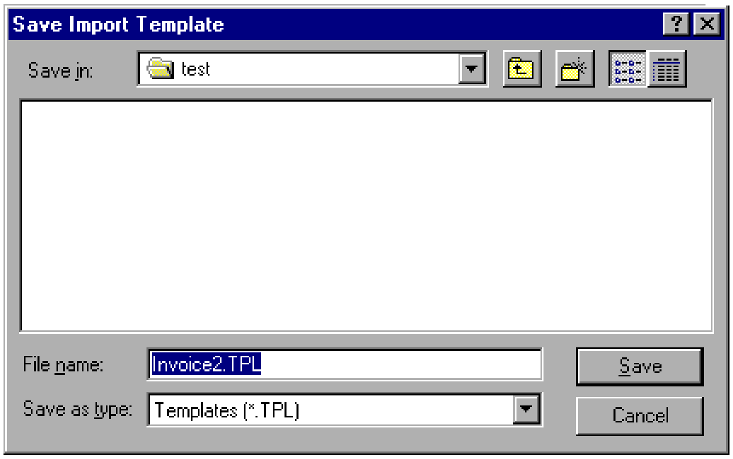
Fig. 10.13. Template options

Creating templates

Creating new templates requires no additional work beyond saving the import instructions you have already created.

▸ To create a template

1. Set up your file import specifications as you normally would.
2. *Before* you import your file, click [Save Template] and the **Save Import Template** dialog box (fig. 10.14) will open.



Save in: test

File name: Invoice2.TPL

Save as type: Templates (*.TPL)

Fig. 10.14. **Save Import Template** dialog box

3. Change the folder for your template if necessary. Make sure the correct folder appears in the **Save in** field.
4. Either leave the suggested default name in the **File Name** box or enter one of your own choice. Do not change the extension or the file will not appear in the list of templates.
5. Click [Save] to save the template.

> ***Note:*** *After you save your template, you can import your file just as you normally would. Saving your template does not affect your current import.*

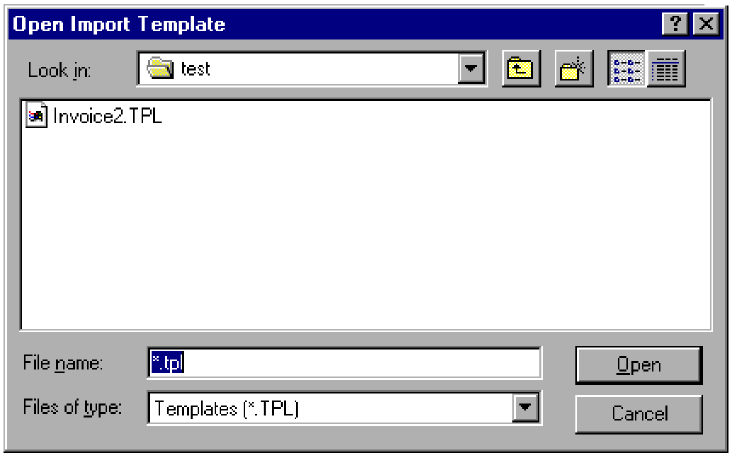
Using a template

Once you have saved a template, you can use it again for other databases with the same structure:

- The files you are importing must be of the same type (i.e., you can't use a template that was created for a comma-separated file with a flat ASCII file).
- The fields in the .CAR database record must be identical to the fields in the template.
- The fields in the import file must have the same format as the one used for the template. For comma-separated files, they must be in the same location as the ones defined in the template. For ASCII files, they must have the same lengths and starting positions.

▸ To use a template

1. Click [Open Template] to open the **Open Import Template** dialog box (fig. 10.15 on page 74).
2. Find the directory where your template is located.
3. Select the template from the list.



Look in: test

Invoice2.TPL

File name: *.tpl

Files of type: Templates (*.TPL)

Fig. 10.15. **Open Import Template** dialog

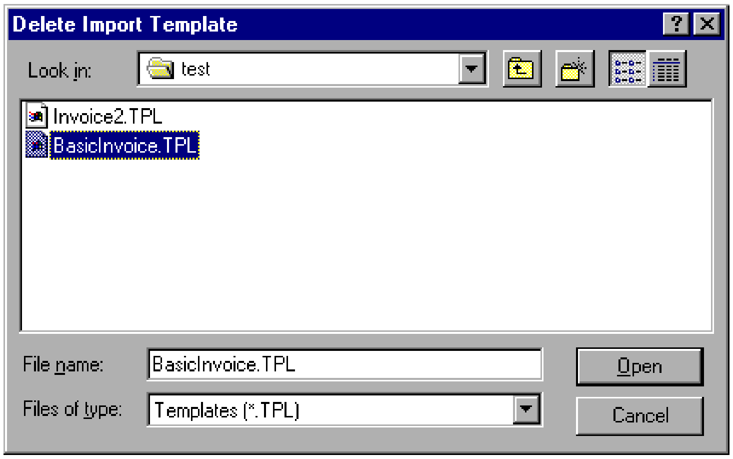
4. Click Open and the template will be applied. The first record from the file will appear in the database record fields on the right.
5. Continue with the rest of your import, just as you normally would.

Deleting templates

If you have import templates that you no longer want, you can delete them from your files through the **Import** option.

▸ To delete a template

1. Open any database. Then select **Import** from the **Tools** menu.
2. Select either **Flat ASCII File** or **Comma-separated File**.
3. Click Delete Template to open the **Delete Import Template** dialog box (fig. 10.16). All of the templates in the default directory will be displayed.



Look in: test

Invoice2.TPL
BasicInvoice.TPL

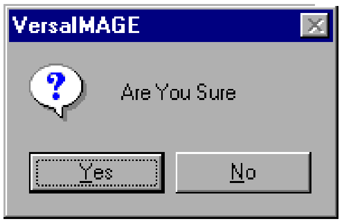
File name: BasicInvoice.TPL

Files of type: Templates (*.TPL)

Fig. 10.16. **Delete Import Template** dialog box

4. The **Delete Import Template** dialog box works just like an **Open** dialog box:
   - Find the folder where your template is located.
   - Select the template you want to delete from the list.

5. Click Open and the confirmation message shown in fig. 10.17 will appear:
   - If you want to delete the template, select Yes.
   - If you do not want to delete the template, select No.



Are You Sure

Fig. 10.17. Delete confirmation

Part 3
Images

About Images

11

VersaImage can scan images from either film or paper and also import images that were scanned elsewhere so you can index them. You may use any of these methods to obtain images for a single database. You may also include scanned or imported paper images with film indexes. Regardless of how you plan to use images, you need to understand how VersaImage handles images and the options that are available to you.

Image Files

VersaImage can handle both single- and multi-page TIFF files. When film is scanned, single-page TIFF files are created for each frame. From paper, either single- or multi-page TIFFs can be created. Either type can be imported.

To handle images, a database must be image enabled. You can do this when you create the database or from the **File** menu if you decide you want to add images later. When a database is image enabled, the **Image Address** field is added to the record and a folder with the same name as the database is created for the images. The folder is placed in the same folder as your database.

You scan images in rolls (film) or batches (paper). Each roll or batch will have a separate folder in the main image folder:

- Folders for roll images will be named ROLL*nnnn*, where *nnnn* is the roll number.
- Folders for batches will be named BCH*nnnnn*, where *nnnnn* is the batch number.

When you import images, all images in a given directory are imported as a batch. You may follow the naming conventions above or you may create your own if you want to distinguish them from your scanned batches.

Scanning Modes and File Names

VersaImage has different scanning modes for different types of indexes and different naming conventions for each. In general, image files are treated in two different ways:

- In databases where each document is indexed and has a corresponding index record, scanned image files are treated as individual entities. The image file path is placed in the **Image Address** field of the index record. When you view a record, the single image is displayed with the record.
- In databases where documents are indexed in groups, the images are treated as a group or folder of documents. Individual TIFF image files are created for each document and a folder file containing the location of each image in the group is created for each group. The folder file path is placed in the **Image Address** field. When you view a record associated with a group, all images in the group will be displayed with the record.

Note: *The term "folder" may be misleading as directories in Windows 95 are usually referred to as folders. The "folders" created for your image groups are not physical folders or directories for image files. They are logical groupings defined in a FOLDER FILE associated with the group. Both image files and folder files are placed in the directory folder for the batch.*

Given below is a brief overview of the way images from each of the different sources are handled. More detailed information for each is found in Chapters 12—14.

Roll film

When you scan roll film, single-page TIFF images will be created and stored to correspond to the type of film and the way it is indexed. If you have single-level film and index every image, your image folder for the roll will contain an image for every frame. If you have indexed single records in groups, the images will be grouped into folders based on your document groupings. If you have multi-level film, the images will be grouped in folders based on your file blips (and batch blips if you have three-level film).

File-naming conventions for roll film indexes are as follows.

- Single-level film images have the format

  rrrrpppp.TIF

  where *rrrr* is the roll number and *pppp* is the page number within the batch.

- Two-level film images have the format

  ffffpppp.TIF

  where *ffff* is the file blip number and *pppp* is the page number in the file.

- Three-level film images have the format

  bbbfffpp.TIF

  where *bbb* is the batch blip, *fff* is the file blip, and *pp* is the page blip.

Folder files have the same name as the first image file in the folder and the extension .FLD.

Paper images

When you scan paper images, you choose the indexing structure for your database when you select your scan mode. You can elect to treat each document individually and associate each document with an index record or group images into folders. The latter method allows you to group several documents that should be associated with a single record or group several pages of a multi-page document together for the record. You can also create multi-page TIFFs, which is a way to handle multi-page documents without using folders.

For paper images, the file name format is:

bbbbbppp.TIF

where *bbbbb* is the batch number and *ppp* is the page within the batch. Folder files have the same name as the first image in the file and the extension .FLD.

Paper images allow you more flexibility than roll film images do after scanning. Although you must select a specific scan mode when you scan your documents, you can if, necessary, mix grouping conventions when you index. You can, for example, have a database scanned in single-record mode, where most records are associated with single images but create folders as you index for the occasional multi-page document.

Note: *When you are scanning paper images for a hybrid database, it is usually best to select the same convention for your paper images as the one used for your film images.*

Imported files

Images are imported into VersaImage "as is." Both single- and multi-page TIFFs can be imported. Imported files keep their original names. VersaImage does not change them to match its conventions for scanned documents. If your TIFF files have logical eight-character names that follow specific conventions described in Chapter 14, VersaImage may be able to create folder files for your images when it imports them. You can also create folders when you index the images. More information is given in Chapter 19. In either case, the folder files will have the name of the first file in the folder and the extension .FLD.

Master Reference Database Images

Master reference databases combine documents and images from a number of different sources. These documents are often wildly different from each other. Each batch of images may contain documents of a totally different structure. One set might be full of single-page documents while another may contain multi-page documents. Another might have been scanned from roll film in a mode totally unsuitable for the other sets of documents in the database. Because indexing in a master reference database does not have to be sequential, you can mix scanning modes more easily. While you cannot choose your mode for roll film, for paper images you can simply select the most suitable scanning mode for each batch of documents you are scanning.

The "To-be-indexed" List

VersaImage keeps track of the images that need indexing in a "to-be-indexed" list. When you scan a batch of paper images, VersaImage creates a to-be-indexed list for the batch. An empty index record, containing only the image address, is created in the database for each image. When you index the batch, the **Index Images** function uses the to-be-indexed list to determine which images still need indexing. The image or image folder is displayed so you can enter the rest of the data in the record. When an image is indexed, it is removed from the list.

When you scan roll film, you can either scan the images and index them later or scan the film after you index the images. If you scan an indexed film, each image is automatically associated with the roll frame and the address is placed in the appropriate record. No to-be-indexed list is created because the images are indexed automatically.

If you scan a roll before it is indexed, the images are placed in a to-be-indexed list for the roll. An empty record is created for each image, which contains not only the image address, but also the roll and frame number of the document. This automatically links the images to the roll and frame number. You can then index the images without using the microfilm reader. As with paper indexes, the images will be removed from the to-be-indexed list when they are indexed.

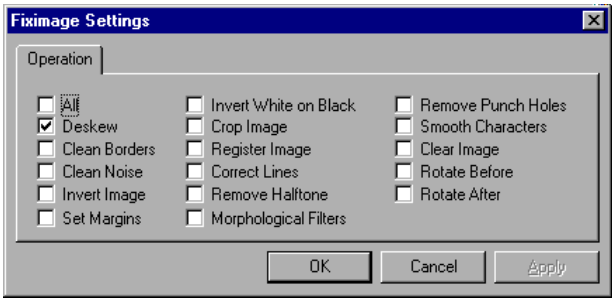
Imported images are handled like scanned paper images. When a batch of images is imported, they are placed in a to-be-indexed list and an empty record containing the image address is placed in the database. Even if the records were scanned for roll film and have roll frame naming conventions, there is no way to automatically associate them with a roll of film. You will need to do this manually as you index.

Image Quality and Image Correction

VersaImage has a number of options that allow you to make corrections to the image during and after scanning. If the image cannot be corrected adequately, it can be rescanned from the search and QC functions. You can also scan single documents that may have been skipped or accidentally deleted.

The image correction function

VersaImage uses the ClearImage engine by Imagination Software, Inc., to make background image corrections while scanning. These corrections can also be used to correct images globally or individually when you view your database records. Correction options are selected through the **FixImage Settings** dialog (fig. 11.1).



☐ All
☑ Deskew
☐ Clean Borders
☐ Clean Noise
☐ Invert Image
☐ Set Margins
☐ Invert White on Black
☐ Crop Image
☐ Register Image
☐ Correct Lines
☐ Remove Halftone
☐ Morphological Filters
☐ Remove Punch Holes
☐ Smooth Characters
☐ Clear Image
☐ Rotate Before
☐ Rotate After

Fig. 11.1. **FixImage Settings** dialog box to set up image correction

This dialog is available from the **Image Correction** option on the **Tools** menu. You can also access it from the **Batch Scan** dialog when you are scanning paper images.

The following correction options are available:

Deskew	Straightens the image.
Clean Borders	Removes unwanted lines, etc., from around the edges.
Clean Noise	Removes random spots from the image.
Invert Image	Inverts the image colors to their opposites.
Set Margins	
Invert White on Black	Changes black areas to white.
Crop Image	Removes excess unprinted area from around the image.
Register Image	
Correct Lines	Removes lines.
Remove Halftone	Removes halftone shading from graphics on the image.
Morphological Filters	Lightens dark text.
Remove Punch Holes	Removes punch hole spots from the edges of the image.
Smooth Characters	Smoothes jagged characters.
Clear image	Removes the image.
Rotate Before	Rotates the image 90 degrees to the right before making other corrections.
Rotate After	Rotates the image 90 degrees to the right after making other corrections.

Needless to say, most of these options should not be applied on a global basis. **Deskew**, **Clean Borders**, **Clean Noise** may be applied safely across the board during scanning. **Remove Punch Holes** and **Invert Image** may also be applied safely where applicable. The other options had best be left alone except on an individual image basis.

Warning: *The options in this dialog are "sticky." Regardless of which function you enable them from, once they are enabled they remain enabled until they are disabled. If background image correction is enabled, the selected options will be applied to all scans. Thus, if you forgot to remove* ***Rotate Before*** *after rotating a batch that was scanned in the wrong orientation, you would find all your scanned images rotated. Therefore, be sure to always clear and reset your options after applying special corrections to an image or group of images.*

To enable or disable background image correction

1. Click **Use Image Correction** on the **Scan** menu:
   - If the option is not checked, clicking it will enable it.
   - If the option is checked, clicking it will disable it.
2. The option will remain set for ALL subsequent scanning operations until you change it.

Note: *This option can also be enabled or disabled from the* ***Batch Scan*** *dialog box.*

The image correction options can also be applied to individual images and batches from the **Image Correction** menu. Both scanned and imported images can be corrected as you view your images. This function will be discussed in Chapter 23.

Other correction options

In addition to the **Image Correction** feature, there are several other correction options that can be accessed through various functions. These corrections can be applied to any image whether it was scanned or imported. Given below is an overview of these functions and the chapters where their instructions can be found:

- While indexing your images, you can deskew and rotate them with tools from the tool bar. This is a good way to correct for the occasional misoriented image. You can also crop your images or delete images that were scanned by mistake. Information is given in Chapter 19.
- While searching your database, you can scan missed or deleted images and rescan badly scanned images. You can also crop images and apply the image correction options described above. Information is given in Chapter 23.
- While performing image QC operations, you can scan and insert missing images, rescan images, delete images, and rearrange them in your folders. Information is given in Chapter 30. Note that the image correction options described above are not available in QC mode.

What to Do Next

Once you have a general idea of how image files are handled, you are ready to scan or import your own images:

- For instructions on scanning film, go to Chapter 12.
- For instructions on scanning paper documents, go to Chapter 13.
- For instructions on importing images, go to Chapter 14.
- For instructions on operating the check scanner (VersaImage/Check only), go to Chapter 15.
- For instructions on scanning and indexing individual folders in a single operation, go to Chapter 16 for general information about indexing and then to Chapter 21.

Scanning Microfilm Images

12

If you have VersaImage and a microfilm scanner, you can scan the images directly into your database from your reader and then index the images. You can also scan a roll of film you have previously indexed and VersaImage will associate the images automatically with your database records.

Image Files

VersaImage creates TIFF image files for each document it scans. When you scan a frame that is already indexed, the file name associated with the index record will be placed in the **Image Address** field. If there is no index record for the frame in the database, VersaImage will create one and add it to the database. The roll, frame and image address information will be placed in the record and the image will be added to the to-be-indexed list.

There are three scan modes for microfilm:

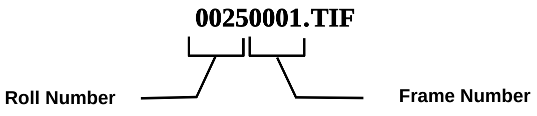
- Single level, no folders (for film where each frame is indexed)
- Single level, one folder per index (for film where frames are indexed in logical groups)
- Multi level, one folder per file or index (for all multilevel film)

Your choice depends on the film you are indexing. For multi-level film, you must choose the multi-level option. If you are scanning single-level film you have already indexed, you must choose the option that matches the index you have created. If you scan single-level film that you have not yet indexed, the only option available is “single level, no folders.” If you want to index the frames in logical groups, you will need to group them when you index.

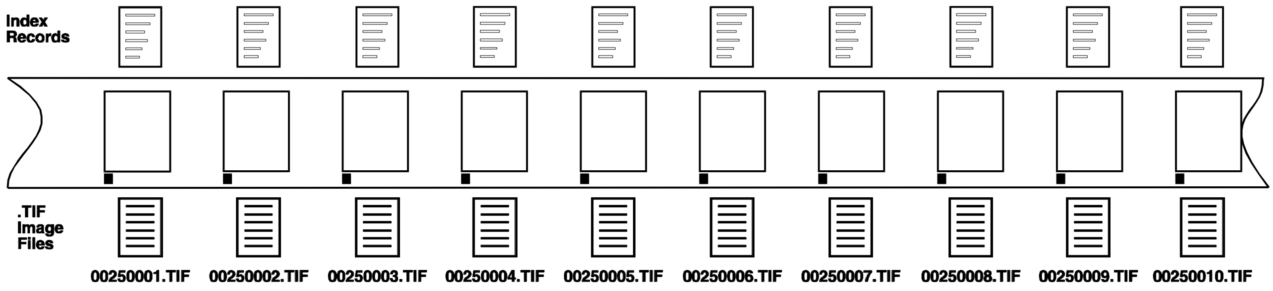
So that you will better understand how the image files are associated with your film, each mode is explained more thoroughly below.

Single level, no folders

Single-level scanning with no folders is done for film with single-level blips where every frame is indexed. This method creates a TIFF file for each image and places the file name in the **Image Address** field. The file name is composed of eight digits and the extension .TIF in *rrrrpppp* format. The first four digits represent the roll number and the last four, the frame number:



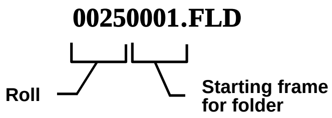
The frame number in the file name increments for each frame:



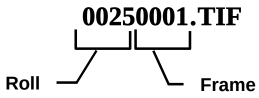
Single level, one folder per index

Single-level scanning with one folder per index record is done for film with single-level blips that has been indexed in logical groups. One index record is created for the first record in each group. When the roll is scanned, VersaImage creates a folder file for each index record. For each frame in the group, it creates a TIFF file and places its path in the folder file associated with the index record.

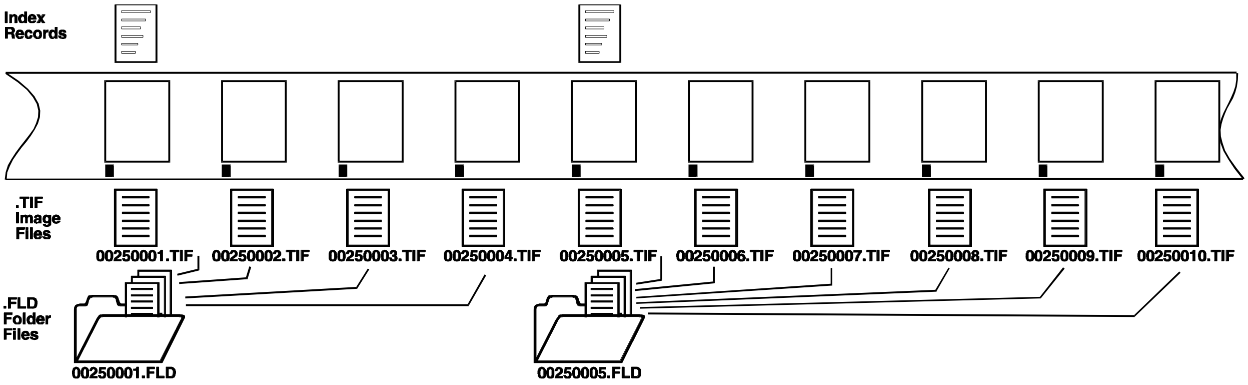
The folder file name is placed in the **Image Address** field of the index record. It is composed of eight digits in *rrrrpppp* format and the extension .FLD. The first four digits represent the roll number and the last four, the frame number where the folder starts:


00250001.FLD
Roll
Starting frame for folder

The image file names are also eight digits in *rrrrpppp* format but with the extension .TIF. The first number is the roll and the second, the frame:

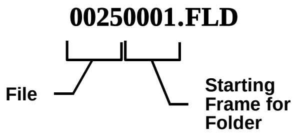

00250001.TIF
Roll
Frame

The frame numbers increment for each image and remain sequential throughout the roll. Each folder will have the same number as its starting frame:

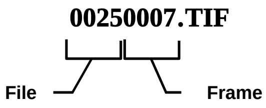

Index Records
.TIF Image Files
00250001.TIF
00250002.TIF
00250003.TIF
00250004.TIF
00250005.TIF
00250006.TIF
00250007.TIF
00250008.TIF
00250009.TIF
00250010.TIF
.FLD Folder Files
00250001.FLD
00250005.FLD

Two-level film

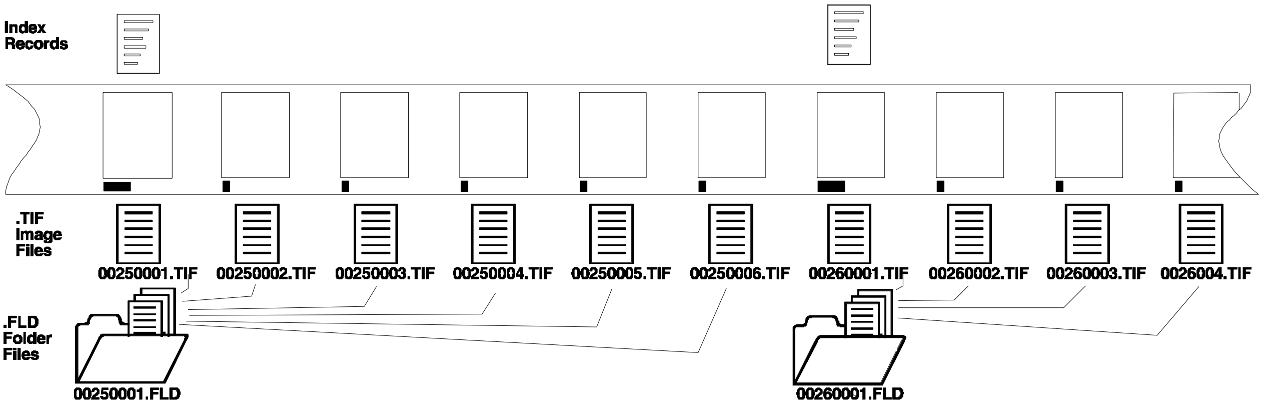
When film with two-level blips is indexed, one index record is created for each large or "file" blip. When the roll is scanned, VersaImage creates a folder file for each index record or "file blip" frame. For each frame, it creates a TIFF file and places its path in the folder file of its associated index record. The folder file name is placed in the **Image Address** field of the index record. It is composed of eight digits and the extension .FLD in *ffffpppp* format. The first four digits represent the file blip number and the last four, the starting frame number of the folder:


00250001.FLD
File
Starting Frame for Folder

The image file names are also eight digits in *ffffpppp* format but with the extension .TIF. The first number is the file and the second, the frame:


00250007.TIF
File
Frame

Each time a file blip frame is scanned, a folder file is created:



Usually, when a new folder is created, the file number will increment and the first frame of a folder will be page blip 1. If the film has not yet been indexed, the folder files will be created strictly on the basis of the file blips. When you scan film that has already been indexed, the file folders are based on the index records. Generally, this will be no different from non-indexed film. However, when you index two-level roll film, it is possible to also index individual pages.

If a roll has already been indexed and VersaImage finds an index record associated with a page blip, it will create a folder file for that frame also. All subsequent images until the next folder file is created will be placed in this folder. In such cases, the starting frame for the folder will have a frame number other than 1. If, in the drawing above, there were an index record for the page blip associated with TIFF file 00250004.TIF, the folder file would be 00250004.FLD. The images 00250005.TIF and 00250006.TIF would also be placed in that folder.

Three-level film

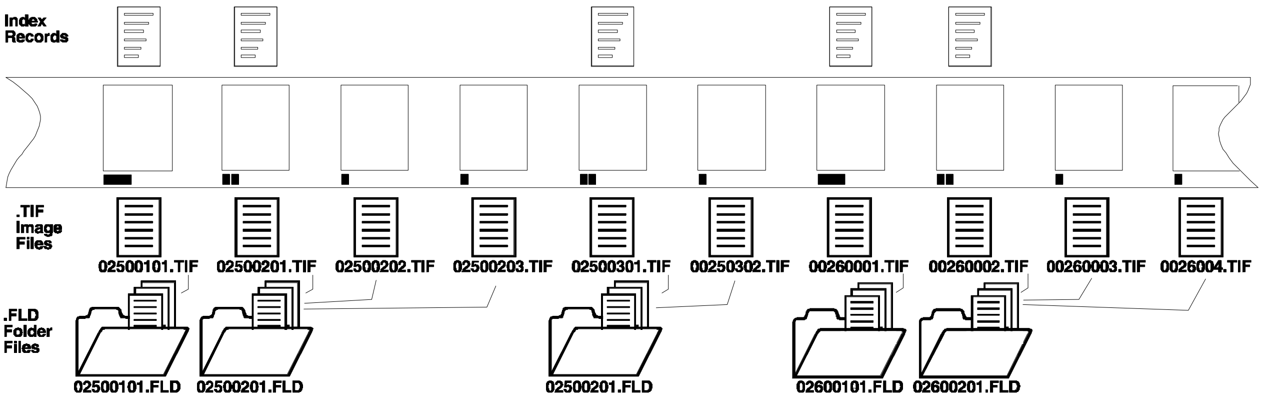
When three-level film is indexed, a record is generally created for each batch blip and each file blip. When a three-level roll is scanned, a folder file is created for each batch blip and each file blip. The folder file name is placed in the **Image Address** field of the index record. It is composed of eight digits and the extension .FLD in *bbbfffpp* format. The first three digits represent the batch blip number, the second three, the file blip number, and the last two, the starting frame number of the folder:

$$\underbrace{025}_{\text{Batch}}\underbrace{012}_{\text{File}}\underbrace{01}_{\text{Frame}}\text{.FLD}$$

For each frame, it creates a TIFF file and places it in the folder of its associated index record. The image file names are also eight digits in *ffffpppp* format but with the extension .TIF. The first number is the file and the second, the frame:

$$\underbrace{025}_{\text{Batch}}\underbrace{012}_{\text{File}}\underbrace{01}_{\text{Frame}}\text{.TIF}$$

Each time a batch blip or file blip frame is scanned, a folder file is created:


Index Records
.TIF Image Files
02500101.TIF
02500201.TIF
02500202.TIF
02500203.TIF
02500301.TIF
00250302.TIF
00260001.TIF
00260002.TIF
00260003.TIF
0026004.TIF
.FLD Folder Files
02500101.FLD
02500201.FLD
02500201.FLD
02600101.FLD
02600201.FLD

The illustration above shows the standard three-level indexing scheme where folder files are created for both batch and file blips. They will be created this way by default if the film has not yet been indexed. If the film has been indexed, folders will be created for each index record.

Usually, both batch and file blips are indexed. However, with three-level film, you have the option of indexing batch blips only. If the film has been indexed with records for batch blips only, folder files will be created for batch blips. You also have the option of indexing page blips when you index three-level film, just as you do with two-level. If a roll is already indexed and VersaImage finds any page blips with index records, it will also create folder files for those frames.

Scanner Setup

Before you scan, you will need to set the contrast, brightness, and other attributes on your microfilm scanner for the film you will be scanning. You can do this through the **Setup Scanner** option.

To set up your scanner

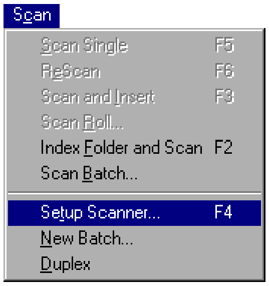

Scan
Scan Single F5
ReScan F6
Scan and Insert F3
Scan Roll...
Index Folder and Scan F2
Scan Batch...
Setup Scanner... F4
New Batch...
Duplex

Fig. 12.1. **Scan** menu with **Setup Scanner** option

1. Select **Setup Scanner** from the **Scan** menu (fig. 12.1). The scanner setup box for your scanner will appear. The contents of this dialog box vary from scanner to scanner.
2. Enter the parameters for your scanner in the box. For further information on setting up your scanner, refer to your scanner manual.
3. When you finish, click OK.

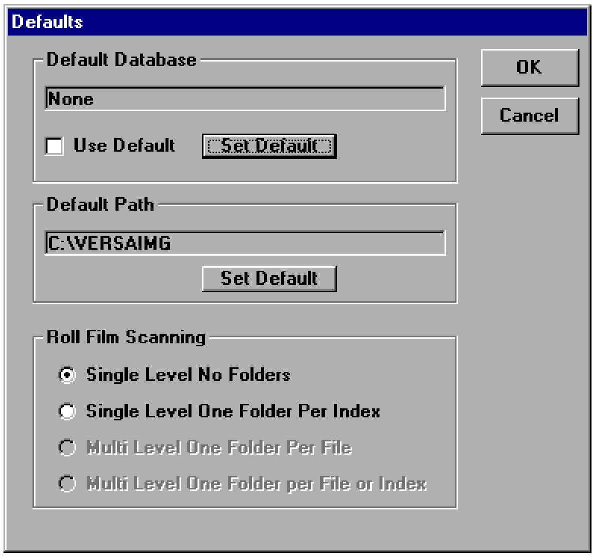
> ***Note:*** *You can adjust these later after you start your scanning operations if necessary.*

Starting Your Scan

Before you scan a roll of film, you need to enter your roll number and tell the system which frame you are starting on and which frame you want to end on. You don't have to scan the entire roll at once. The first time you scan a roll for a database, you must also select your scanning mode. After you set it once, VersaImage will remember it.

To set your scanning parameters

1. Load the roll you want to scan.
2. From the **File** menu, select **Open Database**.
3. Select the database you want to scan images for from the **Open** dialog box. The main database search screen will appear.


Defaults

Default Database

None

☐ Use Default

Default Path

C:\VERSAIMG

Roll Film Scanning

● Single Level No Folders

○ Single Level One Folder Per Index

○ Multi Level One Folder Per File

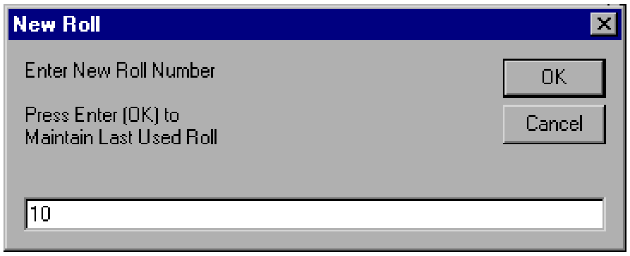
○ Multi Level One Folder per File or Index

Fig. 12.2. **Defaults** dialog box

4. If you have not already image enabled your database, select **Image Enable Database** from the **File** menu. An **Image Address** field will appear on your screen.

5. If this is the first time you have scanned this roll, do the following:
   - Select **Preferences** from the **File** menu. Then select **Defaults**. The **Defaults** dialog box (fig. 12.2) will appear.
   - Select your scan mode from the **Roll Film Scanning** option group and click OK.

6. From the **Scan** menu, select **Scan Roll**. The **New Roll** dialog box (fig. 12.3) will appear.


New Roll

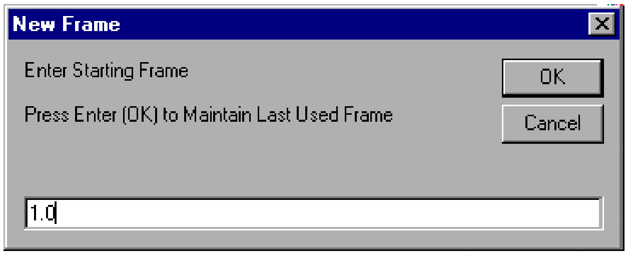
Enter New Roll Number

Press Enter (OK) to
Maintain Last Used Roll

10

Fig. 12.3. **New Roll** dialog

7. Enter the number of the roll you want to scan and click OK. The reader status will change to **Ready** in the status bar and the **New Frame** dialog box (fig. 12.4) will appear.


New Frame

Enter Starting Frame

Press Enter (OK) to Maintain Last Used Frame

1.0

Fig. 12.4. **New Frame** dialog

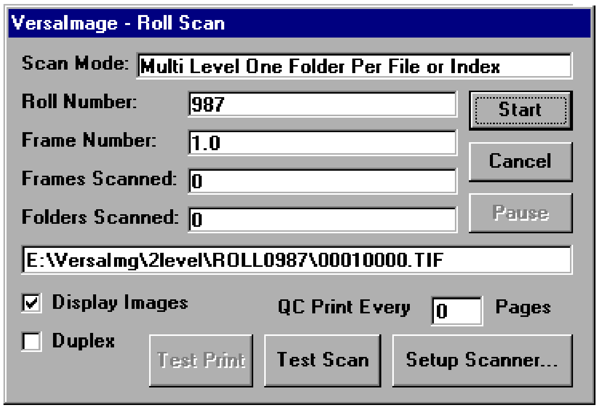
8. Enter the frame number you want to start with in the text box and click OK. The reader will advance the film to that frame and the **Ending Frame** dialog box will appear.

9. Enter the frame number you want to end with in the text box and click OK.

Operating the Scanner

After you enter the starting and ending frame numbers, you will see the **Roll Scan** dialog box (fig. 12.5). Your scan mode, the roll you are scanning, the starting frame, and the path and file name for the first image to be scanned will be displayed in the box.

> ***Note:*** *The program will create a subdirectory for each roll scanned. The name will be ROLLnnnn where nnnn is the roll number.*



VersaImage - Roll Scan

Scan Mode: Multi Level One Folder Per File or Index

Roll Number: 987

Frame Number: 1.0

Frames Scanned: 0

Folders Scanned: 0

E:\VersaImg\2level\ROLL0987\00010000.TIF

☑ Display Images

☐ Duplex

QC Print Every 0 Pages

Fig. 12.5. **Roll Scan** dialog box at the start of a scan

▸ To test your image quality

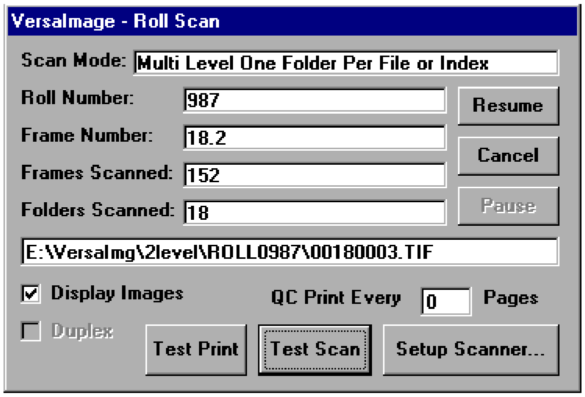
1. To do a test scan, click Test Scan. To print the test scan, click Test Print.
2. To make adjustments to your setup, press Setup Scanner to access your **Setup Scanner** dialog box.

▸ To set your scanning options

1. To display each image as it is scanned, enable **Display Images**.
2. To print a QC print on your laser printer every so often to check the scan quality, enter the page (frame) interval you want in the **QC Print Every ___ Pages** text box. For example, if you want to print every 25th frame, enter **25**. If you don't want to print at all, enter a **0**.

▸ To scan your film

1. Press Start. The scanner will start scanning automatically:
   - The frame number and number of frames and folders scanned will increment each time a frame is scanned, and the next file name will be displayed.
   - If you enabled **Display Images,** each image will appear on the right side of the screen.
2. If you need to interrupt scanning operations temporarily, do the following:
   - To stop, press Pause.
   - To continue, press Resume.
3. When the entire roll is scanned, VersaImage will display a completion message. To exit before the scan is completed, press Pause. Then press Cancel.



VersaImage - Roll Scan

Scan Mode: Multi Level One Folder Per File or Index

Roll Number: 987

Frame Number: 18.2

Frames Scanned: 152

Folders Scanned: 18

E:\VersaImg\2level\ROLL0987\00180003.TIF

☑ Display Images

☐ Duplex

QC Print Every 0 Pages

Fig. 12.6. **Roll Scan** dialog during a pause in scanning.

> ***Note:*** *Some readers do not inform the program that they are at the end of a roll. If yours does not, you will need to stop the scan manually as explained above or make sure the last frame is correctly set to the last frame on the roll you are scanning.*

What to Do Next

What you do next depends on whether or not the roll you scanned has been indexed:

- If you scanned a previously indexed roll, go to Chapter 23 for instructions on searching your database and viewing your images.
- If the roll is not yet indexed, go to Chapter 16 for instructions on indexing.

Scanning Paper Images

13

If you have VersaImage and a paper scanner, you can scan the images directly into your database from your scanner and then index the images. You can scan batches of paper as individual documents or in document groups. If you use separator sheets (either Image Vision's or those provided for your scanner) to separate your document groups, VersaImage can create files for them automatically.

Image Files

VersaImage creates TIFF image files for each document it scans. Each TIFF file is given an eight-digit file name. When you scan your images, an empty record will be created for the document or group of documents and the image address will be placed in the **Image Address** field of the record.

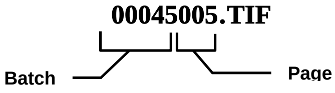
There are three scan modes for paper documents:

- Single-page TIFF images with folder files
- Multi-page TIFF images
- Single-page TIFF images, no folders

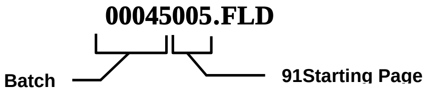
Single-page TIFF images with folder files is most common and generally the most efficient method of handling image files, except in cases where documents are mostly one page and unrelated. Each of these scan modes is explained more thoroughly below.

Single-page TIFF images with folder files

Single-page TIFF images with folder files stores each TIFF image in a separate file with a .TIF extension. It then creates a separate folder file with a .FLD extension that ties all of the TIFF images together into a document. The path to the folder file is placed in the **Image Address** field. The first five digits of the TIFF file name contain the number of the batch being scanned. The last three contain the page number within that batch:



Folder files also have eight-digit names. The first five digits contain the batch number. The last three contain the starting page number within that batch of the first page in the folder:



VersaImage creates one blank database entry for each folder scanned and adds that folder to the to-be-indexed list.

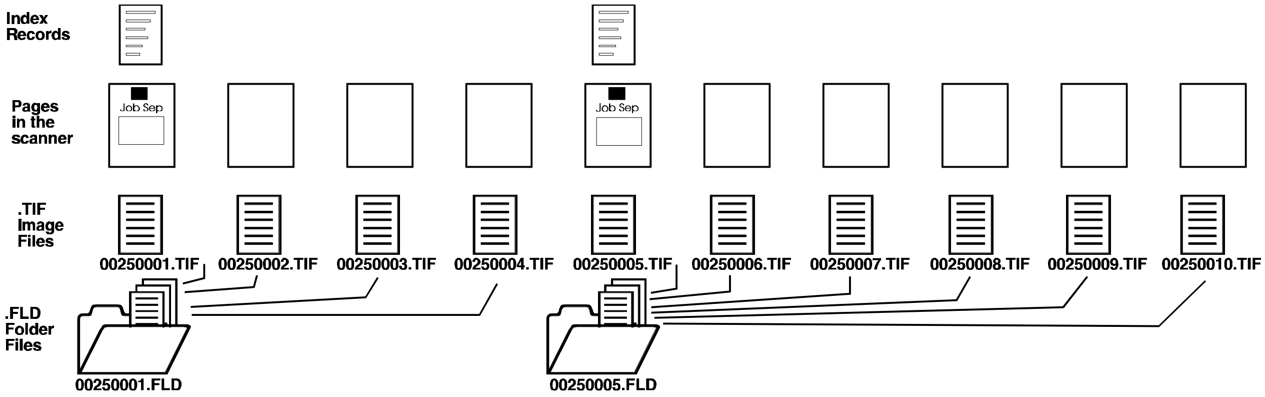
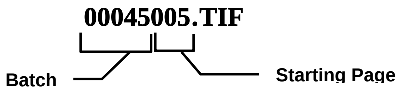

Index Records
Pages in the scanner
Job Sep
Job Sep
.TIF Image Files
00250001.TIF
00250002.TIF
00250003.TIF
00250004.TIF
00250005.TIF
00250006.TIF
00250007.TIF
00250008.TIF
00250009.TIF
00250010.TIF
.FLD Folder Files
00250001.FLD
00250005.FLD

Fig. 13.1. TIFF images with folder files

Multi-page TIFF images

The **Multi-page TIFF images** option stores images in a multi-page TIFF file with a .TIF extension. All of the pages of the document are placed in the same TIFF file. The path to the TIFF file is placed in the **Image Address** field. The first five digits of the TIFF file name contain number of the batch being scanned. The last three contain the starting page number within that batch:


00045005.TIF
Batch
Starting Page

VersaImage creates one blank database entry for each document scanned and adds that TIFF image to the to-be-indexed list.

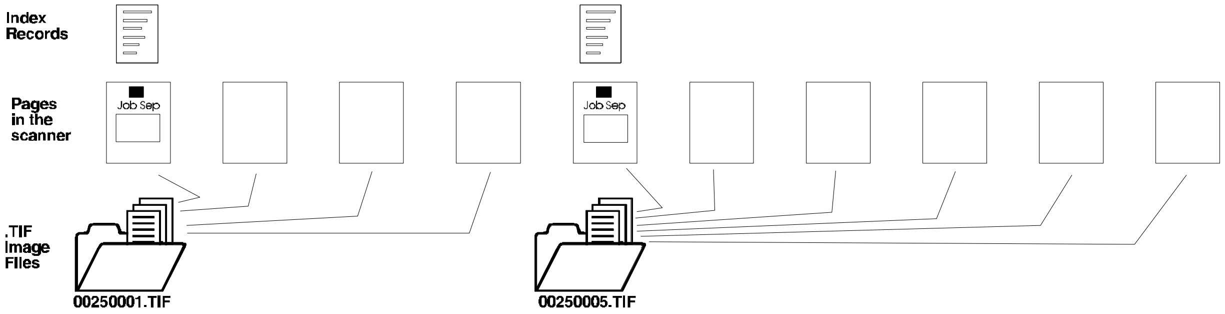
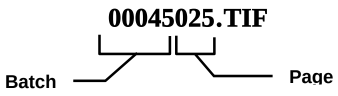

Index Records
Pages in the scanner
Job Sep
Job Sep
.TIF Image Files
00250001.TIF
00250005.TIF

Fig. 13.2. Multi-page TIFF files

Single-page TIFF images, no folders

If all or most images in a database will be indexed, single TIFF images with no folders is the best option. Each page is stored in a TIFF file with a .TIF extension. The path to the TIFF file is placed in the **Image Address** field. The first five digits of the TIFF file name contain the number of the batch being scanned. The last three contain the page number within that batch:


00045025.TIF
Batch
Page

VersaImage creates one blank database entry for each document scanned and adds that TIFF image to the to-be-indexed list.

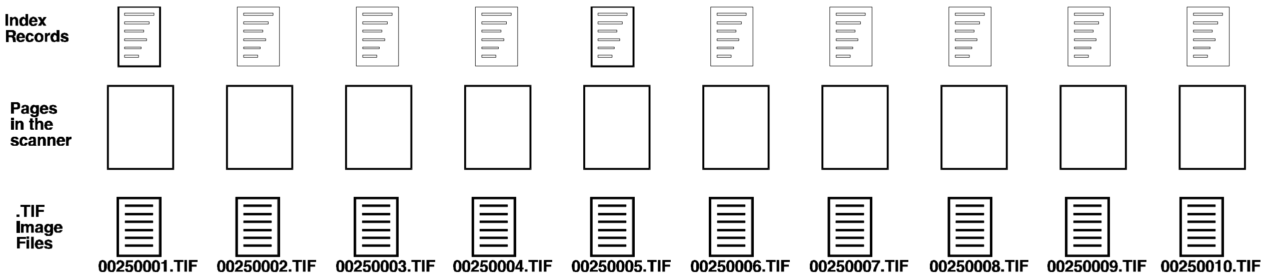


Fig. 13.3. Single TIFF images, no folders

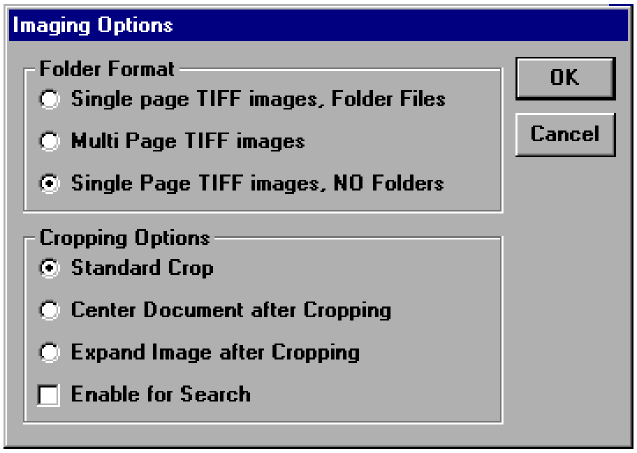
Selecting a Folder Format

The first time you scan images for a database, you will need to select the folder format. VersaImage will then remember the setting and use it as the default for the database. Except for master reference databases, you are not likely to need to change it after you set it.

> ***Note:*** *If other workstations also scan images for the database, this option will also need to be set on those workstations. It is not retained from workstation to workstation*

To select a folder format

1. Select **Preferences** from the **File** menu.
2. Select **Imaging Options** from the **Preferences** menu. The **Imaging Options** dialog box (fig. 13.4) will appear.



Imaging Options

Folder Format
○ Single page TIFF images, Folder Files
○ Multi Page TIFF images
● Single Page TIFF images, NO Folders

Cropping Options
● Standard Crop
○ Center Document after Cropping
○ Expand Image after Cropping
☐ Enable for Search

Fig. 13.4. **Imaging Options** dialog box

3. Select the folder format you want to use by clicking the option.
4. Click OK to save the folder format information.

Document Preparation

Prepare the documents to be scanned by removing all staples and straightening folded corners. If you are scanning single-page TIFF images with folder files or multi-page TIFF images, you can use Image Vision job separator sheets (or sheets provided by the scanner manufacturer) to separate the scanned images into documents. Place these separator sheets in your document “stack” in the places where you want to start a new folder. The separator sheets enable VersaImage to create your folder files automatically and allow you to scan your batch without manual intervention. If you do not want to use separator sheets, you can scan each folder individually instead.

***Note:** The document BWS_SEP.DOC contains the Image Vision separator sheets and is located in the directory where the VersaImage .EXE is located. You can print sheets with Microsoft Word version 6.0 or later. The black rectangle on the sheets can be moved to accommodate your scanner. Call Image Vision Technical Support for instructions.*

Scanner Setup

Before you scan, you will need to set the contrast, brightness, and other attributes on your paper scanner for the documents you will be scanning. You can do this through the **Setup Scanner** option.

To set up your scanner

1. Select **Setup Scanner** from the **Scan** menu (fig. 13.5). The **Scanner Settings** dialog box will appear. The contents of this dialog box vary from scanner to scanner.
2. Enter the parameters for your scanner in the dialog box. For further information on how to set up your scanner, refer to your scanner manual or ISIS driver manual.
3. When you finish, click OK.

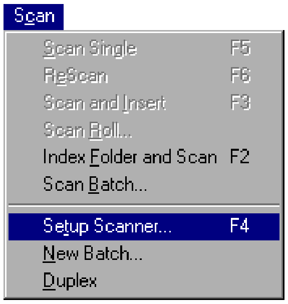

Scan
Scan Single F5
ReScan F6
Scan and Insert F3
Scan Roll...
Index Folder and Scan F2
Scan Batch...
Setup Scanner... F4
New Batch...
Duplex

Fig. 13.5. Selecting the **Setup Scanner** option

***Note:** You can adjust these later after you start your scanning operations if necessary.*

Setting Your Scanning Options

Your next step is to set your scanning parameters for your batch.

To set your scanning options

1. From the **File** menu, select **Open Database**.
2. Select the database you want to scan images for from the **Open** dialog box. The main database screen will appear.
3. If you have not yet image enabled your database, select **Image Enable Database** from the **File** menu. The **Image Address** field will appear on your screen.
4. Select **Scan Batch** from the **Scan** menu (fig. 13.6). The **Batch Scan** dialog box (fig. 13.7) will appear. The scan mode and the number of the last batch scanned will be displayed in the box.

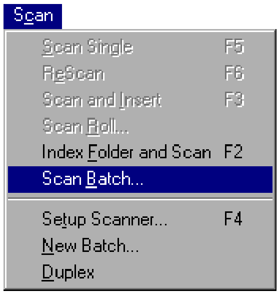
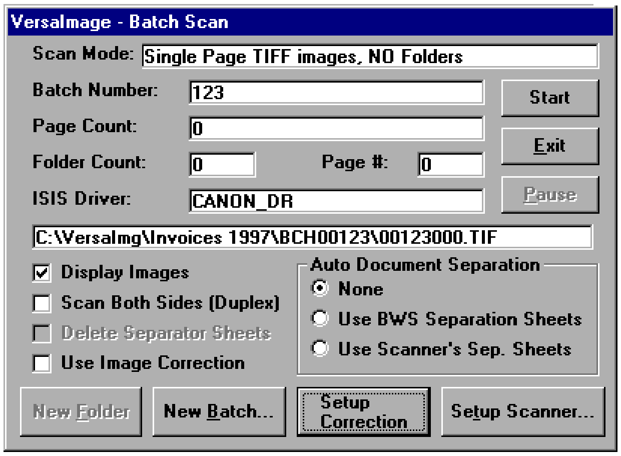

Scan
Scan Single F5
ReScan F6
Scan and Insert F3
Scan Roll...
Index Folder and Scan F2
Scan Batch...
Setup Scanner... F4
New Batch...
Duplex

Fig. 13.6. **Scan** menu with **Scan Batch** selected


VersaImage - Batch Scan

Scan Mode: Single Page TIFF images, NO Folders
Batch Number: 123
Page Count: 0
Folder Count: 0
Page #: 0
ISIS Driver: CANON_DR
C:\VersaImg\Invoices 1997\BCH00123\00123000.TIF

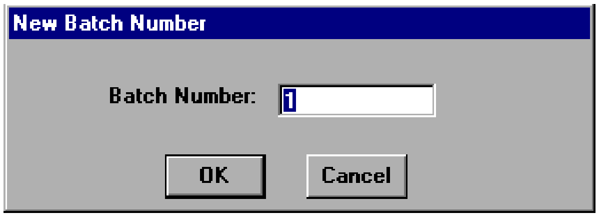
☑ Display Images
☐ Scan Both Sides (Duplex)
☐ Delete Separator Sheets
☐ Use Image Correction

Auto Document Separation
● None
○ Use BWS Separation Sheets
○ Use Scanner's Sep. Sheets

Start
Exit
Pause
New Folder
New Batch...
Setup Correction
Setup Scanner...

Fig. 13.7. **Batch Scan** dialog

5. The first time you scan a batch for a database and whenever you want to start a new batch, you will need to enter the batch number. To start a new batch, do the following:
   - Click New Batch and the **New Batch Number** dialog box will appear (fig. 13.8).



Batch Number: 1

Fig. 13.8. **New Batch Number** dialog box

   - Enter a batch number between 1 and 99999 and click OK.

> *Note: VersaImage will create a subdirectory folder for each batch scanned. The name will be BCHnnnnn where nnnnn is the batch number.*

6. Select your **Auto Document Separation** option:

None	If you are not using separator sheets or if you are scanning single-page images with no folders.
Use BWS Separator Sheets	If you are using Image Vision separator sheets.
Use Scanner's Sep. Sheets	If your scanner manufacturer provides separator sheets and you want to use them.

> ***Important:*** *You must select one of the two separator sheet options for VersaImage to create folder files or multi-image TIFFs automatically. If you select* ***None****, you will have to split the folders yourself even if you do insert separator sheets.*

7. To display the images as they are scanned (recommended), check the **Display Images** option.

8. To scan both sides of every page, check the **Scan Both Sides** box. This option will not be enabled unless your scanner has duplex scanning capability.

9. To have VersaImage delete the separator sheets as it creates your folders, check **Delete Separator Sheets**. This option will only be enabled if you select one of the separator sheet options.

10. To apply background image correction, do the following:
    - Check the **Use Image Correction** option. If it is already checked, background image correction is currently enabled for your system.
    - Click Setup Correction to display the **Fix Image Settings** dialog and select your correction options. More detailed information on these settings is given in Chapter 11.

> ***Warning:*** *When you enable or disable* ***Use Image Correction*** *from this dialog, it is enabled on the* ***Scan*** *menu. This setting and whatever options you select will be in effect for all scanning that is done from this point on until you disable it. It does not apply to this batch or this dialog only.*

Operating the Scanner

After you have set your scanner options, you can start scanning. If you are scanning single-page images or using job separator sheets, you can scan the entire batch. If you want to create folders manually, you can scan folder by folder.

To scan in batch mode

1. Load as much of your batch as your scanner can handle into your scanner.
2. Click Start. The scanner will start scanning automatically. If you enabled **Display Images**, each image will appear on the right side of the screen as it is scanned. The page number and number of pages and folders scanned will increment each time a page is scanned, and the next file name will be displayed.
3. To interrupt scanning operations temporarily, do the following:
   - To stop, click Pause.
   - To continue, click Resume.
4. To make adjustments to the scanner, do the following:
   - Stop the scan with Pause.
   - Click Setup Scanner to access your **Setup Scanner** dialog box.
   - Exit from your scanner setup dialog and return to the **Batch Scan** dialog.
   - Click Resume to continue.
5. When the scanner is empty, the Start button will change to Resume and the Pause button will be disabled:
   - To continue scanning the same batch, load more documents into the scanner and click Resume.
   - To start a new batch, click New Batch and enter the batch number.
6. To exit, click Exit.

To scan individual folders

1. Load your folder pages into the scanner.
2. Click Start. The scanner will start scanning automatically. If you enabled **Display Images**, each image will appear on the right side of the screen as it is scanned. The page number and number of pages and folders scanned will increment each time a page is scanned, and the next file name will be displayed.
3. To interrupt scanning operations temporarily, do the following:
   - To stop, click Pause.
   - To continue, click Resume.
4. To make adjustments to the scanner, do the following:
   - Stop the scan with Pause.
   - Click Setup Scanner to access your **Setup Scanner** dialog box.
   - Exit from your scanner setup dialog and return to the **Batch Scan** dialog.
   - Click Resume to continue.
5. When your pages are scanned, the scanner will stop and Start will change to Resume:
   - To add more documents to the same folder, load the documents and click Resume.
   - To create a new folder, click New Folder. The folder number will increment and the Resume button will change back to Start. Place the documents for the next folder into the scanner and click Start to start scanning the folder.
6. To exit, click Exit.

Splitting Folders

If you scanned your images with Image Vision job separator sheets but set the **Auto Document Separation** option to **None**, you will need to split your folders. If you do not select one of the separator sheet options, VersaImage will create one large folder file (if you elected to use folder files) or a multi-image TIFF file (if you elected the multi-page TIFF option). If you find that you only have one folder or one image in your batch, you probably left your setting at **None**. You can, however, easily correct the problem through the **Split Image Folders** function.

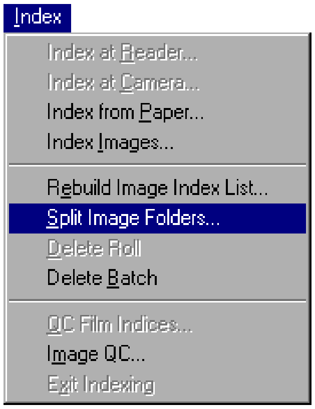
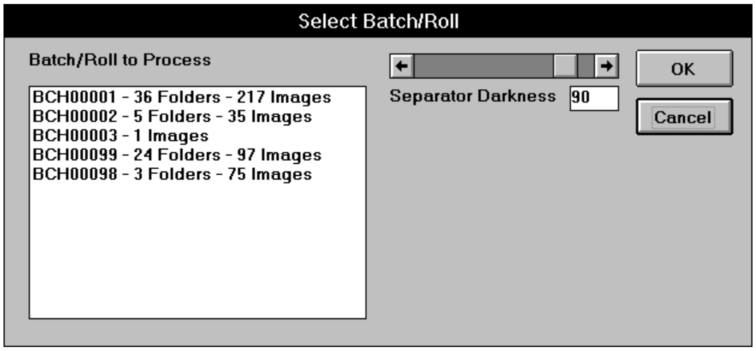

Index
Index at Reader...
Index at Camera...
Index from Paper...
Index Images...
Rebuild Image Index List...
Split Image Folders...
Delete Roll
Delete Batch
QC Film Indices...
Image QC...
Exit Indexing

Fig. 13.9. **Indexing** menu

> ***Important:*** *The* ***Folder Format*** *in* ***Imaging Options*** *must have the same setting when you split the folders as it did when the images were scanned.*

To split folders

1. If your database is not already open, select **Open** from the **File** menu and open your database.
2. Select **Split Image Folders** from the **Index** menu (fig. 13.9). The **Select Batch/Roll** dialog box will be displayed (fig. 13.10).

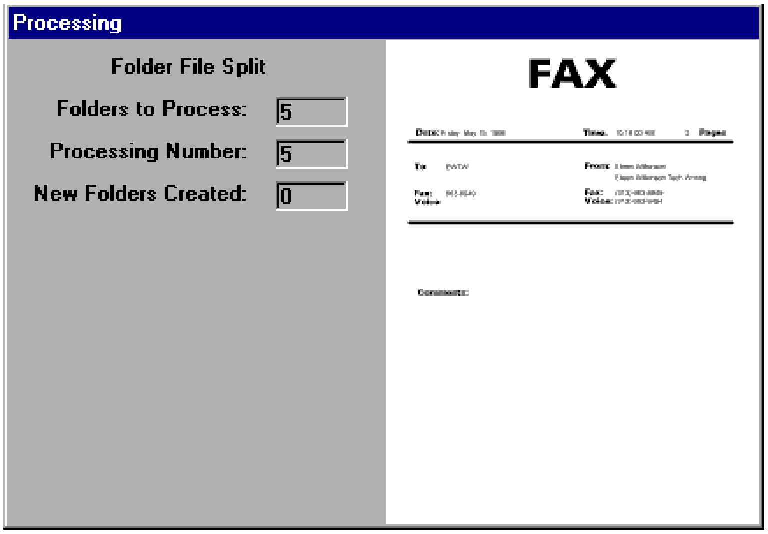

Select Batch/Roll
Batch/Roll to Process
OK
Cancel

BCH00001 - 36 Folders - 217 Images
BCH00002 - 5 Folders - 35 Images
BCH00003 - 1 Images
BCH00099 - 24 Folders - 97 Images
BCH00098 - 3 Folders - 75 Images

Separator Darkness 90

Fig. 13.10. **Select Batch/Roll** dialog box

3. To select the batch you want to split, either double click on the batch number or highlight the batch number and click OK. The **Split Folder Status** box (fig. 13.11) will appear.


Processing
Folder File Split
FAX

Folders to Process: 5
Processing Number: 5
New Folders Created: 0

Fig. 13.11. **Split Folder Status** box

4. Processing will proceed automatically. The label near the top of the box will indicate **Folder File Split** or **Multi TIFF Split**. The box will remain on the screen until the process is complete. The file currently being processed will be displayed on the screen.

Important: *In order for the split process to work successfully, the documents must have been scanned with the paper size set to a width of 8.5 inches and a length of either 11 inches (letter) or 14 inches (legal).*

Importing Images 14

With VersaImage, you can import TIFF image files from other imaging systems or scanning systems. This is very useful when you first set up VersaImage if you already have images in your database as it eliminates the need to scan them again. Although VersaImage has excellent scanner support for most environments, there could also be instances after your initial setup where it might be necessary or preferable to scan the images outside of VersaImage and import them. For example, you might have an unsupported scanner or a scanner with automated features, such as a high-speed film scanner, that you prefer to use. This feature also enables you to import TIFF images archived by a fax modem and index them.

When image files are imported, VersaImage creates an empty record for each in the database and places the images in a to-be-indexed list. You can then open the database and index them. You will be able to enter information for the images to create new records or associate the images with existing records in the database. More information will be given on indexing images in Chapter 19.

Image Files and File Names

When VersaImage imports TIFF files, the files keep the same names as they had previously. If the files are single TIFF images and have an eight-character naming convention that logically organizes the files into documents or folders, VersaImage can automatically build folder files based on that organization. For instance, suppose your microfilm images were scanned so that at each file blip, the first five digits of the file number were incremented and at a page blip, the last three digits were incremented. VersaImage would create a folder file for each file blip and place references for all files matching those first five characters in the folder file. The folder files will have the same name as the first image file in the folder and the extension .FLD.

If you do not have a logical naming convention such as the one described above, you will still be able to create folder files when you index your images. More information and instructions on creating folders as you index is given in Chapter 19.

Getting Ready for Import

Before you can import images, you must get both your database and your images ready.

The database

To import images for a database, you must have must first created the database (Chapter 7). The database must be image enabled. If you did not image enable your database, you can do it now.

▸ **To image enable a database**

1. Select **Open Database** from the **File** menu and open the database.
2. Open the **File** menu again and select **Image Enable Database**.
3. The **Image Address** field will appear in your record and the image tool bar will appear at the top of your screen.

The images

The images you want to import must all be located in one folder and that folder must be in the database's image folder. If they are not there, VersaImage will MOVE them there. If you do not want your images moved, you should copy them to the image folder.

To copy your images

1. In Windows **Explorer**, locate the folder where your images are located.
2. Move your mouse pointer to the folder and click your right mouse button. This will select the folder and display the context menu.
3. Click **Copy** to copy the folder.
4. Locate the VersaImage folder and double-click to open it.
5. In the VersaImage folder, find the folder that has the same name as your database. This is your image folder. Double-click on the folder to open it.
6. Move your mouse pointer to the right pane and press your right mouse button to display the context menu.
7. Select **Paste** and the folder will be pasted in.
8. This folder will now be your batch folder. Rename it with an eight-character name. This will be your batch number. You may want to follow VersaImage naming conventions for batches and rolls:
    - The first three characters for a batch are BCH. The last five should be digits and are your batch number. For example, batch 84 would be:

      BCH00084
    - For images scanned from rolls, the first four characters are ROLL and the last four are your roll number. Roll 100 would be:

      ROLL0100

   Alternatively, you could create your own naming conventions to distinguish imported batches from those scanned in VersaImage (e.g., **IMP00010**).

> ***Hint:*** *If want your images moved but are copying them from an external source, you can speed up the import if you move them into your database's image file first. Follow the instructions above, but instead of using **Copy**, select **Cut**.*

Getting Ready to Import

Your first step is to open the VersaImage database you want to import your file to. Then you must select your import file. If your folders are logically named in incremental groups, you can choose to have the system build folder files for each group as described under "Image Files and File Names" above.

To open your database

1. Select **Open Database** from the **File** menu. The **Open** dialog box will appear.
2. Select your database from the **Open** dialog box.
3. Press Open and the fields you have defined for your record will appear on the screen.

▸ To select your import file

1. Select **Import** from the **Tools** menu.
2. Select **Import Images** (fig. 14.1) from the **Import** menu.
3. The **Import Images for Indexing** dialog box will appear (fig. 14.2).

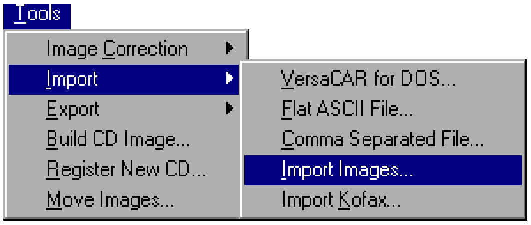
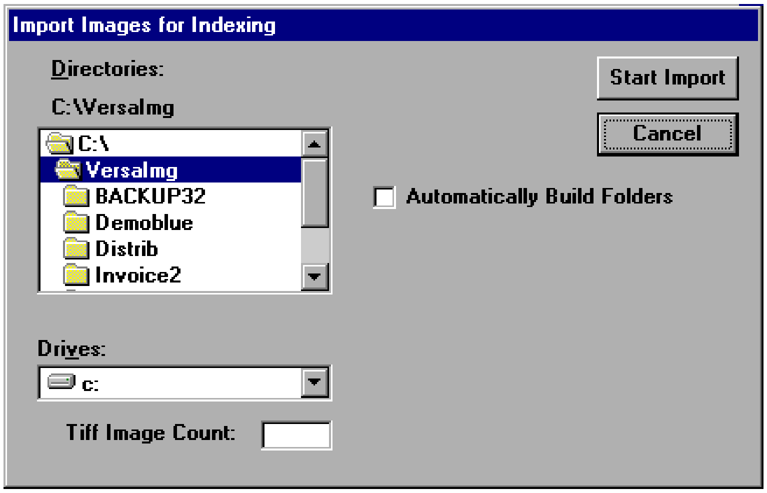

Tools
Image Correction
Import
Export
Build CD Image...
Register New CD...
Move Images...
VersaCAR for DOS...
Flat ASCII File...
Comma Separated File...
Import Images...
Import Kofax...

Fig. 14.1. **Import Images** option


Import Images for Indexing
Start Import
Cancel
C:\
VersaImg
BACKUP32
Demoblue
Distrib
Invoice2

Directories: C:\VersaImg

☐ Automatically Build Folders

Drives: c:

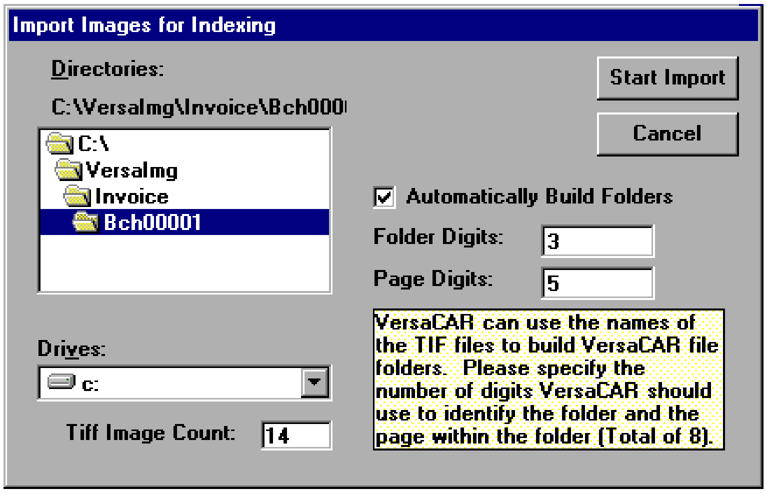
Tiff Image Count:

Fig. 14.2. **Import Images for Indexing** dialog

4. Select the drive where your folder is located from the **Drives** list box.
5. Double-click on the folder where your images are located in the **Directories** list box. Note that the TIFF image count box at the bottom of the screen will display the number of files with a ".TIF" extension in the directory selected.

▸ To automatically build folder files

1. Check the box labeled **Automatically Build Folders**. The dialog box will change to allow you to tell VersaImage how to build the folders (fig. 14.3).


Import Images for Indexing
Start Import
Cancel
C:\
VersaImg
Invoice
Bch00001

Directories: C:\VersaImg\Invoice\Bch000

☑ Automatically Build Folders

Folder Digits: 3

Page Digits: 5

VersaCAR can use the names of the TIF files to build VersaCAR file folders. Please specify the number of digits VersaCAR should use to identify the folder and the page within the folder (Total of 8).

Drives: c:

Tiff Image Count: 14

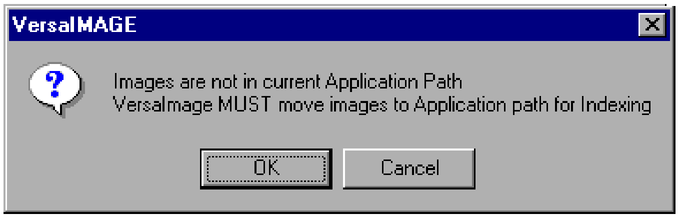
Fig. 14.3. Dialog box with **Automatically Build File Folders** enabled

2. Enter the number of characters in the file name that correspond to either the folder or the page. VersaImage will automatically calculate the other number (there must be a total of exactly eight characters).

▸ To import your images

1. Press Start Import to start the import procedure.

2. If the images are not currently in the database image folder, VersaImage will display a message informing you that the images will be moved to the correct VersaImage directory (fig. 14.4):



Images are not in current Application Path
VersaImage MUST move images to Application path for Indexing

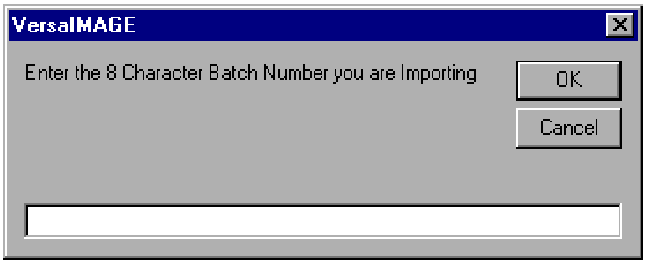
Fig. 14.4. Image move confirmation message

- Click one of the following:

OK	If you want to move the images.
Cancel	If you do not want to move the images.

> ***Warning:*** *This is a MOVE, not a copy! If you select* OK*, your files will be MOVED. If you do not want them moved, select* Cancel *and copy them to your database image folder first (see page 102).*

- If you select OK, you will be prompted to enter an eight-character batch number (fig. 14.5). Rename it with an eight-character name. You may follow the VersaImage naming conventions or create a separate one of your own.

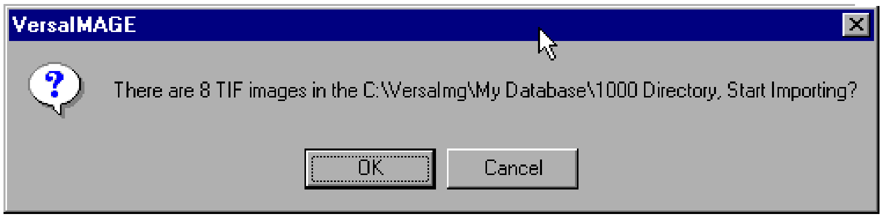


Enter the 8 Character Batch Number you are Importing

Fig. 14.5. Dialog box for entering the batch number

- Click OK and the TIFF images will be moved into the correct VersaImage subdirectory.

3. Before VersaImage imports the images, a confirmation box (fig. 14.6) will be displayed.



There are 8 TIF images in the C:\VersaImg\My Database\1000 Directory, Start Importing?

Fig. 14.6. Image import confirmation message

4. Click OK. The database entries will be created and the images will be added to the to-be-indexed list for the batch.

Operating the Check Scanner

15

The VersaImage/Check system interfaces with either the Visionshape B-1000 scanner or the BUIC-1000 scanner. These scanners can scan checks, either single or dual-sided, and read the MICR line at the bottom of the check. VersaImage/Check scans these checks and places the information read from the MICR line into a VersaImage database. This allows for scanning and indexing in a completely hands-free mode. This product has been used in many applications including “Checks on CD” and many “lockbox” applications.

Scanner Setup

Before you scan a batch of checks, you will need to set your scanning options for the checks you are scanning and enter the batch number.

Setting up your scanner

1. From the **File** menu, select **Open Database**.
2. Select the database you want to scan images for from the **Open** dialog box. The main database screen will appear.
3. If you have not already done so, select **Image Enable Database** from the **File** menu.
4. From the **Scan** menu, select **Scan Checks** (fig. 15.1). The **Check Scan** dialog box (fig. 15.2) will appear. The batch number, path, and file name for the last image scanned for the database will be displayed.

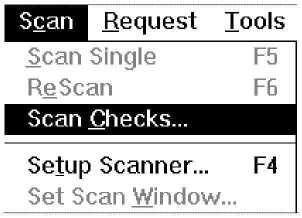
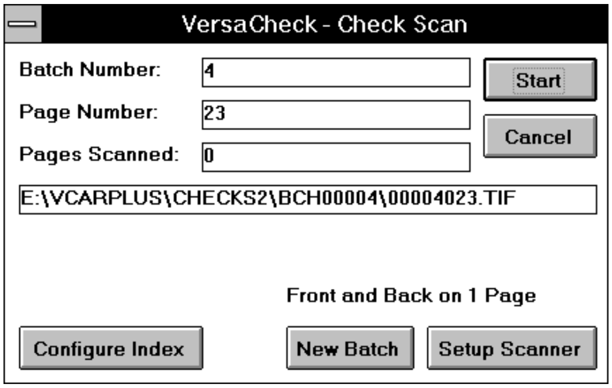


Fig. 15.1. **Check Scan** menu



Batch Number: 4

Page Number: 23

Pages Scanned: 0

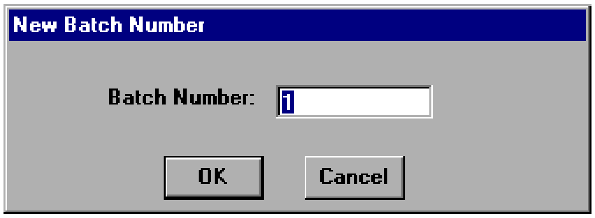
E:\VCARPLUS\CHECKS2\BCH00004\00004023.TIF

Front and Back on 1 Page

Fig. 15.2. **Check Scan** dialog box

> ***Note:*** *VersaImage will create a subdirectory for each batch scanned. The name will be BCHnnnnn where nnnnn is the batch number.*

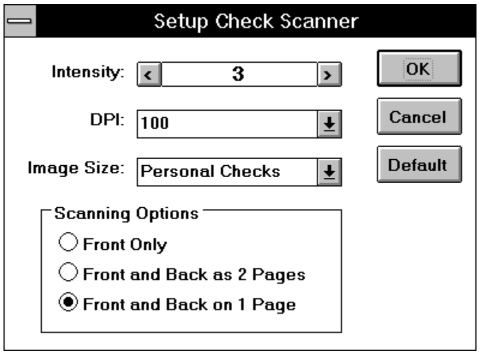
5. To start a new batch, click New Batch. The **New Batch** dialog box will appear (fig. 15.3). Enter a batch number between 1 and 99999 and click OK.



Batch Number: 1

Fig. 15.3. **New Batch** dialog

6. Click Setup Scanner to display the **Setup Check Scanner** dialog box (fig. 15.4).



Intensity: 3

DPI: 100

Image Size: Personal Checks

Scanning Options
○ Front Only
○ Front and Back as 2 Pages
● Front and Back on 1 Page

Fig. 15.4. **Setup Check Scanner** dialog

7. Select your scanner settings:

Intensity	The lightness or darkness of the image.
DPI	Dots per inch. The higher the number, the higher the resolution.
Image Size	Check size.

*Note: **Intensity** and **DPI** once set will not usually need to be changed. **Image Size** may need to be changed for each batch. Consult your scanner manual for more information.*

8. Select your scanning options:

Front Only	Single-image TIFF
Front and Back as Two Pages	Multi-image TIFF
Front and Back on One Page	Single-image TIFF

Indexing Setup

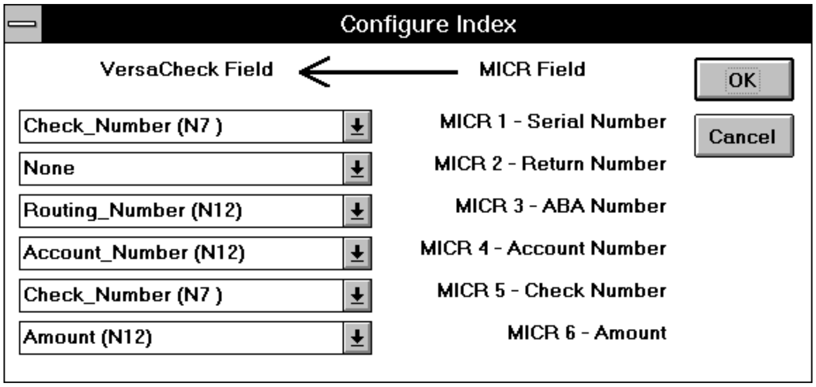
If you have not scanned checks previously for a given database, you will need to configure your database for indexing. On each check, there are up to six MICR fields along the bottom of the check. Any one of these six fields can be placed into any field of your VersaImage database as the checks are scanned.

A definition of the MICR fields is listed in the following table:

Field Sequence	Field Name	Description
MICR 1	Serial Number	For many business checks, the check number is in this field instead of the check number (MICR 5) field.
MICR 2	Return Number	Used only for items returned through the Federal Reserve.
MICR 3	ABA Number	The unique number of the bank is in this field.
MICR 4	Account Number	The customer's account number is in this field.
MICR 5	Check Number	For some business checks and all personal checks, the check number is in this field.
MICR 6	Amount	The amount of the check will appear in the last field. The number is placed onto the check by a bank's proof department. If the check has not been through the proof department, there will be no amount.

▸ **To configure automatic indexing**

1. Click Configure Index. The **Configure Index** dialog box will appear (fig. 15.5).



Configure Index

VersaCheck Field	MICR Field
Check_Number (N7)	MICR 1 - Serial Number
None	MICR 2 - Return Number
Routing_Number (N12)	MICR 3 - ABA Number
Account_Number (N12)	MICR 4 - Account Number
Check_Number (N7)	MICR 5 - Check Number
Amount (N12)	MICR 6 - Amount

Fig. 15.5. **Configure Index** dialog box

2. Click the ▾ button to the left of the MICR field you want to configure. A list of the fields that have been defined for your VersaImage/Check database will be listed.

3. Select the field where the data will be placed.

> ***Note:*** *You may place two different MICR fields into the same VersaImage field if you want. In fact, this is common for the check number.*

4. Click OK to return to the **Check Scan** dialog box.

Scanning your checks

▸ **To scan your checks**

1. Place the checks in the hopper.

2. Click Start. The scanner will start scanning automatically. To interrupt scanning, remove the checks from the hopper on the scanner.

3. When the scanner is empty, an hourglass will appear on the screen while the program indexes your checks. This can take a few minutes.

4. When it is finished, the Start button will change to a Resume button. To continue scanning, load more checks into the scanner and click Resume.

5. To exit, click Exit.

Part 4

Indexing

Indexing Basics 16

Indexing is the process of associating your document (either film or paper) with a database record. There are a number of ways you can index:

Film

- Index at the reader
- Index at the camera as you shoot
- Associate imported records with your film, either at the reader or at the camera
- Index images captured from your film
- Scan and index individual folders in one step

Paper

- Index scanned or imported images
- Associate your images with imported data records
- Index the page documents and associate the images later
- Scan and index individual folders in one step

What Happens When You Index

When you index, the system associates the index record with the document. How it does this depends on whether you are indexing film or images.

Film

When you index a roll of film, VersaCAR automatically inserts the roll and frame numbers into your database record. The roll number will be the number you enter when you start your indexing. The frame number starts with the frame you specify and increments for each frame:

- For single-level indexing, the blip or frame number is a whole number and represents the frame's sequential location in the roll.
- For two-level indexing, the blip or frame number is given in 0.0 format. The number before the period is the group or file number. The number after the period is the frame or blip within the group. For example, the first record or "file blip" would be 1.0. The small blips (page blips) that follow would be **1.1**, **1.2**, **1.3** ... **1.10**, **1.11**, etc. The next file blip would be **2.0**, followed by **2.1**, **2.2**, etc.
- For three-level film, the blip or frame number is given in 0.0.0 format. The first number is the batch number, the second number is the group or file number, and the third, the page number. In the first batch of a roll, **1.2.5** would be the fifth page of the second group in the batch.

Images

When you scan or import your images, VersaImage creates an empty record for each image or folder and places the file location of the image or folder file in the **Image Address** field in the record:

- For single-page or multi-image TIFF files, the file name and path for the image will be placed in the record.
- For image folder files, the file name and path of the folder file will be placed in the record.

If the images were scanned from roll film through VersaImage, the roll and frame number will be placed in the record as well. When you index, VersaImage displays the empty record and its associated image or image folder so you can enter the record information.

Entering Index Records

There are two ways to enter index records. One is from scratch and the other is in **Lookup/Append** mode. **Lookup/Append** mode is used when you want to associate imported records or previously entered records with your film or images.

Entering records from scratch

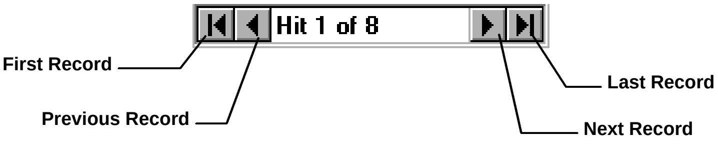
When you enter records from scratch, you enter data in all the fields in the record. If a value for a field is not available when you index, you may enter it later in the search screen. The following keys and buttons are used while entering records:

Tab or Enter	Moves to the next field.
OK or F8	"Files" the record and moves into the next.

The method of entering the data in the record varies somewhat depending on the type of indexing you are doing (reader, camera, or image). For this reason, you should read the instructions carefully in Chapters 17—22 for the indexing method you are using.

Lookup/Append mode

When you index in **Lookup/Append** mode, you enter a value in the first field only. The system then looks for all matching records in your database and displays the first one it finds. The total number of matching records is displayed in a "hit bar" at the bottom of your screen:



If there is more than one record, you can use the buttons in the hit bar to page through the records. When you find the record you want, you click OK to file the record.

Since there is some variation in the procedure you use with different types of indexing (reader, camera, or image), be sure to read the instructions for using **Lookup/Append** mode for the indexing method you are using.

Indexing Setup Options

The **Indexing Setup** dialog gives you a number of setup options that can make your indexing easier and faster if you are entering data from scratch. This dialog allows you to do the following:

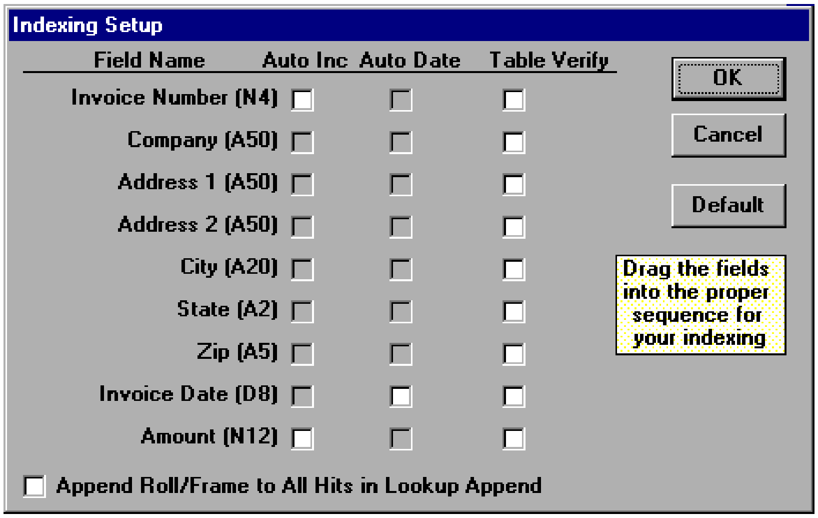
- Rearrange your data fields for more convenient entry or to meet specific index entry requirements (such as putting a specific field first for **Lookup/Append** mode).
- Automatically increment numeric values (e.g., invoice numbers).

- Automatically enter the current date in a date field.
- Set up “verification tables” containing commonly entered values for a field (such as company names or addresses). To place a value from the table in the field, you key in a code or abbreviation.

The indexing setup options can be set in advance and maintained for each database. This dialog also will show up the first time you index a database if you haven’t set these options for the database yet.

Selecting index options

The **Indexing Setup** dialog (fig. 16.1) lists all the fields you can enter while indexing and the entry options available for each:



Field Name	Auto Inc	Auto Date	Table Verify
Invoice Number (N4)	☐	☐	☐
Company (A50)	☐	☐	☐
Address 1 (A50)	☐	☐	☐
Address 2 (A50)	☐	☐	☐
City (A20)	☐	☐	☐
State (A2)	☐	☐	☐
Zip (A5)	☐	☐	☐
Invoice Date (D8)	☐	☐	☐
Amount (N12)	☐	☐	☐

Drag the fields into the proper sequence for your indexing

☐ Append Roll/Frame to All Hits in Lookup Append

Fig. 16.1. **Indexing Setup** dialog

Auto Inc	Automatically increments the number in the field. Available for numeric fields only.
Auto Date	Enters the date automatically. Available for date fields only.
Table Verify	Allows you to set up a verification table for the field. Available for all fields.

▸ To set your indexing preferences

1. Select **Preferences** from the **File** menu.
2. Select **Indexing Setup** from the **Preferences** menu. The **Indexing Setup** dialog (fig. 16.1) will appear.
3. If you want to enter your index values in a different order, drag the fields into the position you want.
4. Select entry options for whatever fields you want to apply them to:
   - Only the options with enabled check boxes are valid for a field.
   - In cases where one or more than one option is enabled, you can only select one.

▸ To remove all setup options

1. Click Default.
2. Your original order will be restored and all options you have set will be removed.

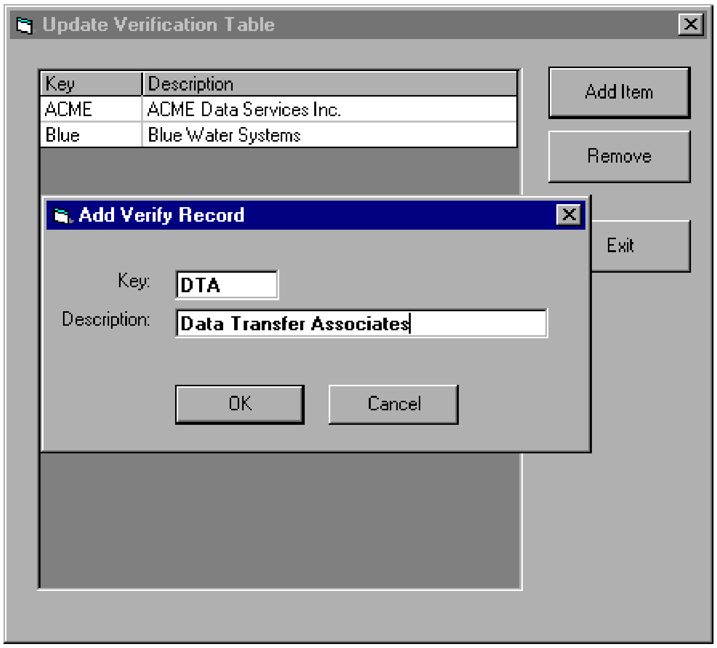
Maintaining the verification tables

If you choose to have a verification table for a field, you will need to set up your list of values and the codes you want to use to retrieve them. You can add and remove entries in these tables whenever you need to. For example, if you keep a table of company names, you can add to it whenever you get a new client.

Hint: *For speedy data entry, tie address fields and other static company information to the same code as you use for the name of the company.*

To access the Update Verification Table dialog

1. Enable the field for **Table Verify** (see above) if you have not already done so. A Setup button will appear.
2. Press the Setup button by the field. The **Update Verification Table** dialog will appear (fig. 16.2).



Key	Description
ACME	ACME Data Services Inc.
Blue	Blue Water Systems

Key: DTA

Description: Data Transfer Associates

Fig. 16.2. **Update Verification Table** dialog with **Add Verify Record** dialog box

To add a value

1. Click the Add button to display the **Add Verify Record** dialog box (fig. 16.2).
2. Enter the code in the **Key** field.
3. Enter the full entry in the **Description** field.
4. Click OK.

To remove a value

1. Highlight the entry you want to remove.
2. Click Remove.

To use a table

1. When you move your cursor to a field with a verification table, the table will appear on the screen.

2. Type the key code in the field.
3. Press Tab or Enter

Indexing Your Film at the Reader

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You can index your microfilm from scratch at your reader. You can also index it by associating the frames with imported database records that do not have roll or frame numbers. If your imported records already contain roll and frame numbers, the film will be associated with the records automatically. You don't need to do anything.

Getting Ready to Index

Regardless of whether you are indexing a roll of film from scratch or indexing the film to an imported database, you must set up your basic index parameters.

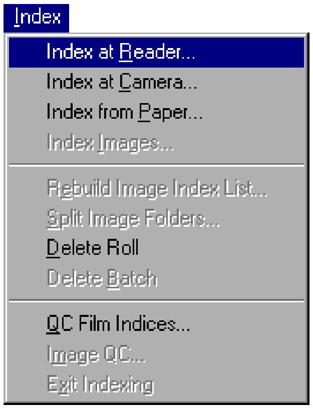
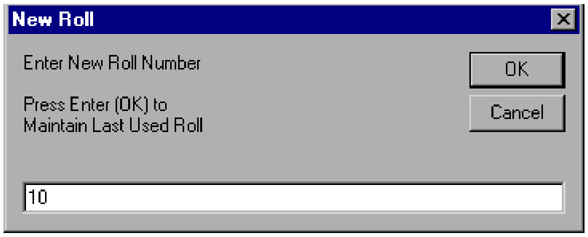

Index
Index at Reader...
Index at Camera...
Index from Paper...
Index Images...
Rebuild Image Index List...
Split Image Folders...
Delete Roll
Delete Batch
QC Film Indices...
Image QC...
Exit Indexing

Fig. 17.1. **Index** menu

To start an index

1. Load your film.
2. From the **File** menu, select **Open Database**.
3. Select the database you want to index from the **Open** dialog box. The database search screen will appear.
4. From the **Index** menu, select **Index at Reader** (fig. 17.1). The **New Roll** dialog box (fig. 17.2) will appear.
5. Enter the number of the roll you are indexing in the text box and click OK:



New Roll

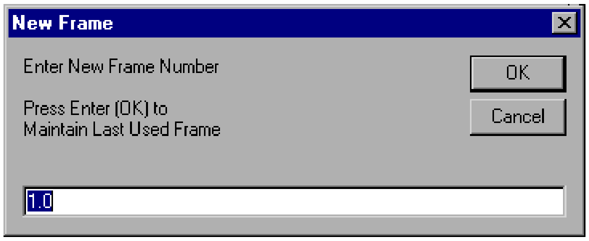
Enter New Roll Number

Press Enter (OK) to
Maintain Last Used Roll

10

Fig. 17.2. **New Roll** dialog box

- If you are indexing one- or two-level film, the **New Frame** dialog box (fig. 17.3) will appear.



New Frame

Enter New Frame Number

Press Enter (OK) to
Maintain Last Used Frame

1.0

Fig. 17.3. **New Frame** dialog

- If you are indexing three-level film, a message will appear asking you if you want to index batch blips only. Select the type of index you want:

Yes	To enter records for batch blips only
No	To enter records for both batch and file blips

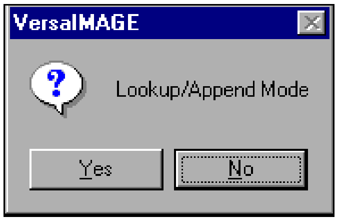
After you make your selection, the **New Frame** dialog (fig. 17.3) will appear.

6. In the **New Frame** dialog box, enter the number of the frame you want to start with:

- For single-level indexing, enter a whole number.
- For two-level indexing, enter the number of the file blip you are starting with, followed by **.0**.
- For three-level indexing, enter the number of the batch blip followed by the file blip and **.0** for the page blip (e.g., **3.1.0**).

> ***Note:*** *If your reader/printer is set up to recognize page 1 as the file blip, enter .1 instead of .0 after the file number.*

7. Click OK and the reader will advance to that frame number:
    - If you have not yet defined your indexing setup parameters, the **Indexing Setup** dialog will be displayed (see Chapter 16). Change the defaults if you want. Then click OK and the **Lookup/Append** dialog box (fig. 17.4) will appear.
    - If you have already defined your indexing setup parameters, the **Lookup/Append** dialog box (fig. 17.4) will appear immediately.



Lookup/Append Mode

Fig. 17.4. **Lookup/Append** dialog

8. Select your option from the **Lookup/Append** message box:
    - If you are indexing your film from scratch, click No.
    - If you are indexing film to an imported database, click Yes.

> ***Note:*** *After you have indexed a database once, the last roll and frame you indexed will always be displayed for you in the* ***New Roll*** *and* ***New Frame*** *dialogs so that you can continue from where you left off by merely clicking* OK.

The Reader Index Screen

After you enter your setup parameters, the index screen for entering your records will appear (fig. 17.5). It looks much like the main database search screen and contains all the fields you defined for your records except the **Roll** field and **Blip** field. These will be entered by the system automatically as you index. The fields will appear in the order you specified when you set up your database, unless you changed them in the **Index Setup** dialog. The status bar at the bottom of the screen contains information about the reader and displays the current roll and frame (blip) number.

You do not have to index the entire roll at one sitting. You may quit whenever you want. To quit, click Exit and you will exit from the index screen. The system will "remember" the roll number and the frame number where you left off so that you can continue from that point if you are not finished.

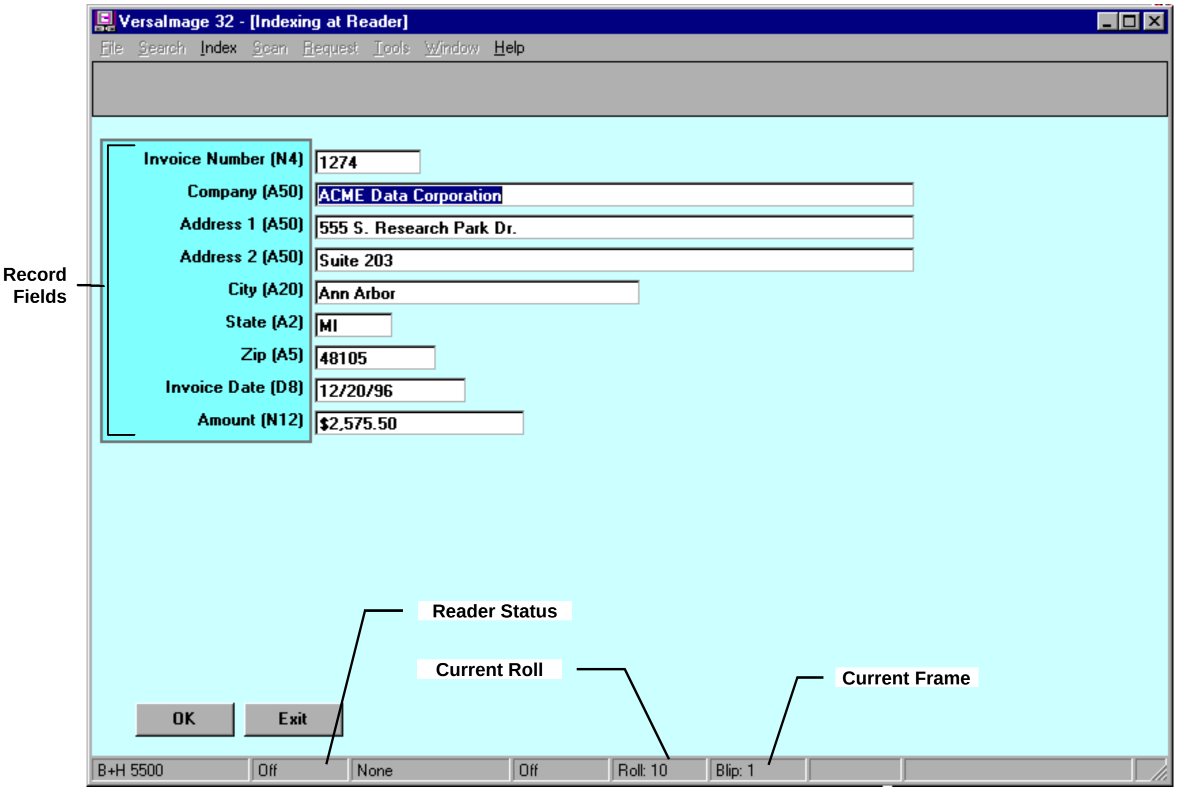
Indexing from Scratch at the Reader

For each frame you index, you will enter your index record in the fields on the screen. When you click OK or press F8 to file the record and move to the next frame, the data for the last record will remain in the fields so that you won't have to reenter duplicate information, such as dates or company names if they happen to be the same. You can just change the information that is different.

> ***Note:*** *If you press* Enter *after you enter your last field, you will see the message "****OK to File****". Click* Yes *or press* Enter *to file the record.*

Single-level film

For single-level film, you can index your frames in two ways:


VersaImage 32 - [Indexing at Reader]
File Search Index Scan Request Tools Window Help
OK
Exit
B+H 5500
Off
None
Off
Roll: 10
Blip: 1

Invoice Number (N4)	1274
Company (A50)	ACME Data Corporation
Address 1 (A50)	555 S. Research Park Dr.
Address 2 (A50)	Suite 203
City (A20)	Ann Arbor
State (A2)	MI
Zip (A5)	48105
Invoice Date (D8)	12/20/96
Amount (N12)	$2,575.50

Record Fields

Reader Status

Current Roll

Current Frame

Fig. 17.5. Screen for indexing at the reader

- You can index each frame.
- You can index the frames in logical subgroups by entering an index record for only the first frame in the group. This simulates two-level indexing.

▸ To enter a record for each frame

1. Fill in the fields in the record.
2. Click OK. The reader will advance to the next frame and the number in the **Blip** field in the status bar at the bottom of the screen will increment.

▸ To index your frames in groups

For each logical subgroup, do the following:

1. For the first frame of the subgroup, fill in the fields in the index record.
2. Click OK or press F8 to move to the next frame.
3. Continue clicking OK or pressing F8 to advance through the frames until you reach the first record in the next subgroup. As long as you do not change any data on the screen, no index records will be created.

Two-level film

When you index two-level film, you generally create index records for each frame with a file blip. Occasionally, however, you may wish to index all the page blips within a file. Whenever you want to index an individual frame or set of frames, you can switch to page-level mode. For instructions, see “Page-level indexing with multi-level film” below.

▸ To index two-level film

1. Fill in the fields in the record.
2. Click OK or press F8 and the reader will advance to the next file blip.

Three-level film

In three-level indexing, you usually index the frames with batch blips and file blips. You also have the option of indexing batch blips only. You must select this option when you start your index (see page 117). While you are indexing, you can switch to page mode if you want to index individual frames (see "Page-level indexing with multi-level film" below).

▸ **To index frames with batch blips**

1. Enter the fields for the batch record.
2. Click OK or press Enter:
   - If you are indexing both batch and file blips, the film will advance to the first file blip.
   - If you are indexing batch blips only, the film will advance to the next batch blip.

▸ **To index frames with file blips**

1. Enter the fields for the file record.
2. Click OK or press Enter:
   - If there are more file blips in the batch, the film will stop at the next file blip.
   - If there are no more file blips, the film will advance to the next batch blip.

Page-level indexing with multi-level film

When you want to index a page-level frame while indexing two- or three-level film, you can switch to page-level mode.

▸ **To change to page-level indexing**

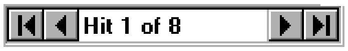
1. Press F7. The rightmost box on the status bar at the bottom of the screen will switch to **Page**.
2. Enter the record for the frame and click OK to move to the next frame.

▸ **To return to file-level indexing**

1. Press F7. The rightmost box on the status bar at the bottom of the screen will switch to **File**.
2. Proceed again with two-level or three-level indexing.

Indexing to Imported Records

If your index records are already in the database but do not have roll numbers, you can associate your film frames with them. You choose this option by selecting **Lookup/Append** mode when you start indexing. In **Lookup/Append** mode, you enter a "key" value in the first field. The system then looks for matching records for your key. The number of records it finds will be displayed in the hit bar at the bottom of the screen:



The first record found will be displayed on the screen. You can use the buttons on the hit bar to page through the other records if necessary (see Chapter 16 for a more detailed description of the hit bar). When you select and file the record, the roll and frame number will be placed in that record. The screen will then clear so you can enter the key field for the next record.

> ***Hint:*** *Before you index records in* ***Lookup/Append*** *mode, reorder the fields on the* ***Index Setup*** *screen (see Chapter* ***16****) so you have a "key" field that will most likely be a unique identifier for the record.*

Single-level film

For single-level film, you can index your frames in two ways:

- You can each frame.
- You can index the frames in logical subgroups by associating an index record with only the first frame in the group.

▸ To enter a record for each frame in Lookup/Append mode

1. Fill in the first field in the record.
2. Press Tab or Enter. The number of matching records will appear at the bottom of the screen. The first matching record will be displayed.
3. If there is more than one matching record and the first record is not the correct one, click the ▶ button in the hit bar. Continue clicking ▶ until you find the right record.
4. Click OK to file the record. The reader will advance to the next frame.

▸ To index your frames in groups in Lookup/Append mode

1. For the first frame in the group, fill in the first field of the record.
2. Press Tab or Enter. The number of matching records will appear at the bottom of the screen. The first matching record will be displayed on the screen.
3. If there is more than one matching record and the first record is not the correct one, click the ▶ button in the hit bar. Continue clicking ▶ until you find the right record.
4. Click OK or press Enter to file the record. The reader will advance to the next frame and the screen will clear.
5. Continue clicking OK or pressing Enter to advance through the frames until you reach the first record in the next subgroup. Do not enter anything in the screen.

Two-level film

Generally, you will be associating your records with a file blip. Occasionally, however, you may want to associate records with page blips. Whenever you want to index an individual frame or set of frames, you can switch to page-level mode (see page 122).

▸ To index two-level film in Lookup/Append mode

1. Fill in the first field in the record.
2. Press Tab or Enter. The number of matching records will appear at the bottom of the screen. The first matching record will be displayed on the screen.
3. If there is more than one matching record and the first record is not the correct one, click the ▶ button in the hit bar. Continue clicking ▶ until you find the right record.
4. Click OK or press Enter and the reader will advance to the next file blip.

Three-level film

Usually, you will be associating records with batch blips and file blips. You also have the option of indexing batch blips only. You must select this option when you set up your index (see page 117). While you are indexing, you can switch to page mode if you want to index individual frames.

▸ To index frames with batch blips

1. Enter the first field for the batch record.

2. Press Tab or Enter. The number of matching records will appear at the bottom of the screen. The first matching record will be displayed on the screen.
3. If there is more than one matching record and the first record is not the correct one, click the ▶ button in the hit bar. Continue clicking ▶ until you find the right record.
4. Click OK or press Enter:
   - If you are indexing both batch and file blips, the film will advance to the first file blip.
   - If you are indexing batch blips only, the film will advance to the next batch blip.

To index frames with a file blip

1. Enter the first field in the record.
2. Press Tab or Enter. The number of matching records will appear at the bottom of the screen. The first matching record will be displayed on the screen.
3. If there is more than one record and the first record is not the correct one, click the ▶ button in the hit bar. Continue clicking ▶ until you find the right record.
4. Click OK or press Enter:
   - If there are more file blips in the batch, the system will stop at the next file blip.
   - If there are no more file blips, the film will advance to the next batch blip.

Page-level indexing in Lookup/Append mode

If you are indexing multi-level film, you can switch to page-level indexing in **Lookup/Append** mode.

To change to page-level indexing

1. Press F7. The rightmost box on the status bar at the bottom of the screen will switch to **Page**.
2. Enter the first field for the record
3. Press Tab or Enter. The number of matching records will appear at the bottom of the screen. The first matching record will be displayed on the screen.
4. If there is more than one record and the first record is not the correct one, click the ▶ button. Continue clicking ▶ until you find the right record.
5. Click OK or press Enter to move to the next frame.

To return to file-level indexing

1. Press F7. The rightmost box on the status bar at the bottom of the screen will switch to **File**.
2. Proceed with two- or three-level indexing as described above.

What To Do Next

- If you want to search and view your database, go to Chapter 23.
- If you have VersaImage and want to scan images for your database, go to Chapter 11 to learn about images and Chapter 12 for instructions on scanning your film.

Indexing at the Camera

18

If your camera is interfaced to your computer, you can do your indexing as you shoot your film. You control the camera from your keyboard as you index. For single-level film, you can also associate the frames with records that are already in the database.

Note: *If you are using a Minolta DAR2800 or DR1600 (or their equivalents), refer to the hardware supplement for a complete discussion of indexing on those cameras.*

When you index multi-level film at the camera, your field order is very important:

- With two-level film, a file blip will be added whenever the first field changes.
- With three-level film, a batch blip is added whenever the first field changes and a file blip whenever the second field changes.

If your fields are not in this order, be sure to rearrange them through the **Indexing Setup** option (see Chapter 16) before you index.

Getting Ready to Index

Before you index, you need to get your camera ready to shoot. Then you need to enter the starting parameters for your index.

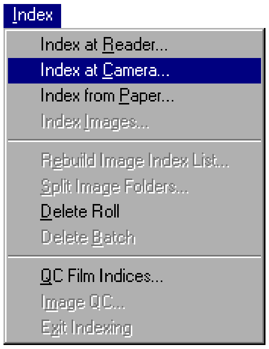
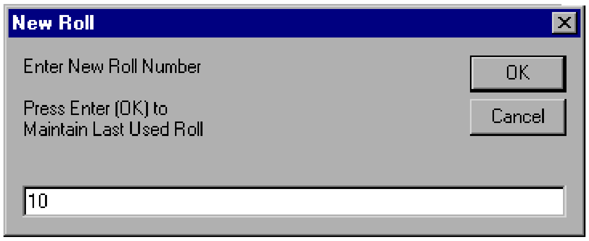

Index
Index at Reader...
Index at Camera...
Index from Paper...
Index Images...
Rebuild Image Index List...
Split Image Folders...
Delete Roll
Delete Batch
QC Film Indices...
Image QC...
Exit Indexing

Fig. 18.1. **Index** menu

▶ To start an index

1. From the **File** menu, select **Open Database**.
2. Select the database you want to index from the **Open** dialog box. The main database screen will appear.
3. From the **Index** menu, select **Index at Camera** (fig. 18.1). The **New Roll** dialog box (fig. 18.2) will appear.


New Roll
OK
Cancel

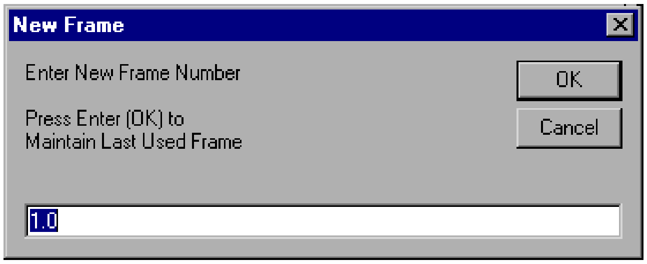
Enter New Roll Number

Press Enter (OK) to
Maintain Last Used Roll

10

Fig. 18.2. **New Roll** dialog box

4. Enter the number of the roll you are indexing in the text box (see fig. 18.2) and click OK.
   - If you are indexing one-or two-level film, the **New Frame** dialog box (fig. 18.1) will appear.
   - If you are indexing three-level film, a message will appear asking you if you want to index batch blips only. Select the type of indexing you want:


New Frame

Enter New Frame Number

Press Enter (OK) to
Maintain Last Used Frame

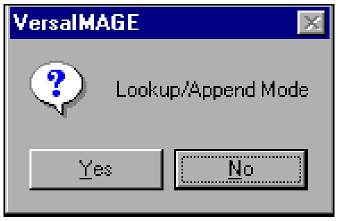
1.0

Fig. 18.3. **New Frame** dialog

Yes	To enter records for batch blips only.
No	To enter records for both batch and file blips.

After you make your selection, the **New Frame** dialog box (fig. 18.3) will appear.

5. In the **New Frame** dialog box, enter the number of the frame you want to start with:
   - For single-level indexing, enter a whole number.
   - For two-level indexing, enter the number of the large blip you are starting with, followed by **.0**.
   - For three-level indexing, enter the number of the batch blip, followed by a period and the number of the file blip, followed by **.0** (1.21.0).
6. Click OK:
   - If you have not yet defined your indexing setup parameters, the **Indexing Setup** dialog will be displayed (see Chapter 16). Change the defaults if you want. Then click OK and the **Lookup/Append** dialog box (fig. 18.4) will appear.
   - If you have already defined your indexing setup parameters, the **Lookup/Append** dialog box (fig. 18.4) will appear immediately.


VersaIMAGE

Lookup/Append Mode

Fig. 18.4. **Lookup/Append** dialog

7. Select your option from the **Lookup/Append** message box:
   - If you are indexing your film from scratch, click No.
   - If you are indexing film for an imported database, click Yes.

> ***Note:*** *After you have used this option once for a database, the last roll and frame you indexed will always appear in the* ***New Roll*** *and* ***New Frame*** *dialogs so you can continue from where you left off by merely clicking* OK.

The Camera Index Screen

After you enter your setup parameters, the screen for indexing at the camera will appear. This screen (fig. 18.5) contains all the record fields you defined for your database records except for the **Roll** field and **Blip** (frame) field. These fields will be entered automatically by the system as you shoot your film. The fields on your screen will appear in the order you specified in your database screen, unless you changed them in the **Index Setup** dialog.

At the top of the screen, the **Block**, **Batch**, and **Item** fields display the following:

Block	For one and two-level film, the roll number For three-level film, the batch blip
Batch	For two and three-level film, the file blip number For one-level film, ignored

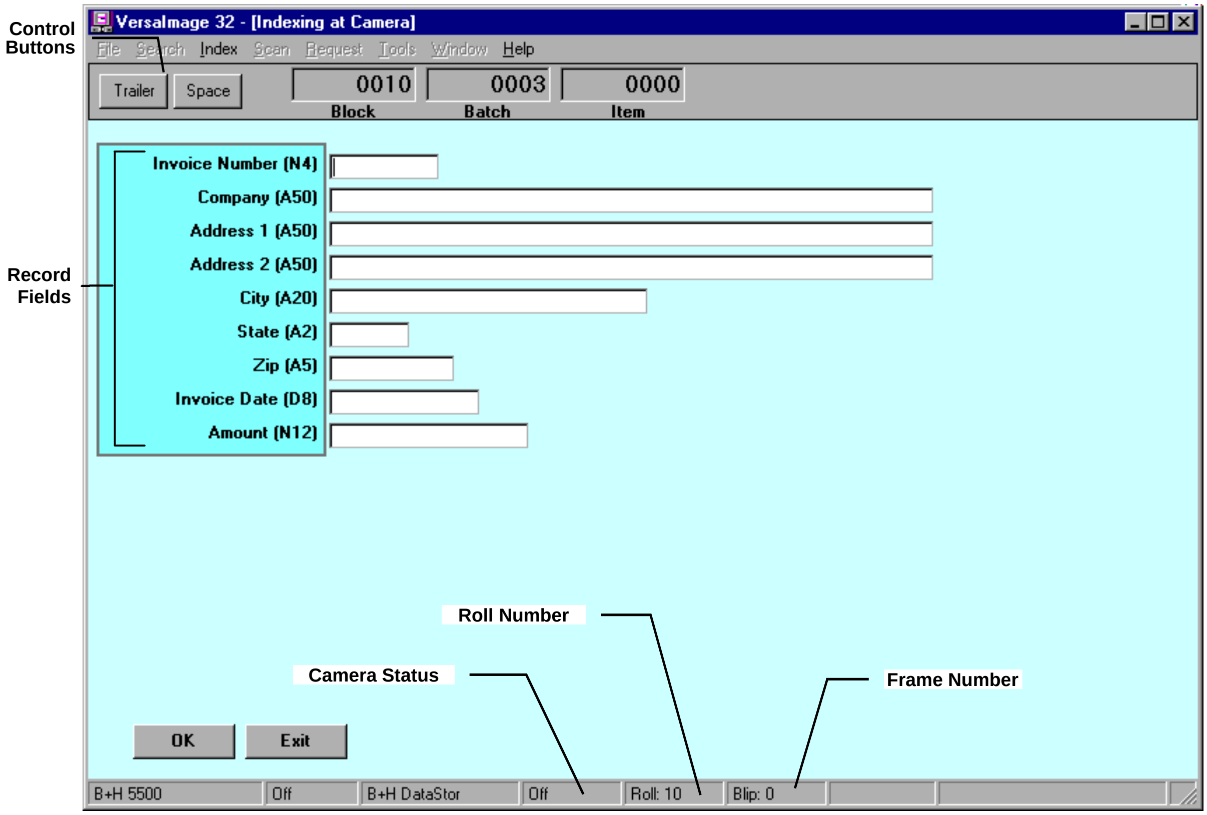

Control Buttons
Record Fields
VersaImage 32 - [Indexing at Camera]
File Search Index Scan Request Tools Window Help
Trailer
Space
0010
Block
0003
Batch
0000
Item
Invoice Number (N4)
Company (A50)
Address 1 (A50)
Address 2 (A50)
City (A20)
State (A2)
Zip (A5)
Invoice Date (D8)
Amount (N12)
Roll Number
Camera Status
Frame Number
OK
Exit
B+H 5500
Off
B+H DataStor
Off
Roll: 10
Blip: 0

Fig. 18.5. Index screen for indexing at the camera

Item	Page-level blip number

In the status bar at the bottom of the screen, the number of the roll you are indexing and the current frame will be displayed. The screen also contains two additional buttons in the tool bar—the **Space** button and the **Trailer** button:

Space	Inserts extra space between the frames.
Trailer	Advances the film 50 spaces. You can use this button to add leader and trailer to the beginning and end of your film.

You can use these buttons whenever you need them to advance your film without making an exposure.

You do not have to index the entire roll at one sitting. You may quit whenever you want. To quit, click **Exit** and you will exit from the index screen. The system will “remember” the roll number and the frame number where you left off so that you can continue from that point if you are not finished.

Indexing from Scratch at the Camera

For each frame you index, you will enter your index record in the fields on the screen. When you click **OK** or press **F8** to move to the next frame, the data for the last record will remain in the fields so that you won’t have to reenter duplicate information, such as dates or company names if they happen to be the same. You can just change the information that is different.

> ***Note:*** *If you press* **Enter** *after you enter your last field, you will see the message “**OK to File**”. Click* **Yes** *or press* **Enter** *to file the record and the film will advance.*

Single-level indexing—one record per frame

For standard single-level indexing, you create one record per frame. When you index at the camera, a blip will be added to the frame when the film is shot.

To index each frame as you shoot

1. Position the document on the camera.
2. Enter the record information on the screen.
3. Click OK or press F8. The frame will be shot and the film will advance. The number of the next frame will appear in the status bar at the bottom of the screen.

Single-level indexing—one record per subgroup

When you index single-level film in subgroups at the camera, you create one record for the first frame in the subgroup. You then shoot the other frames without creating a new record. A blip will be added to each frame when the film is shot, regardless of whether or not you entered a record.

To shoot the first document of the subgroup

1. Position the first document for the group on the camera.
2. Enter the index information. Click OK to shoot the frame and advance the film.

To shoot the rest of the documents in the group

1. Position the document on the camera.
2. Click OK or press Enter to shoot the frame *without* changing the data in the screen.

Two-level indexing

When you do two-level indexing at the camera, the first field in the record is the "key" for the group. When the value in this field changes, the system will assume that it is the beginning of a new group and add a large blip to the frame. If you have not arranged your fields correctly, be sure you do so before you index.

With two-level film, you can also enter index records for any of the frames within the group. For example, if you have multi-page documents within a group, you could create an index record for the first page of each. Or, if you have a large number of documents in the file, you could insert index records at strategic points to make it easier to position yourself in the file when you are searching for records.

To shoot the first document in a subgroup

1. Position the first document for the group on the camera.
2. Enter the index information for the record. The value in the first field must be *DIFFERENT* from the previous group for the system to recognize it as a new group.
3. Click OK to shoot the frame and advance the film.

To shoot each of the remaining documents in the group

1. Position the document on the camera.
2. Decide whether you want to create a record for the frame:
   - If you want to create an index record for the frame, modify the record as needed. *DO NOT CHANGE THE VALUE IN THE FIRST FIELD!*

- If you do not want to create an index record for the frame, do not change anything. Leave the record fields alone.

3. Click OK to shoot the frame and advance the film.

Three-level indexing—batch and file blips

When you do three-level indexing at the camera, the first field in the screen is the key for the batch blip and the second is the key for the file blip. When the first field changes, a batch blip will be added to the film. When the second field changes, a file blip will be added. A record will be added to your database for each batch and each file blip. If you have not arranged your fields correctly, be sure you do so before you index.

You can also do page-level indexing with three-level film. Under some circumstances, you may want to index each page in a file, or you may want to place strategic index records periodically in a large group of pages.

To shoot the first document in the batch (batch blip)

1. Position the first document for the batch on the camera.
2. Enter the index information for the record. The value in the *FIRST FIELD* must be *DIFFERENT* from the previous group for the system to recognize it as a new batch.
3. Click OK to shoot the frame and advance the film.

To shoot the first document for a file (file blip)

1. Position the document for the subgroup on the camera.
2. Enter the index information for the record. The value in the *SECOND FIELD* must be *DIFFERENT* to be recognized as a file blip. Do NOT change the value in the *FIRST FIELD*.
3. Click OK to shoot the frame and advance the film.

To shoot the remaining documents in a subgroup

1. Position the document on the camera.
2. Decide whether you want to create a record for the frame:
   - If you want to create an index record for the frame, modify the record as needed. *DO NOT CHANGE THE VALUE IN EITHER THE FIRST OR THE SECOND FIELD!*
   - If you do not want to create an index record for the frame, do not change anything. Leave the record fields alone.
3. Click OK to shoot the frame and advance the film.

Three-level indexing—batch blips only

If you chose to index batch blips only when you started your index, a record will be added to your database whenever you shoot a frame with a batch blip. The first field in the screen is the key for the batch blip and the second is the key for the file blip. When the first field changes, a batch blip will be added to the film. When the second field changes, a file blip will be added. You will need to change this value to shoot a frame with a file blip even though you are not creating a record. If you have not arranged your fields correctly, be sure you do so before you index.

To shoot the first document in the batch

1. Position the first document for the group on the camera.

2. Enter the index information for the record. The value in the first field must be *DIFFERENT* from the previous group for the system to recognize it as a new batch.
3. Click OK to shoot the frame and advance the film.

▸ To shoot the first document for a file group

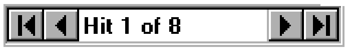
1. Position the document for the subgroup on the camera.
2. Change the value in the *SECOND FIELD*. This value must be different for the frame to be recognized as a file blip. However, no index record will be created.
3. Click OK to shoot the frame and advance the film.

▸ To shoot the remaining documents in a subgroup

1. Position the document on the camera.
2. Decide whether you want to create a record for the frame:
   - If you want to create an index record for the frame, modify the record as needed. *DO NOT CHANGE THE VALUES IN EITHER THE FIRST OR THE SECOND FIELD!*
   - If you do not want to create an index record for the frame, do not change anything. Leave the record fields alone.
3. Click OK to shoot the frame and advance the film.

Indexing to Imported Records

If you have imported your records without roll and frame numbers and are indexing single-level film, you can associate them with your film as you shoot. This is done in **Lookup/Append** mode. **Lookup/Append** mode does not work for multi-level film at the camera as all record fields in **Lookup/Append** mode are cleared after the frame is shot. When you use **Lookup/Append** mode, you enter a value in the first field. The program then searches for all matching records for the value. The first record found will be displayed on the screen and the number of matching records will be displayed in the hit bar at the bottom of the screen:



You can use the buttons in the hit bar to page through the records (see Chapter 16 for more information). When you associate a record with a frame, the program places the roll and frame number in the record. After the record is filed, the screen will clear so you can enter the key value for the next frame.

> ***Hint:*** *Before you index records in* ***Lookup/Append*** *mode, reorder the fields on the* ***Index Setup*** *screen (see Chapter 16) so that the first field will most likely be a unique identifier for the record.*

Single-level indexing—one record per frame

For standard single-level indexing, you will associate one record with each frame. When you index at the camera, a blip will be added to the frame when the film is shot.

▸ To index each frame as you shoot

1. Position the document on the camera.
2. Enter the data for the first field.

3. Press Tab or Enter. The number of matching records will appear at the bottom of the screen. The first matching record will be displayed on the screen.
4. If there is more than one record and the first record is not the correct one, press the ▶ button. Continue pressing ▶ until you find the right record.
5. When you find the right record, click OK. The frame will be shot and the film will advance.

Single-level indexing—one record per subgroup

When you index single-level film in subgroups at the camera, you associate a record with the first frame in the subgroup. You then shoot the other frames without associating them with a record. A blip will be added to each frame when the film is shot, regardless of whether or not the frame is associated with a record.

▶ **To shoot the first document of the group**

1. Position the first document for the group on the camera.
2. Enter the value for the first field.
3. Press Tab or Enter. The number of matching records will appear at the bottom of the screen. The first matching record will be displayed on the screen.
4. If there is more than one matching record and the first record is not the correct one, press the ▶ button. Continue pressing ▶ until you find the right record.
5. When you have found the right record, click OK to shoot the frame and advance the film.

▶ **To shoot the rest of the documents in the group**

1. Position the document on the camera.
2. Click OK to shoot the frame. *DO NOT ENTER ANYTHING* in the screen.

What To Do Next

- If you want to search and view your database, go to Chapter 23.
- If you have VersaImage and want to scan images for your database, go to Chapter 11 to learn about images and Chapter 12 for instructions on scanning your film.

Indexing Images 19

VersaImage has a very powerful and versatile image indexing module. Images may be scanned from microfilm or paper or imported from another system through the **Image Import** function. When images are scanned or imported, the VersaImage creates an “empty” record for each image or folder and places the image or folder in a to-be-indexed list. When an image is indexed, it is deleted from the list.

Through the image indexing module, you can enter index records from scratch or associate images with records that have already been entered. Functions are available to deskew, crop, and rotate images and to page through images without indexing them. “Advanced” functions allow you to build file folders as you index and read bar-coded data into your database.

> ***Note:*** *VersaImage also has a* ***Index Folders and Scan*** *function that allows you to scan and index individual folders in one step. Instructions are given in Chapter 21.*

Starting the Image Indexing Function

Before you can index your images, you must select the database to be indexed and the batch of images you want to index. Images scanned from paper will be in folders beginning with BCH. Images scanned from film will be in folders starting with ROLL.

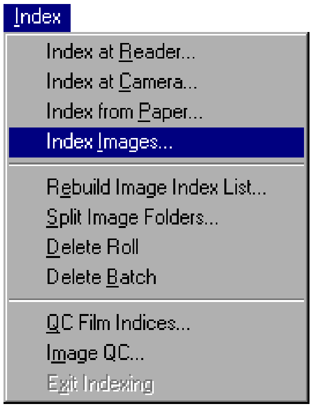
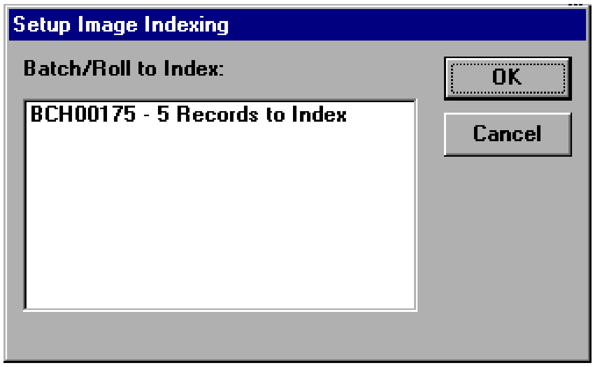

Index
Index at Reader...
Index at Camera...
Index from Paper...
Index Images...
Rebuild Image Index List...
Split Image Folders...
Delete Roll
Delete Batch
QC Film Indices...
Image QC...
Exit Indexing

Fig. 19.1. **Index** menu

▸ To start indexing images

1. Select **Open Database** from the **File** menu.
2. Select the database you want to index from the **Open** dialog box. The main database screen will appear.
3. Select **Index Images** from the **Index** menu (fig. 19.1). The **Setup Image Indexing** dialog box (fig. 19.2) will appear. All batches associated with the database that contain *non-indexed* records will be listed in the box.


Setup Image Indexing
OK
Cancel

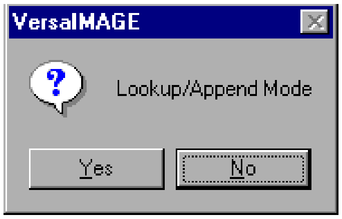
Batch/Roll to Index:

BCH00175 - 5 Records to Index

Fig. 19.2. **Setup Image Indexing** dialog.

4. Select the roll or batch you want to index and click OK:

- If you have not set your **Indexing Setup** parameters yet for this database, the **Indexing Setup** dialog box will be displayed. Change the default settings if necessary and click OK. The **Lookup/Append** message will appear (fig. 19.3).
- If you have already set your **Indexing Setup** parameters, the **Lookup/Append** message will appear (fig. 19.3) immediately.



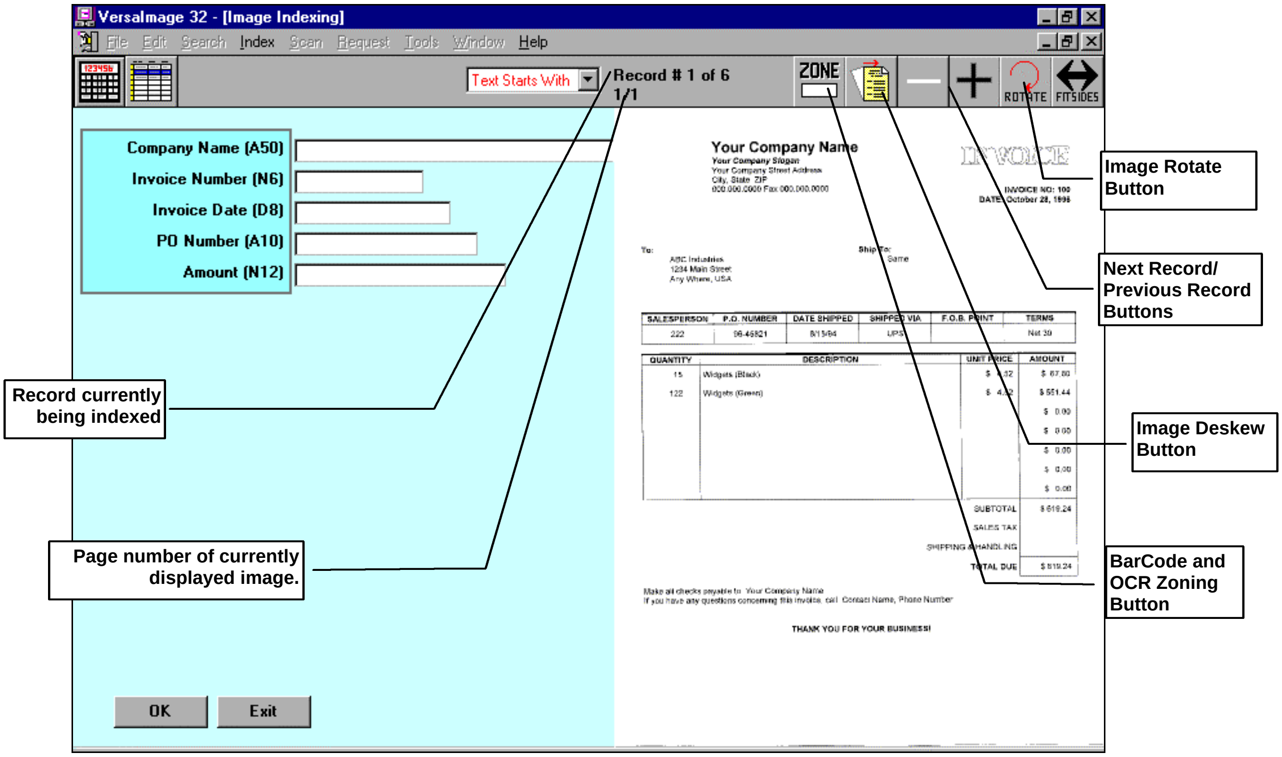
Lookup/Append Mode

Fig. 19.3. **Lookup/Append** message box

5. Select your **Lookup/Append** mode option:
    - If you are entering your records from scratch, click No.
    - If the records for your images are already in the database, click Yes.
6. The screen for indexing your images (fig. 19.4) will appear.

Using the Image Indexing Screen

The image indexing screen will contain all of the fields you defined for your records except for the **Roll**, **Frame**, and **Image Address** fields. The first page of the first record to be indexed will appear on the screen. A special tool bar at the top of the screen contains the record and page number information and buttons that perform special indexing functions. You will be using these buttons to perform some of the functions described in this chapter.



Record # 1 of 6
1/1

Company Name (A50)
Invoice Number (N6)
Invoice Date (D8)
PO Number (A10)
Amount (N12)

Image Rotate Button

Next Record/ Previous Record Buttons

Image Deskew Button

BarCode and OCR Zoning Button

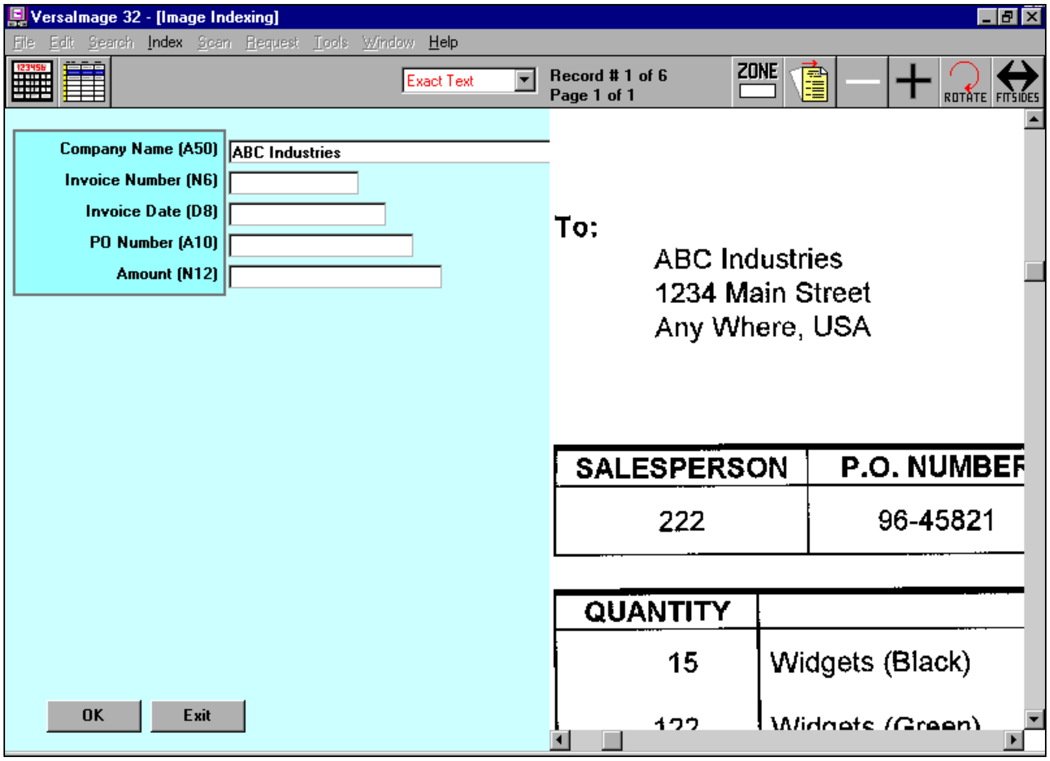
Record currently being indexed

Page number of currently displayed image.

Fig. 19.4. **Index Images** indexing screen

Setting up the data locations

When you index your first record for an indexing session, you tell VersaImage where the information you need to view for each field is located. For subsequent records, VersaImage will zoom into these areas automatically.


VersaImage 32 - [Image Indexing]
File Edit Search Index Scan Request Tools Window Help
Exact Text
Record # 1 of 6
Page 1 of 1
ZONE
ROTATE
FITSIDES
OK
Exit

Company Name (A50): ABC Industries
Invoice Number (N6):
Invoice Date (D8):
PO Number (A10):
Amount (N12):

To:
ABC Industries
1234 Main Street
Any Where, USA

SALESPERSON	P.O. NUMBER
222	96-45821

QUANTITY	
15	Widgets (Black)

Fig. 19.5. Image indexing screen with zoomed image

To set up your data locations

1. Index each field in the first record as follows:
   - Move the cursor to the database field.
   - Position your mouse pointer on the image in the place where the information you are indexing appears on the document.
   - Hold your left mouse button down and draw a box around the area that contains the information. Then release the button and VersaImage will zoom in on the area so you can read the information (fig. 19.5).
   - Enter the data in the field and press Tab or Enter to move to the next field. The image will return to normal display size so you can find the area for the next field.
2. When you finish all the fields in the record, click OK or press F8 and the system will display the next record to be indexed.

> ***Note:** If you press* Enter *from the last field in the record, you will see a message that says "**OK to File?**" To go on to the next record, click* Yes *or press* Enter *again.*

To index the other records for the batch

1. When a record is displayed, the cursor will be on the first field and the system will zoom in the data for the first field.
2. Enter your data into the screen fields. As you move from field to field, the program will "remember" the area you zoomed in on before and will automatically zoom in on it again.
3. When you finish with the record, click OK or press F8 to display the next one.

You do not need to index all the images in a batch at one sitting. You may quit whenever you want. To quit, click Exit and you will exit from the index screen. The next time you select the batch for indexing, the system will start with the next non-indexed record. However, it will not remember your data locations. You will need to redefine them each time you index.

Zooming in and out

In addition to zooming in and out on the data for a field, you can zoom in and out from the standard full-page display to a full screen display. For folder files and multi-page TIFF files, you can also display "thumbnails" of all the images in the group.

▸ To switch between full page and full screen

1. To change from full page to full screen, do either of the following:
    - Click your left mouse button.
    - Click FITSIDES on the tool bar.
2. To change from full screen to full page, do either of the following:
    - Click your left mouse button.
    - Click FIT WIN on the tool bar.

▸ To switch between thumbnails and full page

1. To display thumbnails, press your right mouse button and you will zoom out (see fig. 19.6).
2. To display a thumbnail as a full page, move the mouse pointer to the image you want to see and click your left mouse button.

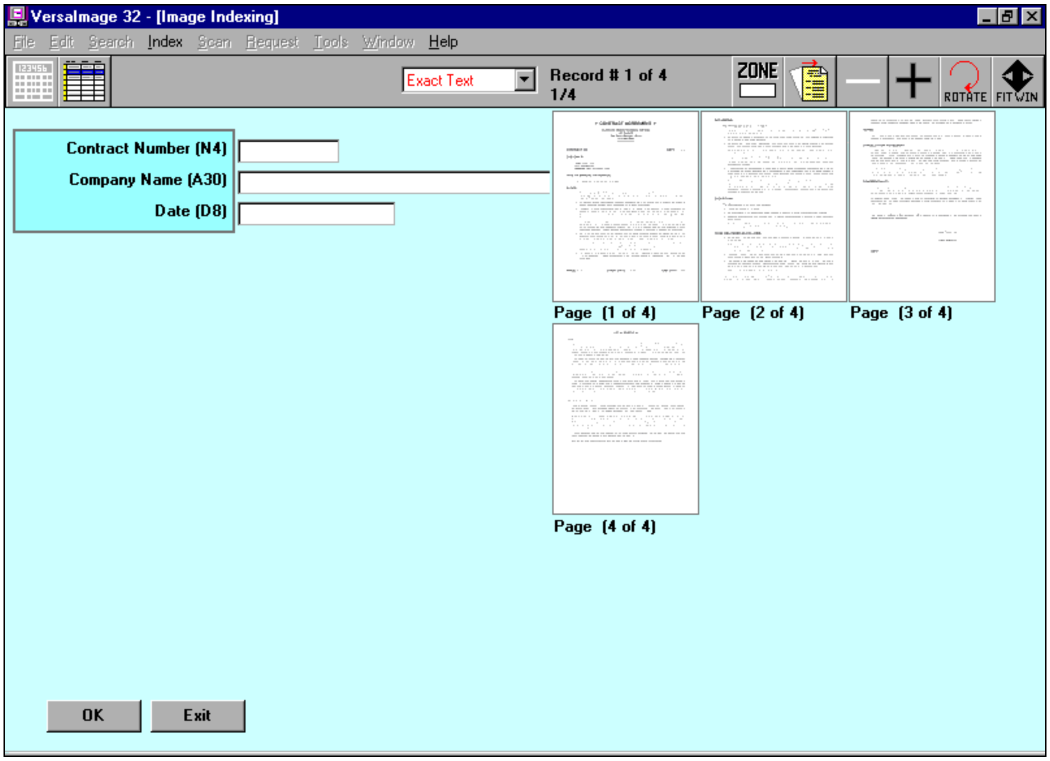

VersaImage 32 - [Image Indexing]
File Edit Search Index Scan Request Tools Window Help
Exact Text
Record # 1 of 4
1/4
ZONE
ROTATE
FIT WIN
Contract Number (N4)
Company Name (A30)
Date (D8)
Page (1 of 4)
Page (2 of 4)
Page (3 of 4)
Page (4 of 4)
OK
Exit

Fig. 19.6. Image indexing screen with thumbnails. Thumbnails are displayed for folder files and multi-page TIFFs

Paging functions

While you are indexing images, you can view images without indexing them, skip images, view previous records you have indexed during this indexing session, and copy index information from the previous record.

▶ **To skip images while you are indexing**

1. To skip an image, click + on the tool bar without entering any data in the record you want to skip. The image will be left in the to-be-indexed list.
2. When you come to an image you want to index, enter the data for that image. Click OK or press F8 to “file” the record and move to the next image.

▶ **To view images without indexing**

1. Click + on the tool bar to display the next image in the list. Do not enter any data in the record.
2. To back up, click − on the tool bar. Do not enter any data in the record.

> ***Note:*** *You can go forward and backward through as many images as you want without indexing them as long as you do not enter data. If you enter any data for an image, it will be indexed.*

▶ **To look at records you’ve indexed previously**

1. Click − on the tool bar to back up to the previous image. The data you entered for the record will be displayed along with the image. You can back up through as many records as you want.
2. To return to the image you left, click + on the tool bar to move forward until you reach the image.

▶ **To copy data from the previous record**

1. Press F9.
2. The data in the previous record will be copied and you will automatically move on to the next record.

Entering Records from Scratch

When you index from scratch, you enter data for each field in the record. If data is not available for a particular field, you can skip it and enter it later. When you file the record and display the next image, the data for the previous record will remain in the fields so that you won’t have to reenter duplicate information, such as dates or company names if they happen to be the same. You can just change the information that is different.

> ***Note:*** *Before you start indexing your images, make sure you have read the information above on using the screen. The instructions below assume that you are familiar with this information.*

Indexing single pages

When you index single pages, you create a database record for each image. Each image in the batch will be displayed on the screen for you to view.

▶ **To index single pages**

1. Index each field in the first record as follows:
   - Move the cursor to the database field.
   - Select the area of the image that contains the data you need for the record and release the mouse button to zoom in.
   - Enter the data in the field and press Tab or Enter to move to the next field. The image will return to normal display size so you can select the area for the next field.

2. When you finish all the fields in the record, click OK or press F8 and the system will display the next image to be indexed.
3. For the rest of the records, do the following:
    - When the image is displayed, the program will zoom in on the data for the first field.
    - Enter your data in the screen fields. As you move from field to field, the program will automatically zoom in on the area that contains the information.
    - When you finish with the record, click OK or press F8 to file the record and display the next image.
4. When you finish indexing, click Exit.

Reminder: *Don't forget that you can skip images you don't want to index by pressing* +.

Indexing folders and multi-page TIFFs

When you index folders and multi-page TIFFs, the page counter on the tool bar will display the number of images in the set. The program assumes that the information you need for your index record is on the first page. For that reason, it displays that image as a full page with the blank record. If the information is on another page, you can zoom out and select the page you want from the thumbnails.

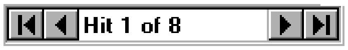
▸ To index folders and multi-page TIFFs

1. Index each field for the first record as follows:
    - Move the cursor to the screen field.
    - If the image that contains the information for the field is not the one displayed, click your right mouse button to zoom out to thumbnail view, move the pointer to the correct image, and click your left mouse button.
    - Select the area of the image where the data for the field is located and release the mouse button to zoom in.
    - Enter the data in the field and press Tab or Enter to move to the next field. The image will return to normal display size so you can select the area for the next field.
2. When you finish all the fields in the record, click OK or press F8 to file the record. The system will display the first image for the next record.
3. For the rest of the records, do the following:
    - When the record is displayed, the program will zoom in on the first image and display the data for the first field. If this is not the right page, click your right mouse button to zoom out and move your mouse pointer to the correct thumbnail. Click your left mouse button and the program will zoom in on your data.
    - Enter your data in the screen fields. As you move from field to field, VersaImage will zoom in on the area you selected for the field on the current page. If your data is on a different page, zoom out to thumbnail view and select the correct one. VersaImage remembers the area of the page, not the position of the document in the set.
    - When you finish with the record, click OK or press F8 to file the record.
4. When you finish indexing, click Exit.

Reminder: *Don't forget that you can skip images you don't want to index by pressing* +.

Associating Images with Existing Records

To associate images with existing records, you use **Lookup/Append** mode. When you index in **Lookup/Append** mode, you enter a value in the first field only. The system then looks for all matching records and displays them for you to select from. The number of hits found for the value you entered in the first field will be displayed at the bottom of the screen:



The first record in the group will be displayed in the screen fields. You can use the buttons in the hit bar to page through the records (see Chapter 16). When you select and file record, the image address is placed in the record and the "empty" record that was created for the image when it was imported or scanned is removed. The screen will be cleared after the record is filed so you can enter the key field for your next image.

Indexing single pages in Lookup/Append mode

When you index single pages in **Lookup/Append** mode, you match each image to a record. Each image in the batch will be displayed on the screen for you to view.

To index single pages in lookup append mode

1. Move the cursor to the first field in the record and do the following:
   - Select the area on the image where the information for the first field is located and release the mouse button to zoom in on it.
   - Enter the value in the first field and press Tab or Enter to display the first matching record.
   - If there is more than one matching record, page through the records with the ▶ on the hit bar to find the one you want.
2. Click OK or press Enter to associate the record with the image and the system will display the next image to be indexed.
3. For the rest of the records, do the following:
   - When the record is displayed, the program will zoom in on the data for the first field.
   - Enter the data in the field and press Tab or Enter.
   - If there is more than one matching record, use ▶ on the hit bar to page to the record you want to associate the image with.
   - Click OK or press Enter to associate the record with the image and display the next image.
4. When you have finished indexing, click Exit.

Indexing folders and multi-page TIFFs in Lookup/Append mode

When you index folders and multi-page TIFFs in **Lookup/Append** mode, all images in the group are associated with the same record. VersaImage assumes that the information you need for your first field is on the first page and displays the first image as a full page with the blank record. If the field is on another page instead, you can zoom out and switch to the correct page.

To index folders and multi-page TIFFs in Lookup/Append mode

1. Index the first record as follows:
   - If the image that contains data for the first field is not the one displayed, click your right mouse button to zoom out to the thumbnails, move your mouse pointer to the correct image, and click your left button.
   - Move the cursor to the first field in the record.

- Select the area where the information you need for your first field is located and release the mouse button to zoom in.
- Enter the data in the field and press Tab or Enter to display the first matching record.
- If there is more than one matching record, page through the records with ▶ on the hit bar to find the one you want.

2. Click OK or press Enter to associate the record with the images and the system will display the first image in the next set.
3. For the rest of the records, do the following:
   - When the record is displayed, the program will zoom in on the area you selected for the first field.
   - If this is not the correct image, click your right mouse button to zoom out to the thumbnails, select the correct page, and click your left mouse button to zoom in again.
   - Enter the data in the field and press Tab or Enter to display the first record for the value you entered.
   - If there is more than one matching record, use ▶ on the hit bar to page to the record you want to associate the image with.
   - Click OK or press Enter to associate the record with the folder.
4. When you have finished indexing, click Exit.

Fixing Images

While you are indexing, you can make some minor "fixes" to your images. These include cropping, rotating and deskewing. More extensive corrections can be applied from the search screen (see Chapter 23)

Cropping images

Cropping removes extraneous area from around an image. This is particularly useful when indexing images scanned from microfilm, where a large amount of background "noise" may be captured with an image. The crop option that you want to use during indexing an indexing session must be selected before you start indexing. This option stays in effect for your entire indexing session. Fig. 19.7 illustrates the available options.

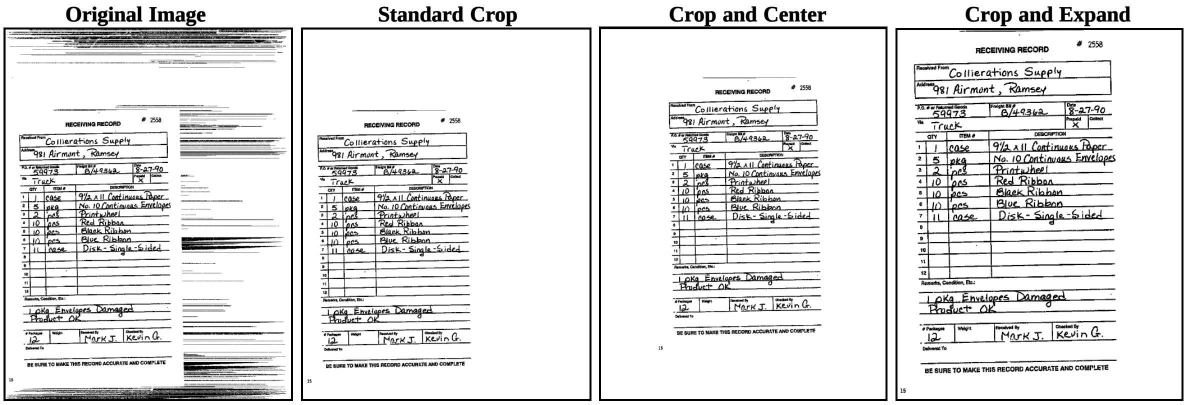
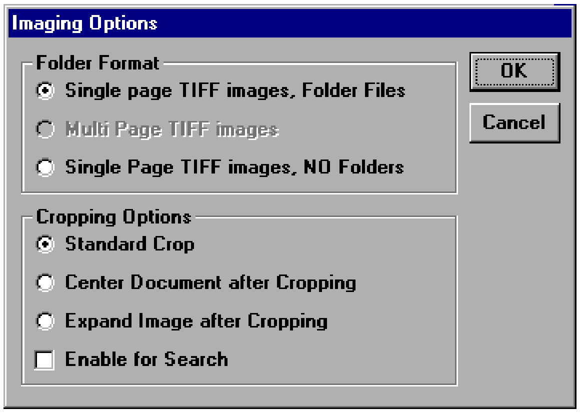

Original Image **Standard Crop** **Crop and Center** **Crop and Expand**

Fig. 19.7. Crop options

▶ To select your cropping option

1. Select **Preferences** from the **File** menu.

2. Select **Imaging Options** from the **Preferences** menu. The **Imaging Options** dialog box will appear (fig. 19.8).


Imaging Options

Folder Format
● Single page TIFF images, Folder Files
○ Multi Page TIFF images
○ Single Page TIFF images, NO Folders

Cropping Options
● Standard Crop
○ Center Document after Cropping
○ Expand Image after Cropping
☐ Enable for Search

Fig. 19.8. **Imaging Options** dialog

3. Select the crop option that best suits your needs (see fig. 19.7).
4. To enable cropping during searches as well as during indexing, check the **Enable for Search** option.
5. When you are finished, click OK and the window will close.

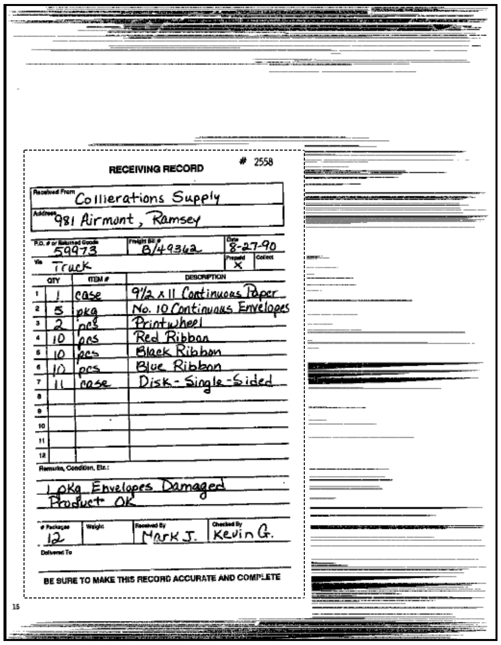
▸ To crop an image

1. Press Ctrl and hold your left mouse button down.
2. Draw a box around the area you want to crop (fig. 19.9). The area inside the box will remain after the crop and the area outside the box will be removed.
3. Release the mouse button to crop the area.

> *Note: If you make a mistake, press the* UNDO *button and start over.*

Deskewing and rotating images

The deskewing and rotating functions allow you to correct misoriented images. The **Rotate** option rotates images that were scanned in the wrong orientation (e.g., upside down) in 90-degree increments. The **Deskew** option straightens a crooked image. It can correct up to 20 degrees of image skew.


RECEIVING RECORD # 2558

Received From Collierations Supply
Address 981 Airmont, Ramsey
P.O. # or Returned Goods 59973
Freight Bill # B/49362
Date 8-27-90
Via Truck
Prepaid X
Collect

	QTY	ITEM #	DESCRIPTION
1	1	case	9½ x 11 Continuous Paper
2	5	pkg	No. 10 Continuous Envelopes
3	2	pcs	Printwheel
4	10	pcs	Red Ribbon
5	10	pcs	Black Ribbon
6	10	pcs	Blue Ribbon
7	11	case	Disk - Single - Sided
8			
9			
10			
11			
12			

Remarks, Condition, Etc.:
1 pkg Envelopes Damaged
Product OK

Packages 12
Weight
Received By Mark J.
Checked By Kevin G.
Delivered To

BE SURE TO MAKE THIS RECORD ACCURATE AND COMPLETE

15

Fig. 19.9. Cropping an image

▸ To rotate an image

1. Do either of the following:
   - Click ROTATE on the tool bar.
   - Press F11.
2. The image will rotate 90° to the right.
3. Continue clicking ROTATE or pressing F11 until the image is in the correct orientation. Each time you click, the image will rotate 90°.

▸ To deskew an image

1. Do either of the following:
   - Click 📋 on the tool bar.
   - Press F10.
2. The image will be deskewed.

Building Folder Files As You Index

VersaImage allows you to build folder files from images that are scanned as either single-page or multi-page TIFF files. This is particularly useful in the following cases:

- In batches where most documents are single page but the occasional document spans more than one page (e.g., the occasional multi-page invoice in a set of invoices that are primarily single-page).
- For batches of imported images that should be grouped in folders but did not have a naming convention that allowed VersaImage to build them automatically.
- To group images scanned from roll film in single-page mode into folders.
- For batches of images that were scanned in single-page mode by mistake.
- For batches where you want to group multi-page TIFF images into folders.

▸ To create or add to a file folder

1. Press F12 to append the current image to the previous image:
   - If the previous image was not in a folder, a new folder file will be created and both images will be added to the folder.
   - If the previous image has already been added to a folder, the current image will be added to the same folder.
2. After you press F12, the next image in the to-be-indexed list will appear. Do one of the following:
   - Press F12 to add the image to the folder.
   - Enter data for the record to either start a new folder or index the image as a single image.

Note: *If you make a mistake, you can remove the image from the folder and place it in the to-be-indexed list again through the* ***QC Image*** *function (see Chapter 30).*

Reading Bar Codes

If you have documents with bar-coded data, a special feature of VersaImage allows you to create your index records automatically by setting up bar code zones. OCR recognition is also available. The system reads these zones and places the values in the fields you specify. Once you have defined zones for a database, they will remain in effect until you remove them.

When you set up bar code zones, you can specify the way you want to handle an associated field if the bar code is not recognized:

Allow Manual Entry	Stops and lets you enter the data manually.
Place ~ into Database	Places a ~ in the field. You can later return any records with a ~ in a field to the to-be-indexed list through the **Rebuild Index List** function. You can also search specifically for a ~ in your database records and fill the field in.

Copy Previous Record Copies the data for the field from the previous record.

> ***Note:*** *Because VersaImage will stop processing whenever the value read is invalid for the field, we recommend that your bar code fields be alphanumeric so an error will not occur when a ~ is placed in the field.*

Because bar code processing is automatic, it can only be used on documents with bar codes in predictable locations. Do not use it for databases with folders or multi-page TIFFs unless all the bar code data is located on the first page. The bar code function will only read the first page.

Setting up zones

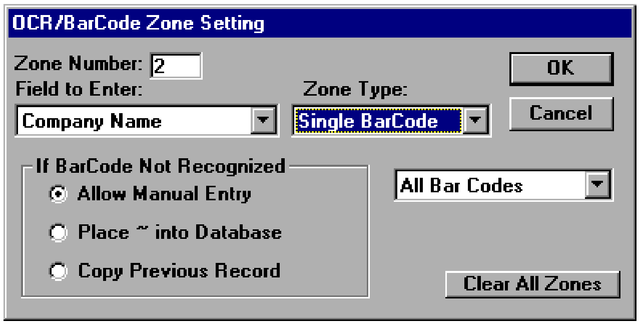
You can set up single bar-code zones, multi bar code zones or OCR zones:

- Single bar code zones contain one bar code each. They are used when each bar code on the page is to be indexed to a different field in the record.
- Multi bar code zones contain multiple bar code for the same field. VersaImage will create a record for each bar code and link the displayed image to each.
- OCR zones contain text to be “scanned” for information.

When you set up a zone with multiple bar codes, you can optionally include a bar code count zone that contains the number of bar codes in your zone. If you include a count zone and VersaImage can’t find or read all the bar codes, it also creates records for the missing codes and places a ~ in the record. If there is no count zone, it will only create records for the codes it can read.

To set up single bar code zones

1. Click ZONE on the tool bar. The button will change to ZONE MODE and the cursor will change to Z.
2. Draw a box around the area where your bar code is located. The **OCR/BarCode Zone Setting** dialog (fig. 19.10) will appear.



Zone Number: 2
Field to Enter: Company Name
Zone Type: Single BarCode
All Bar Codes
If BarCode Not Recognized
● Allow Manual Entry
○ Place ~ into Database
○ Copy Previous Record

Fig. 19.10. **OCR/BarCode Zone Setting** dialog

3. Select the field you want the value of this bar code placed in from the **Field to Enter** drop-down list.
4. Select **Single Bar Code** as the **Zone Type** from the drop-down list.
5. Select the type of bar code from the other drop-down list. The default is **All Bar Codes**.
6. Select the action you wish to take **If BarCode Not Recognized**.
7. Click OK.

> ***Note:*** *If you have more than one bar code zone, you must use the same* ***If BarCode Not Recognized*** *option for all zones.*

▸ To set up a bar code count zone

1. Click ZONE on the tool bar. The button will change to ZONE MODE and the cursor will change to Z.
2. Draw a box around the bar code that contains the number of bar codes for your multi-code zone. The **OCR/BarCode Zone Setting** dialog (fig. 19.10) will appear.
3. Select **Bar Code Count** as the **Zone Type** from the drop-down list. All other fields in the box will be ignored.
4. Click OK.

▸ To set up a multi bar code zone

1. Click ZONE on the tool bar. The button will change to ZONE MODE and the cursor will change to Z.
2. Draw a box around the area that contains the bar codes. The **OCR/BarCode Zone Setting** dialog (fig. 19.10) will appear.
3. Select the field where you want the value for the bar codes in the zone placed from the **Field to Enter** drop-down list.
4. Select **Multi Bar Code** as the **Zone Type** from the drop-down list.
5. Select the type of code from the other drop-down list. The default is **All Bar Codes**.
6. Select the action you wish to take **If BarCode Not Recognized**.
7. Click OK.

▸ To set up OCR zones

1. Click ZONE on the tool bar. The button will change to ZONE MODE and the cursor will change to Z.
2. Draw a box around the area that contains the information to be read. The **OCR/BarCode Zone Setting** dialog (fig. 19.10) will appear.
3. Select the field where you want the value to be placed from the **Field to Enter** drop-down list.
4. Select **OCR** as the **Zone Type** from the drop-down list. The code type field will be ignored.
5. Select the action you wish to take **If BarCodeNot Recognized**.
6. Click OK.

Modifying zones

You can change your bar code definitions, remove the bar code zones from your document, change the size of a zone, or move the zone to a different position.

Note: *You cannot remove individual bar code zones.*

▸ To modify bar code zone definitions

1. Click ZONE on the tool bar. The button will change to ZONE MODE and the cursor will change to Z.
2. Double-click on the zone you want to edit.
3. Change whatever fields you need to change.
4. Click OK.

▸ To remove the bar code zones

1. Click ZONE on the tool bar. The button will change to ZONE MODE and the cursor will change to Z.
2. Double-click on any zone.
3. Click the Clear All Zones button.

▸ To move a bar code zone

1. Place your mouse pointer on the zone.
2. When the cursor changes to ✥, drag the zone to the new location.
3. After you move the zone, the **OCR/Bar Code Zone Setting** dialog will open in case you need to change the definition. Click OK to close the box.

▸ To resize a bar code zone

1. Place your mouse pointer on one of the four corners of the zone.
2. When the cursor changes to a diagonal arrow, drag the corner in or out to resize the box.
3. After you resize the zone, the **OCR/Bar Code Zone Setting** dialog will open in case you need to change the definition. Click OK to close the box.

Processing

Processing, once started, is automatic. It will not stop until it completes the batch unless an error occurs or you have set it to stop for manual entry when a bar code is not recognized.

▸ To process a batch with bar code zones

1. After you have defined your zones, click the OK button at the bottom of the screen. The **Start Processing** message box will appear.
2. Click Yes to start processing.

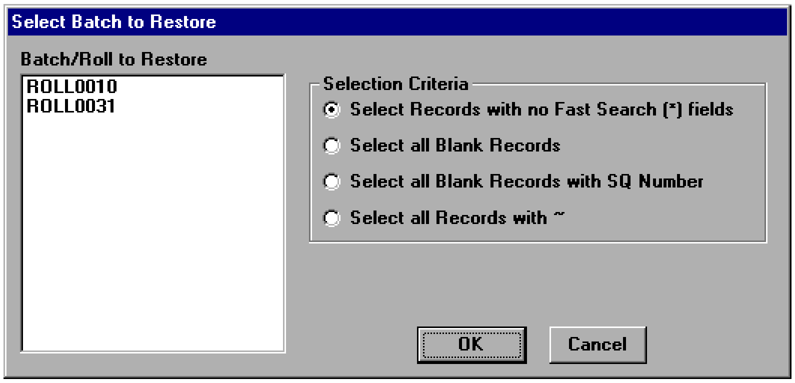
> ***Note:** If you select **Index Images** on a database that already has bar code zones set up, the **Start Processing** message will be displayed immediately. If you want to make changes to your zones before processing, select* No.

Rebuilding the To-Be-Indexed List

There are times when you will need to reindex a batch of images that were not indexed correctly. If you index with bar codes, for example, can have VersaImage place ~ in the record whenever it doesn't recognize the bar code and then have VersaImage return all records with ~ in them to the list. Blank records and records with missing fast search data can also be restored.

▸ To restore the image index list

1. Select **Rebuild Image Index List** from the index menu. A dialog box (fig. 19.11) for entering your restoration criteria will appear.



Select Batch to Restore

Batch/Roll to Restore

ROLL0010
ROLL0031

Selection Criteria

● Select Records with no Fast Search (*) fields
○ Select all Blank Records
○ Select all Blank Records with SQ Number
○ Select all Records with ~

Fig. 19.11. Dialog box for rebuilding the to-be-indexed list

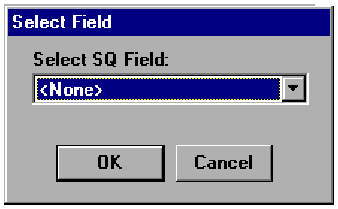
2. Select the batch or roll you want to restore.

3. Select the criteria for selecting the images to restore from the **Selection Criteria** options:

Select Records with no Fast Search Fields	Includes images for records that do not contain data in any of the fast search fields.
Select all Blank Records	Includes images for all blank records.
Select all Blank Records with SQ Number	Includes images for all blank records with no SQ number. This option is used for Canon RFS1000 scanners with SQ feeders. If you capture the SQ number, you can use this option.
Select all Records with ~	Includes images for all records that contain a ~ in any field.

4. Click OK.

5. If you selected **Select all Blank Records with SQ Number**, a dialog box will appear so you can select the field that contains the SQ number (fig. 19.12):
   - Click ▼ to display the drop-down list containing the fields in your record.
   - Select the field that contains the SQ number.
   - Click OK.



Select SQ Field: <None>

Fig. 19.12. Selecting the SQ field

What To Do Next

For instructions on searching and viewing your database, go to Chapter 23.

Indexing from Paper

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Although it is not usually necessary, you can enter index records from paper without associating them with film or images. This can be of use in special circumstances, such as entering information in the master record of a master reference database or in environments where index entry and scanning are done in different places. Because you can also enter roll and frame numbers with this function, you may also find it convenient for entering records for roll film that were written to an error file during import or for maintaining a film index database when your reader is not computer-controlled.

Getting Ready to Index

▸ To start an index

1. From the **File** menu, select **Open Database**.
2. Select the database you want to index from the **Open** dialog box. The database search screen will appear.
3. Select **Index from Paper** from the **Index** menu (fig. 20.1):
   - If you have already defined your indexing setup parameters for this database, the **Lookup/Append** dialog box (fig. 20.2) will appear.
   - If you have not yet defined your indexing setup parameters, the **Indexing Setup** dialog will be displayed (see Chapter 16). Change the defaults if you want. Then click OK and the **Lookup/Append** message box (fig. 20.2) will appear.
4. Select your **Lookup/Append** option:

No	To enter your records from scratch. This is the usual mode for paper indexing.
Yes	To manually add roll and frame numbers to existing records.

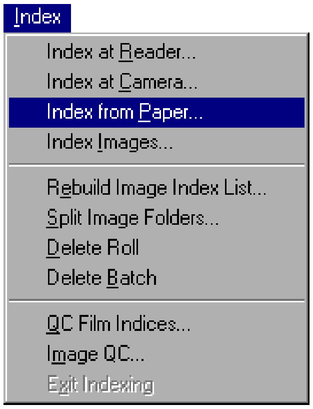


Fig. 20.1. **Index** menu

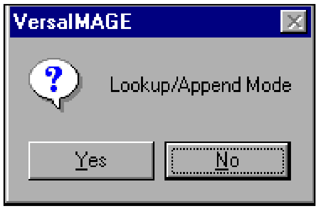


Fig. 20.2. **Lookup/Append** dialog

> ***Note:*** *Although **Lookup/Append** mode is technically available, it is not usually useful for paper indexing as there is no real reason to access previously entered records unless you need to manually add roll and frame numbers. In general, changing information in existing records is much simpler through the search screen and roll and frame number corrections should be done through the QC function.*

The Index Screen

After you enter your setup parameters, the screen for entering your records will appear. It looks much like the main database screen and contains all the fields you defined for your records except **Image Address**. Unlike other index screens, roll and frame fields are included if they have been defined for the record. The fields will appear in the order you specified in your database screen, unless you changed them in the **Index Setup** dialog.

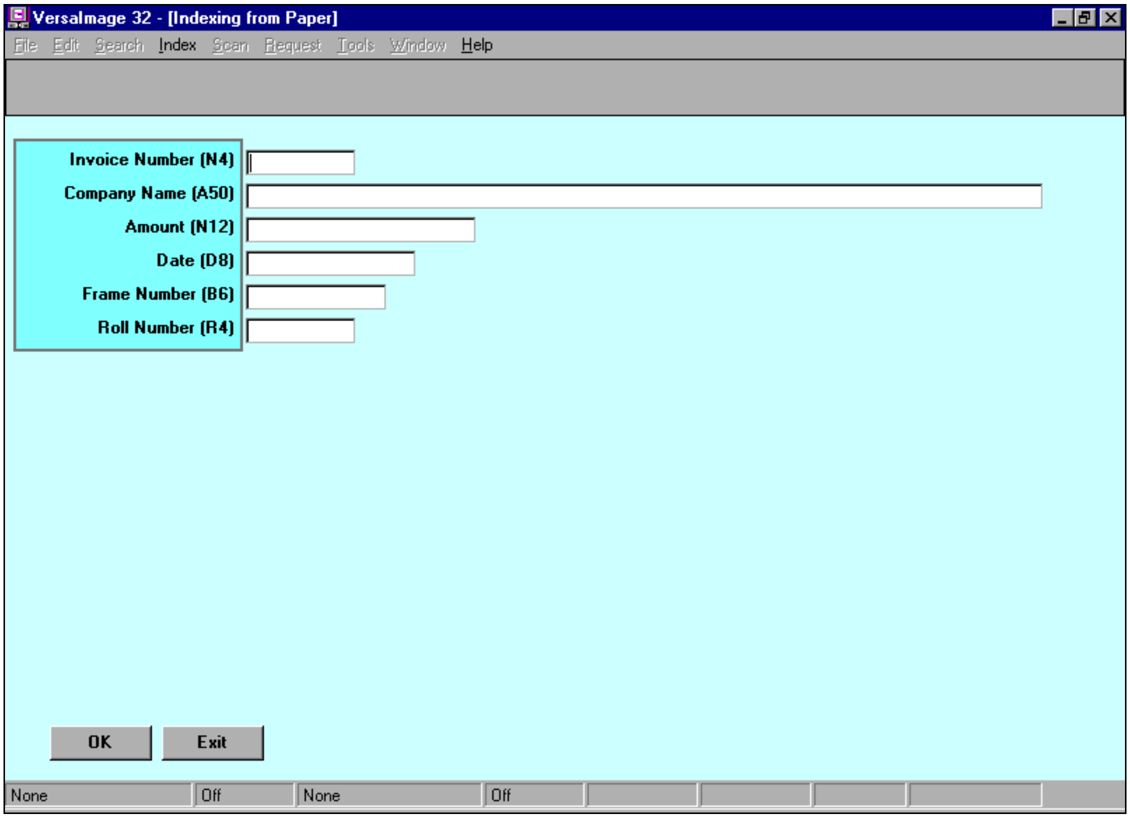

VersaImage 32 - [Indexing from Paper]
File Edit Search Index Scan Request Tools Window Help
Invoice Number (N4)
Company Name (A50)
Amount (N12)
Date (D8)
Frame Number (B6)
Roll Number (R4)
OK
Exit
None
Off
None
Off

Fig. 20.3. Indexing screen for paper indexing

Entering Records from Paper

When you index records separately from film or images, you are simply creating new records that will later be associated with film or images. If you are entering records that will later be indexed to a roll of film, do not fill in the roll and frame numbers. Roll and frame numbers should only be entered when you are adding missing records to a database that has already been indexed to a roll of film or creating a database for manual use in that will not be indexed to film through the computer. If you are already familiar with other indexing methods, you will find that indexing from paper is no different from entering records while you are indexing film or images, except that you have no visual clues that you are entering a new record.

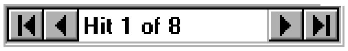
▸ **To enter your records from scratch**

1. Fill in the fields in the record.
2. Click OK or press F8 to file the record.

After you file the record, the data in the record will remain in the fields so that you won't have to enter duplicate information, such as dates or company names if they happen to be the same. You can just change the information that is different.

Using Lookup/Append Mode with Paper Indexing

If your index records are already in the database and you need to enter roll or frame numbers manually, you can use **Lookup/Append** mode. In **Lookup/Append** mode, you enter a "key" value in the first field. The system then looks for matching records for your key. The number of records it finds will be displayed in the hit bar at the bottom of the screen:



The first record found will be displayed on the screen. You can use the buttons on the hit bar to page through the records if necessary to find the one you want (see Chapter 16 for a more detailed description of the hit bar).

Since your only reason to use **Lookup/Append** mode would be to add roll or frame numbers manually, your procedure in **Lookup/Append** mode will be somewhat different than for other modes of indexing you might be familiar with.

To enter records in Lookup/Append mode

1. Enter a value in the first field.
2. Press Tab or Enter. The number of matching records will be displayed in the hit bar at the bottom of the screen and the first record found will be displayed on the screen.
3. Use the buttons in the hit bar to page to the record you want if necessary.
4. Ignore the displayed message and either click your mouse on the field you want to enter data in or use Shift + Tab to back up to the field.
5. Enter your values.
6. Click OK or press F8 to file the record. The data you entered will remain on the screen but the rest of the record will be cleared.

Hint: *If you are using **Lookup/Append** to add roll and frame numbers, make sure you set your indexing order up so the frame number is last. That way, if your frames are on the same roll, you only need to* Shift + Tab *once to reach the frame field. The roll number from the previous record will remain in the field so you won't need to back up to enter it each time.*

What To Do Next

- For instructions on searching your database, go to Chapter 23.
- To associate images with the records you have entered, go to Chapter 11 to learn about placing images in your database. Then index the images to this database in **Lookup/Append** mode as instructed in Chapter 19.
- To associate the records you have entered with microfilm, go to Chapter 17 and index the film to these records in **Lookup/Append** mode.

Scanning and Indexing Folders in One Step

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The **Index Folder and Scan** function bypasses the batch scanning process. It allows you to place a complete file folder into the feeder of your paper scanner, scan the first page, index the folder, then automatically scan the rest of the folder. You can use this feature to either index new folders or add folders of documents to existing records. You can also use it for scanners without feeders (film scanners). However, you will need to use the **Scan Single** function (F5 key) to add the remaining pages to your folder.

> ***Note:*** *This method is a more efficient way than using* **Scan Single** *from the search screen to add pages to an existing folder if you have a large number of pages to add.*

This function is commonly used in hybrid systems to scan a microfiche jacket into an image folder, then add additional pages from paper to the image folder. It can also be used in reverse to scan paper into a file folder and then add microfilm or microfiche images to this folder. The latter method keeps new images at the top of the folder and older images towards the end of the folder.

Before you use this option, you should know how to scan images (Chapter 11) and index them (Chapter 19). The instructions in the chapter assume you know how to do both. All indexing functions that are available when you index images except F9 (copy previous record) and F12 (append existing image to folder) will work in **Index and Scan** mode. You can use the "zoom" feature to zoom in on the areas in the scanned image where the data for your fields are located. VersaImage will remember your data locations for subsequent scans until you exit **Index and Scan** with **Clear**.

Index and Scan operates in **Lookup/Append** mode. However, unlike standard **Lookup/Append** mode, it will allow you to place images in already existing folders. Standard **Lookup/Append** mode looks only for records without images while **Index and Scan** looks for all matching records. You can still enter new records in this mode if there are no hits found in the database. If you are appending images to existing records or want to do so if the record already exists, be sure to arrange your fields for indexing so that your "key" field appears first. If you are planning to enter new records only, make sure your first (key) field is unique (e.g., an invoice number or a case number as opposed to a company name) so VersaImage won't find any "hits."

Scanning a Folder with a Paper Scanner

For **Index and Scan** to work automatically with a paper scanner, you must select **Single page TIFF images, Folder File** as your scanning mode. Otherwise, it will assume you are using single images and will not scan the folder.

▸ **To scan paper images in Index and Scan mode**

1. Click **Imaging Options** on the **Preferences** menu and make sure that **Single page TIFF images, Folder Files** is selected.
2. Select **Setup Scanner** from the **Scan** menu and make whatever changes you need to the settings. If you know it is already set up correctly, you can skip this step.
3. Place the file folder to be scanned into your paper scanner.
4. Do one of the following to scan the first page:
    - Press the F2 key.

- Select **Index Folder and Scan** from the **Scan** menu.

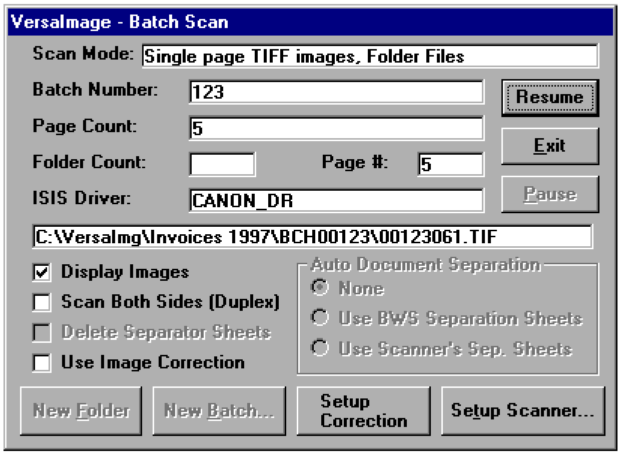
5. Use your mouse to select the area or the image where the data for the first field is located. VersaImage will zoom in on the area.

6. Enter the data in the first field and press Tab or Enter:

   - If there are any matching records, the number of hits will be displayed in the hit bar and the first matching record will appear on the screen. If there is more than one matching record, page through them with ▶ to find the one you want.

   - If there are no matching records, you will see a message telling you to press Tab to continue. Press Tab to leave the first field and enter the remaining fields for the record. You may use the **Zoom** features to zoom in on the image data.

7. Click OK or press F8 to file the record. VersaImage will display the **Batch Scan** dialog box (fig. 21.1) and scan the rest of the pages in the scanner automatically.


VersaImage - Batch Scan

Scan Mode: Single page TIFF images, Folder Files

Batch Number: 123

Page Count: 5

Folder Count:

Page #: 5

ISIS Driver: CANON_DR

C:\VersaImg\Invoices 1997\BCH00123\00123061.TIF

☑ Display Images

☐ Scan Both Sides (Duplex)

☐ Delete Separator Sheets

☐ Use Image Correction

Auto Document Separation

● None

○ Use BWS Separation Sheets

○ Use Scanner's Sep. Sheets

Fig. 21.1. **Batch Scan** screen during an **Index and Scan** operation

8. When it finishes, click Exit in the batch scan dialog and you will return to the search screen. The folder will be displayed for you to examine:

   - To scan another folder, press F2 or select **Index Folder and Scan** from the **Scan** menu.

   - To exit, click Clear to clear the record.

> ***Note:*** *If the batch scan dialog does not appear, you did not select* ***Single page TIFF images, Folder Files*** *as your scanning mode. You can still add additional pages manually with the* F5 *key.*

Scanning a Folder with a Film Scanner

When you scan film images in **Index and Scan** mode, you will need to use the **Scan Single** (F5) option to tell VersaImage which images to include in the folder.

▶ To scan film in Index and Scan mode

1. Select **Setup Scanner** from the **Scan** menu and make whatever changes you need to the settings. If you know it is already set up correctly, you can skip this step.

2. Position your film on the first frame for the folder.

3. Do one of the following to scan the first page:

   - Press F2 key.

- Select **Index Folder and Scan** from the **Scan** menu.

4. Use your mouse to select the area or the image where the data for the first field is located. VersaImage will zoom in on the area.

5. Enter the data in the first field and press Tab or Enter:

   - If there are any matching records, the number of hits will be displayed in the hit bar and the first matching record will appear on the screen. If there is more than one matching record, page through them with ▶ to find the one you want.

   - If there are no matching records, you will see a message telling you to press Tab to continue. Press Tab and enter the remaining fields for the record. You may use the **Zoom** feature to zoom in on the data in the image.

6. Click OK or press F8 to file the record. You will return to the search screen and the scanned image will be displayed.

7. For each subsequent frame you want to add to the folder, do following:

   - Press F5 or select **Scan Single** from the **Scan** menu.

   - The scanned image will appear on the screen and the reader will move to the next frame.

8. When you finish the folder, do either of the following:

   - To scan another folder, press F2 or select **Index Folder and Scan** from the **Scan** menu.

   - To exit, click Clear to clear the record.

Indexing a Master Reference Database

22

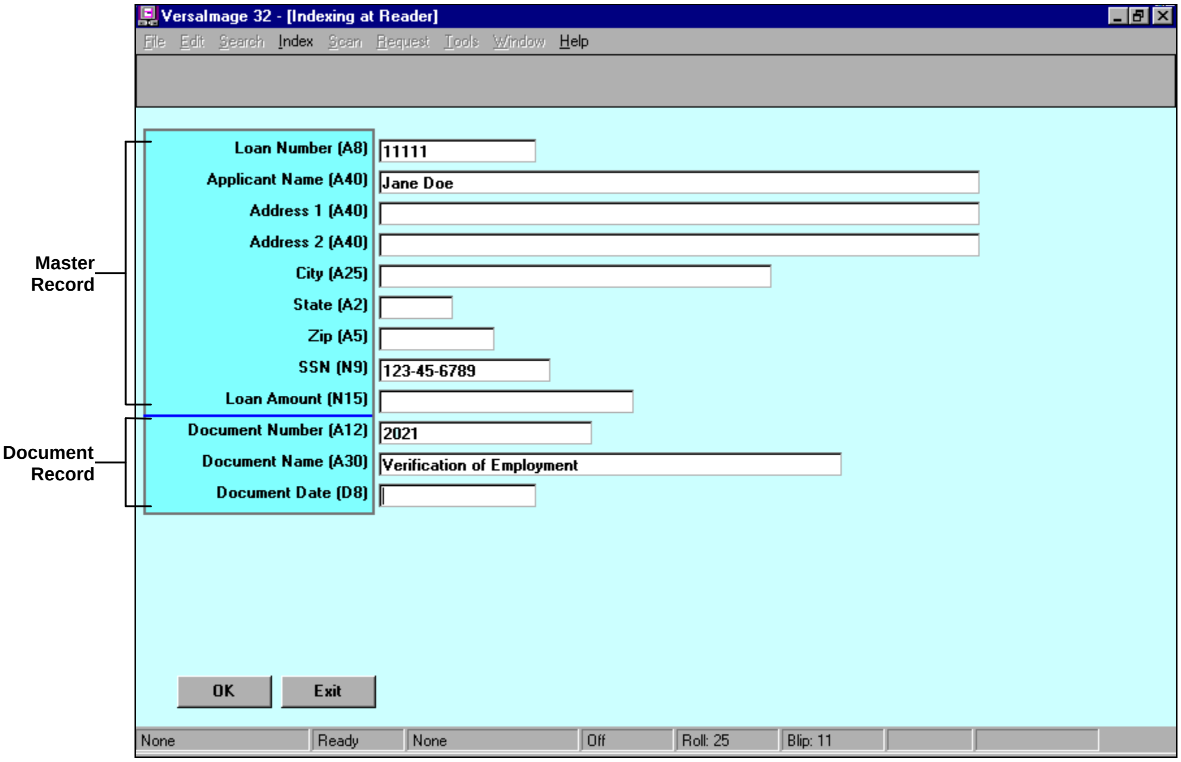
Master reference databases can contain both scanned images and indexed roll film indexed to the same master records. Unlike standard databases where most document groups are indexed sequentially, the master reference database allows you to index from several different sources to one master record. You might for example scan a batch of documents and index them at one sitting, creating master records for each as well as the individual document records, then import a set of images that were scanned by another department and link them to the same master records. Later you might index the documents on a roll of film to the same database and link them to the existing master records.

You don't have to add your master records at the same time you index your database records if this is not a convenient may to operate. If your master record data is already in a database, you could import the master records and then index your documents later. Or you might enter the records independently through the **Indexing from Paper** option (ideal if master record entry is completely separate from document indexing).

Since the basic "how tos" of indexing film and images are the same as for indexing in a standard database, you should first know how to create index records for film and/or scanned images for a standard database as discussed in Chapters 17—19 before you build a master reference index.

The Master Reference Index Screen

The master reference index screen (fig. 22.1) displays the fields in both the master record (from the master table) and the document record (from the reference table). The master record fields are located above the blue line and the document record fields are located below. Like other database filled in automatically as you index. The screen will differ slightly depending on whether you are indexing at the reader, at the camera or from images. For indexing at the reader, it will appear



Loan Number (A8): 11111
Applicant Name (A40): Jane Doe
Address 1 (A40):
Address 2 (A40):
City (A25):
State (A2):
Zip (A5):
SSN (N9): 123-45-6789
Loan Amount (N15):
Document Number (A12): 2021
Document Name (A30): Verification of Employment
Document Date (D8):

Fig. 22.1. The Master Reference Index screen. Fields above the blue line are master record fields. Fields below the blue line are document record fields

exactly as shown in fig. 22.1. For indexing at the camera, it will contain the tool bar for indexing at the camera with Trailer and Space buttons. If you are indexing images, it will display them on the right side of the screen and the tool bar buttons for image indexing will appear.

You can rearrange your fields for more convenient indexing through the **Indexing Setup** options (see Chapter 16) and apply table verify, auto increment and auto date features if you want. However, there are some caveats:

- The link field should be the first field on the screen. If it is not first in your database definition, be sure to place it there before you index. This field must always be entered. It must be present in the master record in order to index the document record. It is also the field that will be used to retrieve master records as you index if you are adding documents.
- Do not reorder fields between the two records. You may place the master record fields in any order among themselves and the document record fields likewise. But you cannot insert a document record field in the middle of the master record fields or vice versa.

Think of the fields as two separate database records and don't intermix them. Other than that, you may do whatever is convenient for indexing.

Hint: *If you are incorporating document type names as well as ID numbers, create a verification table for the names so you don't have to enter them over and over. If your ID numbers are long, you create a verification table for them also and link them to the same two- or three-letter code you use for the names. For example, you could use the code "LA" for both the loan application document ID and the document name.*

Indexing Roll Film at the Reader

Your procedure for indexing roll film for a master reference database depends on the type of film and also how the documents on the film relate to the master reference structure. In this section, we give you some standard scenarios. Based on these, you can make recommendation for how you want the film shot if you plan to use this type of database. Single-level film is usually pretty straight-forward. However, existing multi-level film may have been shot with scenarios that do not relate well to master reference indexing, in which case you will have to get creative. In worst case scenarios, you may want to index completely in page-level mode.

To start indexing roll film for a master reference database

1. Load your film.
2. From the **File** menu, select **Open Database**.
3. Select the database you want to index from the **Open** dialog box. The database search screen will appear.
4. From the **Index** menu, select **Index at Reader**. The **New Roll** dialog box will appear.
5. Enter the number of the roll you are indexing in the text box and click OK:
    - If you are indexing one- or two-level film, the **New Frame** dialog box will appear.
    - If you are indexing three-level film, a message will appear asking you if you want to index batch blips only. Select the type of index you want:

        Yes To enter records for batch blips only

        No To enter records for both batch and file blips

    After you make your selection, the **New Frame** dialog will appear.
6. In the **New Frame** dialog box, enter the number of the frame you want to start with:

- For single-level indexing, enter a whole number.
- For two-level indexing, enter the number of the file blip you are starting with, followed by **.0**.
- For three-level indexing, enter the number of the large (batch) blip followed by the file blip and **.0** for the page blip (e.g., **3.1.0**).

> ***Note:*** *If your reader/printer is set up to recognize page 1 as the file blip, enter .1 instead of .0 after the file number.*

7. Click OK and the reader will advance to that frame number. If you have not yet set your indexing options for this database, the **Indexing Setup** dialog (see Chapter 16) will appear. Change the defaults if you want and click OK.

> ***Note:*** *After you have indexed a database once, the last roll and frame you indexed will always be displayed for you in the **New Roll** and **New Frame** dialogs so that you can continue from where you left off by merely clicking* OK.

Indexing single-level film

Documents that are on single-level film can be either single-page (where you index each page), multi-page (where you index the first page of each document) or both.

▸ To index single-level film in a master reference database

1. Enter the link field and press Tab or Enter.
   - If there is already a master record for this link field, it will be displayed.
   - If no record is displayed, enter the data for the new record in the master record fields.
2. Enter the data for the index record in the document record field.
3. Click OK or press F8. The reader will advance to the next frame:
   - If this frame is a page of the document you just indexed, click OK or press F8 to move to the next frame without changing any data. Continue clicking OK or pressing F8 to advance the reader until you reach the first page of the next document.
   - If this frame belongs to the same master record but is a different document, return to step 2 and enter the data for the document.
   - If this frame belongs to a different master record, return to step 1 and enter the link field for the record.

Two-level film

Usually, when you index a master reference database, you will want to create a record for each document. With two-level film you will usually have one of two basic setups:

- Each file blip will generally signal a new document. Occasionally, however, a page blip may contain a frame that should be indexed as a document. In this case, you will do most of your indexing in file mode but may occasionally switch to page mode.
- Each file blip signals a different master record. Each page blip is a document page for the master record. Documents can be one-page or multi-page. In this case you will do your indexing in page mode unless there is only one document per master record.

If your film is mixed, you will have to switch back and forth between the two modes.

▸ To index two-level film where each file blip is a document

1. Enter the link field and press Tab or Enter.
   - If there is already a master record for this link field, it will be displayed.
   - If no record is displayed, enter the data for the new record in the master record fields.
2. Enter the data for the index record in the document record field.
3. Click OK or press F8. The reader will advance to the next file blip:
   - If this document belongs to the same master record but is a different document, return to step 2 and enter the data for the document.
   - If this frame belongs to a different master record, return to step 1 and enter the link field for the new record.

▸ To index two-level film where each file blip is a new document for a different master record

1. Enter the link field and press Tab or Enter:
   - If there is already a master record for this link field, it will be displayed.
   - If no record is displayed, enter the data for the new record in the master record fields.
2. Enter the data for the index record for the current frame in the document record field.
3. Click OK or press F8 and the reader will advance to the next file blip.

▸ To index two-level film in page-level mode

1. Press F7 to switch to page mode.
2. Enter the link field and press Tab or Enter:
   - If there is already a master record for this link field, it will be displayed.
   - If no record is displayed, enter the data for the new record in the master record fields.
3. Enter the data for the index record for the current frame in the document record field.
4. Click OK or press F8 and the reader will advance to the next frame:
   - If it is the start of a new document and you want to index the record, go to step 3 and enter the data for the record in the document record fields
   - If it is a part of the previous document and you do not want to index the record, press Enter to go to the next frame.
   - If it belongs to a different master record, return to step 2 and enter the link field for the master record.

Three-level film

Ideally, when three-level film is used with master reference databases, the batch blip will signal the start of a different master record and a file blip will signal the start of a document. While you are indexing, you can switch to page mode if you want to index individual frames.

▸ To index frames with batch blips

1. Enter the link field and press Tab or Enter:
   - If there is already a master record for this link field, it will be displayed.
   - If no record is displayed, enter the data for the new record in the master record fields.

2. Enter the data for the document in the current frame in the document record field.
3. Click OK or press Enter and the film will advance to the first file blip.

▸ To index frames with file blips

1. Enter the data for the document associated with the file blip in the document record field. Do not change the master record.
2. Click OK or press Enter:
   - If there are more file blips in the batch, the film will stop at the next file blip.
   - If there are no more file blips, the film will advance to the next batch blip.

Indexing a Master Reference Database at the Camera

When you index a master reference database as you shoot, VersaImage makes certain assumptions:

- For single-level film, it assumes that you want to add a new document record every time you change any values in the document record fields and a new master record whenever the link value changes.
- For two-level film, it assumes that you want a file blip whenever you change the link value in the master record. A new master record is also created. If you have multiple documents associated with the same master record on the same film, you will have to use page-level indexing.
- For three-level film, it assumes that you want a batch blip whenever you change the link value in the master record and a file blip every time the first field in the document record changes. A new master is created when the batch blip changes and a new document record is created when the file blip changes.

▸ To start an index

1. From the **File** menu, select **Open Database**.
2. Select the database you want to index from the **Open** dialog box. The main database screen will appear.
3. From the **Index** menu, select **Index at Camera**. The **New Roll** dialog box will appear.
4. Enter the number of the roll you are indexing in the text box and click OK.
   - If you are indexing one- or two-level film, the **New Frame** dialog box will appear.
   - If you are indexing three-level film, a message will appear asking you if you want to index batch blips only. Select No and the **New Frame** dialog will appear.
5. In the **New Frame** dialog box, enter the number of the frame you want to start with:
   - For single-level indexing, enter a whole number.
   - For two-level indexing, enter the number of the large blip you are starting with, followed by **.0**.
   - For three-level indexing, enter the number of the batch blip, followed by a period and the number of the frame blip, followed by **.0** (1.21.0).
6. Click OK. If you have not yet set your indexing options for this database, the **Indexing Setup** dialog (see Chapter 16) will appear. Change the defaults if you want and click OK.

> ***Note:*** *After you have indexed a database once, the last roll and frame you indexed will always be displayed for you in the **New Roll** and **New Frame** dialogs so that you can continue from where you left off by merely clicking* OK.

Single-level film

For single-level indexing, a blip will be added to the frame when the film is shot. You determine with each frame whether the frame belongs to a new master record or a new document.

To index each frame as you shoot

1. Position the first document on the camera.
2. Enter the link field and press Tab or Enter.
    - If there is already a master record for this link field, it will be displayed.
    - If no record is displayed, enter the data for the new record in the master record fields.
3. Enter the data for the index record in the document record field.
4. Click OK or press F8. The frame will be shot and the film will advance. Position the next document on the camera:
    - If the next document is a page of the document you just indexed, click OK or press Enter without changing any data to shoot the next frame.
    - If the next document belongs to the same master record but is a different document, return to step 3 and enter the data for the document.
    - If the next document belongs to a new master record, return to step 2 and enter the link field for the new record.

Two-level indexing

When you do two-level indexing at the camera, the link field in the master record is the "key" for the file blip. When the value in this field changes, the system will assume that it is the beginning of a new group and add a large blip to the frame.

With two-level film, you can also enter index records for any of the page blips. Therefore, if there is more than one document associated with the master record, you can create an index record for the first page of each.

To shoot the first frame for a master record

1. Position the document on the camera.
2. Enter the link field and press Tab or Enter. The link field must be different from the last one to create a new master record and a file blip:
    - If there is already a master record for this link field, it will be displayed.
    - If no record is displayed, enter the data for the new record in the master record fields.
3. Enter the index information for the document in the document record fields.
4. Click OK to shoot the frame and advance the film.

To shoot each of the remaining documents for the master record

1. Position the document on the camera.
2. Decide whether you want to create a record for the frame:
    - If the page is part of the same document, do not change anything. Leave the record fields alone.
    - If the page is part of a different document, change the information in the document record.
3. Click OK to shoot the frame and advance the film.

Three-level indexing

When you do three-level indexing at the camera, the program assumes that the link field the key for the batch blip and the first field in the document record is the key for the file blip. When the link field changes, a batch blip will be added to the film. When the first field in the document record changes, a file blip will be added. A record will be added to your database for each batch and each file blip. The batch blip signals a new master record and the file blip signals a new document record. You can also do page-level indexing with three-level film, but unless you have sub-documents that need their own index records, you will probably not need to do so.

To shoot the first document in the batch (batch blip)

1. Position the first document for the master record on the camera.
2. Enter the link field and press Tab or Enter. The link field must be different from the last one to create a new master record and a batch blip:
   - If there is already a master record for this link field, it will be displayed.
   - If no record is displayed, enter the data for the new record in the master record fields.
3. Enter the index information for the document in the document record fields.
4. Click OK to shoot the frame and advance the film.

To shoot the first document page for a file (file blip)

1. Position the document for the subgroup on the camera.
2. Enter the index information for the record. The value in the first field of the document record must be different to be recognized as a file blip. Do not change the value in the link field.
3. Click OK to shoot the frame and advance the film.

To shoot the remaining pages for a document

1. Position the document on the camera.
2. Decide whether the page needs its own record:
   - If you do not want to create an index record for the frame (the usual case), do not change anything. Leave the record fields alone.
   - If you want to create an index record for the frame (the exception), modify the record as needed. *DO NOT CHANGE THE FIRST VALUE IN THE DOCUMENT RECORD OR THE LINK FIELD!*
3. Click OK to shoot the frame and advance the film.

Indexing Images in a Master Reference Database

Before you can index your images, you must select the database to be indexed and the batch of images you want to index. Images scanned from paper will be in folders beginning with BCH. Images scanned from film will be in folders starting with ROLL.

To start indexing images

1. Select **Open Database** from the **File** menu.
2. Select the database you want to index from the **Open** dialog box. The main database screen will appear.

3. Select **Index Images** from the **Index** menu. The **Setup Image Indexing** dialog box will appear. All batches with *non-indexed* records for the database will be listed in the box.

4. Select the roll or batch you want to index and click OK.

5. If you have not yet set your indexing options for this database, the **Indexing Setup** dialog (see Chapter 16) will appear. Change the defaults if you want and click OK.

Zooming in on data locations with master reference databases

You can use the zoom feature (see Chapter 19) to zoom in on data in your images while indexing a master reference database. However, if your documents are of different types or you are not always entering master record data, you may find it a little awkward. Here are some tips:

- You can always add new data locations for fields you have not previously indexed and VersaImage will remember them. Therefore, if your first several documents are indexed to existing master records and then you encounter one without a master record, you can define the data locations for master record fields at that time.

- You can always change a location. If the defined data location is in a different place on a document, you can redefine it.

▸ To redefine a “zoom” zone

1. Click your right mouse button on the document to zoom out to full screen.

2. Draw a box around the current location for the data. VersaImage will now remember this as the location until you change it again.

If you are indexing different types of documents and your data is readable without it, it may be easier not to use the zoom feature, especially if you have to change the zones a lot.

Indexing single-page images

When you index single pages, you can decide whether to associate each image with a new master record or a new document.

▸ To index the first document in the batch

1. Zoom in on the area of the image where the link field for the document is located. Then enter the link field and press Tab or Enter:
    - If there is no matching record, enter both the master record information and the document record information as described in step 2.
    - If a matching record is displayed for the link field, the master record is already in the database. Enter data in the document index record fields only as described in step 2.

2. Enter your record fields. If you want to zoom into data locations do the following:
    - Move the cursor to the database field.
    - Select the area of the image that contains the data you need for the record and release the mouse button to zoom in.
    - Enter the data in the field and press Tab or Enter to move to the next field. The image will return to normal display size so you can select the area for the next field.

3. Click OK or press F8. The next image will be displayed and the program will zoom in on the data for the link field.

To append an image to the previous document

1. Press F12 to add the page to the previous record. This will either create a folder for the index record or add the page to the existing folder.
2. The next image in the batch will appear.

To add a new document to the same master record

1. Do not change the master record.
2. Enter the data for the fields in the document record. If you defined data locations on your image, VersaImage will zoom in on the data as you move from field to field.
3. Click OK or press F8. The next image will be displayed and the program will zoom in on the data for the link field.

To add a new document to a different master record

1. Enter the link field and press Tab or Enter.
   - If the master record is already in the database, it will be displayed.
   - If the record is not displayed, enter the master record fields for the record. If you defined your data locations, the system will zoom in on the data for each field in the document.

> ***Note:*** *If you have not defined master record data locations yet and you want to do so, you may do so now.*

2. Enter the data for the fields in the document record. If you set up data location zoom zones, the program will zoom in on the data for each field.
3. Click OK or press F8. The next image will be displayed and the program will zoom in on the data for the link field.

Indexing folders and multi-page TIFFs

When you index folders or multi-page TIFFs with a master reference database, the general assumption is that each folder represents a document. The program assumes that the information you need for your record is in the first image. For that reason, it displays the first image as a full page with the blank record. If you need to look at another page instead, you can zoom out and select it from the thumbnails.

To index the first folder or file in the batch

1. Enter the link field and press Tab or Enter:
   - If there is no matching record, enter both the master record information and the document record information as described in step 2.
   - If a matching record is displayed for the link field, the master record is already in the database. Enter data in the document index record fields only as described in step 2.
2. Enter your record fields. If you want to zoom in on your data locations, do the following:
   - Move the cursor to the screen field.
   - If the image that contains the information for the field is not the one displayed, zoom out to thumbnail view and select the correct image from the thumbnails.
   - Select the area of the image where the data for the field is located and release the mouse button to zoom in.

- Enter the data in the field and press Tab or Enter to move to the next field. The image will return to normal display size so you can select the area for the next field.

3. Click OK or press F8. The next image will be displayed and the program will zoom in on the data for the link field.

To add a folder or file to the same master record

1. Do not change the master record.
2. Enter the data for the fields in the document record. If you defined data locations for the document, VersaImage will zoom in on the location of the data for the active field in the current image. If the current image does not contain the data, zoom out, select the correct image, and zoom in again.
3. Click OK or press F8. The next image will be displayed and the program will zoom in on the data for the link field.

To add a folder or file to a different master record

1. Enter the link field and press Tab or Enter.
   - If the master record is already in the database, it will be displayed.
   - If the record is not displayed, enter the master record fields for the record. As you move the cursor to each one, the system will zoom in on the data for the field in the current image. If the document displayed does not contain the data, zoom out and select the correct one.

> ***Note:*** *If you have not defined master record data locations yet and you want to do so, you may do so now as you enter the master record.*

2. Enter the data for the fields in the document record. If you have defined data locations, VersaImage will zoom in on the data for the active field in the current image. If the document displayed does not contain the data, zoom out and select the correct one.
3. Click OK or press F8. The next image will be displayed and the program will zoom in on the data for the link field.

Part 5

Viewing Documents

Searching Your Database

23

Once your documents are indexed, you can retrieve and view any document you want easily. If the record is on microfilm, you simply find the record in your database and the reader will find the corresponding frame. If there is a scanned image associated with a record, the system will display your image on the right side of the screen. If you have scanned images for your film, you can view your documents without having to go to microfilm. In addition to viewing your documents, you may print, fax, E-mail and, in some cases, export them to another file.

Regardless of whether you have indexed film or scanned images or both, your first step in viewing your documents is to find the record associated with the document in your database. This chapter tells you how to search for and find your records. The remaining chapters in this section give you instructions for viewing your documents and distributing copies of them.

The Screens

When you search for your records, you will use two different screens—the search screen and the table display screen. Because you need to be acquainted with both of them before you start your search, we will give you an overview of them now.

The search screen

The search screen (fig. 23.1) is the main database screen. It is the first screen that is displayed when you open a database. If you have set up a database or indexed records, you are already somewhat familiar with this screen. The search screen contains fields for all of the data in your database record. Under the menu is a tool bar. The buttons in the tool bar vary, depending on what is displayed on the screen. These functions will be explained in the instructions in this chapter and the chapters that follow. A drop-down list on the tool bar contains your text search options. If your database is image enabled, a tool bar with drawing tools will also appear. These tools allow you to add visual annotations to your image. More will be said about these tools in Chapter 26.

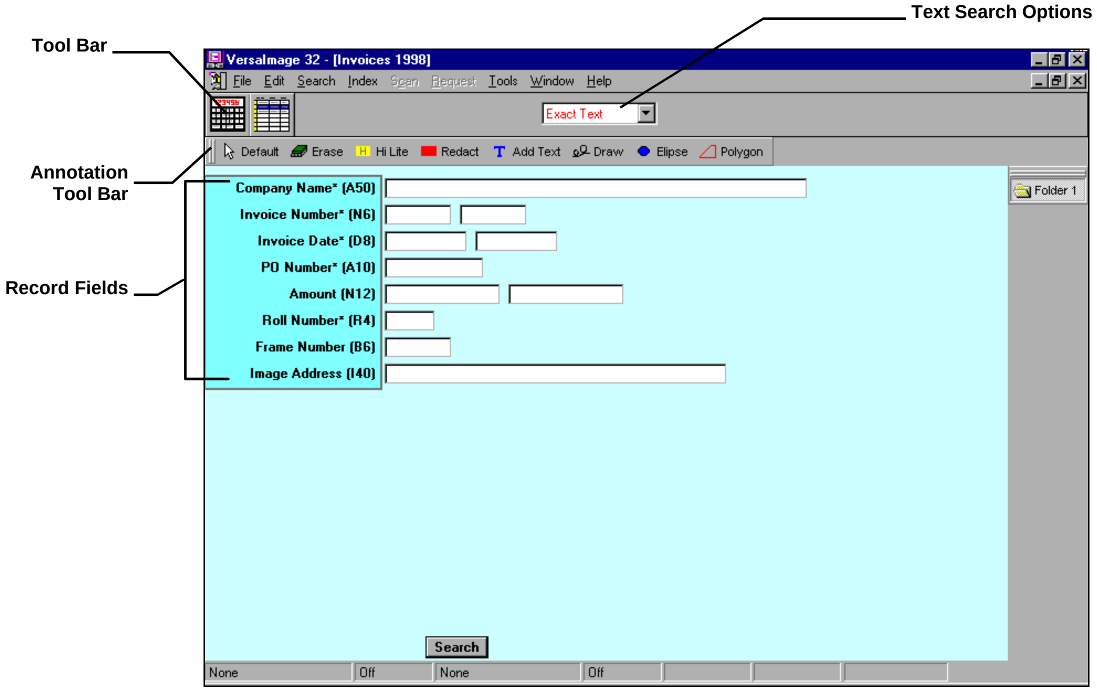

Text Search Options
Tool Bar
Annotation Tool Bar
Record Fields
VersaImage 32 - [Invoices 1998]
File Edit Search Index Scan Request Tools Window Help
Exact Text
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Company Name* (A50)
Invoice Number* (N6)
Invoice Date* (D8)
PO Number* (A10)
Amount (N12)
Roll Number* (R4)
Frame Number (B6)
Image Address (I40)
Folder 1
Search
None
Off
None
Off

Fig. 23.1. Database search screen

The search screen is used to define your search and to display individual records. Users with security clearance to do so can also edit fields in the records.

To move from field to field on the search screen, use the following keys:

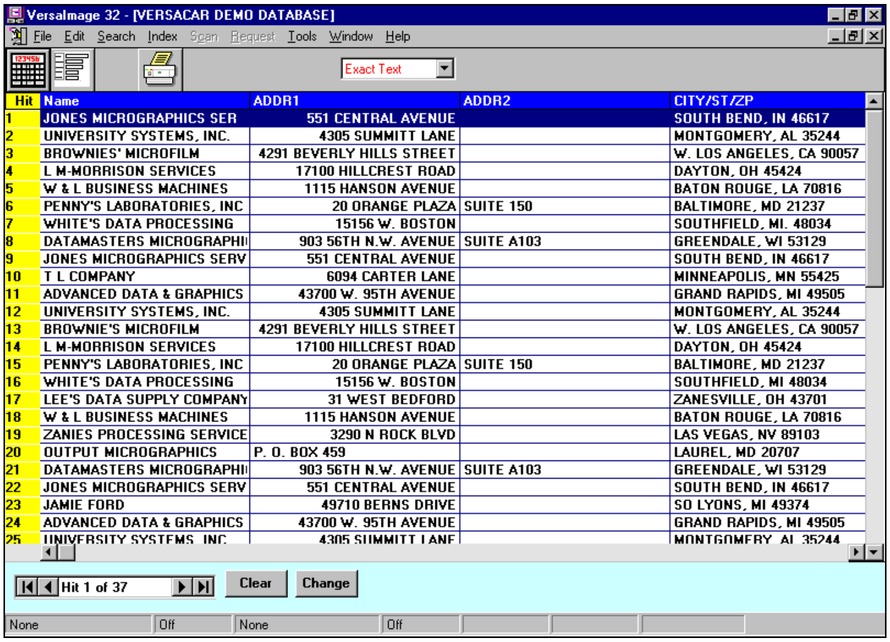
Tab	Moves to the next field.
Shift + Tab	Backs up to the previous field.

You can also go directly to a field by clicking on it with your mouse. However, this is not generally convenient if you are using the keyboard to enter values.

> ***Note:*** *Unlike the indexing screen, you cannot use* Enter *to move from field to field.* Enter *activates your search.*

The table display screen

The table display screen (fig. 23.2) displays your records in table format. It is displayed after you initiate a search if there is more than one matching record. You can also display it anytime from the search screen while you are viewing records.


VersaImage 32 - [VERSACAR DEMO DATABASE]
File Edit Search Index Scan Request Tools Window Help
123456
Exact Text
Hit 1 of 37
Clear
Change
None
Off
None
Off

Hit	Name	ADDR1	ADDR2	CITY/ST/ZP
1	JONES MICROGRAPHICS SER	551 CENTRAL AVENUE		SOUTH BEND, IN 46617
2	UNIVERSITY SYSTEMS, INC.	4305 SUMMITT LANE		MONTGOMERY, AL 35244
3	BROWNIES' MICROFILM	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057
4	L M-MORRISON SERVICES	17100 HILLCREST ROAD		DAYTON, OH 45424
5	W & L BUSINESS MACHINES	1115 HANSON AVENUE		BATON ROUGE, LA 70816
6	PENNY'S LABORATORIES, INC	20 ORANGE PLAZA	SUITE 150	BALTIMORE, MD 21237
7	WHITE'S DATA PROCESSING	15156 W. BOSTON		SOUTHFIELD, MI. 48034
8	DATAMASTERS MICROGRAPHI	903 56TH N.W. AVENUE	SUITE A103	GREENDALE, WI 53129
9	JONES MICROGRAPHICS SERV	551 CENTRAL AVENUE		SOUTH BEND, IN 46617
10	T L COMPANY	6094 CARTER LANE		MINNEAPOLIS, MN 55425
11	ADVANCED DATA & GRAPHICS	43700 W. 95TH AVENUE		GRAND RAPIDS, MI 49505
12	UNIVERSITY SYSTEMS, INC.	4305 SUMMITT LANE		MONTGOMERY, AL 35244
13	BROWNIE'S MICROFILM	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057
14	L M-MORRISON SERVICES	17100 HILLCREST ROAD		DAYTON, OH 45424
15	PENNY'S LABORATORIES, INC	20 ORANGE PLAZA	SUITE 150	BALTIMORE, MD 21237
16	WHITE'S DATA PROCESSING	15156 W. BOSTON		SOUTHFIELD, MI 48034
17	LEE'S DATA SUPPLY COMPANY	31 WEST BEDFORD		ZANESVILLE, OH 43701
18	W & L BUSINESS MACHINES	1115 HANSON AVENUE		BATON ROUGE, LA 70816
19	ZANIES PROCESSING SERVICE	3290 N ROCK BLVD		LAS VEGAS, NV 89103
20	OUTPUT MICROGRAPHICS	P. O. BOX 459		LAUREL, MD 20707
21	DATAMASTERS MICROGRAPHI	903 56TH N.W. AVENUE	SUITE A103	GREENDALE, WI 53129
22	JONES MICROGRAPHICS SERV	551 CENTRAL AVENUE		SOUTH BEND, IN 46617
23	JAMIE FORD	49710 BERNS DRIVE		SO LYONS, MI 49374
24	ADVANCED DATA & GRAPHICS	43700 W. 95TH AVENUE		GRAND RAPIDS, MI 49505
25	UNIVERSITY SYSTEMS INC	4305 SUMMITT LANE		MONTGOMERY AL 35244

Fig. 23.2. Table-display mode

The following buttons on your tool bar are used to switch between the two screens:

▦	Switches to the table screen display from the search screen.
☰	Switches to the search screen display from the table screen.

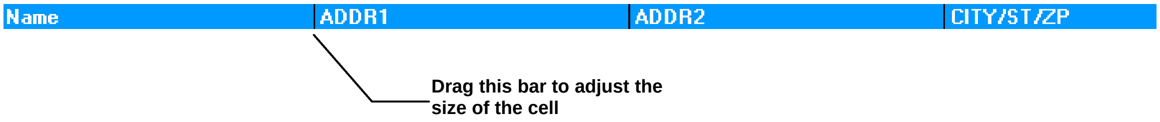
> ***Note:*** *If you want to see this screen now, click the* Search *button from the search screen. Then click* Yes *when you are asked if you wish to see the entire database.*

If your list covers more than one page, you can do the following to move through it:

- Press PgDn to display the next page.
- Press PgUp to display the previous page.
- Use the scroll box or arrows on the vertical scroll bar.

Most database records will not fit horizontally on one screen. You will be able to see the start of the record but not the end of it. To scroll through a record horizontally, use the horizontal scroll bar.

The size of the table cells is arbitrary and not all of the data in a given cell may show. You can adjust the width of the cells if you want by dragging the vertical bars in the table heading with your mouse:



Setting Up a Search

You may search the database on virtually any field in your record. How you define your search depends on whether or not a field is an alphanumeric, numeric or date field.

Alphanumeric fields

For alphanumeric fields, you have three options, all of which are displayed in the drop-down list in your tool bar:

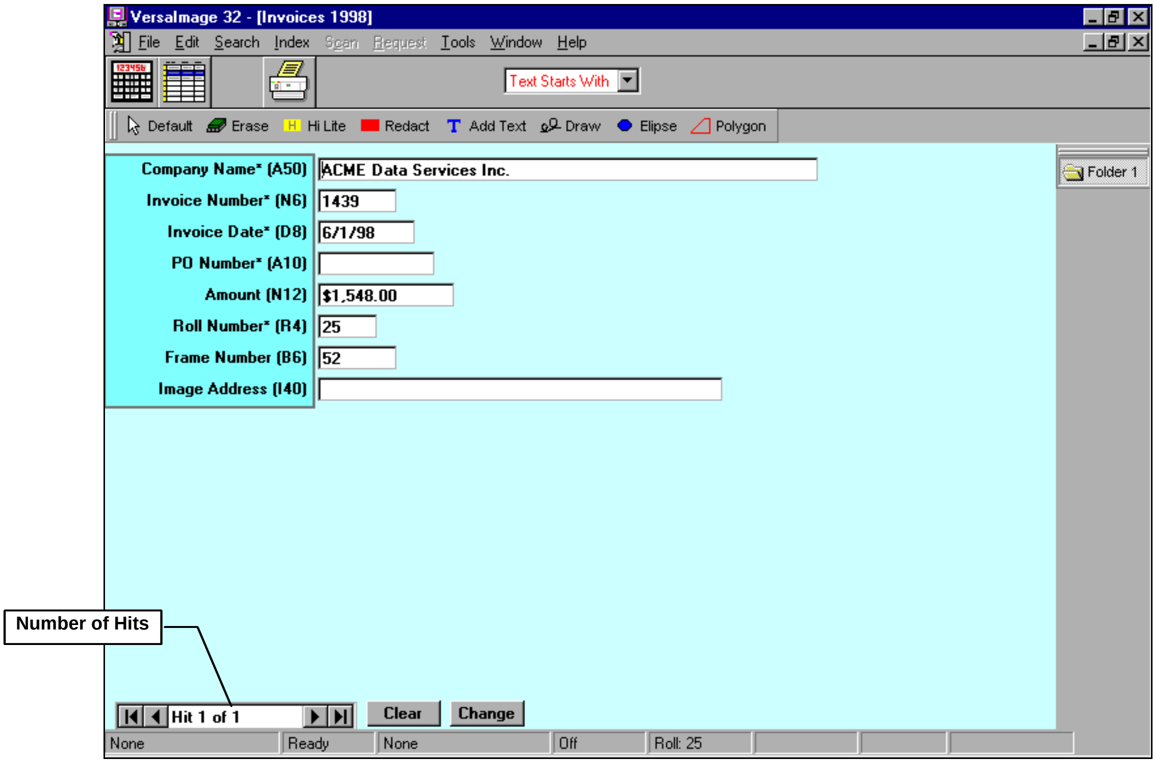
Exact	Searches for records with the exact value you enter in the field.
Starts with	Searches for records with values in the field that start with the text you enter.
Contains	Searches for records that contain the value you enter in your search field.

These options are also available from the **Search** menu. This allows you to use the keyboard instead of your mouse if you prefer not to take your hands off your keys while you are searching.

> ***Note:*** *The alphanumeric search also works for* ***Roll*** *and* ***Blip*** *fields. However, keep in mind that searching for "text contains" can yield unpredictable results. For example, if you select "text contains" and enter a 2 to find roll 2, you will get all rolls that have 2 in their number.*

▸ To start an alphanumeric search with your mouse

1. Select the type of search you want from the drop-down list.
2. Either click your mouse in the field you want to search or use Tab to move to the field.
3. Enter your search value.
4. Click Search and the system will search the database for records that match your search value.
5. The number of "hits" will be displayed in the "hit" bar at the bottom of your screen:
    - If there is only one hit, the record will be displayed on the search screen (see fig. 23.3).
    - If there is more than one hit, the table display screen will be displayed so you can select the record you want to view.


VersaImage 32 - [Invoices 1998]
File Edit Search Index Scan Request Tools Window Help
Text Starts With
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Folder 1
Number of Hits
Hit 1 of 1
Clear
Change
None Ready None Off Roll: 25

Company Name* (A50) ACME Data Services Inc.
Invoice Number* (N6) 1439
Invoice Date* (D8) 6/1/98
PO Number* (A10)
Amount (N12) $1,548.00
Roll Number* (R4) 25
Frame Number (B6) 52
Image Address (I40)

Fig. 23.3. Search screen with a record displayed

▸ To start an alphanumeric search with your keyboard

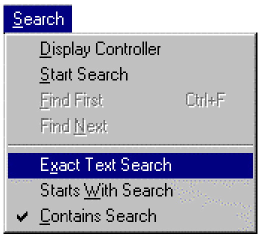

Search
Display Controller
Start Search
Find First Ctrl+F
Find Next
Exact Text Search
Starts With Search
✓ Contains Search

Fig. 23.4. **Search** menu

1. Press Alt and then S to select **Search** from the menu. The **Search** menu (fig. 23.4) will appear.
2. Do one of the following to select your search type:
   - Type the underlined letter.
   - Use the ↑ and ↓ keys to move the highlight to the search type and press Enter.
3. Use Tab to move to the field you want to search on and enter your search value.
4. Press Enter to start your search.

Numeric and date fields

Numeric and date fields do not allow "text" searches. They will match on exact values only. However, you may notice that, for each of these field types, there are two text boxes instead of one. This permits you to enter a range—a range of dates or a range of numeric values—as search parameters. Numeric field search values must contain numeric characters only. Date field search values must be valid dates entered and must be entered in *month/day/year* order. Either of the following formats are valid:

- **MM/DD/YY** format

12/25/95

Enter the month, day, and year numerically, separated by slashes. You do not need to enter leading zeros for single-digit months or days. **10/21/95**, **9/8/95**, and **11/2/93** are all valid entries.

- **Month Day Year** format

  Jan 25 1994

  Enter at least the first three characters of the month, followed by the date and then the year. Do not use periods or commas. Either a two-digit or four-digit year is acceptable—**Sep 2 1993** and **Sep 2 93** are both legal. If no year is entered, the current year is assumed.

> ***Note:*** *If you want to use four-digit years you must configure your system in* ***Regional Settings*** *on the Windows* ***Control Panel*** *for four-digit years.*

To set up a numeric or date search

1. Use Tab to move your cursor to the field you want to search on or click on it with your mouse.
2. Enter your search values:
   - To search for an exact value, enter the value you want to search for in the first text box.
   - To search for a range of values, enter the starting value for your range in the first box. Then press Tab to move to the second box and enter the ending value for your range. Make sure that your ending value is greater than your starting value.
3. Click Search or press Enter to start your search.
4. The number of hits will be displayed in the bottom of the screen:
   - If there is only one record, it will be displayed in the fields on the screen.
   - If there is more than one hit, the table display screen will be displayed so you can select the record you want to view.

Searching on more than one field

You can use more than one field to narrow the set of records down if you want. For example, you might search for all invoices for a company that fall within a specific date range by entering both the company name and the date range. There are two things to keep in mind, however:

- All values you search for must be present in the record, so do not use fields that are mutually exclusive.
- The type of alphanumeric search you choose is in effect for *all* alphanumeric fields. You cannot search for “exact text” in one field and “text contains” in another. For searching in multiple fields, it is best to use “text contains” unless you are using roll or frame numbers as part of your search.

To search on multiple fields

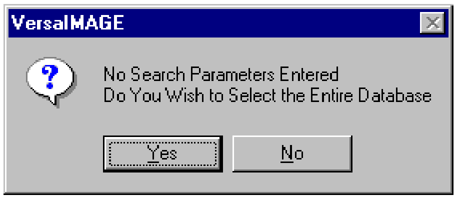
1. If you are searching any alphanumeric fields, select your type of search from the drop-down list box.
2. Enter the values for your search in each field you want to search on. Use Tab to move from field to field.
3. Click Search or press Enter.
4. The number of hits will be displayed in the bottom of the screen:
   - If there is only one record, it will be displayed in the fields on the screen.
   - If there is more than one hit, the table display screen will be displayed so you can select the record you want to view.

Displaying your entire database

If you prefer, you can display all of your database records sequentially instead of a selected subset.

To display your entire database

1. Click on **Search** without entering any search parameters.
2. A message (fig. 23.5) will appear asking you if you want to select the entire database.
3. Click **Yes**. The table display screen will appear.



VersaIMAGE

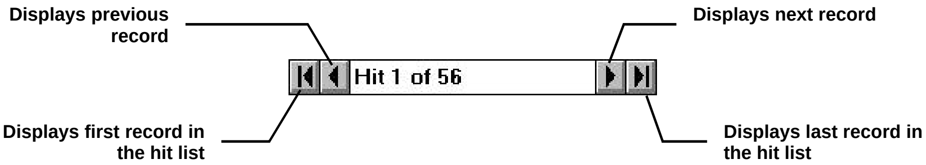
No Search Parameters Entered
Do You Wish to Select the Entire Database

Fig. 23.5. Selecting the entire database

> ***Note:*** *This will work only on databases with less than 32,000 items.*

Looking at the Records

You can look at your records in either single-record mode and table-display mode. If there is only one record on your hit list, you will be placed in single-record mode automatically. If there is more than one, you will be placed in table-display mode. Regardless of mode, the number of hits will be displayed in the "hit bar" at the bottom of the screen:


Displays previous record
Displays next record
Hit 1 of 56
Displays first record in the hit list
Displays last record in the hit list

If you have indexed in **Lookup/Append Mode**, you will already be familiar with the hit bar.

Using table-display mode

The main purpose of table-display mode is to allow you to quickly locate the record you want to look at or start with. You can then switch to single-record mode and return to the search screen to view it. If your record is not visible in the table, you can find it either by scrolling or by using the **Find** function. The **Find** function allows you to search for an exact text match for any field in the record.

To select a record with your mouse

1. Move your mouse pointer to the record you want to view.
2. Double-click on the record to view the search screen.

To select a record with your keyboard

1. Use the arrow keys to move the highlight to the record you want:

↓ or →	Moves down to the next record.
↑ or ←	Moves up to the previous record.
Home	Moves to the first record.
End	Moves to the last record.
PgDn	Moves to the next "page" of records.
PgUp	Moves to the previous "page" of records.

2. When the record you want to see is highlighted, press Enter to view the search screen.

▶ To scroll through the records with your mouse

1. Move the highlight by doing one of the following:
   - To move the highlight down to the next record, click ▼ at the end of the vertical scroll bar or ▶ on the hit bar.
   - To move the highlight up to the previous record, click ▲ at the top of the vertical scroll bar or ◀ on the hit bar.
   - To scroll continuously, move your mouse pointer to either ▼ or ▲ on the vertical scroll bar. Hold your mouse button down and the records will scroll in the direction of the arrow.
   - To scroll to the last record in the list, click ▶| in the hit bar.
   - To scroll to the first record in the list, click |◀ in the hit bar.
2. When the highlight is on the record you want, do either of the following to display the search screen:
   - Double-click your mouse on the record.
   - Click ☰ on the tool bar.

▶ To use the Find function

1. Do one of the following to display the **Hitlist Search** dialog:
   - Select **Find First** from the **Search** menu.
   - Press Ctrl + F.
2. Enter the text you want to search for. The text can be in any field but it must be an exact match for the data in the field.
3. Click OK and the program will find the first instance of that record.
4. To look for the next instance, select **Find Next** from the **Search** menu.
5. When you find the record you want, do one of the following to display the search screen:
   - Double-click your mouse on the record.
   - Click ☰ on the tool bar.
   - Press Enter.

Single-record mode

In single-record mode, each record is displayed on the search screen in turn. You can display your records with either the mouse or the keyboard. If an image is associated with the record, it will appear on the right.

▶ To display single records sequentially with your mouse

1. When the table display appears for your search, click ☰ on the tool bar to switch to single-record mode and display the first record. (If you do not want to start with the first record, select the record you want to start with first.)
2. Use the buttons on the hit list to browse through the individual records:

▶	Displays the next record.
◀	Displays the previous record.
▶|	Displays the last record.
|◀	Displays the first record.

▸ To display single records sequentially with the keyboard

1. When the table display appears for your search, press Enter to display the first record in single-record mode. (If you do not want to start with the first record, select the record you want to start with first.)

2. Use the following keyboard keys to browse through the individual records:

→	Displays the next record.
←	Displays the previous record.
End	Displays the last record in the hit list.
Home	Displays the first record in the hit list.

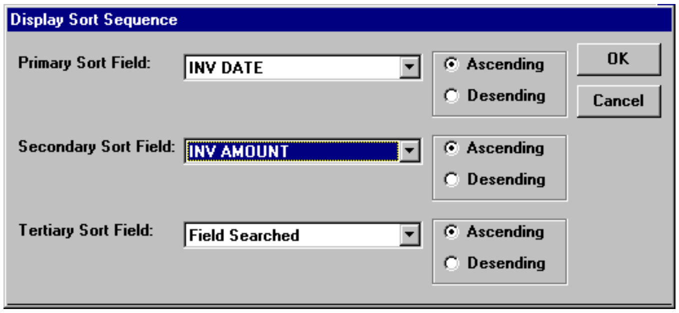
Changing sort sequence

By default your hit list will be sorted on the field you searched on in ascending order. If you select the entire database, the records will be sorted in the order in which they were entered into the database. If you want, you can retrieve your "hits" sorted in a sequence different from the default sort sequence. This can be particularly useful when viewing the table display. For instance, when you retrieve invoices for a particular company, you might want to view them in descending date sequence so you could find the most recent invoice first. By changing the primary sort field to "invoice date" you could view them in your table in this order.

▸ To change the sort sequence

1. Select **Preferences** from the **File** menu.

2. Select **Sort Sequence** from the **Preferences** menu. The dialog box shown in fig. 23.6 will appear.



Display Sort Sequence

Primary Sort Field: INV DATE ● Ascending ○ Desending

Secondary Sort Field: INV AMOUNT ● Ascending ○ Desending

Tertiary Sort Field: Field Searched ● Ascending ○ Desending

Fig. 23.6. **Display Sort Sequence** dialog

3. Select the field you want as your primary sort sequence.

4. Select the sort order:

Ascending	Sorts from lowest to highest.
Desending	Sorts from highest to lowest.

5. To sort all hits within the **Primary Sort** field in a specific order, select a **Secondary Sort** field and sort order.

6. To sort any identical fields for your **Secondary Sort** field in a specific order, select a **Tertiary Sort** field and sort order.

7. When you are done, click OK.

> ***Note:*** *Since the sorting is done as the hit list is extracted from the database, you must select your sort order before you initiate your search. If you have already searched, you will have to perform the search again to have your currently displayed hit list re-sorted into the new sequence.*

Ending a search

After you have finished viewing the records for a search, you will need to “clear” the current search before you can start another.

To clear a search with your mouse

Click Clear at the bottom of the screen.

To clear a search with the keyboard

Press Esc.

Searching a Master Reference Database

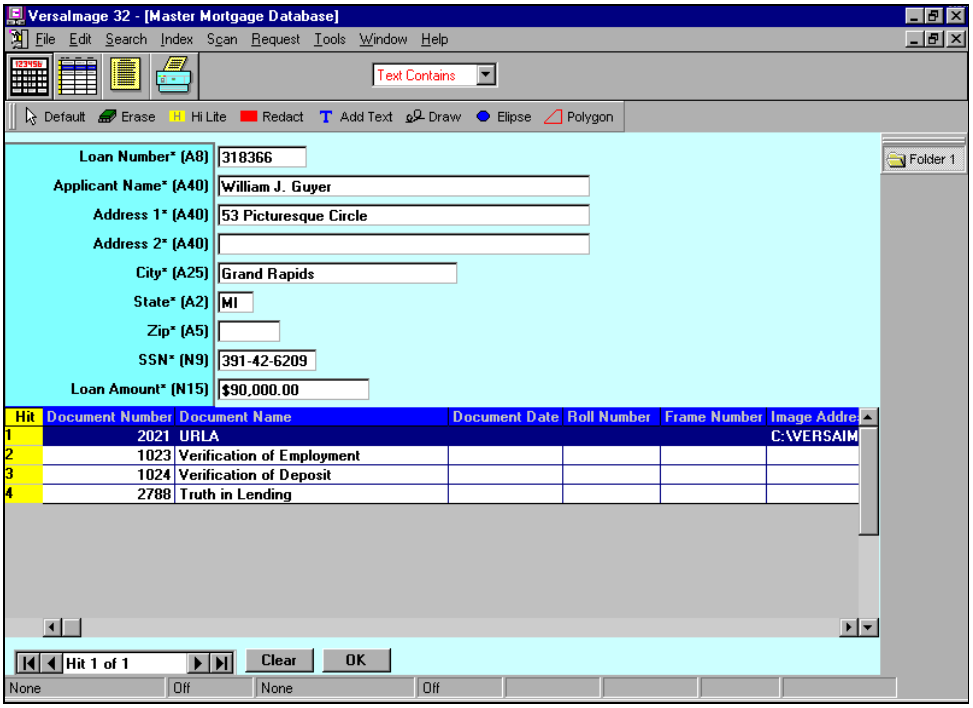
When you search a master reference database, you first look for the master record. Then you select the documents you want to view.

Searching for the master record

In most cases, you will be searching for a specific record, such as a specific loan application, or a specific group of records (e.g., all accounts tied to a given social security number). You can also search the database on fields in the document record. This search will return all master records containing documents that meet the criteria you specify. You might, for example, want to search for master records containing verification of employment forms for a given date.

To search for the master record on master record criteria

1. Enter the value you want to search for in the master record.
2. Click Search.
3. If there is more than one hit, select the one you want to see from the table display screen.
4. Your selected master record and a table display of the documents associated with the record (fig. 23.7) will appear.


VersaImage 32 - [Master Mortgage Database]
File Edit Search Index Scan Request Tools Window Help
Text Contains
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Folder 1
Hit 1 of 1
Clear
OK
None
Off
None
Off

Loan Number* (A8): 318366
Applicant Name* (A40): William J. Guyer
Address 1* (A40): 53 Picturesque Circle
Address 2* (A40):
City* (A25): Grand Rapids
State* (A2): MI
Zip* (A5):
SSN* (N9): 391-42-6209
Loan Amount* (N15): $90,000.00

Hit	Document Number	Document Name	Document Date	Roll Number	Frame Number	Image Addre
1	2021	URLA				C:\VERSAIM
2	1023	Verification of Employment				
3	1024	Verification of Deposit				
4	2788	Truth in Lending				

Fig. 23.7. Search screen for a master reference database with the master record and the table of associated documents

5. If there is more than one matching master record, you can use the buttons in the hit bar to page through them in single record mode.

To search for master records on document criteria

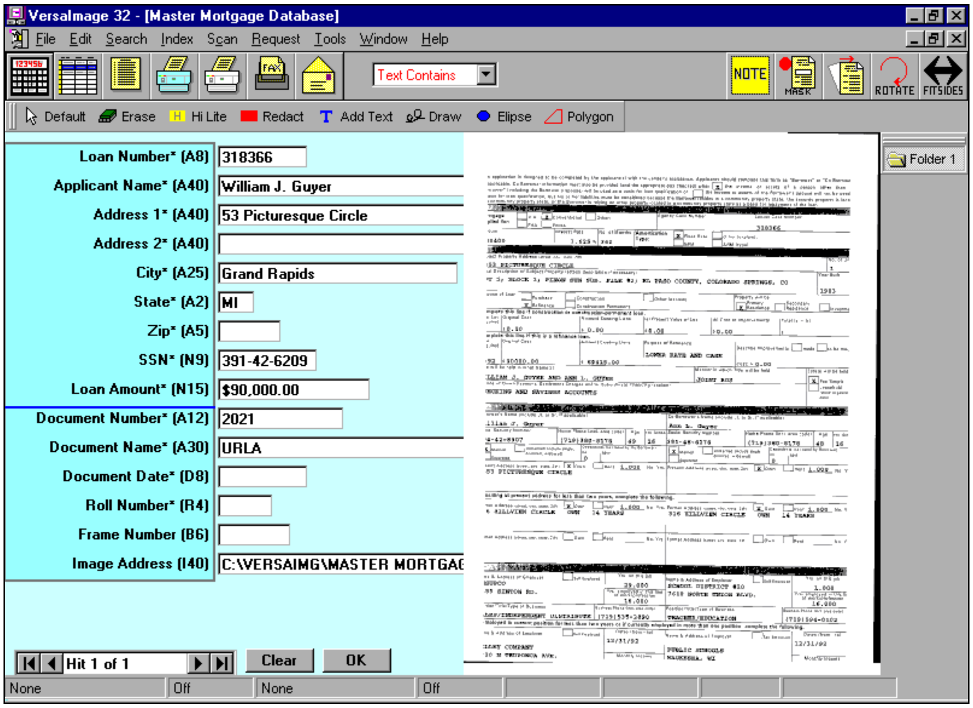
1. Enter the document criteria you want to search for in the document record.
2. Click Search to find all master records containing documents with the criteria you specified.
3. To display the first master record in the list, click . If you want to start with another record, select the one you want to from the table.
4. The record and a table display of the documents associated with the record (fig. 23.7) will appear. Note that it will list all documents associated with the record, not just the one you were looking for.

Displaying document records

To look at an individual document record, you must select it from the document table in the master record.

To display a document for the record

1. Double-click on the document you want to see in the table.
2. The information for the document will be displayed on your screen (fig. 23.8). If an image is associated with the document record, it will be displayed on the screen also.


VersaImage 32 - [Master Mortgage Database]
File Edit Search Index Scan Request Tools Window Help
123456
FAX
Text Contains
NOTE
MASK
ROTATE
FITSIDES
Default
Erase
Hi Lite
Redact
Add Text
Draw
Elipse
Polygon
Folder 1
Hit 1 of 1
Clear
OK
None
Off
None
Off

Loan Number* (A8)	318366
Applicant Name* (A40)	William J. Guyer
Address 1* (A40)	53 Picturesque Circle
Address 2* (A40)	
City* (A25)	Grand Rapids
State* (A2)	MI
Zip* (A5)	
SSN* (N9)	391-42-6209
Loan Amount* (N15)	$90,000.00
Document Number* (A12)	2021
Document Name* (A30)	URLA
Document Date* (D8)	
Roll Number* (R4)	
Frame Number (B6)	
Image Address (I40)	C:\VERSAIMG\MASTER MORTGAG

Fig. 23.8. Document selected and displayed for a master record

3. To select another document for the master record, click Clear. You will return to master record view and the table of documents so you can select another.

Note: *You cannot use the hit bar to browse through your documents sequentially.*

Browsing through master records

You can browse through your master records in single-record mode or you can return to table-display mode. When you browse in single-record mode, you must be in master record view. It does not work if you have a document displayed.

▸ To view another master record in single-record mode

1. Click Clear to return to the master record view.
2. Use the hit bar to page through the master records until you find the one you want.

▸ To select another master record in table-display mode

1. Click the ▦ in the tool bar from any screen (either document or master record view).
2. Select the master record from the table.

Ending the search

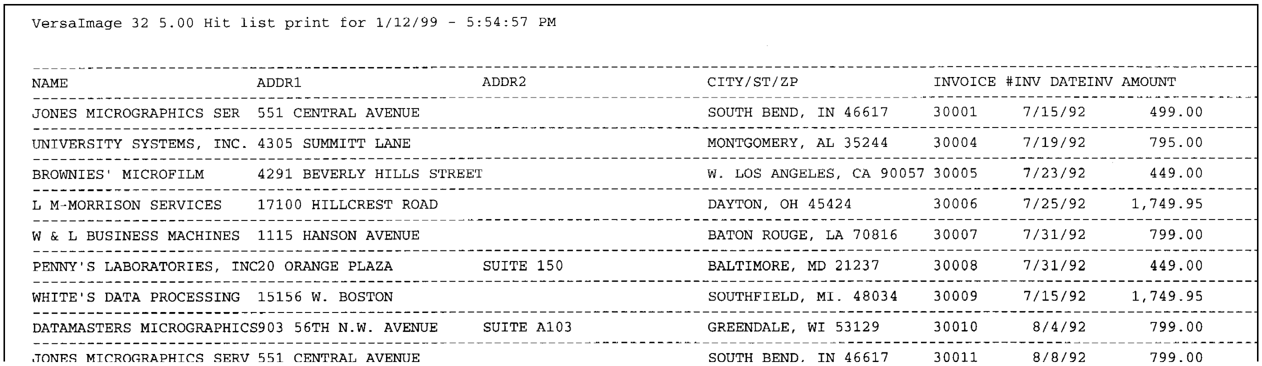
When you end a search for a master reference database, you must first return to the master record view. Then you can exit.

▸ To end your search

1. Click Clear to clear the currently displayed document.
2. Click Clear again to clear the master record.

Printing Your Hit List

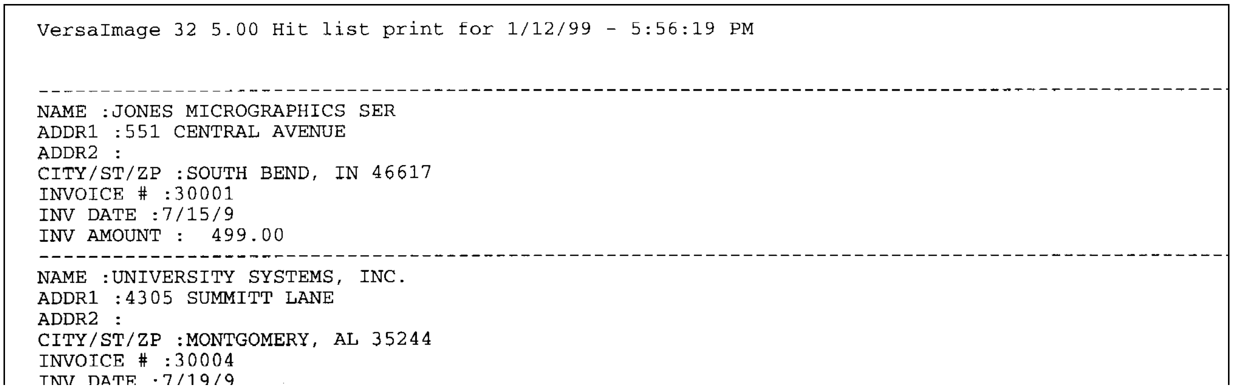
If you want a hard copy, you can print your hit list on your laser or inkjet printer. You can print the hit list in either table format or single-record format. In table format, there is one record per line (fig. 23.9). In single-record format, each record is listed with one field per line (fig. 23.10).



```
VersaImage 32 5.00 Hit list print for 1/12/99 - 5:54:57 PM


-----------------------------------------------------------------------------------------------------------------------------------------------
NAME                      ADDR1                     ADDR2                     CITY/ST/ZP                INVOICE #INV DATEINV AMOUNT
-----------------------------------------------------------------------------------------------------------------------------------------------
JONES MICROGRAPHICS SER  551 CENTRAL AVENUE                                  SOUTH BEND, IN 46617      30001      7/15/92        499.00
-----------------------------------------------------------------------------------------------------------------------------------------------
UNIVERSITY SYSTEMS, INC. 4305 SUMMITT LANE                                   MONTGOMERY, AL 35244      30004      7/19/92        795.00
-----------------------------------------------------------------------------------------------------------------------------------------------
BROWNIES' MICROFILM      4291 BEVERLY HILLS STREET                           W. LOS ANGELES, CA 90057 30005      7/23/92        449.00
-----------------------------------------------------------------------------------------------------------------------------------------------
L M-MORRISON SERVICES    17100 HILLCREST ROAD                                DAYTON, OH 45424          30006      7/25/92      1,749.95
-----------------------------------------------------------------------------------------------------------------------------------------------
W & L BUSINESS MACHINES  1115 HANSON AVENUE                                  BATON ROUGE, LA 70816     30007      7/31/92        799.00
-----------------------------------------------------------------------------------------------------------------------------------------------
PENNY'S LABORATORIES, INC20 ORANGE PLAZA          SUITE 150                  BALTIMORE, MD 21237       30008      7/31/92        449.00
-----------------------------------------------------------------------------------------------------------------------------------------------
WHITE'S DATA PROCESSING  15156 W. BOSTON                                     SOUTHFIELD, MI. 48034     30009      7/15/92      1,749.95
-----------------------------------------------------------------------------------------------------------------------------------------------
DATAMASTERS MICROGRAPHICS903 56TH N.W. AVENUE     SUITE A103                 GREENDALE, WI 53129       30010       8/4/92        799.00
-----------------------------------------------------------------------------------------------------------------------------------------------
JONES MICROGRAPHICS SERV 551 CENTRAL AVENUE                                  SOUTH BEND, IN 46617      30011       8/8/92        799.00
```

Fig. 23.9. Printed hit list - table format



```
VersaImage 32 5.00 Hit list print for 1/12/99 - 5:56:19 PM



--------------------------------------------------------------------------------------------------------
NAME :JONES MICROGRAPHICS SER
ADDR1 :551 CENTRAL AVENUE
ADDR2 :
CITY/ST/ZP :SOUTH BEND, IN 46617
INVOICE # :30001
INV DATE :7/15/9
INV AMOUNT :  499.00
--------------------------------------------------------------------------------------------------------
NAME :UNIVERSITY SYSTEMS, INC.
ADDR1 :4305 SUMMITT LANE
ADDR2 :
CITY/ST/ZP :MONTGOMERY, AL 35244
INVOICE # :30004
INV DATE :7/19/9
```

Fig. 23.10. Printed hit list - record format

When you print your hit list, you can print all fields in the record or you can select the fields you want to print. You may also select the print order for your fields. If your database is image enabled, you may elect to print data records, images, or both.

> ***Note:*** *If you are printing hits for a master reference database and choose to print document fields, all documents associated with the master record will be listed. This is a good way to get a "report" of associated documents for a group of master records.*

▸ To print your hit list

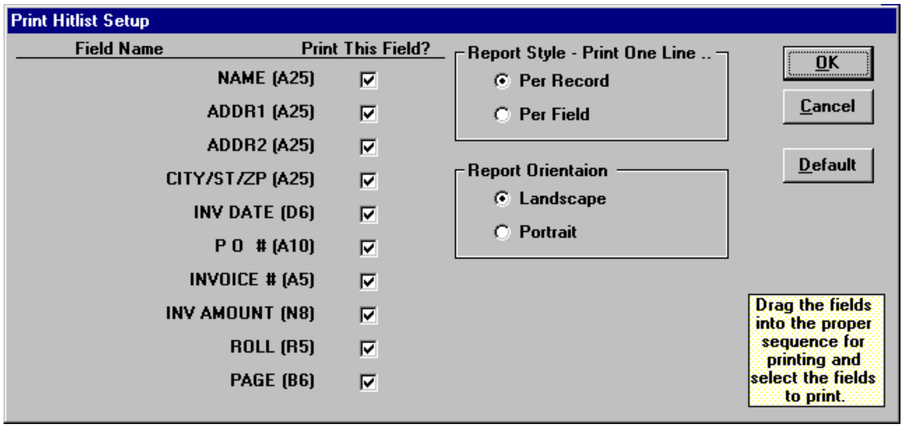
1. Click on the tool bar (the one with the *blue* printer) or select **Print Hitlist** from the **File** menu.
2. If your database is image enabled, you will see the following messages:
   - **Print data records?**

     Yes If you want to print the data records for your hit list.

     No If you do not want to print data records for your hit list.
   - **Print images?**

     Yes If you want to print the images for your hit list.

     No If you do not want to print images for your hit list.
3. Unless you are printing images only, the **Print Hitlist Setup** dialog (fig. 23.11) will appear.



Print Hitlist Setup

Field Name	Print This Field?
NAME (A25)	☑
ADDR1 (A25)	☑
ADDR2 (A25)	☑
CITY/ST/ZP (A25)	☑
INV DATE (D6)	☑
P O # (A10)	☑
INVOICE # (A5)	☑
INV AMOUNT (N8)	☑
ROLL (R5)	☑
PAGE (B6)	☑

Report Style - Print One Line ..
● Per Record
○ Per Field

Report Orientaion
● Landscape
○ Portrait

Drag the fields into the proper sequence for printing and select the fields to print.

Fig. 23.11. **Print Hitlist Setup** dialog

4. Select the fields you want to print by enabling and disabling the check boxes to the right of the fields. By default, all fields are enabled.
5. To change the order of the fields, drag the fields into the order you want. To restore the original order, click Default.
6. Select the **Report Style**:
   - To print a table-style format (fig. 23.9), choose to print one line **Per Record**.
   - To print a single-record format (fig. 23.10), choose to print one line **Per Field**.
7. Select your page orientation:
   - **Landscape** is generally best for table-style format (unless you have very few fields).
   - **Portrait** is generally best for single-record format.
8. Click OK to print your report.

Editing your Records

If you have security clearance to do so, you can edit the fields in your records from the search screen. This is particularly useful if you need to change the occasional field in a record to correct an address, spelling, date, etc. Note that **Roll** and **Frame** fields can only be changed through **QC Film Indices** and **Image Addresses** cannot be changed at all. For global changes, frame adjustments, etc., you should use the **QC Film Indices** option (see Chapter 29) instead. For correcting image indexing problems, you should use the **Image QC** option.

To edit records from the search screen

1. Display the record you want to edit in single-record mode.
2. Press Change to enable editing.
3. Use Tab to move to the field or fields you want to edit and make your changes.
4. When you finish, click OK or press Enter the changes will be made.

What To Do Next

Now that you know how to use your database search screen, you can view and print your images:

- For instructions on viewing and printing microfilm documents, go to Chapter 24.
- For instructions on viewing and printing images, go to Chapter 25
- For instructions on making and filling requests from request-enabled workstations, go to Chapter 27.
- If you want to view multiple databases at once and do not know how to use this feature in Windows programs, go to Chapter 28.

Viewing and Printing Microfilm Documents

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After you find a record in your database, you can retrieve the corresponding document on your microfilm reader. Depending on your system's capabilities and available equipment, you can scan, print, and/or fax your documents right from your search screen (some options are not available from VersaCAR).

> ***Note:*** *If you have scanned images associated with your file, the system will display them right on screen so that you do not have to go to microfilm. Instructions for viewing images are given in Chapter 25.*

The Microfilm Controller

Through VersaImage and VersaCAR, you can retrieve the microfilm frames for the records in your database on your microfilm reader. To do this, you use the program's microfilm controller. (This function is not available in VersaView.)

Activating the controller

To activate the microfilm controller

1. Do either of the following:
    - Press on the tool bar.
    - Click on **Display Controller** on the **Search** menu.
2. The controller will appear on your screen (fig 24.1). A prompt in the controller "window" will tell you which roll to load for your current database record. If you have not already done so, load the film onto your reader.

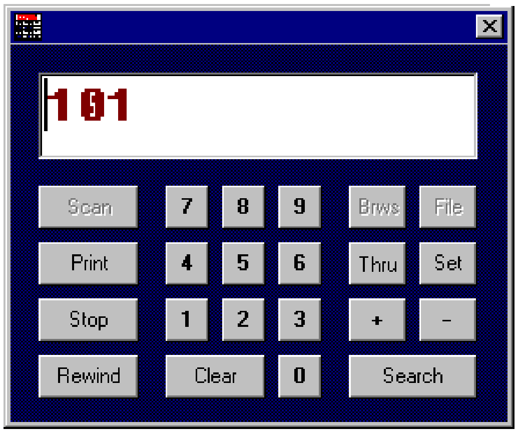


Fig 24.1. Microfilm Controller

> ***Note:*** *If you perform a search in VersaImage and there is no* ***Image Address****, but there are* ***Roll*** *and* ***Frame*** *numbers, the controller will automatically be activated.*

To remove the microfilm controller

1. Do one of the following:
    - Press on the tool bar.
    - Click on **Display Controller** in the **Search** menu.
    - Click the ☒ button in the upper right hand corner of the controller window.
2. The controller will disappear from the screen.

Operating the controller

The controller looks much like a calculator. Once you activate it, you operate it by "pushing" the "keys" with your mouse or by pushing the corresponding keys on your keyboard. There are keyboard equivalents for most controller keys:

Controller	Keyboard
0-9	0-9
Search	Enter
Clear	Esc
Thru	/
+	+
-	-
Print	P
Scan	S
Rewind	R

The keyboard keys are active for the controller when the controller is the "active window" (i.e., its title bar is highlighted). To use the arrow keys for your search screen, press Alt + F6 to make the search screen the active window. After you press an arrow key to go to the next record, the controller will become the active window again.

Hint: *Another way to use the controller function keys with your keyboard is to tab to the function key on the controller with the* Tab *key and press* Enter.

Moving and sizing the controller

You can move the controller around if you want, just like any dialog box. This may be necessary if it gets in the way of your record. You can also make the box smaller.

To reduce the size of the controller

1. Position the mouse pointer on one of the corners of the box.
2. Hold your first (left) mouse button down and move the pointer toward the center to make the frame smaller.
3. Release the button and the controller will turn into a "credit-card-size" box.

To restore the controller to normal size

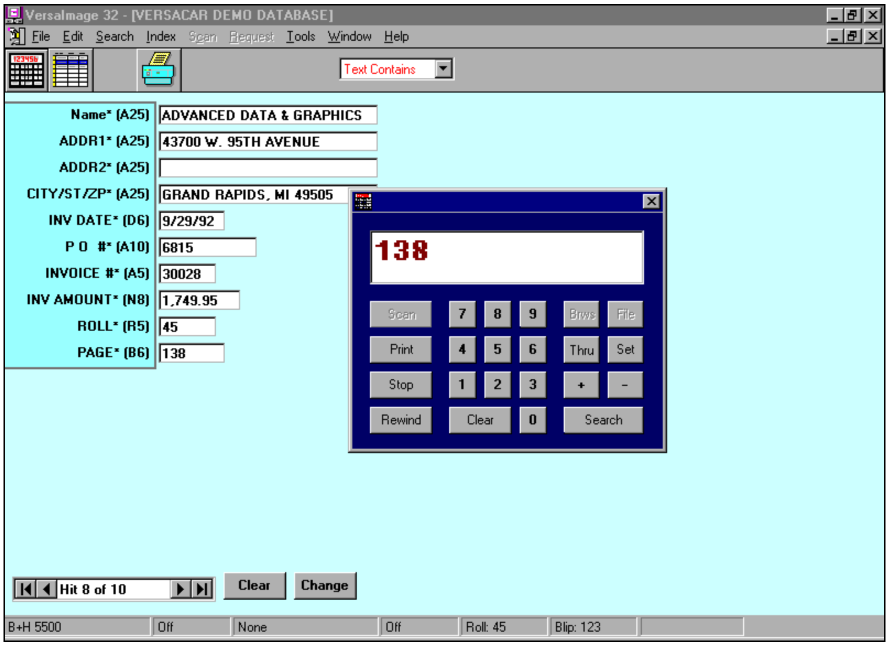
1. Drag the frame outward until it is quite large.
2. Release the button and the controller will reappear in its original size.

Using the Controller to Retrieve Documents

The method you use to retrieve documents with the controller depends on how your database is indexed.

Single-level indexes with one record per frame

If your database has single-level indexing, you will notice that the frame (blip) number for the record will appear in the window of the controller as you "page" through your database records. You can use the controller "keys" to retrieve a record from film.



Name* (A25)	ADVANCED DATA & GRAPHICS
ADDR1* (A25)	43700 W. 95TH AVENUE
ADDR2* (A25)	
CITY/ST/ZP* (A25)	GRAND RAPIDS, MI 49505
INV DATE* (D6)	9/29/92
P O #* (A10)	6815
INVOICE #* (A5)	30028
INV AMOUNT* (N8)	1,749.95
ROLL* (R5)	45
PAGE* (B6)	138

138

B+H 5500 | Off | None | Off | Roll: 45 | Blip: 123

Fig 24.2. Search screen with microfilm controller displayed

To search with your mouse

1. Search through your database records by clicking on the buttons in the hit bar until you find the record you want. Each time you click, the record frame number will appear in the controller window.
2. Click Search on the controller. "**Searching . . .**" will be displayed in the window and the reader will move to the frame. When it finds the frame, the frame number will reappear in the controller window. It will also be displayed in the status bar at the bottom of the screen.

To search with the keyboard

1. Use the → key to "page" to the next record.
2. The frame number will appear in the controller window. If this is not the record you want, press Alt + F6 to leave the controller window. Then press → to move to the next record.
3. When you find the record you want, press Enter. "**Searching . . .**" will be displayed in the window and the reader will move to the frame. When it finds the frame, the frame number will reappear in the controller window. It will also be displayed in the status bar at the bottom of the screen.

Multi-level indexes

If you have a two- or three-level index or a single-level index with logical subgroups, you search for the indexed record. Then you page through the associated frames in your group with the controller.

To search with your mouse

1. Search through your index records by clicking ▶ in the hit bar until you find the record for the subgroup.
2. Click Search on the controller to position the reader on that frame.
3. Use the + key on the controller to advance the film to the next frame. As you advance, the frame number will be displayed.
4. Continue using + to advance and - to back up until you find the record you want.

To search with the keyboard

1. Use the → key to "page" to the next record.
2. The frame number will appear in the controller window. If this is not the record you want, press Alt + F6 to leave the controller window. Then press → to move to the next record.
3. When you find the record you want, press Enter.
4. After the film is positioned on the frame for the record, use + and - on the keyboard to search for the frame:

+	Moves forward one frame.
-	Moves backward.

Requesting a specific frame

You can look at a frame other than the one associated with your record if you wish.

To request a specific frame with the mouse

1. Click Clear on the controller to clear the controller display.
2. Use the controller keys to enter the frame number.
3. Click Search on the controller.

To request a specific frame with the keyboard

1. Press Esc to clear the controller.
2. Use either the numeric keypad or the number keys on the keyboard to enter the frame number. The number will appear in the controller window.
3. Press Enter.

Scanning Documents

If you have a microfilm scanner, you can use the controller "keys" to scan a frame you have retrieved. You can scan a single frame or a sequence of frames. The scanned images will be saved in your database.

Note: *If your database is not image-enabled, you will need to enable it before you can scan.*

To scan a single frame with your mouse

1. Locate the record you want in the database and retrieve its frame on microfilm.
2. Click Scan to scan the image. The scanned image will be displayed on your screen on the right.

To scan a single frame with the keyboard

1. Locate the record you want in the database and retrieve its frame on microfilm.
2. Click S. The scanned image will be displayed on your screen on the right.

To scan a sequence of frames with your mouse

1. Click Clear to clear the window.
2. Use the controller "keys" to enter the starting frame number.

3. Click Thru. Then enter the ending frame number.

4. Click Scan to scan the frames.

To scan a sequence of frames with the keyboard

1. Press Esc to clear the controller.

2. Use the numeric keypad or number keys to enter your starting frame number. The number will appear in the controller window.

3. Enter a forward slash (/). Then enter the ending frame number.

4. Press S to scan.

Printing Documents

If you can print from your reader, you can use the controller "keys" to print a frame you have retrieved. If you have VersaImage and have a microfilm scanner, you have the following additional output options:

- Scanning the document and printing it on your laser or inkjet printer.
- Scanning the document and faxing it through your fax software.
- Scanning the document and E-mailing it through your E-mail software.

Regardless of the output option, you can print either a single frame or a sequence of frames.

When you scan, you can apply background image correction to your document. If you choose to do so, check to make sure your correction options are set appropriately *before* you scan. You can access the **Correction Options** from **Image Correction** on the **Tools** menu. For more information on image correction, refer to Chapter 11.

Caution: *Enabling or disabling image correction when you print from the controller does not use or affect your current setting on the* ***Scan*** *menu. It is only in effect for this function. However, it uses whatever correction options are in effect at the time. These changes will remain in effect after you exit this function.*

Note: *The* ***Scan and Print****,* ***Scan and Fax****, and* ***Scan and E-Mail*** *functions do NOT save the images onto your hard drive. To do this, use the* ***Scan*** *function on the controller.*

To print a single frame

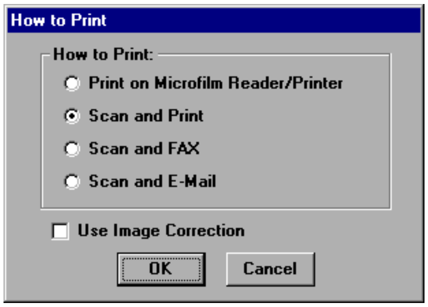
1. Locate the record you want in the database and retrieve its frame on microfilm.

2. Click Print or press P to print the document. The **How to Print** dialog box (fig 24.3) will appear so you can select your print option.

3. Select your print option.

4. If you want to apply background image correction, enable **Use Image Correction**.

5. Click OK or press Enter.



How to Print

How to Print:

○ Print on Microfilm Reader/Printer

● Scan and Print

○ Scan and FAX

○ Scan and E-Mail

☐ Use Image Correction

Fig 24.3. **How to Print** dialog box

▸ To print a sequence of frames with your mouse

1. Click **Clear** on the controller to clear the controller window.
2. Use the controller "keys" to enter the starting frame number.
3. Click **Thru**. Then enter the ending frame number.
4. Click **Print** to print the frames. The **How to Print** dialog box (fig 24.3) will appear so you can select your print option.
5. Select your print option.
6. If you want to apply background image correction, enable **Use Image Correction**.
7. Click **OK** to print your documents.

▸ To print a sequence of frames with the keyboard keys

1. Press **Esc** to clear the window.
2. Use the numeric keypad to enter the starting frame number. The number will appear in the controller window.
3. Enter a forward slash (/). Then enter your ending frame number.
4. Press **P**. The **How to Print** dialog box (fig 24.3) will be displayed so you can select your print options.
5. Select your print option.
6. If you want to apply background image correction, enable **Use Image Correction**.
7. Click **OK** to print your documents.

Other Controller Operations

In addition to retrieving frames, you can use the controller keyboard to reset your position and rewind the film. These functions allow you to operate the reader almost completely from your search screen.

Rewinding

After you finish with a roll, you can use the controller to rewind it directly from your computer screen.

▸ To rewind your film

1. To start rewinding your film, press **Rewind** on the controller or **R** on the keyboard.
2. To stop the rewind, click **Stop** on the controller.

> ***Caution:*** **Stop** *does not work with all readers.*

Resetting the microfilm frame position

If you notice that the number of the frame on your microfilm does not agree with the number displayed on the screen, you can reset on the controller so that it will be "in sync" with your data records:

▶ To reset the frame position

1. Enter the correct number for the frame in the controller window.
2. Click **Set** and the frame number will be reset.

Viewing and Printing Images

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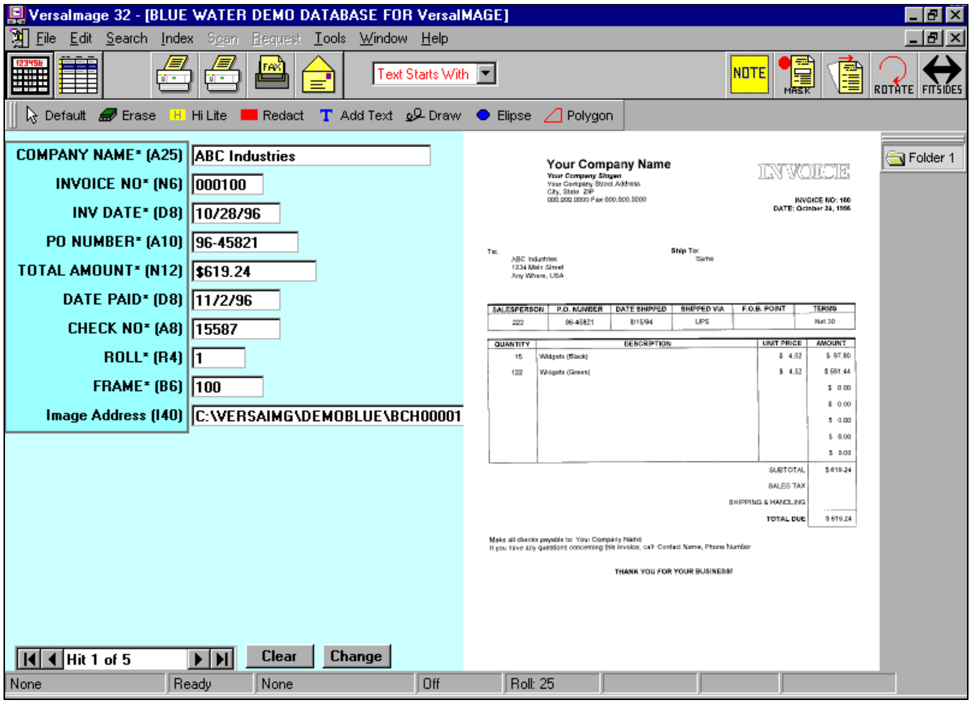
When you search an image-enabled database, the scanned images will be displayed with your records. You can zoom in on them, print them on your laser printer, send them to your fax machine, or E-mail them. The distribution folder option permits you to collect documents from a number of different records in different databases prior to printing.

Zooming in on Images

The zoom feature allows you to get a close-up view of any portion of your document.

Records with single images

If a record has a single image associated with it, the image will be displayed as a full page next to the record (fig. 25.1).

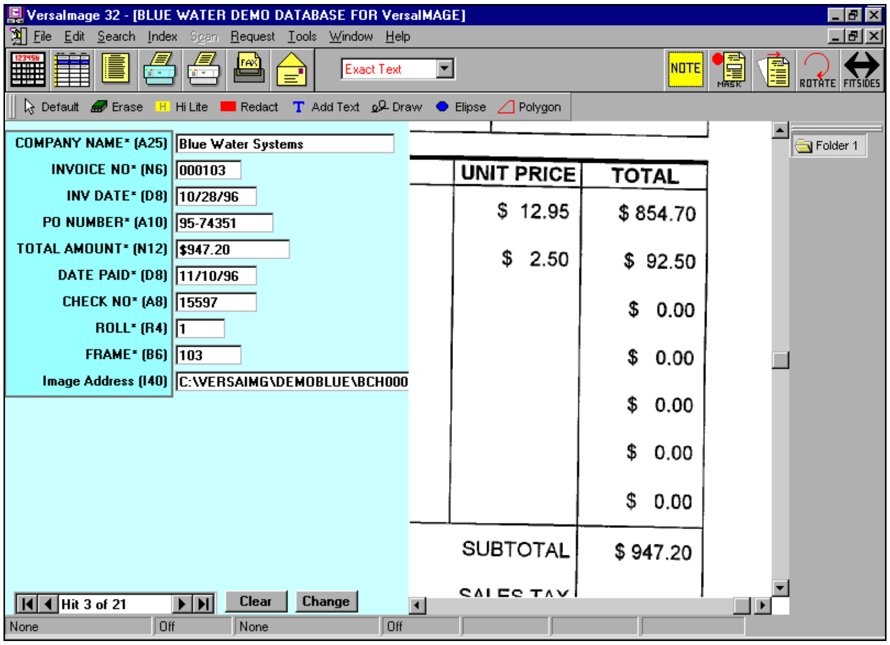

VersaImage 32 - [BLUE WATER DEMO DATABASE FOR VersaIMAGE]
File Edit Search Index Scan Request Tools Window Help
Text Starts With
NOTE
MASK
ROTATE
FITSIDES
Default
Erase
Hi Lite
Redact
Add Text
Draw
Elipse
Polygon
Folder 1
Hit 1 of 5
Clear
Change
None
Ready
None
Off
Roll: 25

COMPANY NAME* (A25) ABC Industries
INVOICE NO* (N6) 000100
INV DATE* (D8) 10/28/96
PO NUMBER* (A10) 96-45821
TOTAL AMOUNT* (N12) $619.24
DATE PAID* (D8) 11/2/96
CHECK NO* (A8) 15587
ROLL* (R4) 1
FRAME* (B6) 100
Image Address (I40) C:\VERSAIMG\DEMOBLUE\BCH00001

Fig. 25.1. Database record with single scanned image on right

▸ To zoom in on the image

1. Hold your left mouse button down and draw a “box” around the area you want to zoom in on.
2. Release the mouse button to zoom in on the area.
3. When you zoom into an image, horizontal and vertical scroll bars will appear by the image (fig. 25.2). You will be able to move up and down and left and right to see other parts of the zoomed image.
4. To zoom in further, draw a box around the place you want to zoom in on.
5. To restore the image to normal size, press your right mouse button.

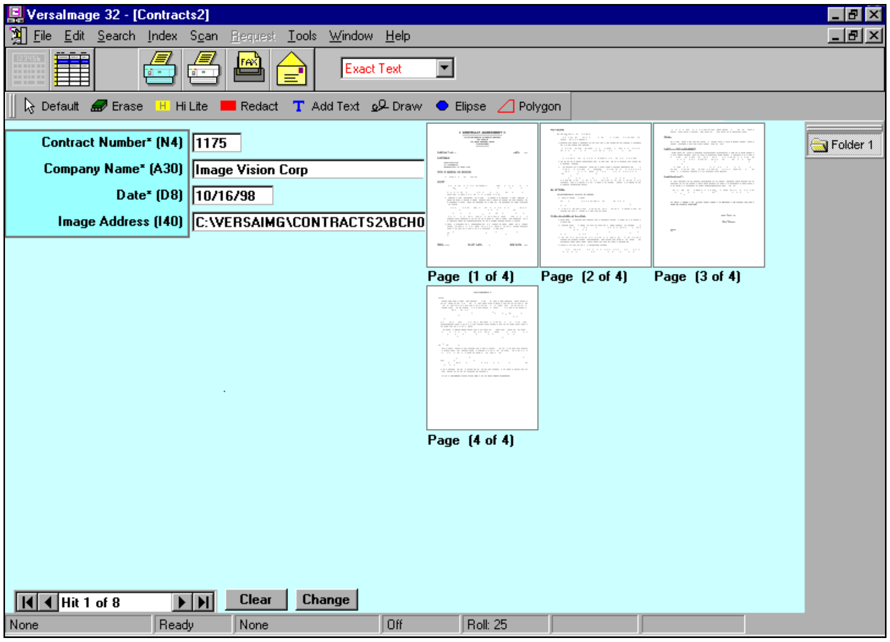

VersaImage 32 - [BLUE WATER DEMO DATABASE FOR VersaIMAGE]
File Edit Search Index Scan Request Tools Window Help
Exact Text
NOTE
MASK
ROTATE
FITSIDES
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Folder 1
UNIT PRICE
TOTAL
$ 12.95
$ 854.70
$ 2.50
$ 92.50
$ 0.00
$ 0.00
$ 0.00
$ 0.00
$ 0.00
SUBTOTAL
$ 947.20
SALES TAX
Hit 3 of 21
Clear
Change
None
Off
None
Off

COMPANY NAME* (A25) Blue Water Systems
INVOICE NO* (N6) 000103
INV DATE* (D8) 10/28/96
PO NUMBER* (A10) 95-74351
TOTAL AMOUNT* (N12) $947.20
DATE PAID* (D8) 11/10/96
CHECK NO* (A8) 15597
ROLL* (R4) 1
FRAME* (B6) 103
Image Address (I40) C:\VERSAIMG\DEMOBLUE\BCH000

Fig. 25.2. Database record with zoomed image. Note the scroll bars.

Records with multiple images

Documents for images in folder files and multi-page TIFF files appear in "thumbnails" next to the record (fig. 25.3).


VersaImage 32 - [Contracts2]
File Edit Search Index Scan Request Tools Window Help
Exact Text
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Folder 1
Page (1 of 4)
Page (2 of 4)
Page (3 of 4)
Page (4 of 4)
Hit 1 of 8
Clear
Change
None
Ready
None
Off
Roll: 25

Contract Number* (N4) 1175
Company Name* (A30) Image Vision Corp
Date* (D8) 10/16/98
Image Address (I40) C:\VERSAIMG\CONTRACTS2\BCH0

Fig. 25.3. Database "folder" record with thumbnails of scanned images

▸ To view multi-page documents

1. To view an individual image, move the pointer to the image and click your left mouse button.

2. To zoom in further:
   - Hold your left mouse button down and draw a box around the area you want to zoom in on.
   - Release the mouse button to zoom in on the area.

3. When you zoom into an image, horizontal and vertical scroll bars will appear by the image. You will be able to move up and down and left and right to see other parts of the zoomed image.
4. To zoom in further, draw a box around the place you want to zoom in on.
5. To restore the image to normal size, click the right mouse button. To return it to thumbnail size, click the right mouse button again.

Other Viewing Adjustments

In addition to zooming in, there are some other viewing adjustments you can make.

Full screen mode

For a better view of your document, you can switch your display to full screen mode.

▶ To activate full screen mode

Do either of the following:

- Click anywhere on your document with the left mouse button.
- Click the FITSIDES button on the tool bar.

▶ To return to window mode

Do either of the following:

- Click anywhere on your document with either mouse button.
- Click the FIT WIN button on the tool bar.

Rotating and deskewing your image

If an image was scanned in the wrong orientation, you can rotate or deskew it for easier reading. These functions do not change the image orientation permanently, only so you can view it. To change the image permanently, use **Image QC**.

▶ To rotate an image

1. Do either of the following:
   - Click ROTATE on the tool bar.
   - Press F11.
2. The image will rotate 90° to the right.
3. Continue clicking ROTATE or pressing F11 until the image is in the correct orientation. Each time you click, the image will rotate 90°.

▶ To deskew an image

1. Do either of the following:
   - Click on the tool bar.
   - Press F10.
2. The image will be deskewed.

Scanning Images

If you have the security clearance to do so, you can add images to folders or records with your scanner. You can also rescan badly scanned images. When you rescan an image, it replaces the image you have selected. When you scan an image, it adds the image to the record. If there is a folder file associated with the record, it adds the document to the end of file. A special **Scan and Insert** function allows you to scan a page and insert it into a specific place in the file. The single-page scanning options allow you to add images scanned from paper to folders of images that were scanned from film and add images to folders or records at a later date.

▸ To rescan an image

1. Make sure the page you want to replace is displayed on the screen.
2. Place the page you want to scan in the scanner.
3. Either select **Rescan** from the **Scan** menu or press F6. The page will be scanned and replace the currently displayed page in your database.

▸ To scan and add an image

1. Place the page you want to scan in the scanner.
2. Either select **Scan Single** from the **Scan** menu or press F5 to scan the page:
   - If there was no previous image associated with the record, VersaImage places the file name in the **Image Address** field.
   - If there was a single image previously associated with the record, VersaImage creates a folder file and places both images in the folder file.
   - If the record has a folder file associated with it, VersaImage adds the new image to the end of the folder.

▸ To scan and insert an image

1. Place the page you want to scan in the scanner.
2. Zoom out to thumbnail view.
3. Move your mouse pointer to the image that is in the location where you want to place the inserted image.
4. Click your right mouse button on the page number label to select the image. The label will be highlighted to show the image is selected.
5. Either select **Scan and Insert** from the **Scan** menu or press F3 to scan the page.
6. The page will be scanned and inserted in front of the selected page.

Correcting Images

You can apply image corrections from your search screen through the **Image Correction** menu. These functions use the same correction options that are available for background scanning (see Chapter 11). If you use background correction as a general rule, you will not have to apply these options individually. However, there may be images or folders or even batches that require a special correction procedure. The **Image Correction** functions allow you to select and apply options that you would not normally use for background correction (such as lightening text in an image that is so dark it is not readable) or rotating an entire batch that was scanned upside down.

> ***Warning:*** *If you change the correction options, they will remain in effect for all subsequent scanning operation, including background correction, until you change them. If you set special options for a correction and also use background correction, do not forget to reset these options after you finish correcting your images!*

▶ To correct an individual image

1. Select the image you want to correct. It should be displayed on the right side of your screen in full-page mode.

2. Select your correction options as follows:

   - Select **Image Correction** from the **Tools** menu.
   - Select **Correction Options** from the **Image Correction** menu. The **FixImage Settings** dialog box will appear.
   - Select the correction options you want to apply to the image from the box and click OK.

3. Select **Image Correction** from the **Tools** menu. Then select **Correct Image**.

▶ To correct all images in a folder

1. Make sure you have the correct folder displayed.

2. Select your correction options as follows:

   - Select **Image Correction** from the **Tools** menu.
   - Select **Correction Options** from the **Image Correction** menu. The **FixImage Settings** dialog box will appear.
   - Select the correction options you want to apply to the image from the box and click OK.

3. Select **Image Correction** from the **Tools** menu. Then select **Correct All Images in Folder**.

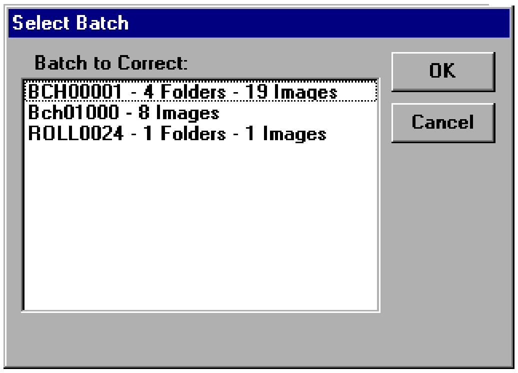
▶ To correct an entire batch

1. Select your correction options as follows:

   - Select **Image Correction** from the **Tools** menu.
   - Select **Correction Options** from the **Image Correction** menu. The **FixImage Settings** dialog box will appear.
   - Select the correction options you want to apply to the image from the box and click OK.

2. Select **Image Correction** from the **Tools** menu.

3. Select **Correct Batch** from the **Image Correction** menu. The **Select Batch** dialog box (fig. 25.4) will appear.



Select Batch

Batch to Correct:

BCH00001 - 4 Folders - 19 Images
Bch01000 - 8 Images
ROLL0024 - 1 Folders - 1 Images

Fig. 25.4. Selecting a batch for image correction

4. Select the batch you want to correct and click OK.

Printing and Faxing

You may have noticed that, when you did your first search on your image-enabled database, three additional buttons appeared in your tool bar:

Prints the image on your laser or inkjet printer.

Initiates a fax transaction.

Initiates an E-mail transaction.

With these buttons, you can distribute copies of your images directly from the search screen. If your images are kept in folders or multi-page TIFFs, you can print either single pages or the entire set of documents. You can also print thumbnails.

> ***Note:*** *To fax and E-mail, you must first set up your fax and E-mail software so VersaImage can recognize it. Fax setup is found on the* ***File*** *menu. E-mail setup is found on the* ***Preferences*** *menu. Instructions are given in Chapter 4.*

▸ To print, fax, or E-mail from a single-page record

1. Display the record with the image.
2. Press the button that performs the action you want:
   - If you selected the print button, the image will be printed on your printer.
   - If you selected the fax button, you will be placed in your fax software so you can complete the transaction.
   - If you selected the E-mail button, you will be placed in your E-mail software so you can complete the transaction.

▸ To print, fax, or E-mail a single page from a folder or multi-page TIFF

1. Display the record for the folder on the screen.
2. Click the page you want to print with the left mouse button to display it full size.
3. Press the button that performs the action you want:
   - If you selected the print button, the image will be printed on your printer.
   - If you selected the fax button, you will be placed in your fax software so you can complete the transaction.
   - If you selected the E-mail button, you will be placed in your E-mail software so you can complete the transaction.

▸ To print, fax, or E-mail all pages in a folder or multi-page TIFF

1. Display the record for the folder on the screen.
2. With the thumbnails displayed, press the button that performs the action you want.
3. A message will appear asking you if you want to print thumbnails. Click one of the following:

Yes	To print the pages as thumbnails
No	To print the pages full size

4. After you respond to the message, the pages will be printed:
    - If you selected the print button, the images will be printed on your printer.
    - If you selected the fax button, you will be placed in your fax software so you can complete the transaction.
    - If you selected the E-mail button, you will be placed in your E-mail software so you can complete the transaction.

Distribution Folders

The distribution folder is located at the right side of your screen for all databases that have images. You can place documents in this folder for printing or faxing. By default, there is one folder called **Folder 1**. You may rename this folder and add additional folders. The distribution folders allow you to search your database and collect documents prior to distribution. They are not attached to a specific database, so you can pull documents from any number of databases for distribution as a unit.

Using a distribution folder

You can add pages to your distribution folder for any record and delete pages from a folder. A distribution folder can be viewed or cleared from any image-enabled database, regardless of whether it contains documents for that database.

▸ To add pages to the distribution folder

1. Find the record that contains the document you want.
2. If the document is in a folder or is a page in a multi-page TIFF file, select the document:
    - To select one page, either click your left mouse button on the page or click your right mouse button on the page number.
    - To select several random pages, hold Ctrl down and click your right mouse button on the page number label of the pages you want to select.
    - To select consecutive pages, click your right mouse button on the page number label below the first document you want to select. Then hold Shift down and click your right mouse button on the page number label of the last page.
3. Place your mouse pointer on the distribution folder and click your right mouse button to display the folder menu (fig. 25.5).
4. Click on **Add Page to Folder**. The selected page (or pages) will be added and the current contents of the folder displayed.
5. Click Clear at the bottom of the screen to close the folder.

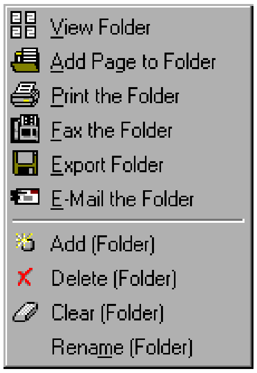


Fig. 25.5. Folder menu

▸ To view a folder

1. Place your mouse pointer on the distribution folder.
2. Do one of the following to open the folder:
    - Double-click on the folder.
    - Click your right mouse button to display the folder menu and select **View Folder**.
3. The contents of the folder will be displayed in the image area on the right of the screen.
4. To close the folder, click Clear at the bottom of the screen.

> ***Note:*** *If you are in the middle of a search when you requested a distribution folder, you will be exited from that search when the distribution folder is displayed.*

▶ To delete a page from a distribution folder

1. Move your mouse pointer to the distribution folder and click your right mouse button to open the folder.
2. Select the page you want to delete:
   - To select one page, either click your left mouse button on the page or click your right mouse button on the page number label.
   - To select several random pages, hold Ctrl down and click your right mouse button on the page number label of each page you want to select.
   - To select consecutive pages, click your right mouse button on the first page number label. Then hold Shift down and click your right mouse button on the page number label of the last page.
3. Press Del on the keyboard.

▶ To clear the contents of a distribution folder

1. Place your mouse pointer on the distribution folder you want to clear.
2. Click your right mouse button to display the folder menu (fig. 25.5).
3. Click on **Clear (Folder)**.

Maintaining distribution folders

You may create, delete, and rename your distribution folders as needed. If, for example, you needed to pull documents for several different recipients, you could name a folder for each. Then you could search your databases and deposit the needed documents in the appropriate folders. After you no longer needed the folders, you could delete them or rename them for another recipient.

▶ To add a new distribution folder

1. Place your mouse pointer on any existing distribution folder.
2. Click your right mouse button to display the folder menu (fig. 25.5).
3. Click on **Add (Folder)**. The **New Folder Name** dialog (fig. 25.6) will appear.

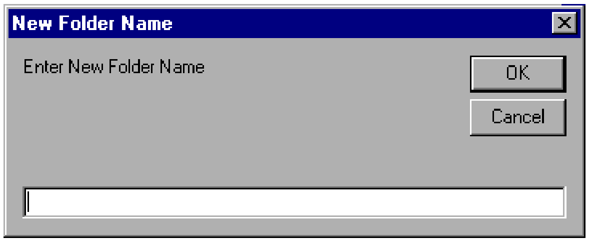


Fig. 25.6. **New Folder Name** dialog

4. Type a name for your folder in the box and click OK. The new folder will appear on the right.

▶ To rename a distribution folder

1. Place your mouse pointer on the distribution folder you want to rename.
2. Click your right mouse button to display the folder menu (fig. 25.5).
3. Click on **Rename (Folder)**. The **New Folder Name** dialog (fig. 25.6) will appear.
4. Type the new name for your folder in the box and click OK. The name will appear on the folder on the right.

▸ To delete a folder

1. Place your mouse pointer on the distribution folder you want to delete.
2. Click your right mouse button to display the folder menu (fig. 25.5).
3. Click on **Delete (Folder)**.

Distributing the contents of a distribution folder

You can output the contents of a distribution folder to a printer, fax modem, or E-mail attachment. You can also export the documents to a multi-image TIFF file.

▸ To print the contents of a distribution folder

1. Place your mouse pointer on the distribution folder you want to print.
2. Click your right mouse button to display the folder menu (fig. 25.5).
3. Click on **Print the Folder**. The contents of the folder will be sent to your printer.

▸ To fax the contents of a distribution folder

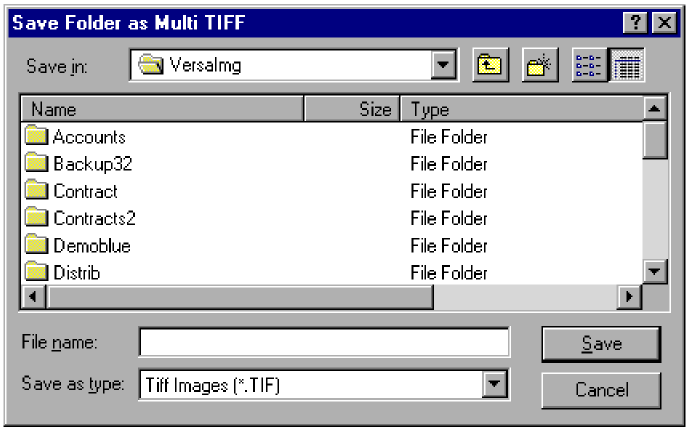
1. Place your mouse pointer on the distribution folder you want to fax.
2. Click your right mouse button to display the folder menu (fig. 25.5).
3. Click on **Fax the Folder**. You will be placed in your fax application so you can complete the transaction.

▸ To E-mail the contents of a distribution folder

1. Place your mouse pointer on the distribution folder you want to fax.
2. Click your right mouse button to display the folder menu (fig. 25.5).
3. Click on **E-mail the Folder**. You will be placed in your E-mail application so you can complete the transaction.

▸ To export the contents of a distribution folder as a multi-image TIFF

1. Place your mouse pointer on the distribution folder you want to export.
2. Click your right mouse button to display the folder menu (fig. 25.5).
3. Click on **Export the Folder**. The **Save Folder as Multi TIFF** dialog box (fig. 25.7) will appear.



Save in: VersaImg

Name	Size	Type
Accounts		File Folder
Backup32		File Folder
Contract		File Folder
Contracts2		File Folder
Demoblue		File Folder
Distrib		File Folder

File name:

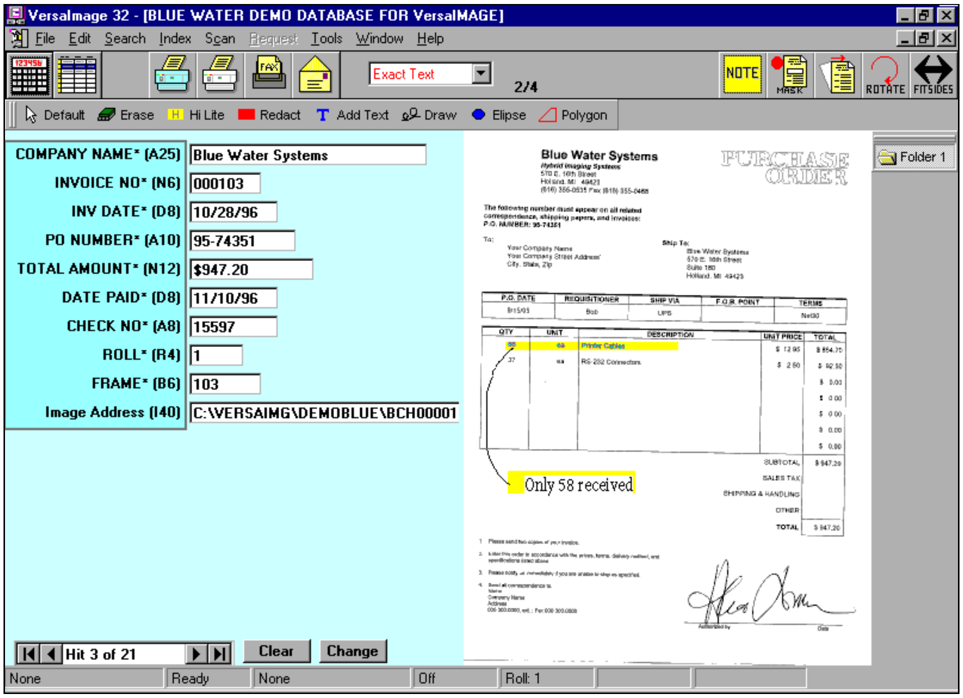
Save as type: Tiff Images (*.TIF)

Fig. 25.7. **Save Folder as Multi TIFF** dialog

4. Navigate to the directory where you want to save your folder.
5. Type the name you want to save the image under in the box and click Save.

Annotating Images 26

You can annotate your images with the drawing tools on the annotation tool bar. The drawing tools allow you to add highlights, masks, shapes, lines, and text to a document. You can also use the note feature to add and store text notes for your images. Fig. 26.1 shows an example of some of these features. These annotations overlay the document and can be added and removed without affecting the image file itself. Therefore, they can be very useful for tracking problems and pending issues.


VersaImage 32 - [BLUE WATER DEMO DATABASE FOR VersaIMAGE]
File Edit Search Index Scan Request Tools Window Help
Exact Text
2/4
NOTE
MASK
ROTATE
FITSIDES
Default
Erase
Hi Lite
Redact
Add Text
Draw
Elipse
Polygon
Folder 1
Blue Water Systems
PURCHASE ORDER
Only 58 received
Hit 3 of 21
Clear
Change
None
Ready
None
Off
Roll: 1

COMPANY NAME* (A25)	Blue Water Systems
INVOICE NO* (N6)	000103
INV DATE* (D8)	10/28/96
PO NUMBER* (A10)	95-74351
TOTAL AMOUNT* (N12)	$947.20
DATE PAID* (D8)	11/10/96
CHECK NO* (A8)	15597
ROLL* (R4)	1
FRAME* (B6)	103
Image Address (I40)	C:\VERSAIMG\DEMOBLUE\BCH00001

Fig. 26.1. Document with graphic and text annotations added

Adding Graphic Elements

Graphic annotation elements consist of highlights, ellipses, polygons, masks and free-hand lines. These elements can be used to flag parts of a document you want people to look at and to mask portions of a document during printing that you do not want people to see (such as confidential or security-sensitive elements). You may also use them to highlight text annotations (see page 199).

***Note:** If you select a drawing tool by mistake, click on the* Default *tool on the drawing tool bar to return the mouse pointer to the default arrow.*

Drawing highlights

You can "highlight" portions of the document with the highlighter tool. Highlights have a transparent yellow fill that allows your text to show through on the display. They also print as transparent yellow highlights on a color inkjet printer. On most laser printers the highlight will print a transparent gray highlight. It will not, however, print as transparent on either PostScript printers or most fax machines. It will appear instead as an opaque layer over the printed copy. Therefore, if you want to highlight a document that will be printed on either of these devices, be sure not to place the highlight directly over the text. Put a bar along the side instead.

▶ To place a highlight on your document

1. Select the H Hi Lite tool.
2. Drag your mouse to the image. The pointer will change to a highlighter.
3. Position the "point end" of the highlighter at the point where you want to start drawing your highlight.
4. Press your left mouse button and hold it down.
5. Start dragging your mouse to select the area you want to highlight. A "rubber band" outline will appear.
6. When all the area you want to highlight is covered, release the mouse button. A yellow highlight will appear on the image.

Drawing polygons and ellipses

You also draw ellipses or free-form polygons on your documents. Like highlights, these shapes appear as "transparent solids" that allow your text to show through on the display and also on color inkjet output. However, because the colors are so dark, they will print as black on black and white printers, obscuring any text that is underneath. They will also cover the text on any PostScript printer or fax machine.

▶ To add an ellipse

1. Select the ● Elipse tool.
2. Drag your mouse to the image. The pointer will change to an ellipse.
3. Position the + in the pointer at the point where you want to start drawing your ellipse.
4. Press your left mouse button and hold it down.
5. Start dragging your mouse to draw your ellipse. A rectangular "rubber band" outline will appear.
6. When the outline is the size you want your ellipse to be, release the mouse button. A blue ellipse will appear on the image.

▶ To add a polygon

1. Select the Polygon tool.
2. Drag your mouse to the image. The pointer will change to a polygon.
3. Position the + in the pointer at the point where you want to start drawing your polygon and click your mouse.
4. Move the mouse pointer to the point where you want your first side to end and click. A red line will appear on your image.
5. Move the pointer to the place where the next side should end and click again. The next line will appear. Do this to draw all sides except the last one.
6. Double-click your mouse to draw the last side and complete the polygon. A red polygon of the shape you defined will appear on the image.

Masks

A mask can be added to any area of an image to mask out parts of the image you don't want people to see. Masks are opaque in the display as well as when they are printed. They will be opaque on any print device.

To create a mask

1. Select either the Redact drawing tool or the MASK tool from the tool bar.
2. Drag your mouse to the image. The pointer will change to a rectangle.
3. Position the + in the pointer at the point where you want to start drawing your mask.
4. Press your left mouse button and hold it down.
5. Start dragging your mouse to draw your mask. A rectangular "rubber band" outline will appear.
6. When the outline is the size you want your mask to be, release the mouse button. A red rectangular mask will appear on the image.

Free-hand line drawing

You can draw free-hand lines on your image. You can draw arrows to or point out a particular item, underline an item, or circle an item on the image. Because you can create shapes that are not filled in, it is a good way to draw attention to items on documents you plan on faxing. The free-hand drawing tool is a little difficult to manage at first. You will need to practice using your mouse as a drawing tool in order to develop your skill. (Fortunately, there is an "eraser!" See page 201).

To draw a free-hand line

1. Select the Draw tool.
2. Drag your mouse to the image. The pointer will change to a pencil.
3. Position the "point end" of the pencil at the point where you want to start drawing your line.
4. Press your left mouse button and hold it down.
5. Start dragging your mouse to draw your line. The line will appear on the screen as you draw it.
6. When your line is finished, release the mouse button.

> ***Note:*** *If you are drawing an object with multiple lines, you will need to reselect the* Draw *tool for each line you draw.*

Adding Text Annotations

You can add text annotations either through the drawing text tool or the note tool. The drawing tool is good for adding "one-time only" text. The note tool stores the annotation and lets you add stored annotations as well as new ones. You can also edit stored notes and reapply them. You cannot edit the annotations you add with the drawing tool.

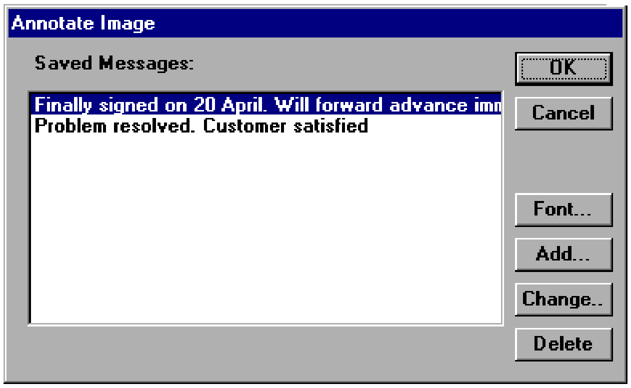
> ***Hint:*** *If you want to highlight your text annotation, draw a highlight or shape first. Then place your text on top of it. Both the highlight and the annotation will then print on any output device, including faxes.*

▸ To add text with the drawing tool

1. Select the T Add Text tool.
2. Drag your mouse to the image. The pointer will change to an insertion bar.
3. Position the + in the pointer at the point where you want to enter your text and click your mouse.
4. Start typing your text. The text will appear on the screen as you type.
5. When you finish typing your text, either click your mouse again or press Enter. The text will be changed to that of the currently selected annotation font.

▸ To add a new message with the note tool

1. Select the NOTE tool from the tool bar. The **Annotate Image** dialog (fig. 26.2) will appear. All saved messages for your system will be displayed.



Finally signed on 20 April. Will forward advance imn
Problem resolved. Customer satisfied

Fig. 26.2. **Annotate Image** dialog box

2. To enter a new message, press Add. The **Add Annotation** dialog (fig. 26.3) will appear.

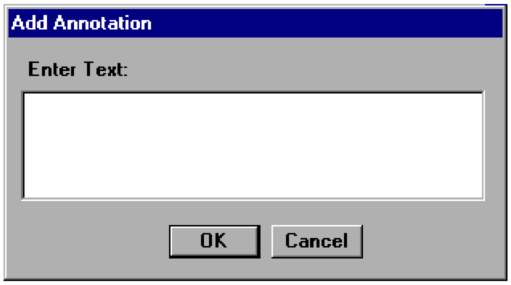


Fig. 26.3. **Add Annotation** dialog

3. Enter your annotation text in the box.
4. Click OK. The box will close and your message will appear in the **Annotate Image** list.
5. To place the annotation in your text, do one of the following:
   - Double-click on the message in the list.
   - Highlight the message and click OK.
6. The annotation will appear in the upper left corner of the image. To position it where you want it, do the following:
   - Place your mouse pointer on the text. The mouse pointer will change to a ✥.
   - Drag the message to the place where you want to put it and release the mouse button.

Moving, Sizing, and Erasing Annotations

You can move your text or graphic annotations anywhere on your image or delete them from the image. You can also resize your graphic annotations. You cannot resize text annotations.

▶ To erase an annotation object

1. Select the Erase tool.
2. Drag your mouse to the image. The pointer will change to an eraser.
3. Position the + in the pointer on the object you want to remove.
4. Click your mouse and the object will be removed from your image.

▶ To move an annotation object

1. If a drawing tool is selected, select the Default instead.
2. Place your mouse pointer on the object. The mouse pointer will change to a ✥.
3. Press your left mouse button and drag the object to the place where you want to put it.
4. When the object is where you want it, release the mouse button.

▶ To resize an annotation object

1. If a drawing tool is selected, select the Default instead.
2. Place your mouse pointer on one of the object's corners. The mouse pointer will change to a diagonal arrow and a rubber band outline will appear around the object.
3. Press your left mouse button and drag your mouse to change the size of the outline.
4. When the outline is the size you want the object to be, release the mouse button. The object will be resized to the size of the outline.

Using and Maintaining Stored Annotations

The note tool stores your annotations automatically. Therefore, it is useful for maintaining annotations you frequently use. Once you create an annotation with the note tool, it is available for use until you delete it.

▶ To insert an existing annotation

1. Select the NOTE tool from the tool bar. The **Annotate Image** dialog (fig. 26.2) will appear. All saved messages for your system will be displayed.
2. Select the annotation you want to insert and do one of the following:
   - Double-click on the message in the list.
   - Highlight the message and click OK.
3. The message will appear in the upper left corner of the image. To position it where you want it, do the following:
   - Place your mouse pointer on the text. The mouse pointer will change to a ✥.
   - Drag the message to the place where you want to put it and release the mouse button.

To edit an annotation

1. Select the NOTE tool from the tool bar. The **Annotate Image** dialog (fig. 26.2) will appear. All saved messages for your system will be displayed.

2. Highlight the message you want to edit and click Change. The current text of the message will appear in the **Add Annotation** dialog box (fig. 26.3).

3. Make your changes to the annotation text.

4. Click OK. The box will close and your message will appear in the **Annotate Image** list.

> ***Note:*** *There is no link between the messages in the list and the documents you may have added them to. If the text of the message is already inserted in the image you want to add the updated text to, you will need to remove the old message and add the new one.*

To delete a stored annotation

1. Select the NOTE tool from the tool bar. The **Annotate Image** dialog (fig. 26.2) will appear. All saved messages for your system will be displayed.

2. Highlight the message you want to delete.

3. Click Delete and the message will be removed from the list.

4. To add the message to an image, follow the instructions above.

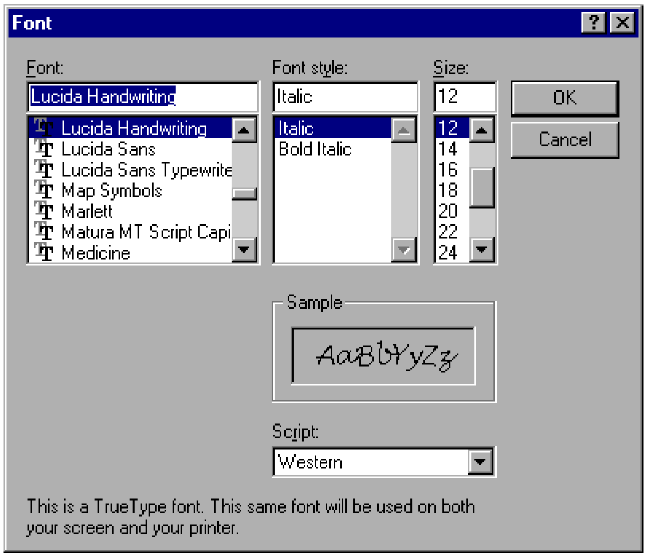
Changing the Annotation Text Font

You can also use the note function to change the annotation text font. The font you select will be in effect for all text annotations until you change it. It will also affect text that you apply with the T Add Text tool.

To change the annotation text font

1. Select the NOTE tool from the tool bar. The **Annotate Image** dialog (fig. 26.2) will appear. All saved messages for your system will be displayed.

2. Click Font. The **Font** dialog (fig. 26.4) will appear.



Font: Lucida Handwriting

Font style: Italic

Size: 12

Script: Western

This is a TrueType font. This same font will be used on both your screen and your printer.

Fig. 26.4. **Font** dialog box

3. All fonts available on your system will be displayed in the box. To select your font, do the following:
   - Select the font name from the **Font** drop-down list.
   - Select the style (bold, italic, etc.) from the **Font Style** list. Only valid styles for the font you selected will appear.
   - Enter the font size in the **Size** field. Common font sizes are listed for you to select from. If the size you want is not in the list, enter it in the text box at the top.
4. Click OK and the **Font** dialog box will close. All annotations you apply to your image from now on will appear in the selected font. This includes notes applied with the text tool as well as with the note tool.
5. Click OK again to close the **Annotate Image** dialog.

Requesting Document Prints

27

If your system operates on a network, the program's request functions permit user workstations without microfilm readers to request documents from stations that have access to your microfilm "library" and a microfilm reader. Stations that can process the requests are enabled as *request fulfilling workstations*. Other stations on the network would be enabled as *requesting workstations*. Requests made by requesting workstations are placed in a queue to be processed by request fulfilling workstations. Requests can also be imported by request fulfilling workstations from workstations that do not have VersaImage or VersaCAR.

The requests can be one of three types:

Return to Requestor	The document is retrieved, printed, and returned to the requestor.
Mail To	The document is retrieved, printed, and mailed. The request includes the address and accompanying notes. An insert for the envelope containing the recipient address and the notes is printed directly from the included information.
Fax To	The document is retrieved, printed, and faxed. The request includes the fax number and fax notes. An accompanying fax cover sheet is printed from this information.

Setting up Your Workstation

To use the request feature, the workstations on your network must be set up either as requesting stations or request fulfilling stations.

To set up your workstation

1. Select **Preferences** from the **File** menu. Then select **Workstation Setup** (fig. 27.1).

2. When you make a selection, the **Workstation Setup** dialog box (fig. 27.2) will appear. Select one of the following as your workstation type from the group of options:

   Requesting Workstation

   Request Fulfilling Workstation

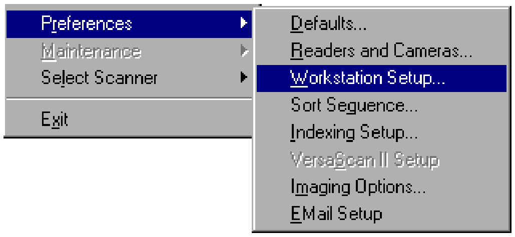
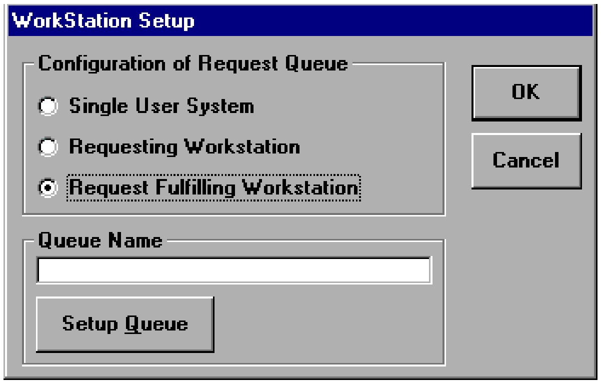

Preferences
Maintenance
Select Scanner
Exit
Defaults...
Readers and Cameras...
Workstation Setup...
Sort Sequence...
Indexing Setup...
VersaScan II Setup
Imaging Options...
EMail Setup

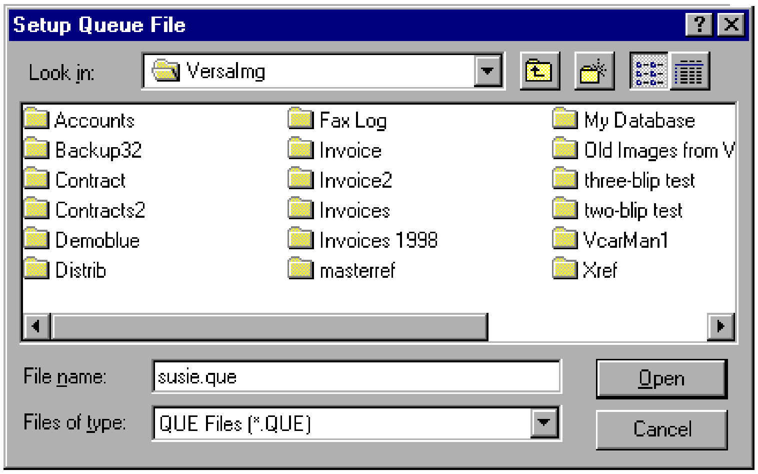
Fig. 27.1. Selecting **Workstation Setup**


WorkStation Setup
OK
Cancel
Queue Name
Setup Queue

Configuration of Request Queue
○ Single User System
○ Requesting Workstation
● Request Fulfilling Workstation

Fig. 27.2. **WorkStation Setup** dialog

3. Next, you must set up a queue file. Press **Setup Queue** and a dialog box for setting up your queue file will appear. The **Setup Queue File** dialog box (fig. 27.3) looks and works like the **Open** dialog box:


Setup Queue File
Accounts
Backup32
Contract
Contracts2
Demoblue
Distrib
Fax Log
Invoice
Invoice2
Invoices
Invoices 1998
masterref
My Database
Old Images from V
three-blip test
two-blip test
VcarMan1
Xref
Open
Cancel

Look in: VersaImg

File name: susie.que

Files of type: QUE Files (*.QUE)

Fig. 27.3. **Setup Queue File** dialog box

- Navigate to the directory where you want to place the queue file.
- Either enter a new queue file name or select one of the existing ones.
- Click **Open**. You will return to the **WorkStation Setup** dialog box.

4. Click **OK** to complete your setup.

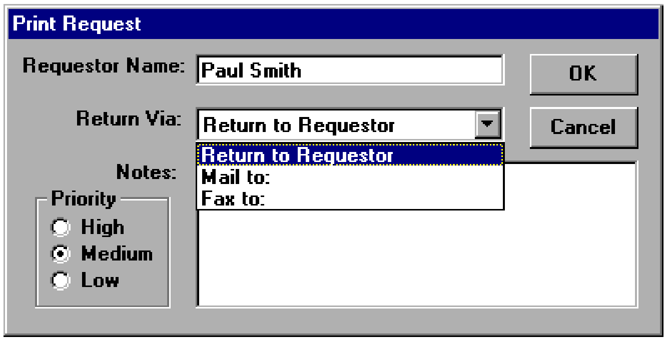
> *Note: Generally, for most setups, all workstations should be set up to use the same queue file on a network server.*

Making a Print Request

You can make a print, fax, or mail request from a requesting workstation.

To open the print request dialog

1. Locate the record for the document you want in your database (see Chapter 23).
2. There are two ways to initiate your request:
   - Click on the tool bar. This button will appear whenever you do a search if you are a requesting workstation.
   - Select **Make Request** from the **Request** menu.
3. The **Print Request** dialog box (fig. 27.4) will appear.


Print Request
OK
Cancel
Return to Requestor
Mail to:
Fax to:
Notes:
High
Low

Requestor Name: Paul Smith

Return Via: Return to Requestor

Priority: ● Medium

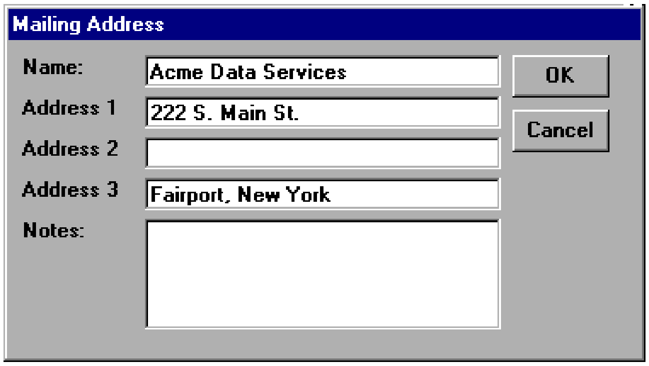
Fig. 27.4. **Print Request** dialog box

To request a copy of a document

1. Enter your name in the **Requestor Name** box.
2. Select **Return to Requestor** from the **Return Via** drop-down list.
3. Enter any notes you may want to make for the request fulfilling station in the **Notes** field of the **Print Request** dialog box.
4. Click OK and your request will be placed in the queue.

To mail a document to a recipient

1. Enter your name in the **Requestor Name** box.
2. Select **Mail to** from the **Return Via** drop-down list. The dialog box shown in fig. 27.5 will appear.



Name: Acme Data Services
Address 1 222 S. Main St.
Address 2
Address 3 Fairport, New York
Notes:

Fig. 27.5. **Mailing Address** dialog box

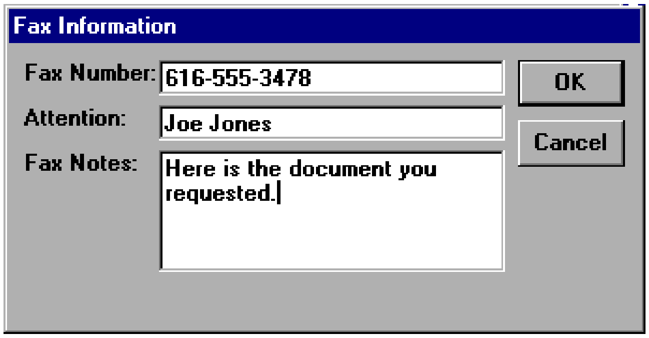
3. Enter the following:

Name	Name of recipient
Address 1, 2, 3	Mailing address
Notes	Mailing notes to include with the document

4. Click OK and you will return to the **Print Request** box. The recipient's name will appear in the box.
5. Enter any notes you may want to make for the request fulfilling station in the **Notes** field of the **Print Request** dialog box.
6. Click OK and your request will be placed in the queue.

To fax a document to a recipient

1. Enter your name in the **Requestor Name** box.
2. Select **Fax to** from the **Return Via** drop-down list. The dialog box shown in fig. 27.6 will appear.



Fax Number: 616-555-3478
Attention: Joe Jones
Fax Notes: Here is the document you requested.

Fig. 27.6. **Fax Information** dialog box

3. Enter the following:

Fax Number	Number of recipient's fax line
Attention	Recipient's name
Fax Notes	Notes to be included on fax cover sheet

4. Click OK and you will return to the **Print Request** dialog box.

5. Enter any notes you may want to make for the request fulfilling station in the **Notes** field of the **Print Request** dialog box.

6. Click OK and your request will be placed in the queue.

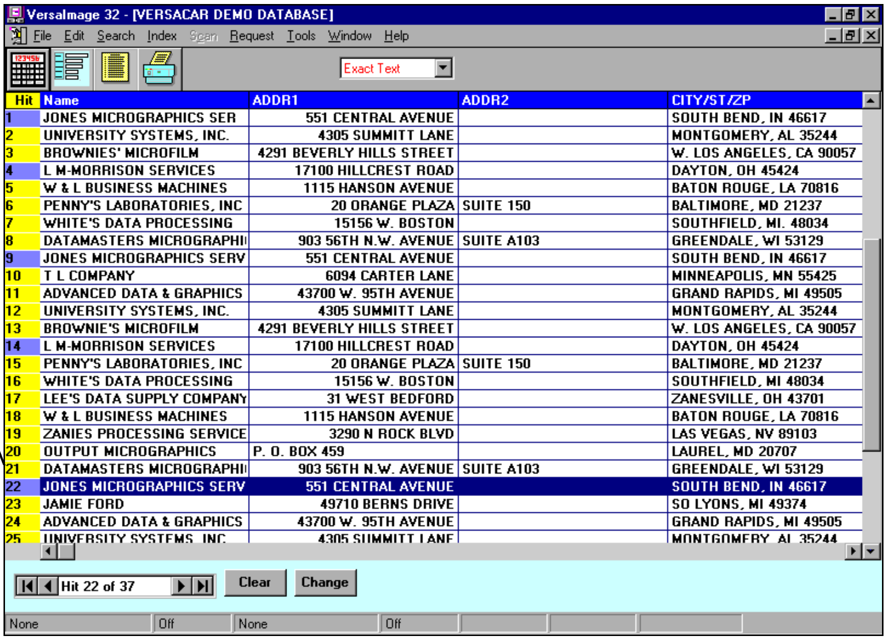
Requesting a Group of Documents

If you have several documents in a database which are to be delivered to the same recipient, you can request them all at once.

▸ To request a group of documents

1. Change to table display mode.

2. Select the documents you want to request by clicking on the box in the **Hit** column with your mouse (fig. 27.7). To request the entire hit list, click **Hit**.



Hit	Name	ADDR1	ADDR2	CITY/ST/ZP
1	JONES MICROGRAPHICS SER	551 CENTRAL AVENUE		SOUTH BEND, IN 46617
2	UNIVERSITY SYSTEMS, INC.	4305 SUMMITT LANE		MONTGOMERY, AL 35244
3	BROWNIES' MICROFILM	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057
4	L M-MORRISON SERVICES	17100 HILLCREST ROAD		DAYTON, OH 45424
5	W & L BUSINESS MACHINES	1115 HANSON AVENUE		BATON ROUGE, LA 70816
6	PENNY'S LABORATORIES, INC	20 ORANGE PLAZA	SUITE 150	BALTIMORE, MD 21237
7	WHITE'S DATA PROCESSING	15156 W. BOSTON		SOUTHFIELD, MI. 48034
8	DATAMASTERS MICROGRAPHI	903 56TH N.W. AVENUE	SUITE A103	GREENDALE, WI 53129
9	JONES MICROGRAPHICS SERV	551 CENTRAL AVENUE		SOUTH BEND, IN 46617
10	T L COMPANY	6094 CARTER LANE		MINNEAPOLIS, MN 55425
11	ADVANCED DATA & GRAPHICS	43700 W. 95TH AVENUE		GRAND RAPIDS, MI 49505
12	UNIVERSITY SYSTEMS, INC.	4305 SUMMITT LANE		MONTGOMERY, AL 35244
13	BROWNIE'S MICROFILM	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057
14	L M-MORRISON SERVICES	17100 HILLCREST ROAD		DAYTON, OH 45424
15	PENNY'S LABORATORIES, INC	20 ORANGE PLAZA	SUITE 150	BALTIMORE, MD 21237
16	WHITE'S DATA PROCESSING	15156 W. BOSTON		SOUTHFIELD, MI 48034
17	LEE'S DATA SUPPLY COMPANY	31 WEST BEDFORD		ZANESVILLE, OH 43701
18	W & L BUSINESS MACHINES	1115 HANSON AVENUE		BATON ROUGE, LA 70816
19	ZANIES PROCESSING SERVICE	3290 N ROCK BLVD		LAS VEGAS, NV 89103
20	OUTPUT MICROGRAPHICS	P. O. BOX 459		LAUREL, MD 20707
21	DATAMASTERS MICROGRAPHI	903 56TH N.W. AVENUE	SUITE A103	GREENDALE, WI 53129
22	JONES MICROGRAPHICS SERV	551 CENTRAL AVENUE		SOUTH BEND, IN 46617
23	JAMIE FORD	49710 BERNS DRIVE		SO LYONS, MI 49374
24	ADVANCED DATA & GRAPHICS	43700 W. 95TH AVENUE		GRAND RAPIDS, MI 49505
25	UNIVERSITY SYSTEMS, INC	4305 SUMMITT LANE		MONTGOMERY, AL 35244

Hit 22 of 37

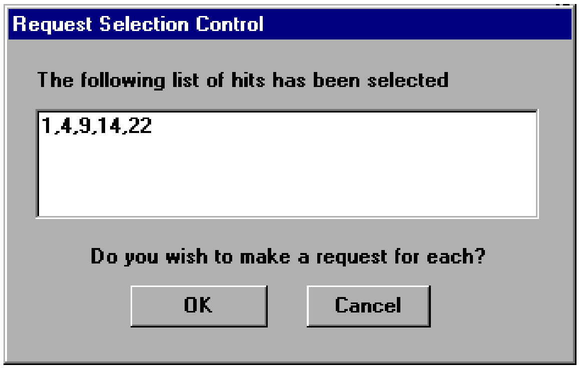
None | Off | None | Off

Shaded items are selected for request processing

Fig. 27.7. Hit list with several items selected for request processing

3. Either press ▤ on the tool bar or select **Make Request** from the **Request** menu.

4. A message displaying the numbers of the items you requested will be displayed (fig. 27.8). To process the requests, click OK.



The following list of hits has been selected

1,4,9,14,22

Do you wish to make a request for each?

Fig. 27.8. Request group confirmation

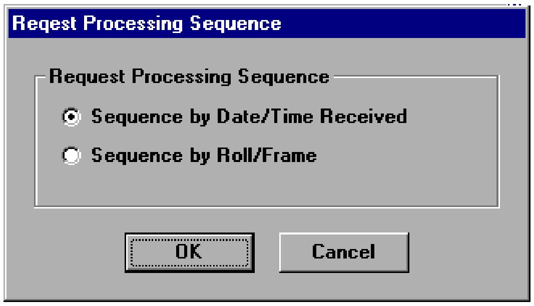
5. The **Print Request** dialog box (fig. 27.4) will appear so that you can complete your requests. The information that you enter for the request will be applied to each of the documents in the group.

Processing Requests

Requests are processed through the request processing option.

▸ To initiate request processing

1. Select **Process Requests** from the **Request** menu. The **Request Processing Sequence** dialog box (fig. 27.9) will open.



● Sequence by Date/Time Received

○ Sequence by Roll/Frame

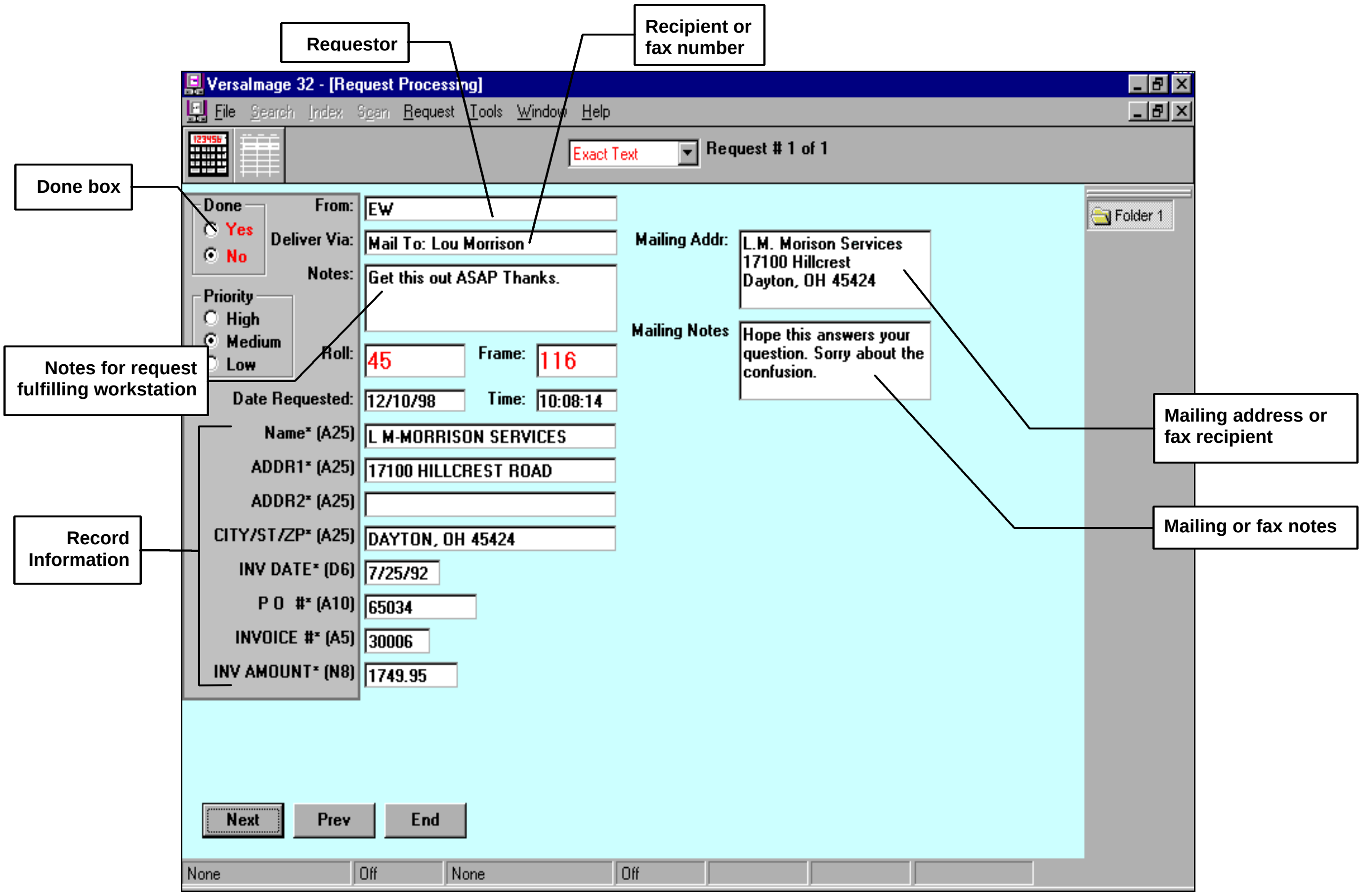
Fig. 27.9. **Request Processing Sequence** dialog

2. Select the sequence in which you want the request queue displayed and click OK.
3. When you select **Process Requests**, the request queue will be opened and the request processing screen (fig. 27.10) will appear.
   - The first record in the queue will be displayed on the screen.
   - At the top of the screen is request information—the name of the requestor, the delivery information (fax number, address, notes, etc.).
   - Below this information is the database record.

When you initiate request processing, all of the request processing functions on the **Request** menu will be enabled.

To process requests, you will need to do the following:

1. Print your request list and pick list.
2. Pull the rolls of film you need.


Requestor
Recipient or fax number
Done box
Notes for request fulfilling workstation
Record Information
Mailing address or fax recipient
Mailing or fax notes
VersaImage 32 - [Request Processing]
File
Search
Index
Scan
Request
Tools
Window
Help
Exact Text
Request # 1 of 1
Folder 1
Next
Prev
End
None
Off
None
Off

Done: ○ Yes ● No

Priority: ○ High ● Medium ○ Low

From: EW

Deliver Via: Mail To: Lou Morrison

Notes: Get this out ASAP Thanks.

Roll: 45

Frame: 116

Date Requested: 12/10/98

Time: 10:08:14

Name* (A25) L M-MORRISON SERVICES

ADDR1* (A25) 17100 HILLCREST ROAD

ADDR2* (A25)

CITY/ST/ZP* (A25) DAYTON, OH 45424

INV DATE* (D6) 7/25/92

P O #* (A10) 65034

INVOICE #* (A5) 30006

INV AMOUNT* (N8) 1749.95

Mailing Addr:
L.M. Morison Services
17100 Hillcrest
Dayton, OH 45424

Mailing Notes: Hope this answers your question. Sorry about the confusion.

Fig. 27.10. Request processing screen

3. Find the frames to be printed, either manually on a reader or with your computer if your reader is interfaced to it.
4. Make your copies and mail, fax, or return them to the requestor as requested.
5. Mark the completed requests done in the queue.

Printing the request list and the pick list

Your first step in processing requests should be to print your request list and your roll pick list.

The request list

The request list is not really a list at all. The **Request List** option prints one request sheet for each request. The type of sheet printed depends on the request:

Mail To	Prints an envelope insert containing the address, mailing notes, and the roll and frame number of the document. The address will be displayed in the window of a #10 window envelope.
Fax To	Prints a fax cover sheet containing the fax number, recipient name, fax notes, and the roll and frame number of the document requested.
Return to Requestor	Prints a sheet with the requestor name, roll, and frame number, which can be attached to the document and sent through interoffice mail.

These request sheets serve two purposes. You can use them to determine what documents to copy and you can use them for the delivery of the document to the recipient.

▸ To print your request list

1. Open the **Request** menu.
2. Select **Reports** from the **Request** menu (fig. 27.11).
3. Select **Print Request List** from the **Reports** menu and the current requests in the queue will be sent to your printer.

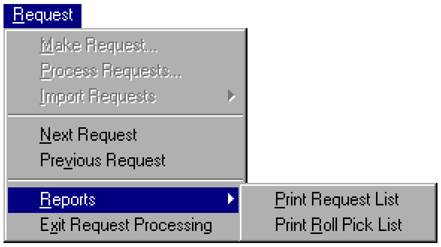


Fig. 27.11. **Reports** menu

The roll pick list

If you do high volume request processing, you will find the roll pick list an indispensable aid. The roll pick list simply lists the roll numbers of all requests in the queue so that you can pull all of your rolls at once, then take them to the reader and process the requests in one sitting.

▸ To print your roll pick list

1. Open the **Request** menu.
2. Select **Reports** from the **Request** menu.
3. Select **Print Roll Pick List** from the **Reports** menu and the pick list will be sent to your printer.

Processing your documents

You do not need to have a reader that is interfaced to your computer to find your documents. However, if you do have such a setup, you will be able to use VersaImage or VersaCAR to find your frames automatically. If you do not, you can use the request sheets to find your documents.

▸ To process your requests from your computer

1. Click to activate the controller (see Chapter 17 for more information on controller operation).
2. The system will display each record in the order it was placed in the queue. You do not have to process the requests in order. To page back and forth through the requests, use the following buttons:

Next	Displays the next record in the queue.
Prev	Displays the previous record in the queue.

3. For each request in the queue, do the following:
   - Make sure that you have the correct roll for the request loaded.
   - Press the Search button on the controller panel. The reader will find and display the frame.
   - Make your document copy.
   - Mark the request “done” by clicking the **Yes** option in the **Done** box.
   - Use Next and Prev to find your next request.
4. When you finish processing requests, click End or select **Exit Request Processing** from the **Request** menu:
   - All records you processed and marked **Done** will be deleted from the queue.
   - Those that you have not marked **Done** will remain in the queue to be processed during your next session.

▸ To process your requests manually

1. Use the request sheets to find your documents on your reader and make your copies.

2. When you finish making your copies, mark each request you completed done on your computer as follows:
    - Using the request sheet, find the request in the queue. Use **Next** to page forward and **Prev** to page backward.
    - Click the **Yes** option in the **Done** box.
3. When you finish, click **End** or select **Exit Request Processing** from the **Request** menu:
    - All records you marked **Done** will be deleted from the queue.
    - Those not marked **Done** will remain in the queue.

Importing Requests

If you have an external program that can generate requests in a flat ASCII file, you can import them into VersaImage or VersaCAR. This allows workstations that do not run VersaImage or VersaCAR to make requests to a request fulfilling workstation that does. To do so, you will need to create a template that maps the fields used in your import file to those used in a standard request in VersaImage or VersaCAR.

Creating templates

To create a template, you must first open the request file you want to process. Then you must map the fields in the request file to the VersaImage/VersaCAR request fields.

To open your request file

1. Select **Import Requests** from the **Request** menu (fig. 27.12).
2. Select **Create Import Template** from the **Import Requests** menu. The **Open** dialog box will appear.
3. Select the file containing the requests from the **Open** dialog box and click **Open**. The dialog box for creating your template (fig. 27.13) will appear. The fields required for the request are displayed on the left side of the screen. The first record in your file will be displayed on the right:

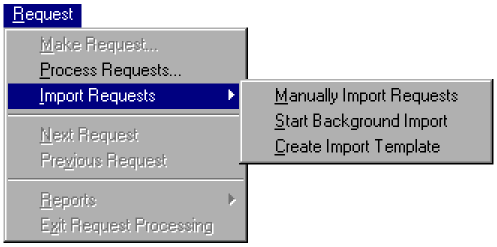
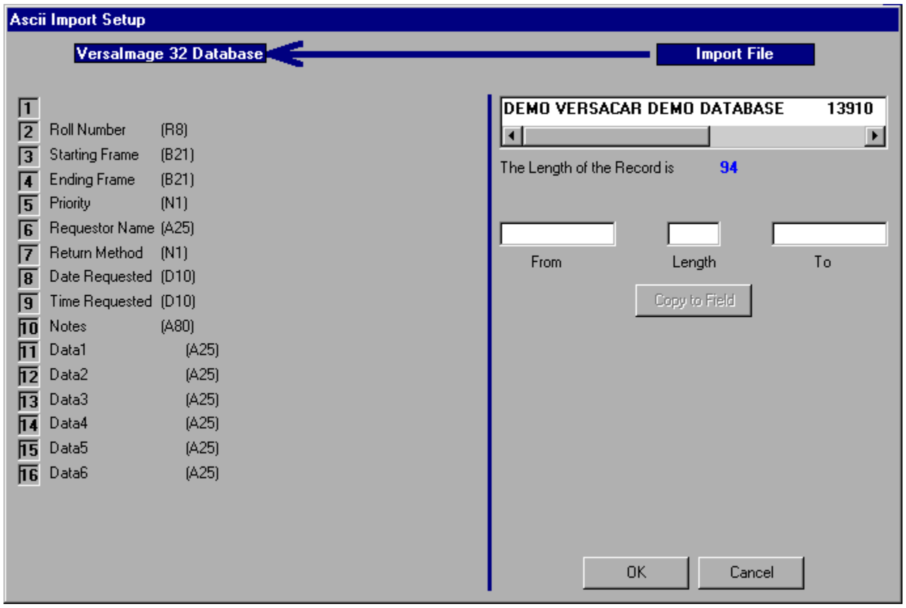

Request
Make Request...
Process Requests...
Import Requests
Next Request
Previous Request
Reports
Exit Request Processing
Manually Import Requests
Start Background Import
Create Import Template

Fig. 27.12. Import Requests menu


Ascii Import Setup
VersaImage 32 Database
Import File
From
Length
To
Copy to Field
OK
Cancel

1
2 Roll Number (R8)
3 Starting Frame (B21)
4 Ending Frame (B21)
5 Priority (N1)
6 Requestor Name (A25)
7 Return Method (N1)
8 Date Requested (D10)
9 Time Requested (D10)
10 Notes (A80)
11 Data1 (A25)
12 Data2 (A25)
13 Data3 (A25)
14 Data4 (A25)
15 Data5 (A25)
16 Data6 (A25)

DEMO VERSACAR DEMO DATABASE 13910

The Length of the Record is 94

Fig. 27.13. Creating a template for importing requests

- Fields 1 through 10 on the left map to the same fields on the request screen.
- The fields labeled **Data1**, **Data2**, etc. can be used for identifying data for the document (e.g., name, address, etc.). They will be displayed in the record information area of the screen.

▸ To map a field

1. Select the field by clicking on the field number on the left.
2. Define the field location in the record by doing one of the following:
    - Selecting the field from the record by highlighting it with your mouse.
    - Entering the starting location for the field in the **From** box and the field length in the **Length** box.
    - Entering the starting location for the field in the **From** box and the ending location in the **To** box.
3. Click Copy to Field and the data will be placed next to the field on the left.

> ***Note:*** *This screen works identical to the flat ASCII import screen described in Chapter 10. If you would like more detailed instructions on selecting mapping your import fields on this screen, refer to page 69 in that chapter.*

▸ To create your template

1. Map fields 1 through 10 to the corresponding data in your record as instructed above.
2. Map your identifying data for the document to the remaining data fields.
3. When you are finished, click OK.

Importing the requests

You can import requests either manually or automatically in the background. If you turn on background processing, requests will be imported and added to the queue as they are made. If you import manually, you select the file you want to import. The imported requests will be placed in your queue.

> ***Note:*** *If you have not created a template or if the system can't find a template when you initiate your report, you will be prompted to create a template first.*

▸ To import requests manually

1. Select **Import Requests** from the **Request** menu.
2. Select **Manually Import Requests**. The **Open** box will appear.
3. Select the request file from the **Open** dialog box and click Open. Import processing will start. During processing, you will see a progress message on the screen.
4. When it is finished, you will see a completion message. Click OK to close the message box.

▸ To import requests in the background

1. Select **Import Requests** from the **Request** menu.
2. Select **Start Background Import**. Requests will be processed in the background and the menu selection will change to **Stop Background Import**
3. To stop background processing, open the **Import Requests** menu and select **Stop Background Import**.

Working with Multiple Databases

28

Like many Windows applications, VersaImage, VersaCAR, and VersaView permit you to open and work with more than one database at a time. This can be quite handy when you need to edit or view related records that are in different files. If you are image enabled, you can switch back and forth among your databases to view your documents. (Technically, you could do this with your film reader also, but it would be a little impractical as you would need to keep switching rolls.)

Opening Additional Databases

To open an additional database, simply select **Open** from the **File** menu without closing the database you already have open. When you open a database, VersaImage/VersaCAR opens it in full screen mode. Any other databases you have open will still be "there", just not visible.

Changing Databases

To look at the list of databases you have open and switch to the one you want, you use the **Window** menu.

▸ To change databases

1. Open the **Window** menu (fig. 28.1).
2. You will notice that at the bottom of the menu is a list of the databases you have open. The currently active one is checked.
3. To switch to another from the menu, do one of the following:
   - Click the one you want to switch to with your mouse.
   - Type the number that is in front of the one you want to switch to.
   - Move the highlight to the one you want and press Enter.

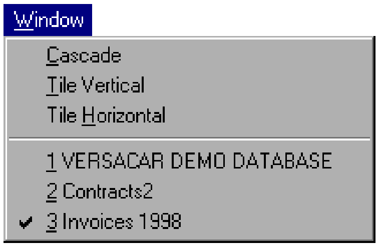


Fig. 28.1. **Window** menu

> ***Note:*** *The hot keys* Ctrl + F6 *can also be used to switch from database to database. This is probably the easiest way to do it if you only have two or three open.*

Displaying Multiple Databases

You can display your open databases at once in cascaded or tiled format. This makes it easier to switch from one to another and is sometimes useful when you need to compare records:

▸ To display all your databases

1. Open the **Window** menu.
2. Select the display option you want:

Cascade Displays the open database as a series of cascading windows (fig. 28.2).

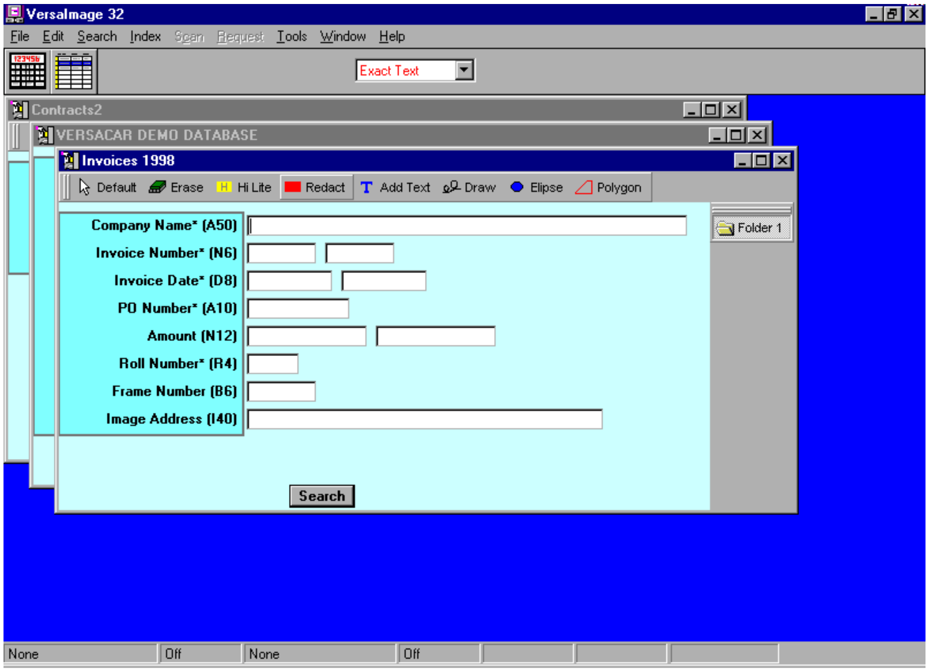

VersaImage 32
File Edit Search Index Scan Request Tools Window Help
Exact Text
Contracts2
VERSACAR DEMO DATABASE
Invoices 1998
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Company Name* (A50)
Invoice Number* (N6)
Invoice Date* (D8)
PO Number* (A10)
Amount (N12)
Roll Number* (R4)
Frame Number (B6)
Image Address (I40)
Folder 1
Search
None Off None Off

Fig. 28.2. Cascade display

Tile Vertical Displays the open databases side by side vertically (fig. 28.3).

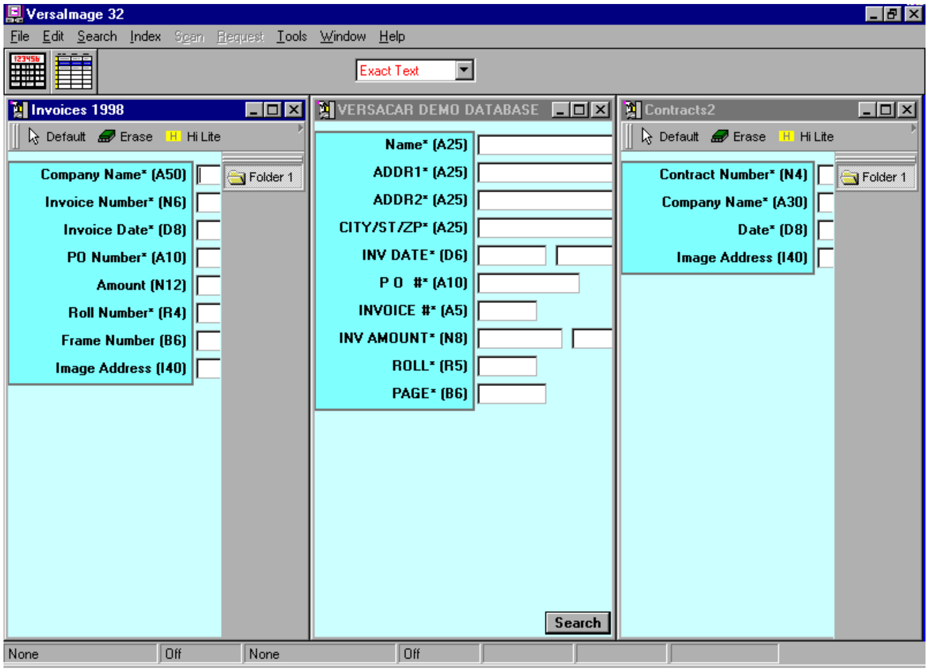

VersaImage 32
File Edit Search Index Scan Request Tools Window Help
Exact Text
Invoices 1998
Default Erase Hi Lite
Company Name* (A50)
Invoice Number* (N6)
Invoice Date* (D8)
PO Number* (A10)
Amount (N12)
Roll Number* (R4)
Frame Number (B6)
Image Address (I40)
Folder 1
VERSACAR DEMO DATABASE
Name* (A25)
ADDR1* (A25)
ADDR2* (A25)
CITY/ST/ZP* (A25)
INV DATE* (D6)
P O #* (A10)
INVOICE #* (A5)
INV AMOUNT* (N8)
ROLL* (R5)
PAGE* (B6)
Search
Contracts2
Default Erase Hi Lite
Contract Number* (N4)
Company Name* (A30)
Date* (D8)
Image Address (I40)
Folder 1
None Off None Off

Fig. 28.3. Vertical tile display

Tile Horizontal Displays the open databases one on top of each other (fig. 28.4). Only the top of the screen will show.

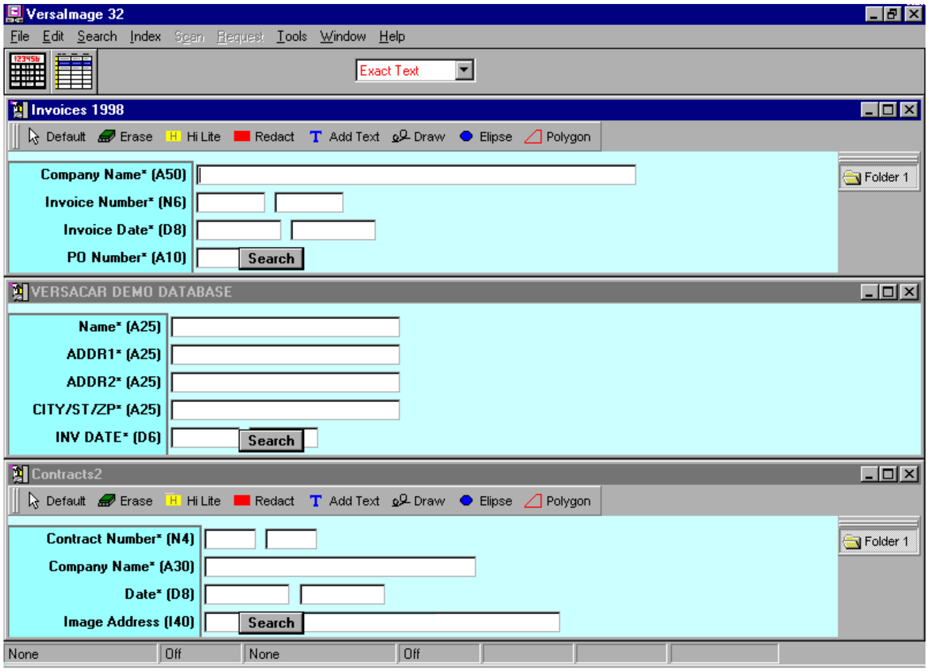

VersaImage 32
File Edit Search Index Scan Request Tools Window Help
Exact Text
Invoices 1998
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Company Name* (A50)
Invoice Number* (N6)
Invoice Date* (D8)
PO Number* (A10)
Search
Folder 1
VERSACAR DEMO DATABASE
Name* (A25)
ADDR1* (A25)
ADDR2* (A25)
CITY/ST/ZP* (A25)
INV DATE* (D6)
Search
Contracts2
Default Erase Hi Lite Redact Add Text Draw Elipse Polygon
Contract Number* (N4)
Company Name* (A30)
Date* (D8)
Image Address (I40)
Search
Folder 1
None
Off
None
Off

Fig. 28.4. Horizontal tile display

All of the windows are fully functional. The main menu, tool bar, etc. can be used with the active window. You can set up searches, switch to and from table displays, etc. To activate a window, just click on it with your mouse and its border will change to show it is the active one. In a cascade display, the active window will move to the front of the "stack."

Changing the Window Display Mode

You can switch back and forth between window and full screen mode. You can also minimize your windows if you want to get a database out of the way temporarily without closing it.

▸ To change display modes with your mouse

Click the control buttons in the upper right hand corner of the window:

☐	Displays the window in full screen mode.
🗗	Displays the database in window mode.
_	Minimizes the window.

▸ To change display modes with the keyboard

1. Use Ctrl + F6 to change the active window if necessary.

2. Press Alt + -.

3. Select the mode you want from the control menu:

Maximize	Displays the window in full screen mode.
Restore	Displays the window in window mode.
Minimize	Minimizes the window.

> ***Note:*** *To restore a minimized window, either click on the* ☐ *or* 🗗 *buttons with your mouse or use the* ***Window*** *menu.*

Sizing Windows

You may have noted that, because the windows are smaller than your original screen, you may not see all of your fields. If you need to see more of the screen, you can make the window larger. When you resize one window, it will not change the size of another. They will overlap. You can also shrink a window if one is in your way.

▸ To size a window with your mouse

1. Place your mouse pointer on the window border as follows:
    - To expand or shrink the window horizontally, place your pointer on either side border.
    - To expand or shrink the window vertically, place your pointer on either the top or the bottom border.
    - To expand or shrink the window proportionally, place your pointer on one of the corners.
2. Hold your left mouse button down and drag your mouse. Pull outward to make the window larger and inward to make it smaller. An outline of the resized window will appear.
3. When the window is the right size, release the mouse button.

▸ To size a window with the keyboard

1. Use Ctrl + F6 to move to the active window.
2. Press Alt + - to open the window command menu.
3. Select **Size** from the menu.
4. Press an arrow key to move the cursor to the side of the window you want to drag:

←	Moves to the left side.
→	Moves to the right side.
↑	Moves to the top.
↓	Moves to the bottom.
←, ↑	Moves to the top left corner.
←, ↓	Moves to the bottom left corner.
→, ↑	Moves to the top right corner.
→, ↓	Moves to the bottom right corner.

5. Use the arrow keys to expand and shrink your window:

← and →	Horizontal sizing
↑ and ↓	Vertical sizing

If you have diagonal arrow keys, you can expand and shrink the box proportionally.

6. When the window outline is the size you want, press Enter.

Moving Windows

You can also move the windows around on the screen, just like you can with dialog boxes, and pile them on top of each other. The active window will appear on top. As long as you can see a piece of a window, you can click it to make it active. If a window gets buried, just press Ctrl + F6 as often as necessary until you "unbury" it (or use the **Window** menu to bring it to the top). If things get too confusing, you can always return to the **Window** menu and start from square one again.

Closing a Database Window

To close a database window, you use the **Close Database** command on the **File** menu of the *application* menu bar (the individual windows do not have their own menu bar). To close a database, do the following:

1. Make the window active.
2. Select **File**. Then select **Close Database**.

Note: *You can also close the database by clicking the* ☒ *control button in the database document window.*

Part 6

Maintenance

Using the Film QC Function

29

Making corrections to your film database records can be done easily through the **QC Film Indices** This option is not available in VersaView. **QC Film Indices** is a very powerful function that lets you make global corrections to your databases as well as to individual records. It allows you to perform operations above and beyond modifying record data, which you can do through the search screen. Through the QC function, you may adjust frame numbers, make changes to data across records, add missing records, and delete records.

Starting the QC Film Indices Function

To initiate the QC Film function

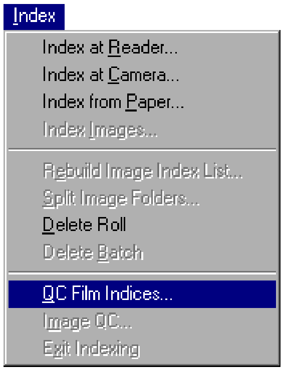
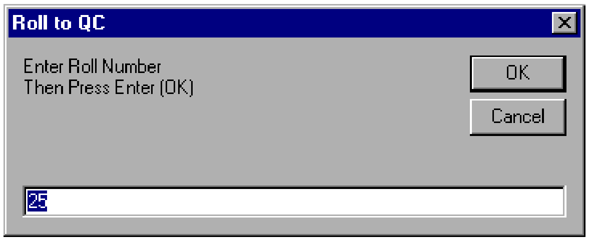

Index
Index at Reader...
Index at Camera...
Index from Paper...
Index Images...
Rebuild Image Index List...
Split Image Folders...
Delete Roll
Delete Batch
QC Film Indices...
Image QC...
Exit Indexing

Fig. 29.1. Selecting the **QC Film** option

1. Open the database you want to work on.
2. Select **QC Film Indices** (fig. 29.1). The **QC Roll** dialog box will appear (fig. 29.2).

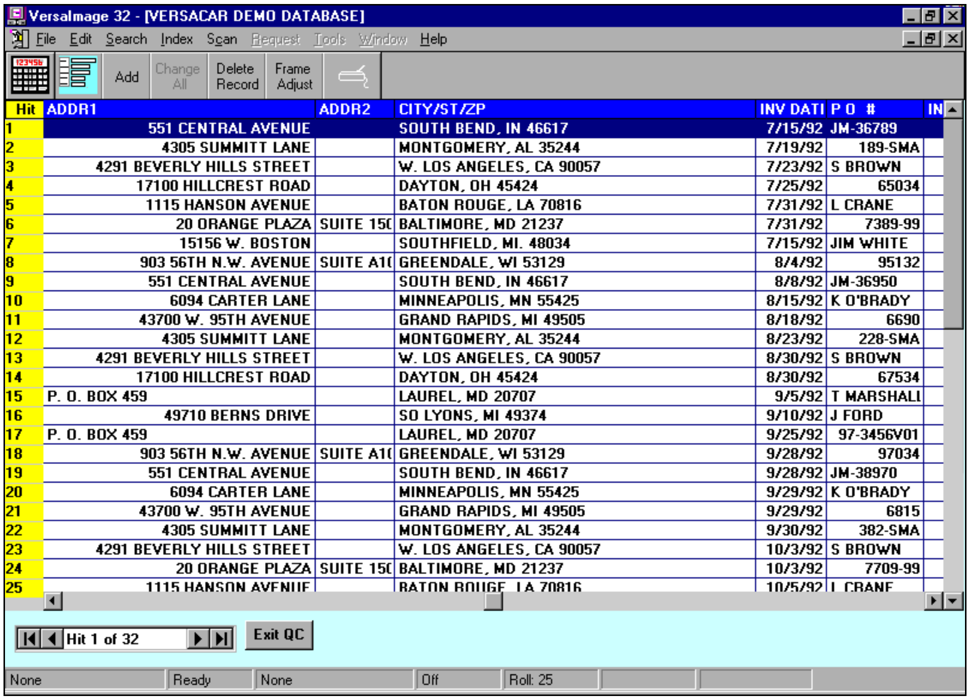

Roll to QC
OK
Cancel

Enter Roll Number
Then Press Enter (OK)

25

Fig. 29.2. **QC Roll** dialog box

3. Enter the number of the roll you want to QC and click OK.
4. If there are records for the roll in the open database, the QC index screen (fig. 29.3) will appear in table format.


VersaImage 32 - [VERSACAR DEMO DATABASE]
File
Edit
Search
Index
Scan
Request
Tools
Window
Help
Add
Change All
Delete Record
Frame Adjust
Exit QC
None
Ready
None
Off

Hit	ADDR1	ADDR2	CITY/ST/ZP	INV DATI	P O #	IN
1	551 CENTRAL AVENUE		SOUTH BEND, IN 46617	7/15/92	JM-36789	
2	4305 SUMMITT LANE		MONTGOMERY, AL 35244	7/19/92	189-SMA	
3	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057	7/23/92	S BROWN	
4	17100 HILLCREST ROAD		DAYTON, OH 45424	7/25/92	65034	
5	1115 HANSON AVENUE		BATON ROUGE, LA 70816	7/31/92	L CRANE	
6	20 ORANGE PLAZA	SUITE 15(	BALTIMORE, MD 21237	7/31/92	7389-99	
7	15156 W. BOSTON		SOUTHFIELD, MI. 48034	7/15/92	JIM WHITE	
8	903 56TH N.W. AVENUE	SUITE A1(	GREENDALE, WI 53129	8/4/92	95132	
9	551 CENTRAL AVENUE		SOUTH BEND, IN 46617	8/8/92	JM-36950	
10	6094 CARTER LANE		MINNEAPOLIS, MN 55425	8/15/92	K O'BRADY	
11	43700 W. 95TH AVENUE		GRAND RAPIDS, MI 49505	8/18/92	6690	
12	4305 SUMMITT LANE		MONTGOMERY, AL 35244	8/23/92	228-SMA	
13	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057	8/30/92	S BROWN	
14	17100 HILLCREST ROAD		DAYTON, OH 45424	8/30/92	67534	
15	P. O. BOX 459		LAUREL, MD 20707	9/5/92	T MARSHALL	
16	49710 BERNS DRIVE		SO LYONS, MI 49374	9/10/92	J FORD	
17	P. O. BOX 459		LAUREL, MD 20707	9/25/92	97-3456V01	
18	903 56TH N.W. AVENUE	SUITE A1(	GREENDALE, WI 53129	9/28/92	97034	
19	551 CENTRAL AVENUE		SOUTH BEND, IN 46617	9/28/92	JM-38970	
20	6094 CARTER LANE		MINNEAPOLIS, MN 55425	9/29/92	K O'BRADY	
21	43700 W. 95TH AVENUE		GRAND RAPIDS, MI 49505	9/29/92	6815	
22	4305 SUMMITT LANE		MONTGOMERY, AL 35244	9/30/92	382-SMA	
23	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057	10/3/92	S BROWN	
24	20 ORANGE PLAZA	SUITE 15(	BALTIMORE, MD 21237	10/3/92	7709-99	
25	1115 HANSON AVENUE		BATON ROUGE, LA 70816	10/5/92	L CRANE	

Hit 1 of 32

Roll: 25

Fig. 29.3. QC screen

All records in the database that are associated with the roll will be listed in frame number sequence. Global operations on your database will be performed from this screen. For operations on individual records, you can switch to single record mode.

The QC tool bar contains several buttons that are used for initiating the QC functions:

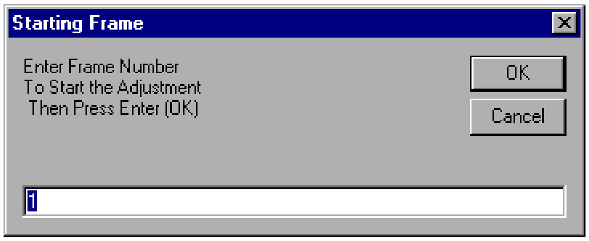
Add	Adds a record to the database.
Change All	Makes global changes to a selected group of records.
Delete Record	Deletes a record.
Frame Adjust	Adjusts frame numbering.
	Scans or rescans an image. Enabled for image-enabled databases only.

Adjusting Frame Numbering

If a mistake was made during indexing that caused the frame numbers on all or part of the roll to be "out of sync," you can adjust them easily through the **Frame Adjust** option. For single-level indexes, **Frame Adjust** starts with the frame you specify and increments (or decrements) all successive frames by the number you specify. For two-level indexing, **Frame Adjust** will adjust the file (folder) number, but not the page numbers. If you have records for individual pages, they will have to be edited manually.

▸ To adjust frame numbering

1. Click the Frame Adjust button on the tool bar. The **Starting Frame** dialog box (fig. 29.4) will appear.



Starting Frame

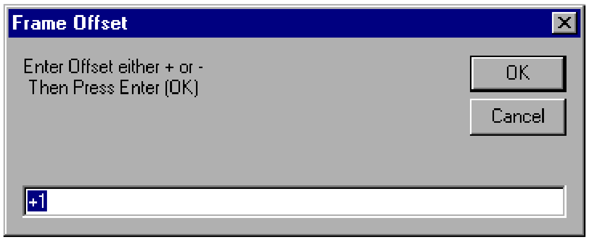
Enter Frame Number
To Start the Adjustment
Then Press Enter (OK)

1

Fig. 29.4. **Starting Frame** dialog box

2. Enter the number you want to start the adjustment with. The frame number of the currently selected record in the table will be displayed by default.

3. Press OK and you will be prompted for the offset. The offset is the number that will be added to each frame during the adjustment.



Frame Offset

Enter Offset either + or -
Then Press Enter (OK)

+1

Fig. 29.5. **Frame Offset** dialog box

4. Enter the offset and press OK to make the adjustment.

If the entire list did not need to be corrected, or if further correction is needed, you can select a frame with a higher number and use **Frame Adjust** to make further adjustments.

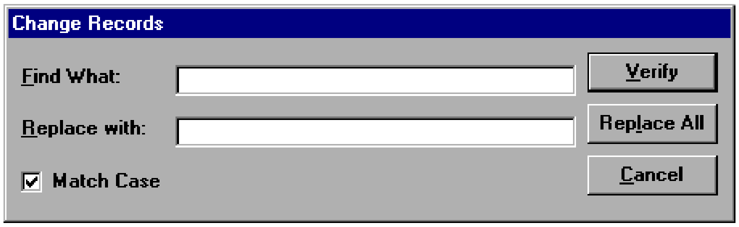
> ***Hint: Frame Adjust*** *is designed for situations where you have a large number of incorrect frames. If you only have a few, use the editing feature (see page 228) to change the records individually.*

Making a Global Change

If you have made an "across the board error" in a large number of records, such as spelling a company name wrong or entering the wrong date or roll number, you may correct it globally through the **Change All** option.

▸ To make a global change

1. Select the field column where the data you want to change is located by clicking on the heading at the top of the column. To select several sequential columns, hold **Shift** down and click on the first column and the last column you want to include.
2. After you select a column, the **Change All** button will be activated. Click **Change All** and the **Change Records** dialog box (fig. 29.6) will appear.



☑ Match Case

Fig. 29.6. **Change Records** dialog box

3. In the **Find What** text box, enter the text you want to change.
4. In the **Replace with** text box, enter the replacement text.
5. If you want your search text (the text in the **Find What** box) to match case when it looks for the text (e.g., find only "Company" and not "company"), check the **Match Case** check box.
6. Press one of the following to start your search:

Verify	If you want to confirm each change before it is made.
Replace All	If you want to make replacements globally without confirmation.

7. If you select **Verify**, the program will stop on each change and ask you to confirm it. Click on one of the following:

Yes	Makes the change
No	Leaves it as is
Cancel	Cancels the operation and exits from the function. Pressing **Cancel** will not affect any changes you have made up to that point.

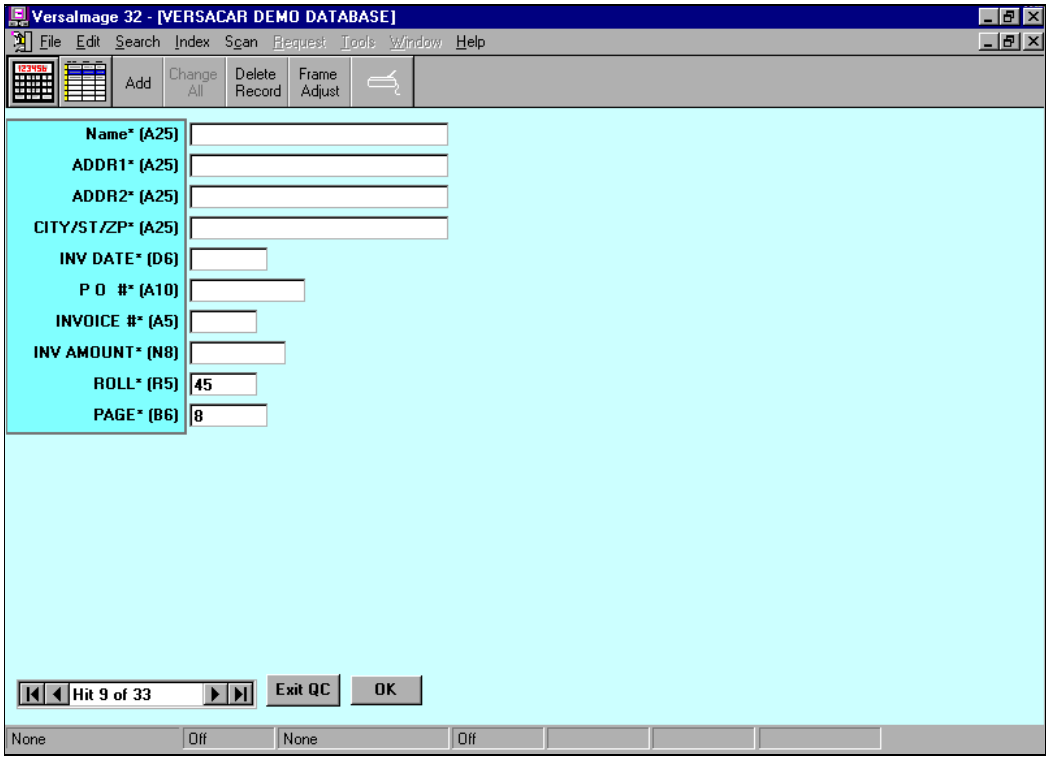
Adding a Record

If a record for a frame was accidentally skipped, you can insert it into the database through the **Add** option. The **Add** option also permits you to add "intermediate" records to a database that is organized in subgroups. For example, suppose that in a two-level index, you have index records for your file blips. However, within each group are a number of multi-page documents and you want to have separate index records for the first page of each to make retrieval easier. You can use Add to insert these records into the database. If you are image enabled and there is an image in the database for the record, you will need to enter the image address (i.e., the path and name of the index file) in order for it to display when the record appears.

For single-level indexes with folders, a couple of cautionary notes might be in order. Adding a record through QC does *not* create a new folder. Therefore, if you have already scanned and/or indexed your roll, you can add intermediate records to the database within folders. You cannot, however, create a new group. If you have not scanned images yet for the database but plan to do so in the future, bear in mind that VersaImage will create a new folder for each record. Therefore, you may want to wait until you have scanned the film before adding these records.

▸ To add a new record

1. Select the line in the table where you want to add the record.
2. Press the Add button on the tool bar. A blank record will appear immediate below the line you selected. The current roll number and next sequential frame will appear as defaults.
3. Either highlight the blank record and click or double-click on the blank record line to display the screen (fig. 29.7).



Name* (A25)
ADDR1* (A25)
ADDR2* (A25)
CITY/ST/ZP* (A25)
INV DATE* (D6)
P O #* (A10)
INVOICE #* (A5)
INV AMOUNT* (N8)
ROLL* (R5) 45
PAGE* (B6) 8

Hit 9 of 33

Fig. 29.7. Screen for adding a record. Note the default roll and frame number.

4. Enter the information for the new record into the fields on the screen. If the default frame number is not correct, be sure to change it to the correct one.
5. When you finish, click OK or press Enter and the record will be added and you will return to the table display.

> ***Note:** If the next sequential frame number is already in use, a message will be displayed when you try to add the record line. You may need to use **Frame Adjust** to adjust the numbers of the frames that follow after you add the record.*

Scanning and Rescanning Images

If your database is image enabled and you have a film scanner, you can insert missing images and rescan badly scanned images through the QC function. When you rescan an image, it replaces the image you have selected. When you scan an image, it adds the image to the record. If there is a folder file associated with the record, it adds the document to the end of file. A special **Scan and Insert** function allows you to scan a frame and insert it into a specific place in the file.

To rescan an image

1. Make sure the page you want to replace is displayed on the screen.
2. Find the frame you want to scan on the roll.
3. Either click on the tool bar or select **Rescan** from the **Scan** menu. The frame will be scanned and replace the currently displayed image in your database.

To scan and add an image to a record

1. Find the frame you want to scan.
2. If you are adding an image to a folder, make sure you are in thumbnail mode.
3. Either click on the tool bar or select **Scan Single** from the **Scan** menu to scan the frame.
   - If there was no previous image associated with the record, VersaImage places the file name in the **Image Address** field.
   - If the record has a folder file associated with it, VersaImage adds the new image to the end of the folder.

> ***Note:*** *The button performs a rescan if there is an image page displayed and a scan if there is no image or if the pages are displayed in thumbnail view.*

To scan and insert an image

1. Find the frame you want to scan.
2. Zoom out to thumbnail view.
3. Move your mouse pointer to the image that is in the location where you want to place the inserted image.
4. Click your right mouse button on the page number label to select the image. The label will be highlighted to show the image is selected.
5. Either select **Scan and Insert** from the **Scan** menu or press F3 to scan the frame.
6. The frame will be scanned and the image will be inserted in front of the selected page.

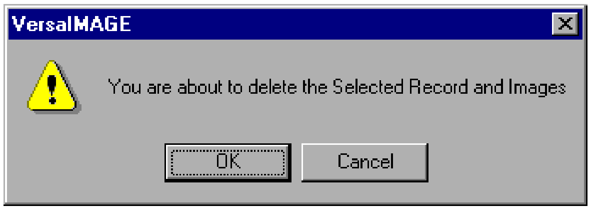
Deleting Records

If a record has been added by mistake, you can delete through the QC function.

To delete a record

1. Select the record you want to delete from the table. If you want to examine it first, double-click on it to view it in single record mode. The delete function works from either screen.

2. Either click the Delete Record on the tool bar or press Del on the keyboard. The record will be displayed in single-record mode and a confirmation message (fig. 29.8) will appear.



You are about to delete the Selected Record and Images

Fig. 29.8. Delete confirmation box

- If you want to delete the record, click OK and the record will be removed.
- If you want to cancel the delete operation, click Cancel. The record will remain in the database.

> ***Note:*** *You may need to use* ***Frame Adjust*** *to correct frame numbering after deleting a record.*

Editing Records

You may edit any record in the database individually through the QC function. You can also do this through the search screen. However, the QC function also allows you to change roll and frame numbers and image addresses.

▸ To edit a record

1. Highlight the record you want to edit in the table.
2. Either double-click your mouse on the record or press the ☰ on the tool bar to display the record in single-record mode.
3. The current data in the record will be displayed on the screen. Make whatever changes you need to make to the record.
4. Click OK to make the changes and return to the table screen.

Exiting from the QC Option

▸ To exit from the QC option

Do either of the following:

- Click Exit QC on the screen.
- Select **Exit QC** from the **Index** menu.

Using the Image QC Function

30

Database records that are tied to images can be corrected through **Image QC** option. This option is not available in VersaCAR or VersaView. Through **Image QC**, you can make global corrections to your databases as well as to individual records. You may add, delete and rearrange images, split image folders, make changes to data across records, and delete records.

The difference between **Image QC** and **Film QC** is the way the database records are selected from the database. The **Film QC** function selects all records in the database for a given roll number *with or without* an image address. The **Image QC** selects records from the database for a roll or batch *with* an image address. Databases that are not associated with roll film can only be corrected through **Image QC**. Databases associated with roll film that also have images can be updated through either. However, the **Frame Adjust** feature is not available since the selected records will not necessarily include all records for the roll.

Starting the Image QC Function

The **Image QC** function allows you to select either a batch to process or all records in the database without an associated image.

▸ To initiate the Image QC function

1. Open the database you want to work on.
2. Select **Image QC** (fig. 30.1) from the **Index** menu. The **Select Batch/Roll** dialog box will appear (fig. 30.2).

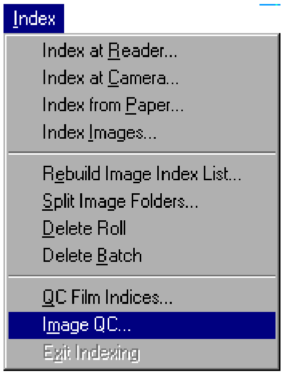
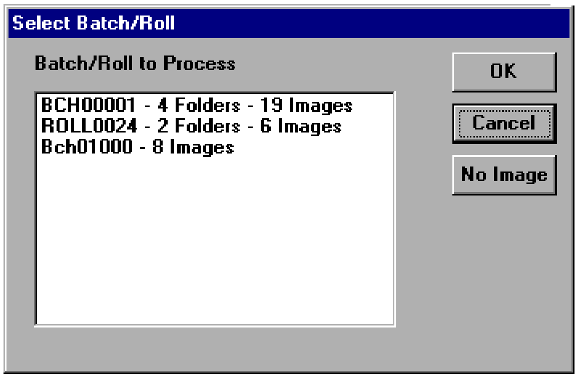

Index
Index at Reader...
Index at Camera...
Index from Paper...
Index Images...
Rebuild Image Index List...
Split Image Folders...
Delete Roll
Delete Batch
QC Film Indices...
Image QC...
Exit Indexing

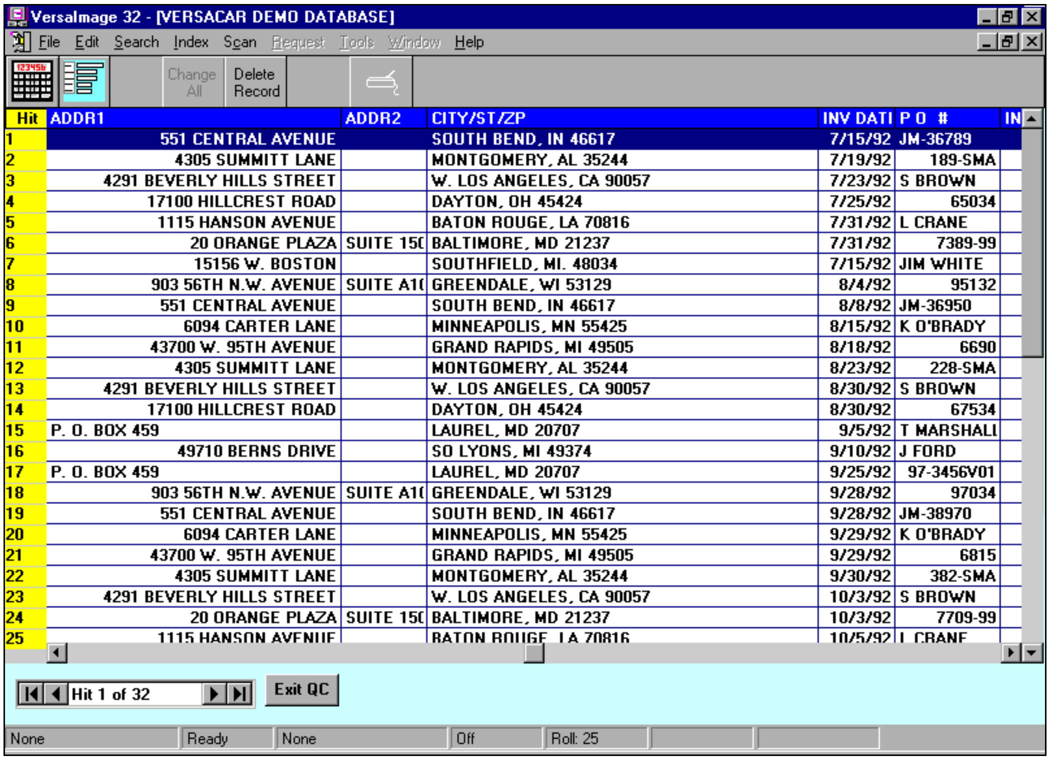
Fig. 30.1. Selecting the **Image QC** option


Select Batch/Roll
Batch/Roll to Process
OK
Cancel
No Image

BCH00001 - 4 Folders - 19 Images
ROLL0024 - 2 Folders - 6 Images
Bch01000 - 8 Images

Fig. 30.2. **Select Batch/Roll** dialog box

3. Do either of the following:
   - Select the batch or roll you want to QC and click OK.
   - Click No Image to select all records in the database without images.
4. The **Image QC** screen (fig. 30.3) will appear in table format:
   - If you selected a batch or roll, all records in the database associated with the batch or roll will be listed in sequence by their image address.
   - If you selected **No Image**, all records in the database without images will be listed.


VersaImage 32 - [VERSACAR DEMO DATABASE]
File Edit Search Index Scan Request Tools Window Help
123456
Change All
Delete Record
Hit 1 of 32
Exit QC
None
Ready
None
Off
Roll: 25

Hit	ADDR1	ADDR2	CITY/ST/ZP	INV DATI	P O #	IN
1	551 CENTRAL AVENUE		SOUTH BEND, IN 46617	7/15/92	JM-36789	
2	4305 SUMMITT LANE		MONTGOMERY, AL 35244	7/19/92	189-SMA	
3	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057	7/23/92	S BROWN	
4	17100 HILLCREST ROAD		DAYTON, OH 45424	7/25/92	65034	
5	1115 HANSON AVENUE		BATON ROUGE, LA 70816	7/31/92	L CRANE	
6	20 ORANGE PLAZA	SUITE 15(	BALTIMORE, MD 21237	7/31/92	7389-99	
7	15156 W. BOSTON		SOUTHFIELD, MI. 48034	7/15/92	JIM WHITE	
8	903 56TH N.W. AVENUE	SUITE A1(	GREENDALE, WI 53129	8/4/92	95132	
9	551 CENTRAL AVENUE		SOUTH BEND, IN 46617	8/8/92	JM-36950	
10	6094 CARTER LANE		MINNEAPOLIS, MN 55425	8/15/92	K O'BRADY	
11	43700 W. 95TH AVENUE		GRAND RAPIDS, MI 49505	8/18/92	6690	
12	4305 SUMMITT LANE		MONTGOMERY, AL 35244	8/23/92	228-SMA	
13	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057	8/30/92	S BROWN	
14	17100 HILLCREST ROAD		DAYTON, OH 45424	8/30/92	67534	
15	P. O. BOX 459		LAUREL, MD 20707	9/5/92	T MARSHALL	
16	49710 BERNS DRIVE		SO LYONS, MI 49374	9/10/92	J FORD	
17	P. O. BOX 459		LAUREL, MD 20707	9/25/92	97-3456V01	
18	903 56TH N.W. AVENUE	SUITE A1(	GREENDALE, WI 53129	9/28/92	97034	
19	551 CENTRAL AVENUE		SOUTH BEND, IN 46617	9/28/92	JM-38970	
20	6094 CARTER LANE		MINNEAPOLIS, MN 55425	9/29/92	K O'BRADY	
21	43700 W. 95TH AVENUE		GRAND RAPIDS, MI 49505	9/29/92	6815	
22	4305 SUMMITT LANE		MONTGOMERY, AL 35244	9/30/92	382-SMA	
23	4291 BEVERLY HILLS STREET		W. LOS ANGELES, CA 90057	10/3/92	S BROWN	
24	20 ORANGE PLAZA	SUITE 15(	BALTIMORE, MD 21237	10/3/92	7709-99	
25	1115 HANSON AVENUE		BATON ROUGE, LA 70816	10/5/92	L CRANE	

Fig. 30.3. **Image QC** screen

The **Image QC** tool bar contains several buttons that are used for initiating QC functions:

Change All	Makes global changes to a selected group of records.
Delete Record	Deletes a record and the image(s) associated with the record.
	Scans or rescans the currently displayed image.

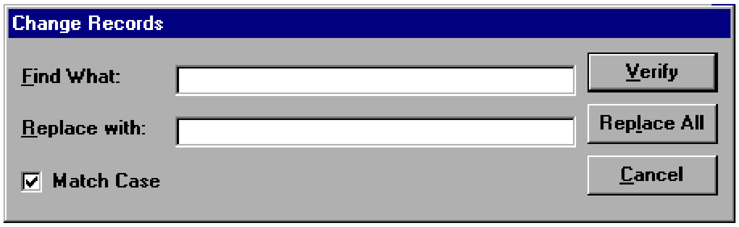
In addition to these buttons, most of the standard tool bar buttons displayed when you search your database will also be available. Some of them are only available in single record mode. You will be able to rotate, deskew and annotate images. You will not, however, be able to apply the image correction options. They must be applied through the search screen.

Making a Global Change

If you have made an "across the board" error in a large number of records, such as spelling a company name wrong or entering the wrong date, you may correct it globally through the QC **Change All** option.

To make a global change

1. Select the field column where the data you want to change is located by clicking on the heading at the top of the column. To select several sequential columns, hold Shift down and click on the first column and the last column you want to include.
2. After you select a column, the Change All button will be activated. Click Change All and the **Change Records** dialog box (fig. 30.4) will appear.



Find What:

Replace with:

☑ Match Case

Fig. 30.4. **Change Records** dialog box

3. In the **Find What** text box, enter the text you want to change.
4. In the **Replace with** text box, enter the replacement text.
5. If you want your search text (the text in the **Find What** box) to match case when it looks for the text (e.g., find only “Company” and not “company”), check the **Match Case** check box.
6. Press one of the following to start your search:

Verify	If you want to confirm each change before it is made.
Replace All	If you want to make replacements globally without confirmation.

7. If you select Verify, the program will stop on each change and ask you to confirm it. Click on one of the following:

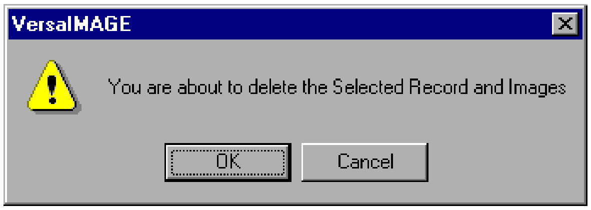
Yes	Makes the change
No	Leaves it as is
Cancel	Cancels the operation and exit from the function. Pressing Cancel will not affect any changes you have made up to that point.

Deleting Records

If a record has been added by mistake, you can delete it through the **Delete Record** option

▸ To delete a record

1. Select the record you want to delete from the table. If you want to examine it first, double-click on it to view it in single record mode. The delete function works from either screen.
2. Click the Delete Record button on the tool bar. The record will be displayed in single-record mode and a confirmation message (fig. 30.5) will appear:



You are about to delete the Selected Record and Images

Fig. 30.5. Delete confirmation box

- If you want to delete the record, click OK and the record will be removed.
- If you want to cancel the delete operation, click Cancel. The record will remain in the database.

Removing Images without Deleting Records

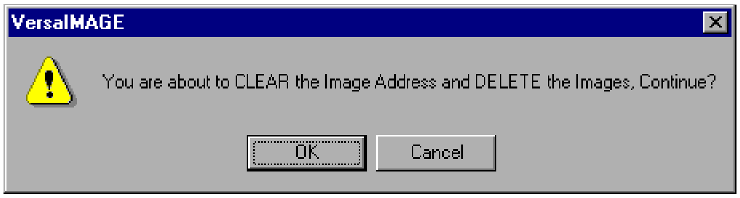
You can clear the images from the records without deleting the records themselves. You can clear all records in the batch globally or you can clear just a single record.

Deleting all images from your records

Global deletion may be useful in cases where the wrong images were indexed to the wrong records or the wrong database. After they are removed, the records are no longer associated with the batch. The batch of images may be reimported and reindexed and the records can be associated with a different batch of images.

▸ To remove all images from the batch

1. Select the **Image Address** column in the table.
2. Click the [Delete Record] button on the tool bar.
3. A message box (fig. 30.6) asking for your confirmation will appear:



You are about to CLEAR the Image Address and DELETE the Images, Continue?

Fig. 30.6. Image Address Delete Confirmation Message

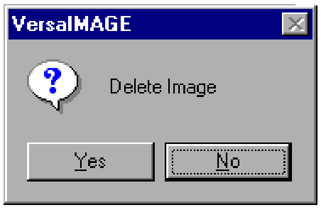
- To delete all records, press [OK].
- To cancel the delete function, press [Cancel].

Deleting individual images

When you delete individual images, they are deleted from the batch. You can no longer access them.

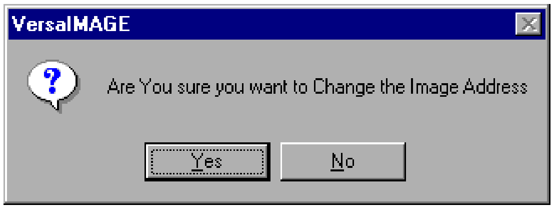
▸ To remove a single image from a record

1. Select the record you want and either click the ☰ button or double-click on the record display to it.
2. Tab to the **Image Address** field and press [Del] on the keyboard. A confirmation message (fig. 30.7) will appear.
3. Click [Yes] to delete the image. A message asking if you want to change the image address will appear.



Delete Image

Fig. 30.7. Delete image confirmation



Are You sure you want to Change the Image Address

Fig. 30.8. Change image address confirmation

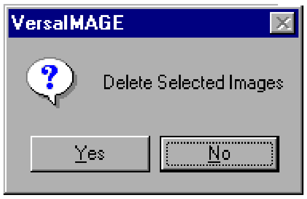
4. Click [Yes].

> ***Important:*** *When you press the* [Del] *key, VersaImage assumes that you either want to delete the value from the field or the image. If you click* [No] *in response to the* ***Delete Image*** *message, the address will be removed but not the image. If you click* [No] *in response to the* ***Change Image Address*** *prompt, the image will be removed but not the address.*

To remove an image from a folder

1. Zoom out to thumbnail view.
2. Select the image or images you want to delete by clicking on the page number labels with your right mouse button:
   - To select one image, right-click on the label of the image.
   - To select more than one image, press Ctrl and right-click on the labels of each image you want to delete.
   - To select consecutive images, hold Shift down and right-click on the label of the first image you want to delete. Then right-click on the label of last image you want to delete.
3. Press Del. A confirmation message (fig. 30.9) will appear:
   - To delete your selected images, click Yes.
   - To cancel the delete operation, click No.

> ***Important:*** *The delete function does not return images to the to-be-indexed list. However, the* ***Select Split Type*** *function (see page 235) can remove images from a folder for reindexing.*



Delete Selected Images

Fig. 30.9. Confirmation message for deleting images from folders

Scanning Images

While in QC mode, you can scan and rescan images. This allows you to insert missing images and rescan badly scanned images during QC operations. When you rescan an image, it replaces the image you have selected. When you scan an image, it adds the image to the record. If there is a folder file associated with the record, it adds the document to the end of file. A special **Scan and Insert** function allows you to scan a frame and insert it into a specific place in the file. These options are identical to the ones available from your search screen. However, a toolbar button has been added to allow you quicker mouse access to the **Scan** and **Rescan** options.

> ***Note:*** *The* *initiates the* ***Rescan*** *function if there is a page displayed and the* ***Scan Single*** *function if there is no page displayed or if you are in thumbnail view.*

To rescan an image

1. Make sure the page you want to replace is displayed on the screen. If you are in thumbnail view, left-click on the page you want to rescan to display it.
2. Place the page you want to scan in the scanner.
3. Do one of the following:
   - Click the button on the tool bar.
   - Select **Rescan** from the **Scan** menu
   - Press F6.
4. The page will be scanned and replace the currently displayed page in your database.

To scan and add an image

1. Place the page you want to scan in the scanner.
2. Do one of the following:
   - Click the button on the tool bar.

- Select **Scan Single** from the **Scan** menu
- Press F5

3. The page will be scanned and one of the following will happen:
    - If there was no previous image associated with the record, VersaImage places the file name in the **Image Address** field.
    - If there was a single image previously associated with the record, VersaImage creates a folder file and places both images in the folder file.
    - If the record has a folder file associated with it, VersaImage adds the new image to the end of the folder.

▶ **To scan and insert an image**

1. Place the page you want to scan in the scanner.
2. Zoom out to thumbnail view.
3. Right-click on the page number label of the image you want to select. The label will be highlighted to show the image is selected.
4. Either select **Scan and Insert** from the **Scan** menu or press F3 to scan the page.
5. The page will be scanned and inserted in front of the selected page.

Rearranging Your Images

You can cut and paste images in your folders to rearrange them in a given folder or move them to another folder. You can also copy an image to another folder. This allows you to place the same image in more than one folder.

▶ **To move an image to a different location in a folder**

1. Display your folder in thumbnail view.
2. Hold Ctrl down and left-click your mouse on the page number label of the image you want to select.
3. To select additional images, keep Ctrl pressed and left-click on the labels of any images you want to add to the group.
4. Either open the **Edit** menu and select **Cut** or press Ctrl + X on the keyboard. The image will remain displayed but its label will be grayed out.
5. Press Ctrl and left-click your mouse on the image that is located in the position where you want to put the new image.
6. Either open the **Edit** menu and select **Paste** or press Ctrl + V on the keyboard. The image will be moved to this position and placed in front of the selected image.

▶ **To move an image to a different folder**

1. Display your folder in thumbnail view.
2. Hold Ctrl down and left-click your mouse on the page number label of the image you want to select.
3. To select additional images, keep Ctrl pressed and left-click on the labels of any images you want to add to the group.

4. Either open the **Edit** menu and select **Cut** or press Ctrl + X on the keyboard. The image will remain displayed but its label will be grayed out.
5. Click ▦ to return to table-display mode and find the record you want to move the image to.
6. Either double-click on the record or click ☰ to display it in single-record mode.
7. Either open the **Edit** menu and select **Paste** or press Ctrl + V on the keyboard. The image will be placed at the end of the folder.

▸ To place a copy of an image in another folder

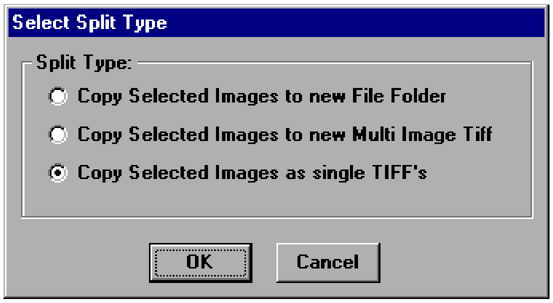
1. Display your folder in thumbnail view.
2. Hold Ctrl down and left-click your mouse on the page number label of the image you want to select.
3. To select additional images, keep Ctrl pressed and left-click on the labels of any images you want to add to the group.
4. Either open the **Edit** menu and select **Cut** or press Ctrl + C on the keyboard.
5. Click ▦ to return to table-display mode and find the record you want to copy the image to.
6. Either double-click on the record or click ☰ to display it in single-record mode.
7. Either open the **Edit** menu and select **Paste** or press Ctrl + V on the keyboard. The image will be placed at the end of the folder.

Splitting Folders

The folder splitting function allows you to remove images from a folder and add them to the to-be-indexed list as single images, folder files, or multi-page TIFFs.

▸ To split a folder

1. Display your folder in thumbnail view.
2. Right-click on the page label of the first image you want to select.
3. To select additional images, do either of the following:
   - If the pages are consecutive, hold Shift down and right-click on the label of the last page you want to select.
   - If the pages are not adjacent, hold Ctrl down and right-click on the labels of the pages you want to select.
4. After you have selected your pages, press F12. The **Select Split Type** dialog box (fig. 30.10) will appear.



Select Split Type

Split Type:

○ Copy Selected Images to new File Folder

○ Copy Selected Images to new Multi Image Tiff

● Copy Selected Images as single TIFF's

Fig. 30.10. **Select Split Type** dialog box

5. Select the type of split you want:
   - If you select **Copy Selected Images to new File Folder**, a new folder file will be created for the selected group of images with same name as the first image in the folder. The folder will be added to the to-be-indexed list.
   - If you select **Copy Selected Images to new Multi-Image TIFF**, a multi-image TIFF file will be created. The new file will be placed in the batch folder and added to the to-be-indexed list.
   - If you select **Copy Selected Images as single TIFFs**, each image will be added to the to-be-indexed list as a TIFF file. If the pages are in a multi-page TIFF image, new TIFF files will be created for them.
6. Click OK. The images will be removed from the folder and returned to the to-be-indexed list.

Editing Records

You may edit any record in the batch individually through the QC function. You can also do this through the search screen. However, the QC function also allows you to change roll and frame numbers and image addresses.

▸ To edit a record

1. Highlight the record you want to edit in the table.
2. Either double-click your mouse on the record or press the ☰ on the tool bar to display the record in single-record mode.
3. The current data in the record will be displayed on the screen. Make whatever changes you need to make to the record.
4. Click OK to make the changes and return to the table screen.

Exiting from the Image QC Option

▸ To exit from the QC option

Do either of the following:

- Click Exit QC on the screen.
- Select **Exit QC** from the **Index** menu.

File Maintenance Functions

31

VersaImage and VersaCAR provide you with built-in functions to perform both routine maintenance and recovery for your databases. The **Repair Database** function repairs a corrupted database. The **Compact Database** function compacts your database to optimize disk space. These functions are available from the **Maintenance** submenu (fig. 31.1), which is accessed from the **File** menu.

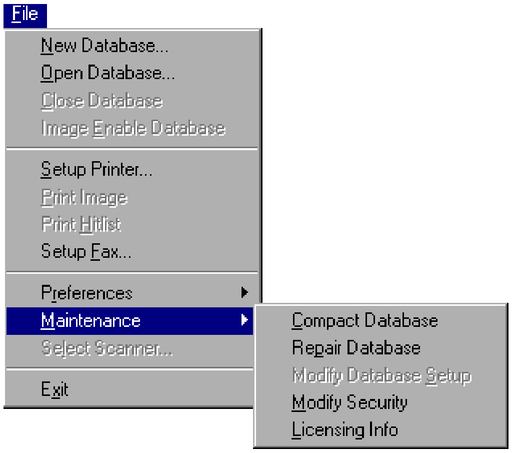

File
New Database...
Open Database...
Close Database
Image Enable Database
Setup Printer...
Print Image
Print Hitlist
Setup Fax...
Preferences
Maintenance
Select Scanner...
Exit
Compact Database
Repair Database
Modify Database Setup
Modify Security
Licensing Info

Fig. 31.1. **Maintenance** menu

> ***Note:*** *Before you can open the **Maintenance** menu, you must close all databases.*

To run **Repair Database**, you must first obtain a repair code from Image Vision technical support. To run **Compact Database**, you must obtain a compact code. These codes must be obtained each time you use the function.

Repairing a Database

If a database ever becomes corrupted, you may be able to repair it instead of restoring it. Database corruption does not occur as a general rule. However, if the system goes down while you are working on a database or if there is a power failure or interruption, it is possible that the database will be corrupted as a result. If it is, a message will appear when you try to open it again to indicate that it has been corrupted. In this case, you can use the **Repair Database** function to try to repair it.

> ***Reminder:*** *Don't forget to obtain your repair code from Image Vision before you run this function.*

To repair a database

1. Close any databases you have open.
2. Select **Maintenance** from the **File** menu.
3. Select **Repair Database** from the **Maintenance** menu. You will be prompted for the repair code (fig. 31.2).

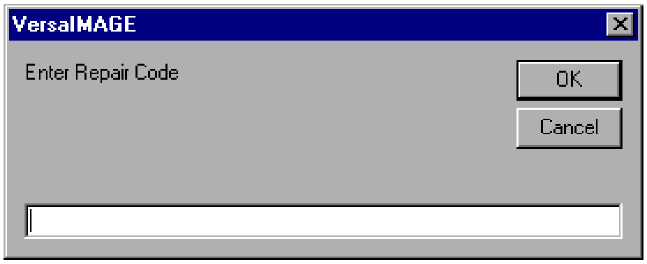
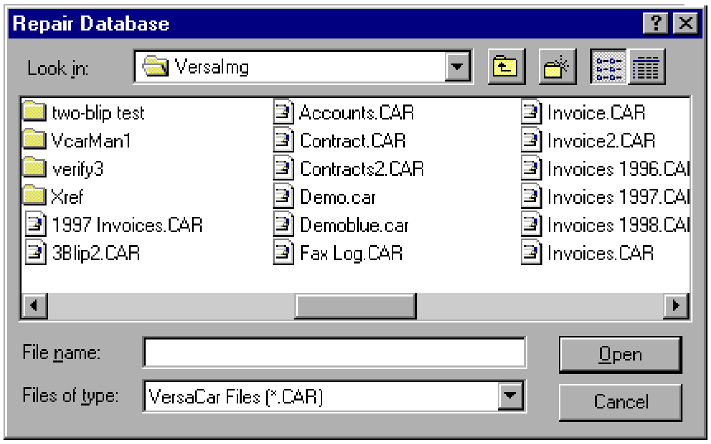

VersaIMAGE
Enter Repair Code
OK
Cancel

Fig. 31.2. **Repair Code** prompt for **Repair Database** function

4. Enter your repair code and click OK. The **Repair Database** dialog box (fig. 31.3) will appear.


Repair Database
two-blip test
VcarMan1
verify3
Xref
1997 Invoices.CAR
3Blip2.CAR
Accounts.CAR
Contract.CAR
Contracts2.CAR
Demo.car
Demoblue.car
Fax Log.CAR
Invoice.CAR
Invoice2.CAR
Invoices 1996.CAI
Invoices 1997.CAI
Invoices 1998.CAI
Invoices.CAR
File name:
Open
Cancel

Look in: VersaImg

Files of type: VersaCar Files (*.CAR)

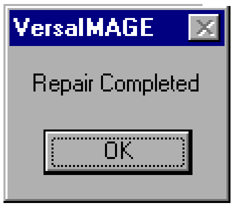
Fig. 31.3. **Repair Database** dialog box

5. Select the database you want to repair from the box and click Open to begin the database repair.

6. When the repair is finished, you will see a completion message (fig. 31.4). Click OK to exit from the function.

7. To find out if the repair was successful, open the database.

Note: This function can take from one minute to several hours depending on the size of your database.


VersaIMAGE
OK

Repair Completed

Fig. 31.4. Completion message

Compacting a Database

The **Compact Database** function optimizes your disk space by removing "gaps" left by deleted records and compressing your file. This function should only be run after a large number of records have been deleted from the database. It is not necessary or advisable on a regular basis.

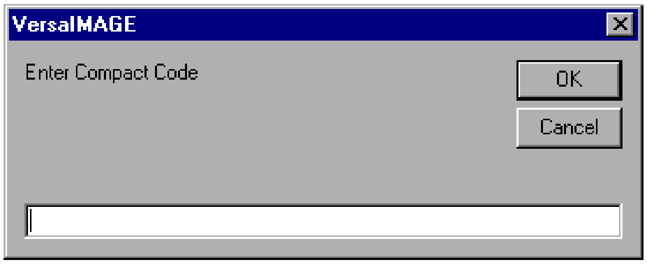
***Reminder:** Don't forget to obtain your compact code from Image Vision before you run this function.*

▸ To compact a database

1. Close any databases you have open.

2. Select **File** from the menu bar. Then select **Maintenance**.

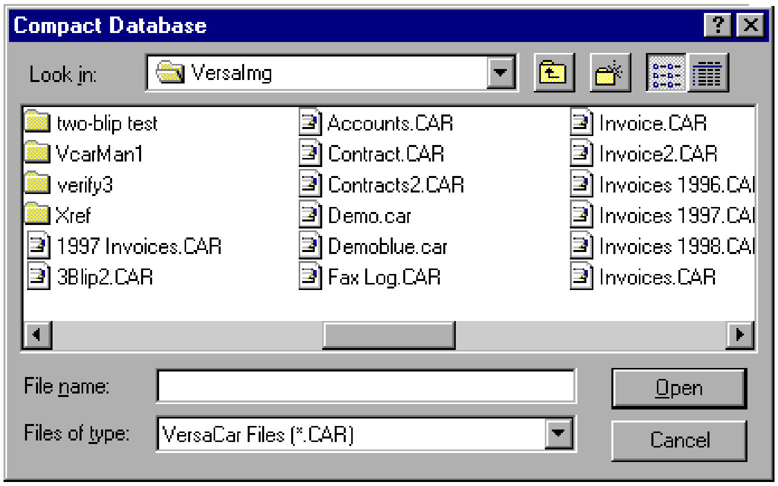
3. Select **Compact Database** and you will be prompted for the compact codes (fig. 31.5).


VersaIMAGE
OK
Cancel

Enter Compact Code

Fig. 31.5. Enter Compact Code

4. Enter your compact code and click OK. The **Compact Database** dialog box (fig. 31.6) will appear.


Compact Database
two-blip test
VcarMan1
verify3
Xref
1997 Invoices.CAR
3Blip2.CAR
Accounts.CAR
Contract.CAR
Contracts2.CAR
Demo.car
Demoblue.car
Fax Log.CAR
Invoice.CAR
Invoice2.CAR
Invoices 1996.CA
Invoices 1997.CA
Invoices 1998.CA
Invoices.CAR
Open
Cancel

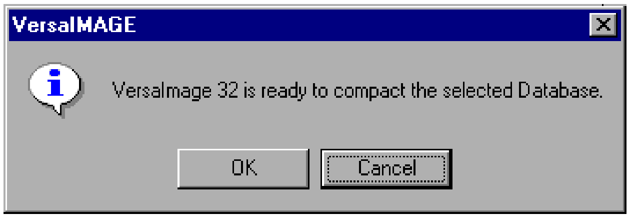
Look in: VersaImg

File name:

Files of type: VersaCar Files (*.CAR)

Fig. 31.6. **Compact Database** dialog box

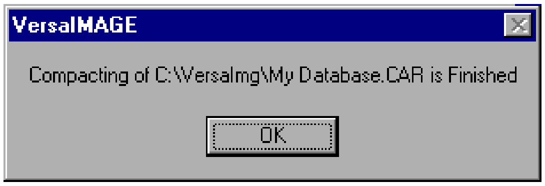
5. Select the database you want to compact from the box and click Open. The message shown in fig. 31.7 will appear.


VersaIMAGE
OK
Cancel

VersaImage 32 is ready to compact the selected Database.

Fig. 31.7. Ready to compact message

6. Click OK to start compacting the database.
7. When it is done you will see a completion message (fig. 31.8). Click OK to exit from the function.


VersaIMAGE
OK

Compacting of C:\VersaImg\My Database.CAR is Finished

Fig. 31.8. **Compact Database** completion message

***Note:** If your database is large, the procedure may take awhile.*

Exporting Files

32

VersaImage and VersaCAR databases are unique to VersaImage and VersaCAR and cannot be used by other applications except Microsoft Access. However, you can export your database files to either a flat ASCII file or a comma-separated file. If your other applications can read either of these types of files, this feature can eliminate the need for duplicate entry in cases where you need the same data for other applications. You can also export image folders as multi-image TIFF files for use in other applications or for archiving purposes. When you export database records, you can create a new file or you can append your exported records to an existing file. This allows you to use the export feature to archive records periodically.

> ***Important:*** *Although you can read VersaImage and VersaCAR databases in Microsoft Access, they should not be modified in Access or unpredictable results may occur.*

Exporting to an ASCII Flat File

When you export to a flat ASCII file, you can export your entire database or you can select a specific hit list of records to export with the search function. You can, for example, specify a particular roll, a range of invoices, or a specific customer.

Specifying your source and destination

To export to a flat ASCII file, you must open the database you want to export from and specify a destination file for your exported data. You may optionally narrow down your records to a specific hit list.

To select your records and export destination

1. Open the database you want to export from.
2. If you do not want to export your entire database, select your records as follows:
    - Enter the search criteria that will find the records you want.
    - Click **Search**.
    - Check the hit list to make sure the search yielded the result you wanted.
3. Select **Export** from the **Tools** menu.
4. Select **Flat ASCII File** from the **Export** menu (fig. 32.1).

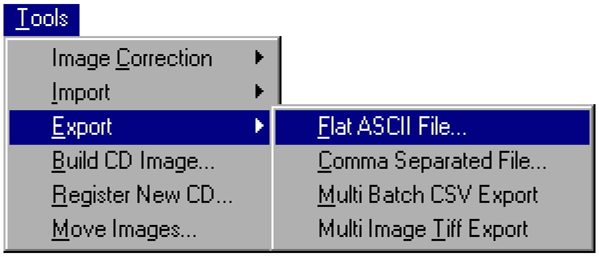


Fig. 32.1. Selecting **Flat ASCII File** from the **Export** dialog box

The **SaveAs** dialog box (fig. 32.2) will appear.

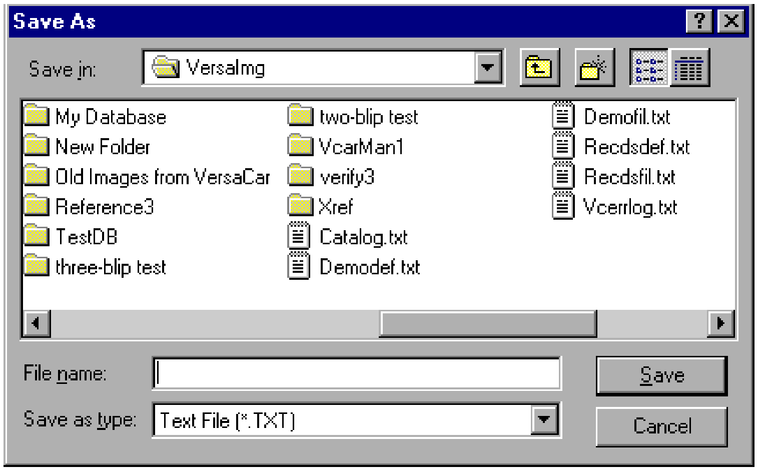

Save As
Save in: VersaImg
My Database
New Folder
Old Images from VersaCar
Reference3
TestDB
three-blip test
two-blip test
VcarMan1
verify3
Xref
Catalog.txt
Demodef.txt
Demofil.txt
Recdsdef.txt
Recdsfil.txt
Vcerrlog.txt
File name:
Save as type: Text File (*.TXT)
Save
Cancel

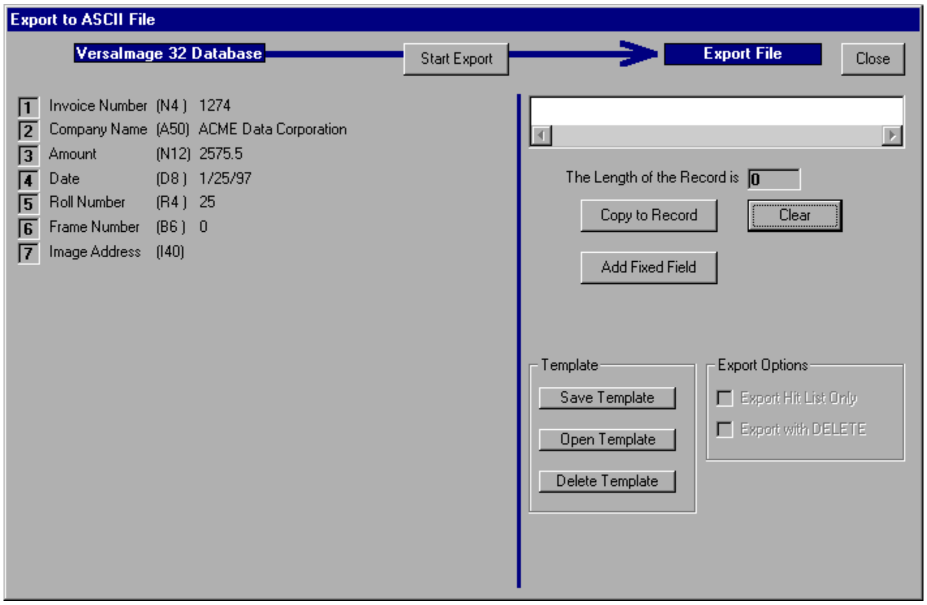
Fig. 32.2. **Save As** dialog box

5. Find the folder where you want to save the exported file. If the folder does not exist, you may create it (see Chapter 4 if you don't know how to do this). Make sure the folder name is displayed in the **Save in** box.

6. Enter the destination file name:
   - If you are creating a new file, enter the file name in the **File name** text box. The extension .TXT is suggested, but you should use whatever extension your application recognizes.
   - If you are replacing an existing file or appending records to an existing file, click on the file name to select it. Its name should appear in the **File Name** box.

> ***Reminder:*** *If the file you are replacing or appending to does not have a .TXT extension, select* ***All files*** *from the* ***Files of type*** *list so all files will appear in the list.*

7. Click and the **Export to ASCII File** dialog (fig. 32.3) will appear.


Export to ASCII File
VersaImage 32 Database
Start Export
Export File
Close
The Length of the Record is 0
Copy to Record
Clear
Add Fixed Field
Template
Save Template
Open Template
Delete Template
Export Options
☐ Export Hit List Only
☐ Export with DELETE

1	Invoice Number	(N4)	1274
2	Company Name	(A50)	ACME Data Corporation
3	Amount	(N12)	2575.5
4	Date	(D8)	1/25/97
5	Roll Number	(R4)	25
6	Frame Number	(B6)	0
7	Image Address	(I40)	

Fig. 32.3. **Export to ASCII File** dialog

Selecting fields to export

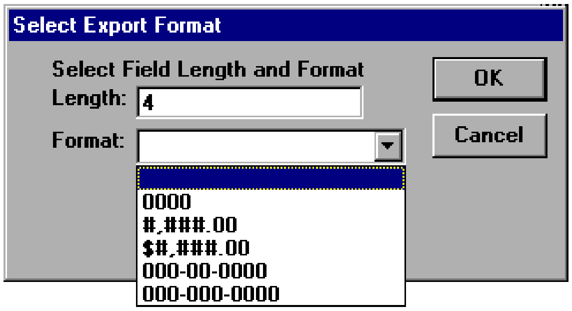
The left side of the screen contains the fields in the record and data from the first record in the database. The right side contains your export options and a field for your export record. You do not have to export all fields in the database record, only the ones you need. You can also specify the order in which you want the fields exported. This allows you to tailor your data to specific applications.

When you define your export record, select your fields in the order you want them placed in the export record. If you need to insert extra space or characters in your record at certain points to conform to record structure requirements, you can insert a fixed field of a specific length and fill it with a character string. If you plan on exporting from this database more than once, you can create an export template for your file. Then you will not have to define your record again.

Hint: *It is highly recommended that you create a template if you will be exporting from this database periodically and appending the records to an existing export file. Then you know the record structure will always be the same.*

To select fields to export

1. On the left side of the screen, click the number of the field you want to export.
2. Click Copy to Record. A dialog box for entering the field length will appear. The field length defined for the database will appear as a default:
   - If the field is a numeric or date field, the dialog will contain a **Length** field and a **Format** field (fig. 32.4).



Select Export Format

Select Field Length and Format

Length: 4

Format:

0000

#,###.00

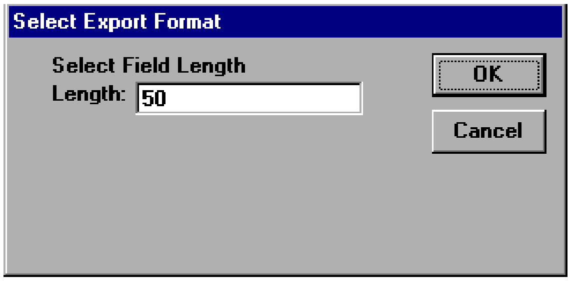
$#,###.00

000-00-0000

000-000-0000

Fig. 32.4. **Select Export Format** dialog with **Format** field

   - For other types of fields, the dialog will only contain the **Length** field (fig. 32.5).



Select Export Format

Select Field Length

Length: 50

Fig. 32.5. **Select Export Format** dialog with **Length** field only

3. Change the field length if necessary. If you enter a length that is shorter than your database field, your data will be truncated to fit if necessary.
4. If the field is a numeric or date field, select the **Format** type.
5. Click OK. The data for that field from the first record in your file will be added to the export record displayed on the right. The record length will be incremented accordingly.

To add a fixed field

1. Click Add Fixed Field. The **Fixed Field Definition** dialog (fig. 32.6) will appear.

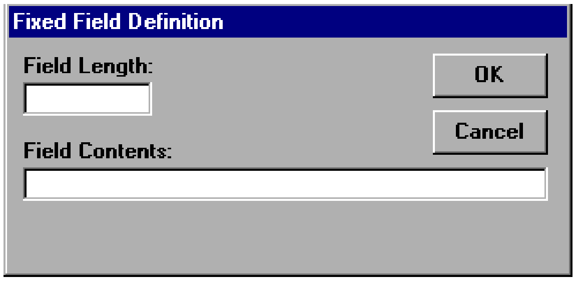

Fixed Field Definition
Field Length:
OK
Cancel
Field Contents:

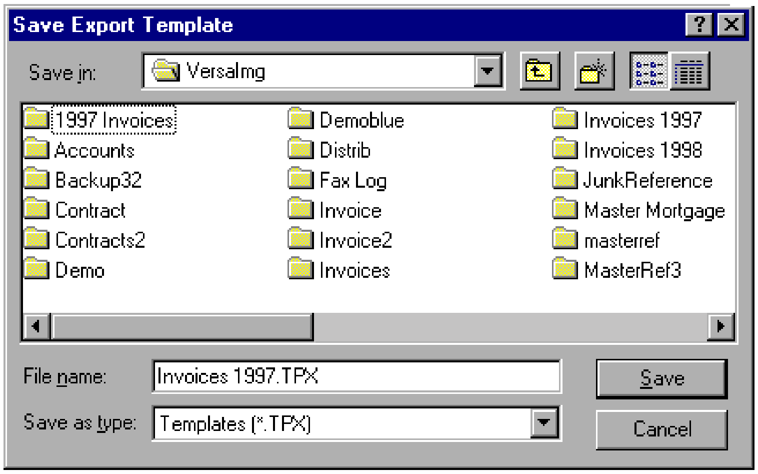
Fig. 32.6. **Fixed Field Definition** dialog

2. Enter the number of characters you are adding in the **Field Length** field.
3. Enter the character string in the **Field Contents** field. If you want space only, leave it blank.
4. Click OK. The fixed field will be added to the export record on the right.

> ***Note:*** *The next field you choose to export will be added immediately after your fixed field.*

To create a template

1. Select all the fields you want to export but do not start the export.
2. Click Save Template. The **Save Export Template** dialog (fig. 32.7) will appear.


Save in: VersaImg

File name: Invoices 1997.TPX

Save as type: Templates (*.TPX)
Save Export Template
?
1997 Invoices
Accounts
Backup32
Contract
Contracts2
Demo
Demoblue
Distrib
Fax Log
Invoice
Invoice2
Invoices
Invoices 1997
Invoices 1998
JunkReference
Master Mortgage
masterref
MasterRef3
Save
Cancel

Fig. 32.7. **Save Export Template** dialog

3. By default, the template will be given the same name as your database:
   - If you want to change it, change the file name in the file name field.
   - Do not change the extension! The template must have the extension .TPX to be recognized as an export template.
4. Click Save to save the template.

> ***Hint:*** *If you will be exporting from this database periodically and will generally use the same template, save it with the same name as the database (the default name). Then it will always be opened for you when you export.*

▸ To redefine an export record

1. Click Clear to remove all fields from the current export record.
2. Select the fields for the new export record.

Exporting a file

When you export your file, you may export your entire file or you may export your hit list only. You may also delete the records you export from your VersaImage or VersaCAR database. This makes it possible to archive older records or remove records you no longer actively need.

▸ To export the file

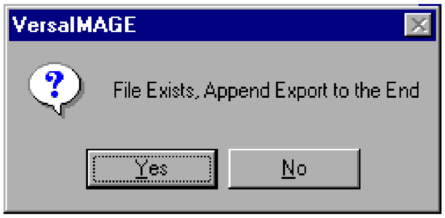
1. Either select the fields you want to export or click Open Template to open the template that contains your field definitions.

> ***Note:*** *If there is a template file with the same name as the database and a .TPX extension, it will automatically be opened for you. You may change it or redefine the fields if necessary before you export. To clear the current export record and start over, click* Clear.

2. Select your export options:
   - If you only want to export the records in your hit list, check **Export Hit List Only**. This option will be grayed out if you did not select a hit list.

> ***Warning:*** *If you do not check **Export Hit List Only**, your entire database will be exported, even if you created a hit list first.*

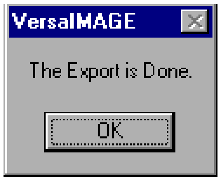
   - If you want the records you export deleted from your VersaImage or VersaCAR database, check **Export with Delete**. Note that to use this option, you must export a hit list.
3. Click Start Export to start the export.
4. If the file you are exporting to already exists, you will be asked if you want to append the records to the end of the existing file (see fig. 32.8):



File Exists, Append Export to the End

Fig. 32.8. Append to file message

   - To add the exported records to the file, click Yes.
   - To overwrite the exiting file, click No.
5. During the export, you will see a progress message on your screen. When the export is finished, a completion message will appear (fig. 32.9). Click OK.



The Export is Done.

Fig. 32.9. Export completed

Exporting to a Comma-separated File

When you export to a comma-separated file, you may export the entire file, export records from a hit list only, or export records for selected batches of images. The latter is available from image-enabled databases only.

Selecting your source and destination

To export to a comma-separated file, you must open the database you want to export from and specify the destination file. If you do not want to export the entire file, you will need to select the records or batch you want to export.

▸ To export a hit list or your entire database

1. Open the database you want to export from.
2. If you do not want to export your entire database, select your records as follows:
   - Enter the search criteria that will find the records you want.
   - Click Search.
   - Check the hit list to make sure the search yielded the result you wanted.
3. Select **Export** from the **Tools** menu.
4. Select **Comma Separated File** from the **Export** menu (fig. 32.10).

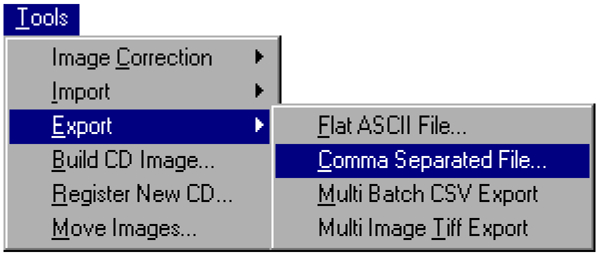
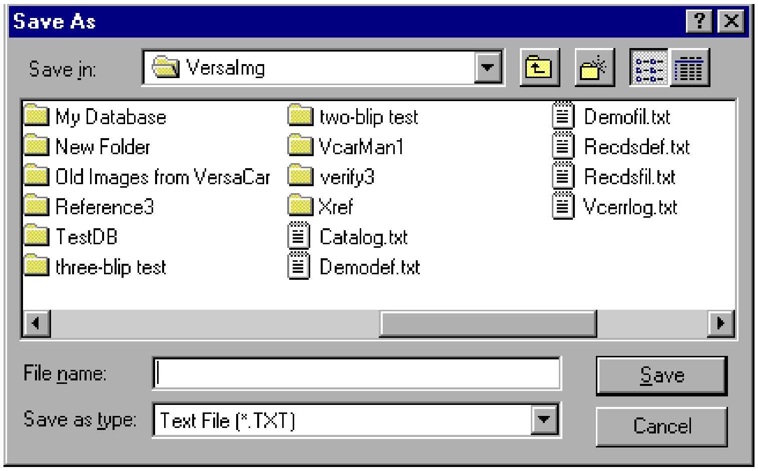

Tools
Image Correction
Import
Export
Build CD Image...
Register New CD...
Move Images...
Flat ASCII File...
Comma Separated File...
Multi Batch CSV Export
Multi Image Tiff Export

Fig. 32.10. Selecting **Comma Separated File** from the **Export** dialog box

The **SaveAs** dialog box (fig. 32.11) will appear.

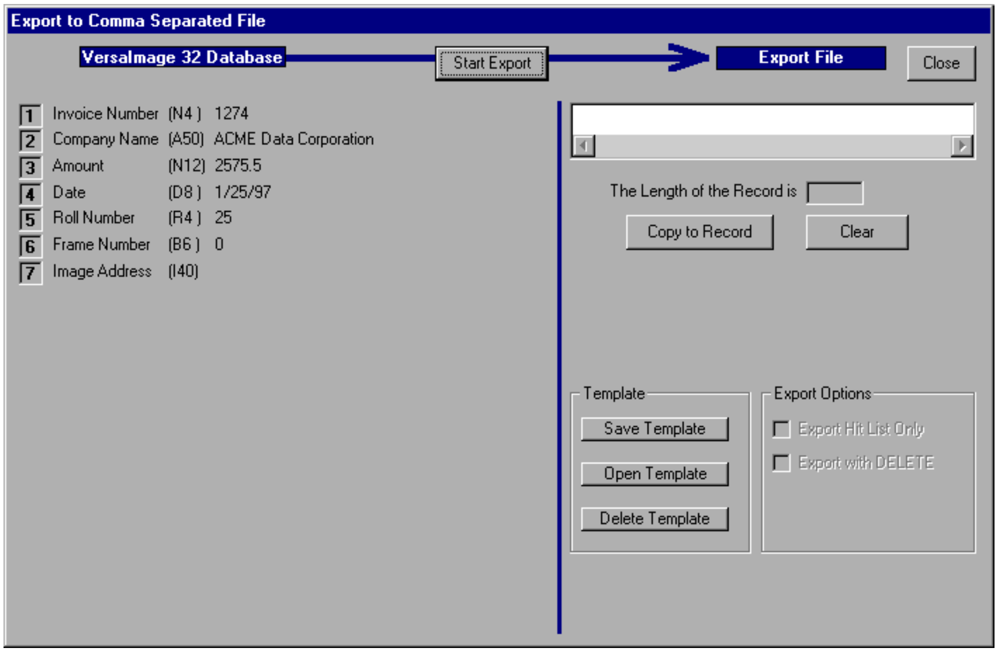

Save As
My Database
New Folder
Old Images from VersaCar
Reference3
TestDB
three-blip test
two-blip test
VcarMan1
verify3
Xref
Catalog.txt
Demodef.txt
Demofil.txt
Recdsdef.txt
Recdsfil.txt
Vcerrlog.txt
File name:
Save
Cancel

Save in: VersaImg

Save as type: Text File (*.TXT)

Fig. 32.11. **Save As** dialog box

5. Find the folder where you want to save the exported file. If the folder does not exist, you may create it (see Chapter 4). Make sure the folder name is displayed in the **Save in** box:
   - If you are creating a new file, enter the file name in the **File name** text box. The extension .CSV is suggested, but you should use whatever extension your application recognizes.
   - If you are replacing an existing file, click on it to select it. Its name should appear in the **File Name** box.
6. Click and the **Export to Comma Separated File** dialog box (fig. 32.12) will appear.

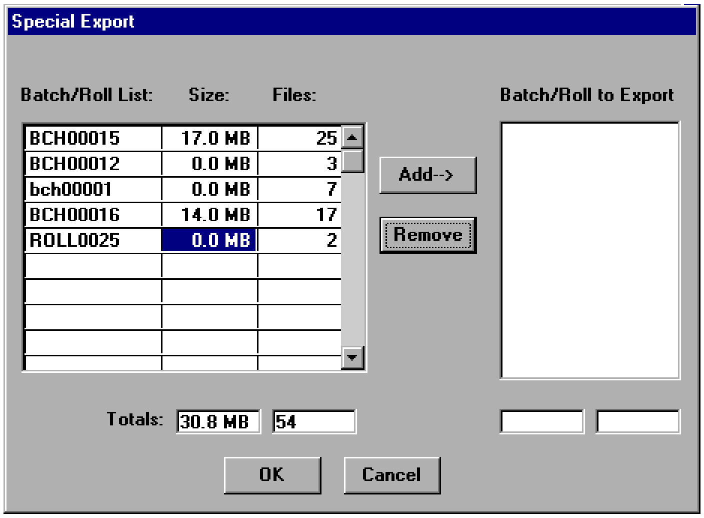

Export to Comma Separated File
VersaImage 32 Database
Start Export
Export File
Close
The Length of the Record is
Copy to Record
Clear
Template
Save Template
Open Template
Delete Template
Export Options
☐ Export Hit List Only
☐ Export with DELETE

1	Invoice Number	(N4)	1274
2	Company Name	(A50)	ACME Data Corporation
3	Amount	(N12)	2575.5
4	Date	(D8)	1/25/97
5	Roll Number	(R4)	25
6	Frame Number	(B6)	0
7	Image Address	(I40)	

Fig. 32.12. **Export** dialog box for comma-separated file

▸ To select specific batches to export

1. Open the database that contains the index records for the batches you want to export.
2. Select **Export** from the **Tools** menu.
3. Select **Multi Batch CSV Export** from the **Export** menu. The **Special Export** dialog box (fig. 32.13) will appear so you can select the batches you want to export.


Special Export
Batch/Roll to Export
Add-->
Remove
OK
Cancel

Batch/Roll List:	Size:	Files:
BCH00015	17.0 MB	25
BCH00012	0.0 MB	3
bch00001	0.0 MB	7
BCH00016	14.0 MB	17
ROLL0025	0.0 MB	2

Totals: 30.8 MB 54

Fig. 32.13. **Special Export** dialog

4. To select your batches, do the following:
   - Highlight the batch in the list on the left.
   - Click Add and the batch will be placed in the list on the right.
5. To remove a batch from your selection, do the following:
   - Highlight the batch in the list on the right.
   - Click Remove and the batch will be removed from the list.
6. When you finish selecting your batches, click OK. The **Save As** dialog box will appear.

7. Find the folder where you want to save the exported file. If the folder does not exist, you may create it (see Chapter 4). Make sure the folder name is displayed in the **Save in** box:
    - If you are creating a new file, enter the file name in the **File name** text box. The extension .CSV is suggested, but you should use whatever extension your application recognizes.
    - If you are replacing an existing file, click on it to select it. Its name should appear in the **File Name** box.
8. Click Save and the **Export to Comma Separated File** dialog (fig. 32.12) will appear.

Selecting the fields to export

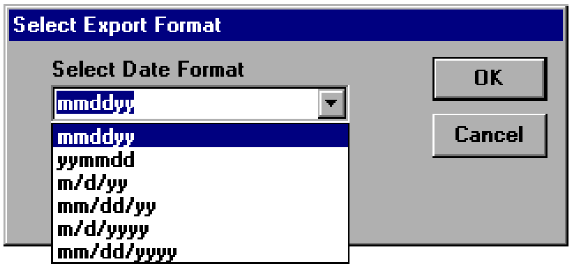
The left side of the export screen contains the fields in your record and the data from the first record in the database. The right side contains your export options and a field for your export record. You do not have to export all fields in the record, only the ones you need. You can also specify the order in which you want the fields exported. This allows you to tailor your data to specific applications.

When you define your export record, select your fields in the order you want them placed in the export record. If you plan on exporting from this database more than once, you can create an export template for your file. Then you will not have to define your record again.

> ***Hint:*** *It is highly recommended that you create a template if you will be exporting from this database periodically and appending the records to an existing export file. Then you know the record structure will always be the same.*

To select the fields for export

1. Click the number of the field you want to export on the left side of your screen.
2. Click Copy to Record:
    - If the field is a numeric or date field, a dialog box will appear (fig. 32.14) so you can select the format for export. Select your field and click OK. The data for the field from the first record will be placed in the export record on the right.



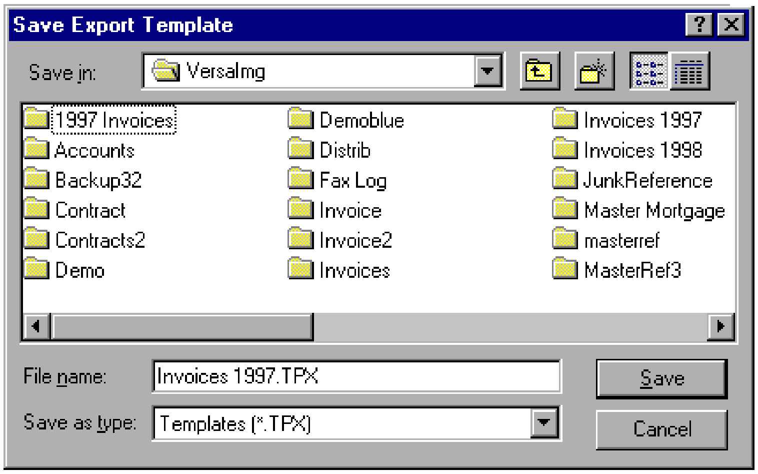
Select Date Format: mmddyy

Fig. 32.14. **Select Export Format** dialog with **Format** field

    - For other types of fields, the data will be moved to the export record on the right when you click Copy to Field.

To create a template

1. Select all the fields you want to export but do not start the export.
2. Click Save Template. The **Save Export Template** dialog (fig. 32.15) will appear.
3. By default, the template will be given the same name as your database:


Save Export Template
Save in:
VersaImg
1997 Invoices
Accounts
Backup32
Contract
Contracts2
Demo
Demoblue
Distrib
Fax Log
Invoice
Invoice2
Invoices
Invoices 1997
Invoices 1998
JunkReference
Master Mortgage
masterref
MasterRef3
Save
Cancel

File name: Invoices 1997.TPX

Save as type: Templates (*.TPX)

Fig. 32.15. **Save Export Template** dialog

- If you want to change it, change the file name in the file name field.
- Do not change the extension! The template must have the extension .TPX to be recognized as an export template.

4. Click Save to save the template.

Hint: *If you will be exporting from this database periodically and will generally use the same template, save it with the same name as the database (the default name). Then it will always be opened for you when you export.*

▸ To redefine an export record

1. Click Clear to remove all fields from the current export record.
2. Select the fields for the new export record.

Exporting the file

The records that will be exported when you export your file depend on the options you selected before you opened your export dialog:

- If you did not select a hit list, your entire file will be exported.
- If you selected a hit list, you can either export the hit list or your entire file.
- If you selected batches for export, only records for those batches will be exported.

▸ To export the file

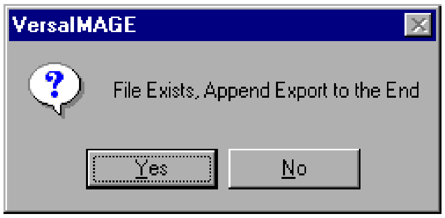
1. Select the fields you want to export or click Open Template to open the template that contains your field definitions.

Note: *If there is a template file with the same name as the database and a .TPX extension, it will automatically be opened for you. You can change it or redefine the fields before you export. To clear the record and start over, click* Clear.

2. If you selected a hit list and want to export the hit list only, check **Export Hit List Only**. This option will be unavailable if you did not select a hit list or are exporting batches.

Warning: *If you do not check* ***Export Hit List Only****, your entire database will be exported, even if you created a hit list first.*

3. If you are exporting a hit list or batches and want the records you export deleted from your VersaImage or VersaCAR database, check **Export with Delete**. This option will be unavailable if you export your entire database.
4. Click Start Export to start the export.
5. If the file you are exporting to already exists, you will be asked if you want to append the records to the end of the existing file (see fig. 32.16).

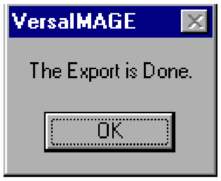

VersaIMAGE

File Exists, Append Export to the End

Fig. 32.16. Append to file message

- To add the exported records to the file, click Yes.
- To overwrite the existing file, click No.

6. During the export, you will see a progress message on your screen.
7. When the export is finished, a completion message will appear (fig. 32.17). Click OK.


VersaIMAGE

The Export is Done.

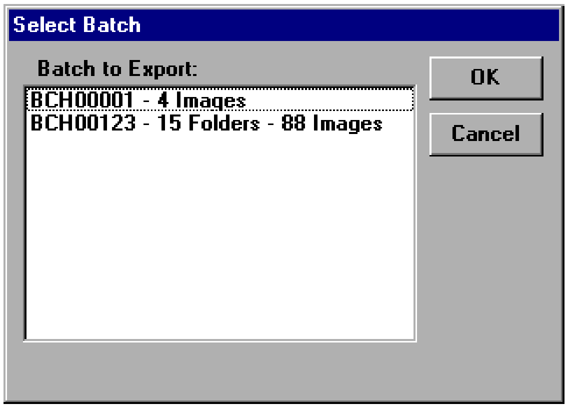
Fig. 32.17. Export completed

Exporting Images

Exporting your images "as is" to use elsewhere needs no special function. You can easily copy them to another drive, folder, or machine through Windows **Explorer**. However, there may be times when you want to export image folders as multi-image TIFFs for use with other applications or to archive. You can do this through the **Multi-Image TIFF Export** function. This function creates one image file for each record. File folders are converted to multi-image TIFF files.

▸ To export images

1. Open the database containing the images you want to export.
2. Select **Export** from the **Tools** menu.
3. Select **Multi Image TIFF Export** from the **Export** menu. The **Select Batch** dialog box (fig. 32.18) will appear so you can select the batch you want to export.

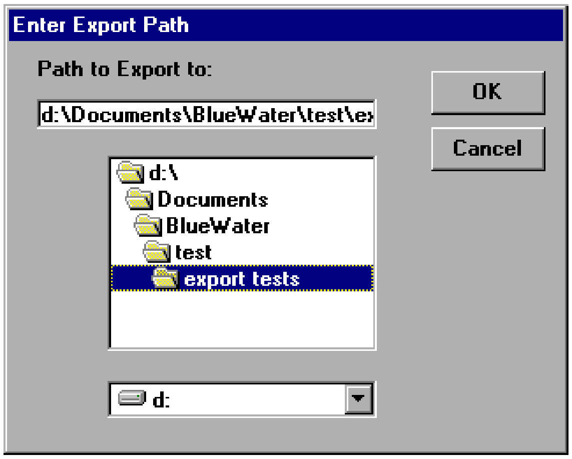

Select Batch

Batch to Export:

BCH00001 - 4 Images
BCH00123 - 15 Folders - 88 Images

Fig. 32.18. Selecting a batch to export

4. Highlight the batch you want to export and click OK. The **Enter Export Path** dialog box (fig. 32.19) will appear.


Enter Export Path
OK
Cancel
d:\
Documents
BlueWater
test
export tests
d:

Path to Export to: d:\Documents\BlueWater\test\ex

Fig. 32.19. **Enter Export Path** dialog box

5. Select the folder where you want to save the exported files.

6. Click OK and the image files will be saved in the folder you selected.

Exporting to CDs and Other Removable Media

33

VersaImage contains functions that allow you to export your files and images to CD and also to use your databases with images stored on CD or other removable media. CDs are a good way to make documents available to independent workstations running VersaView. They are also excellent for archiving purposes.

Exporting to CD

There are a number of reasons you may want to export your databases to CD. For one thing, it is an excellent way to archive or back up large databases, complete with images. You can also use them to make your databases available to independent workstations running VersaView. Regardless of the reason, the VersaImage program will facilitate the CD export procedure.

Since there are many different manufacturers of CD-R (CD recording) equipment, VersaImage was designed to "pre-master" the CD but not to actually write the CD. Most CD-Rs have an associated hard drive where an image of the CD is placed. The VersaImage program writes your files to the CD-R hard drive. The CD authoring software is then used to build the CD from the CD-R's dedicated hard drive.

▸ To export to CD

1. Open the **Tools** menu.
2. Select **Build CD Image** (fig. 33.1) from the **Tools** menu. The dialog box shown in fig. 33.2 will appear.

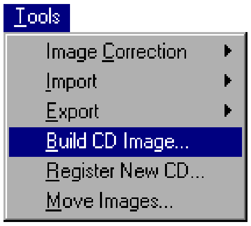


Fig. 33.1

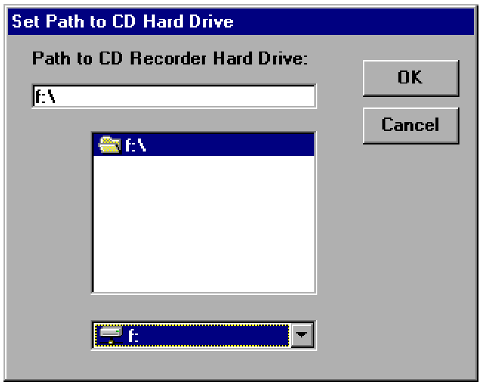
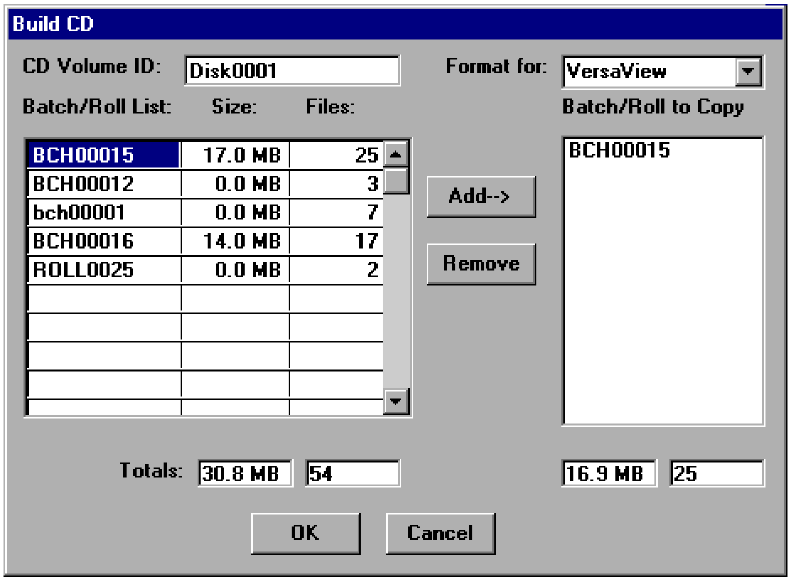


Fig. 33.2. **Set Path to CD Hard Drive** dialog

3. Select the path to your CD-R's hard drive (NOT to the CD itself) and click OK. The **Build CD** dialog box will be displayed (fig. 33.3).
4. Select your format for the CD:

VersaView	To use VersaImage or VersaView.
SimpliFiler	To use with SimpliFiler.

5. To select batches, do the following:



CD Volume ID: Disk0001

Format for: VersaView

Batch/Roll List:

Batch/Roll	Size:	Files:
BCH00015	17.0 MB	25
BCH00012	0.0 MB	3
bch00001	0.0 MB	7
BCH00016	14.0 MB	17
ROLL0025	0.0 MB	2

Totals: 30.8 MB 54

Batch/Roll to Copy: BCH00015

16.9 MB 25

Fig. 33.3. **Build CD Image** dialog box

- Click on the batch in the list on the left. To select consecutive batches, keep your left mouse button pressed and drag your pointer over the batches you want to select.
- Click **Add** and the selected batches will move to the list on the right.

6. To remove a selected batch, highlight the batch on the right and click **Remove**.

7. When you have selected all the batches to copy, click **OK** and VersaImage will copy the batches.

> ***Note:*** *If there are any batches that are not completely indexed (images with no data), you will get a warning message asking if you wish to proceed with the batch. If you answer* ***No****, the batch will be skipped.*

The CD will have a directory structure with a .CSV file in the root directory, a subdirectory named the same as the Volume ID, and subdirectories in that directory for the batches selected. For example, if the Volume ID entered was DISK0001 the following file structure will be created:

```
F:\DISK0001.CSV                          (Index file in Root Directory)
F:[DISK0001]
  └ DISK0001                             (subdirectory)

        ┌─ BCH00001                      (first batch)
        │       00001001.tif             (TIFF images)
        │              .
        │              .
        │       00001999.tif
        └─ BCH00002                      (second batch)
                00002001.tif             (TIFF images)
                       .
                       .
                00002999.tif
```

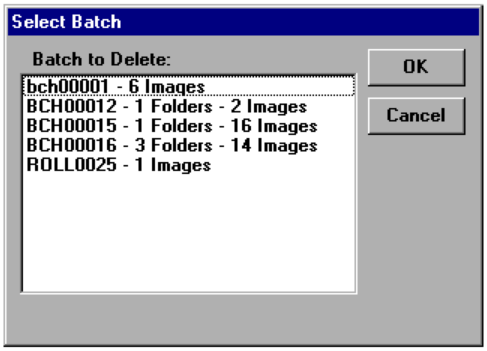
This is the directory structure that needs to be created on your CD. If you are using part of your main hard drive to create the CDs, be sure to create the above directory structure on the CD itself.

Using Images from Your CDs

If you have limited disk space, you can use the images for the CDs you've created with a database that is on your hard drive. This allows you to remove older batches of images from your hard drive after they are archived to CD but still access them from your database on your system. To do this, you create your CD as described above. Once the CD is created, you delete the batches from your hard drive and rebuild the database without the images through the **Register CD** function. After the database is rebuilt, the image addresses in your database records will point to the image files on the CD.

▸ To delete your batches

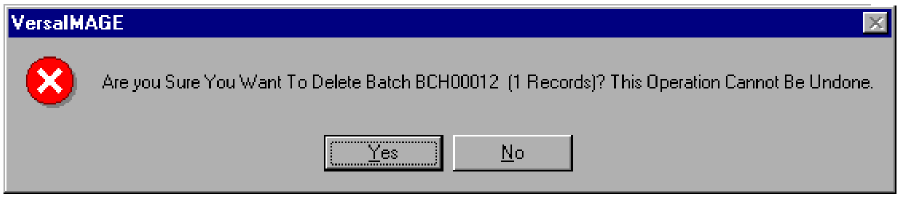
1. Open the database where the batches you want to delete are located.
2. Select **Delete Batch** from the **Index** menu. The dialog box shown in fig. 33.4 will appear.



bch00001 - 6 Images
BCH00012 - 1 Folders - 2 Images
BCH00015 - 1 Folders - 16 Images
BCH00016 - 3 Folders - 14 Images
ROLL0025 - 1 Images

Fig. 33.4. Selecting batches to delete

3. Select the batches you want to delete as follows:
   - To select a single batch, click on it with your mouse.
   - To select consecutive batches, click the first batch you want to delete. Then hold the Shift key down and click on the last batch.
   - To select non-consecutive batches, hold Ctrl down and click on each batch you want to delete.
4. When you are finished, click OK. The message shown in fig. 33.5 will appear.



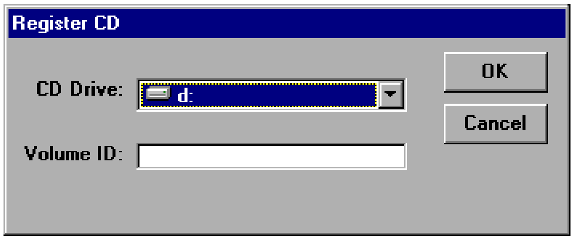
Are you Sure You Want To Delete Batch BCH00012 (1 Records)? This Operation Cannot Be Undone.

Fig. 33.5. Delete Batch confirmation

5. Click Yes to delete the batches.

▸ To rebuild your database

1. Open the database where you want to rebuild the records.
2. Insert the CD containing the database records and images into your CD-ROM drive.
3. Select **Register New CD** from the **Tools** menu. The **Register CD** dialog box (fig. 33.6) will appear.



CD Drive: d:

Volume ID:

Fig. 33.6. **Register CD** dialog

4. Select your CD Drive from the **CD Drive** list box. The volume ID for your CD will be displayed in the **Volume ID** field.
5. Click OK to build your database records from the CD.

Moving Images to External Media

If disk space is limited, images can also be stored on removable media such as optical disks, Zip drives, SyQuest drives, etc., and used with databases that are resident on your system. To do this, you first scan and index your images. Then you *move* them to the removable drive. After the images are moved, the image address will contain the path to the removable drive instead of the old address.

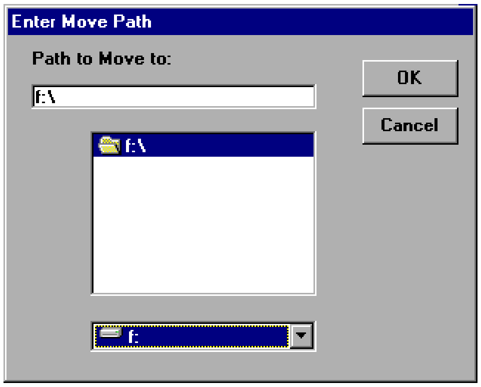
***Note:** Your removable drive must have a volume ID (i.e., label) for this procedure to work as VersaImage uses this label in the image address. VersaImage will not start the move unless there is a volume ID.*

▸ To add a volume ID

1. Open Windows **Explorer** and navigate to your removable drive.
2. Right-click on the drive to open the context menu.
3. Select **Properties** from the menu.
4. On the **General** page, enter the volume ID in the **Label** field.
5. Click OK.

▸ To move your images

1. Open the database where the images you want to move are indexed.
2. Select **Move Images** from the **Tools** menu. A dialog for selecting your path (fig. 33.7) will appear.
3. Select the path to your removable disk and click OK. The **Move Images** dialog box will be displayed (fig. 33.8).
4. To select your batches, do the following:
   - Click on the batch in the list on the left. To select consecutive batches, keep your left mouse button pressed and drag your pointer over the batches you want to select.
   - Click Add and the selected batches will move to the list on the right.

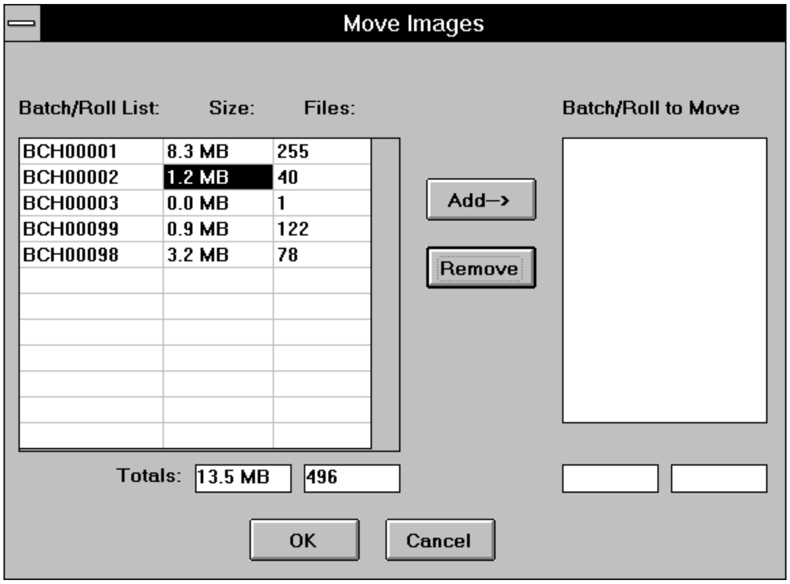


Path to Move to: f:\

f:\

f:

Fig. 33.7. **Enter Move Path** dialog



Batch/Roll List:	Size:	Files:
BCH00001	8.3 MB	255
BCH00002	1.2 MB	40
BCH00003	0.0 MB	1
BCH00099	0.9 MB	122
BCH00098	3.2 MB	78

Totals: 13.5 MB 496

Batch/Roll to Move

Fig. 33.8. **Move Images** dialog

5. To remove a selected batch, highlight the batch on the right and click Remove.

> ***Note:*** *As batches are added to the list, the totals at the bottom of the* ***Batch/Roll to Move*** *list will be updated.*

6. When you are finished, click OK. The images will be removed from your hard drive. The image addresses in the index records will be changed to point to the image files on the removable drive.