

# Workshop on Census Data Processing

## Scan Station User Manual



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# Teleform Modules

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Teleform consists of seven main programme modules: Designer, Automerge Publisher, ScanStation, Reader, Verifier, Remote Capture Station and Web Capture Option. Each of these serves a distinct function and each has its own icon in the Teleform programme group.

## Teleform Scan Station Module

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**Teleform Scan Station** turns completed pages and files into batches that can be processed by Reader and Verifier. Scan Station is the first step in TeleForm's batch processing feature, which handles large groups of items efficiently and accurately.

### JOB SETTINGS

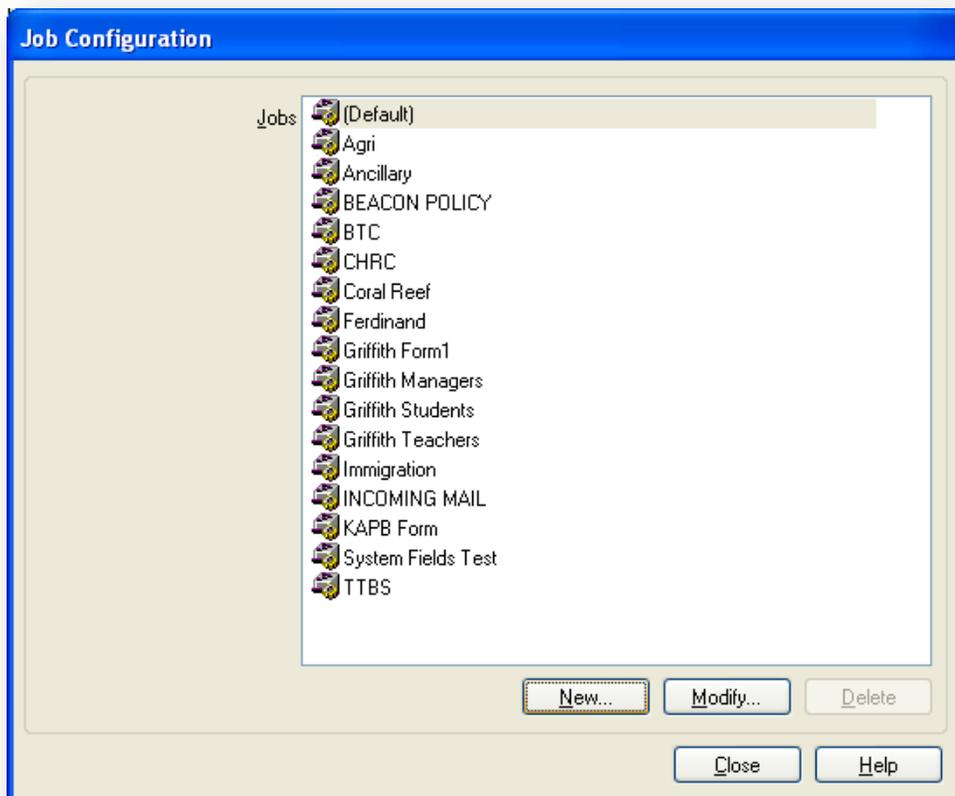
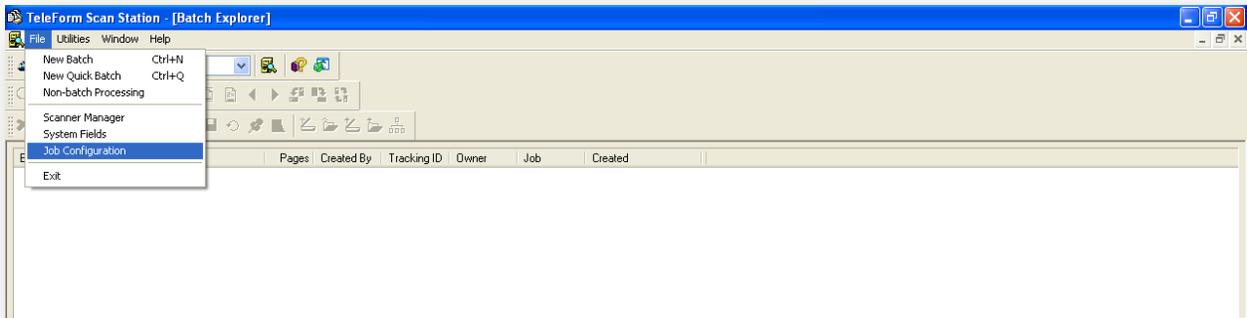
Job Settings allows you to configure and save a group of batch processing settings so they can be used multiple times. Each saved group of settings is called a Job Setting.

A Job Setting can control many aspects of a batch, including:

- Tracking information
- Quality Control modes
- Special Index Fields
- Attachment rules
- Template identification and classification settings
- Specific image preprocessing rules

### **How To Create A New Job Setting**

1. Open the **Job Configuration** window.
2. In Scan Station, click **File — Job Configuration**.
3. Click the **New** button.
4. The **Job Properties** window will appear.

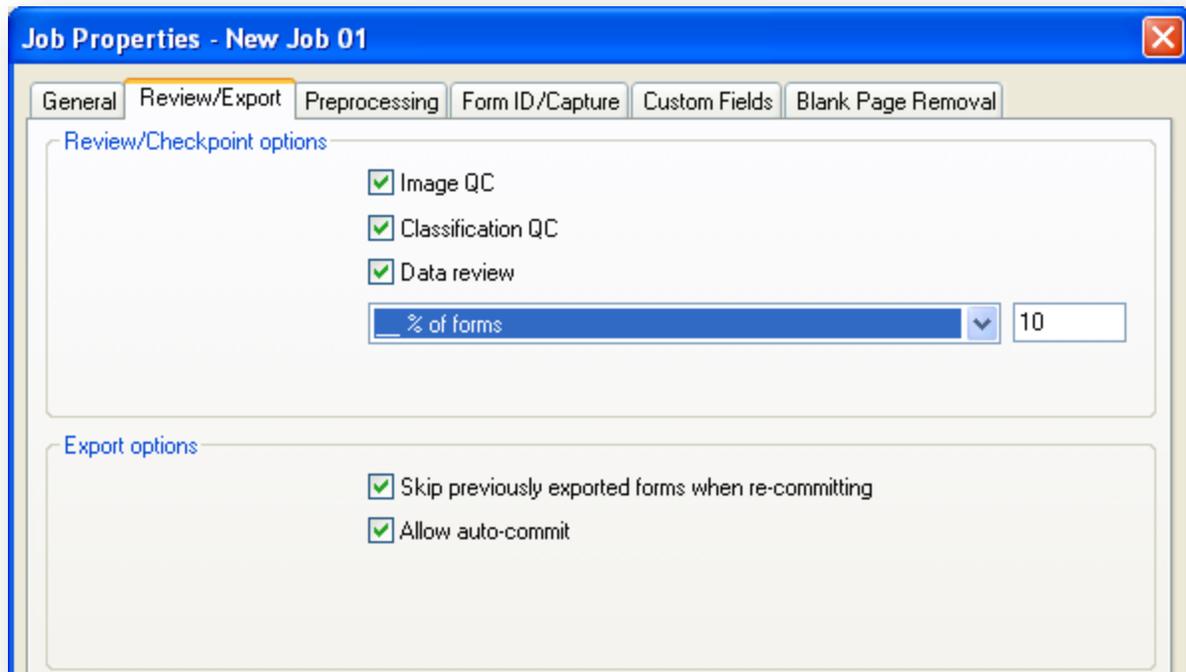


The screenshot shows a software window titled "Job Properties - New Job 01". It has a blue title bar with a close button. Below the title bar are several tabs: "General", "Review/Export", "Preprocessing", "Form ID/Capture", "Custom Fields", and "Blank Page Removal". The "General" tab is active. The main area contains several input fields and controls:

- Job name:** A text box containing "New Job 01".
- Tracking ID:** An empty text box.
- Date:** An empty text box.
- Operator:** An empty text box.
- Priority:** A spin box set to "100". To its right, text reads "0 High, 255 Low, 100 Normal".
- Forms/Documents:** A spin box set to "0". To its right, text reads "0 = Don't care".
- Total pages in batch:** A text box containing "0".
- Error handling:** A dropdown menu showing "Prompt for rejecting or accepting".
- Event logging:** An unchecked checkbox.
- Comment:** A large text area with up and down arrow buttons on the right side.

5. Select the **General** tab. This tab controls and displays information about several basic elements of the batch.
6. In the **Job Name** field, give the job a name which can be selected for processing future batches.
7. In the **Tracking ID** field, you can type an identification value up to 19 alphanumeric characters long in this field. This value is copied to the predefined Virtual Field "Batch Track" for all templates in the batch.
  - In the **Date** field, you can enter any date value in any format.
  - In the **Operator** field, if the Scan Station is protected by a security password, this field will show the log-in name of the Scan Station operator. You will be unable to edit this value. If the Scan Station is not password-protected, you will be able to type any value in this field.
  - The **Priority** field establishes the priority of the batch. Priority ranges from 0 (*high priority*) to 255 (*low priority*). Batch priority determines the order in which batches will be processed. Batches with the same priority will be processed in the order they were generated.
  - The **Forms/Documents** field allows Teleform to check how many forms and documents are contained in the batch. A single copy of a multi-page form counts as one form. A document counts as one document no matter how many non-image or image files it contains. If you do not type a number in this field, the batch will still be processed.
  - In the Total Pages in Batch field, you can type in the expected number of pages in the batch.

- The Error Handling Field allows you to tell Teleform what to do in the event of a batch processing error involving this batch. The options are **Prompt for Rejecting or Accepting**, **Automatically Reject Batch** and **Automatically Accept Batch**.
  - The **Event Logging** option forces TeleForm to track all batch operations in a log file that is saved in the batch subdirectory. This log file can be used to troubleshoot any problems with the batch.
  - In the **Comment** option, you can type a description of the batch here. There is no limit to the length of this description.
8. Select the **Review/Export** Tab. This tab allows you to choose what Quality Control (QC) modes will be visited as well as the export options when the batch is ready to be committed i.e. export all the data records to the specified database(s).

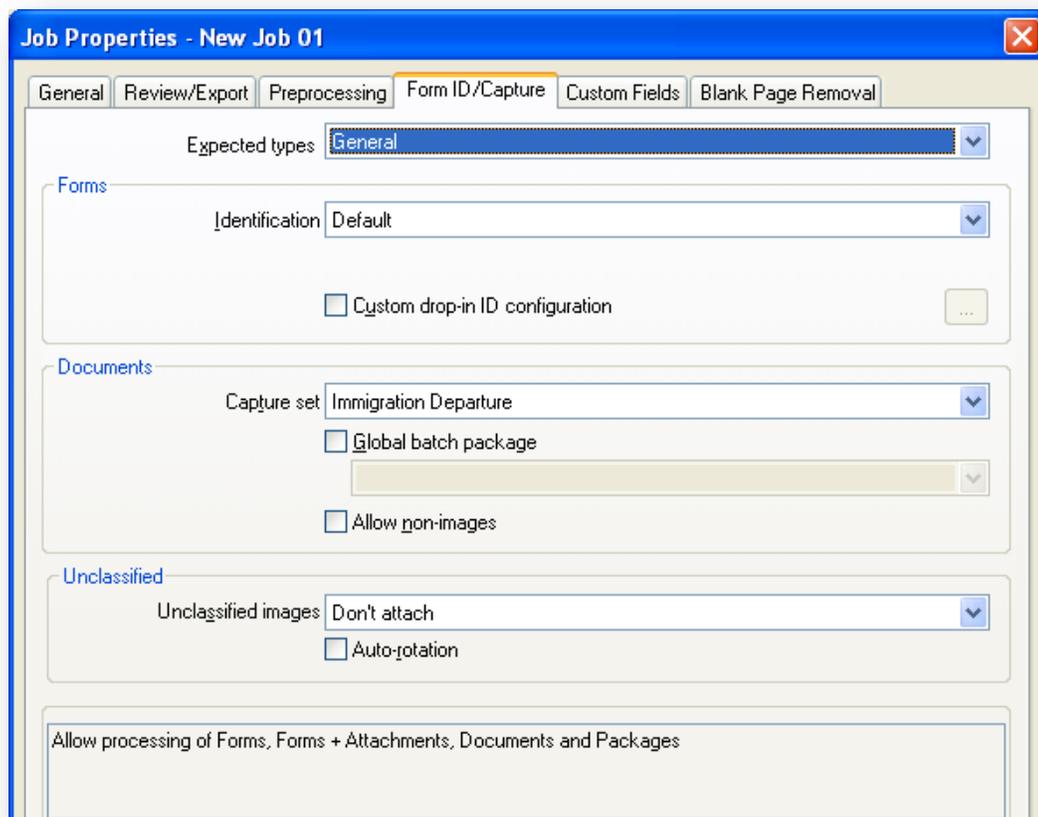


- **Image QC** allows the images scanned and accepted into Teleform to be adjusted before being released to the Verification stage. Adjustments that can be made to images include rescanning, replacing with item from file, inserting items from scanner, inserting items from disk, moving images, saving as, cutting, copying, pasting, deleting, rotating and flipping images, among others.
- **Classification QC** is performed on batches in the Verifier stage. This option allows the manual classification of images to be evaluated or keyed as specific form templates.
- The **Data Review** option allows data collected in fields to be quickly reviewed by the Verifier. This process takes place when all the forms in a batch have been corrected and have the status Evaluated OK.
- The Data Review selection incorporates the following options:
  - **All forms** – reviews every form in the batch.
  - **\_ % of forms** – reviews only a certain percentage of the batch, which is selected at random. The percentage is specified in the right-hand box.
  - **One of every \_ forms** – reviews one out of every N forms in the batch, where N is a number specified in the right-hand box.
  - **Forms with double key fields** – only reviews forms containing fields that are configured for Double Key review.
- The Export Options include:
  - Skip previously exported forms when re-committing – this ensures that if a problem occurs during the Batch Commit process, any data that was exported previous to the problem will not be re-exported once the problem has been fixed and the batch is re-committed.
  - Allow auto-commit – this option allows batches that have reached the Ready to be committed stage in the Verifier to be automatically exported. Otherwise, batches must be manually committed in the Verifier.

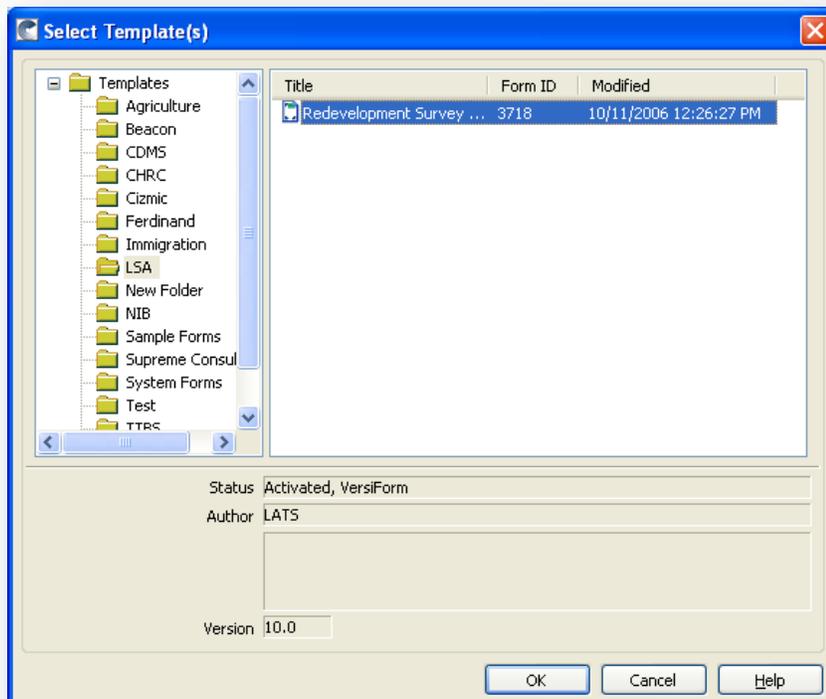
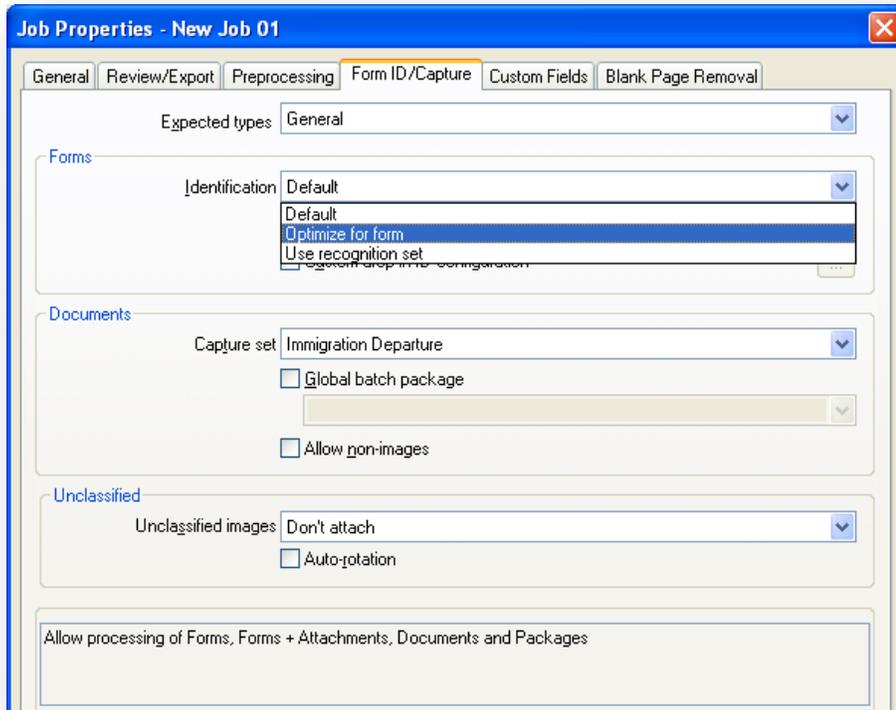
Note however, that in order for the auto-commit function to work, Teleform Reader must be configured to support this feature.

- From the **Utilities** menu in any of the TeleForm modules, select **Configuration**.
- The **Global and Local TeleForm Settings** window will appear.
- Open the **Reader — Local** tab.
- In the **Task** list, select Batch commit.
- Select the **Enable** checkbox.
- Click **Apply** and **OK**.

- TeleForm Reader will now automatically commit batches that have a status of "Batch ready to be committed."
9. The Form ID/Capture tab defines what type of files you expect a batch to contain and how those files should be identified and/or attached. There are three selections you can make in the **Expected Types** box.
- **General** – this selection allows the following options:
    - **Default** – this recognition tries to match an image to a Form Template. If none can be found, the image is identified as a NonForm/Attachment.



- **Optimize for Form** – this option is ideal for **Versiforms** and **Existing** forms that are mixed with Nonform/Attachments. When selected, a Select Template window will open, from which you will choose the activated Form Template that the Reader will identify with the image(s) scanned. Any images that cannot be identified as the selected Form Template will be treated as a Nonform/Attachment.



- **Use Recognition Set** – A Recognition Set is a collection of activated Versiform or Existing form Templates that you direct the Reader to evaluate. Placing Versiform or Existing Form Templates in a **Recognition Set** confines the search the Reader performs to match scanned images. The Reader will only seek to match images to Form Templates from the list in the Recognition Set. To create a Recognition Set:
    - Start Designer or Reader.
    - From the **File** menu, click **Template Sets**.
    - Right-click the Template Sets folder in the left pane of the **Template Sets** window.
    - Select **New recognition set** or **New capture set**.
    - A new folder will appear at the bottom of the list. This folder will be named "**New Set**" by default.
    - Rename the new set.
    - Right-click a set in the left pane of the **Template Sets** window.
    - Select **Add templates**. A Select Templates window appears.
    - Select the templates to be added and click **OK**. The forms will be added to the selected set.
10. The **Unclassified Images** options allow you to link unclassified images to forms. These options include not attaching non-forms/images to Form Templates, attaching non-forms/images to preceding Form Templates or documents, and attaching non-forms/images to the following Form Template or document.
11. The **Auto-rotation** option allows Teleform to attempt to analyse unclassified images by automatically rotating them so they can be identified as a form. This feature is most effective on image with text.
12. The **Blank Page Removal** tab allows Teleform to check for and remove blank pages from a batch.

### **How to Create Custom Fields**

Custom Fields are fields that collect key information about Information Templates at a batch level. The information collected from Custom Fields is exported along with the data collected from the Form Templates to which it is mapped and stored in the same database as the exported data.

1. Under the Custom Fields tab, select Modify.

Job Properties - New Job 01

General Review/Export Preprocessing Form ID/Capture Custom Fields Page Handling

Custom Field 01

Custom Field 02

Custom Field 03

Custom Field 04

Custom Field 05

Modify...

System fields

Name	Type	Default value

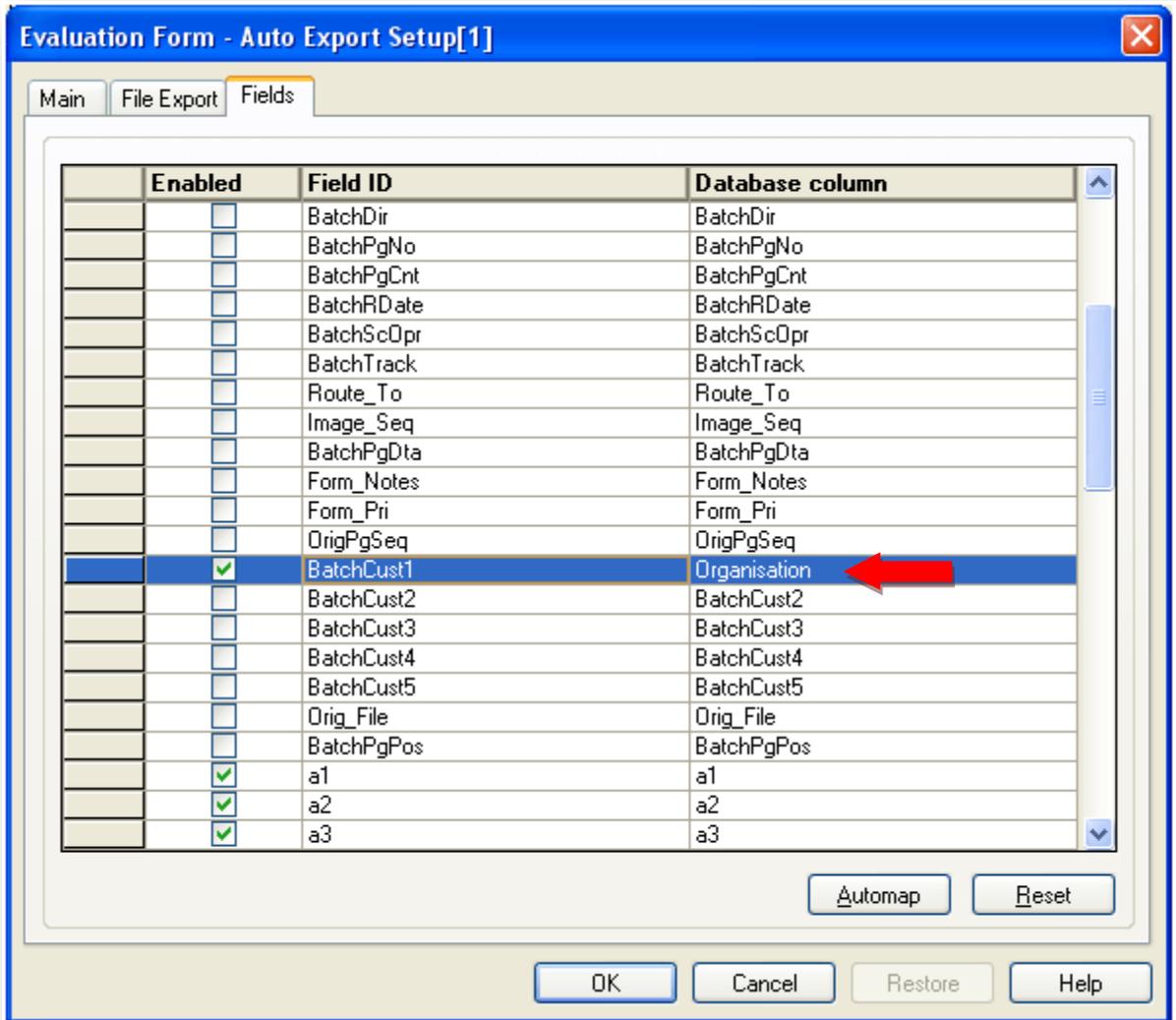
Add Delete Up Down

OK Cancel Help

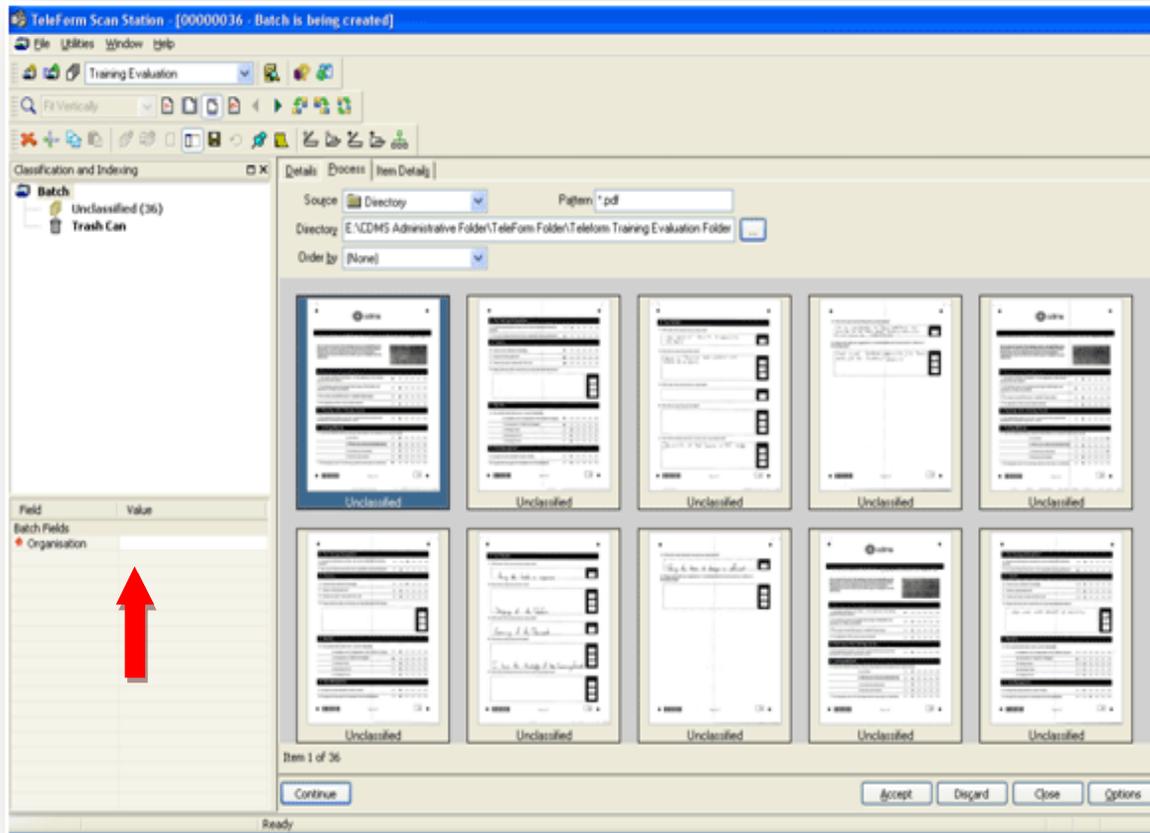
2. In the Custom Fields Properties window, in Custom Field #1, select the Field Enabled check box.
3. Type a field name in the Custom Field #1 box. This field name will let the Scan Station operator know what information to enter in this field.
4. Select Entry Required if the field must be filled in with data.
5. Repeat these steps for any other Custom Field you want activated for this batch.
6. Click OK when you have finished.

Name	Properties
Custom field 1: Organisation	<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Entry required
Custom field 2: Custom Field 02	<input type="checkbox"/> Enabled <input type="checkbox"/> Entry required
Custom field 3: Custom Field 03	<input type="checkbox"/> Enabled <input type="checkbox"/> Entry required
Custom field 4: Custom Field 04	<input type="checkbox"/> Enabled <input type="checkbox"/> Entry required
Custom field 5: Custom Field 05	<input type="checkbox"/> Enabled <input type="checkbox"/> Entry required

7. In the Form Template in Designer, select Auto Export Set Up and click Modify for the database export you set up.
8. Under the Fields tab, enable the BatchCust1, 2, 3, 4 or 5 Fields that correspond to the Custom Fields you named and enabled in the Job Configuration in Scan Station.
9. Under the Database Column, type in the exact name you used in the Custom Fields in Job Configuration. This ensures that the name of the respective database column will correspond to and be exported as the Custom Field name in Job Configuration.
10. Click OK. In the Auto Export Setup Window, click OK.
11. Save the Form Template.



- When a form is scanned into Scan Station, the interface will display the Custom Field name on the lower left and an empty field into which the Scan Operator will type in the relevant information.
- Once the relevant information is typed in, click Accept.

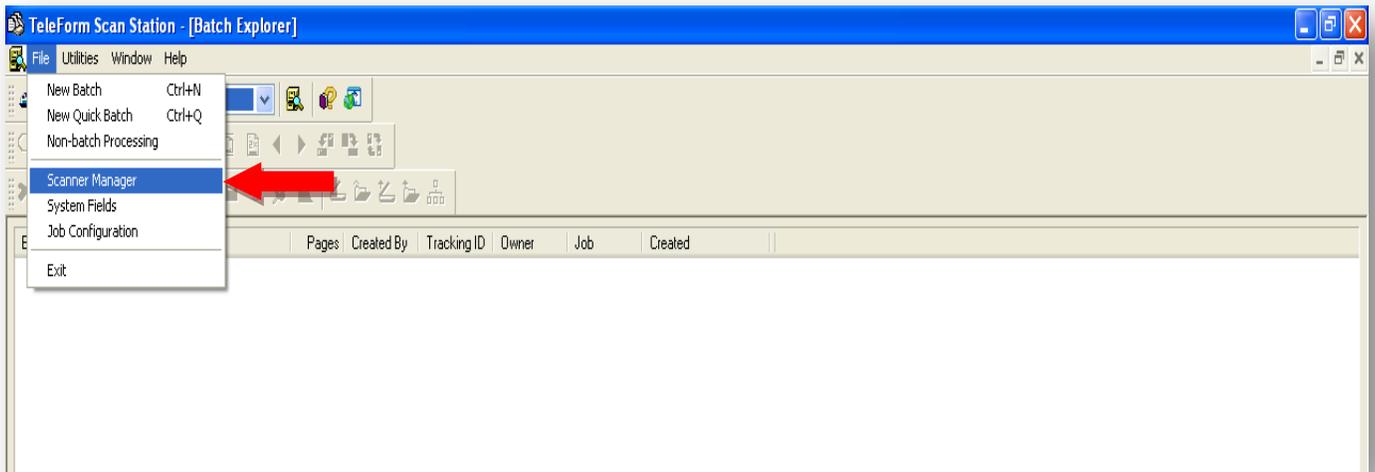


### How to Modify/Delete Job Settings

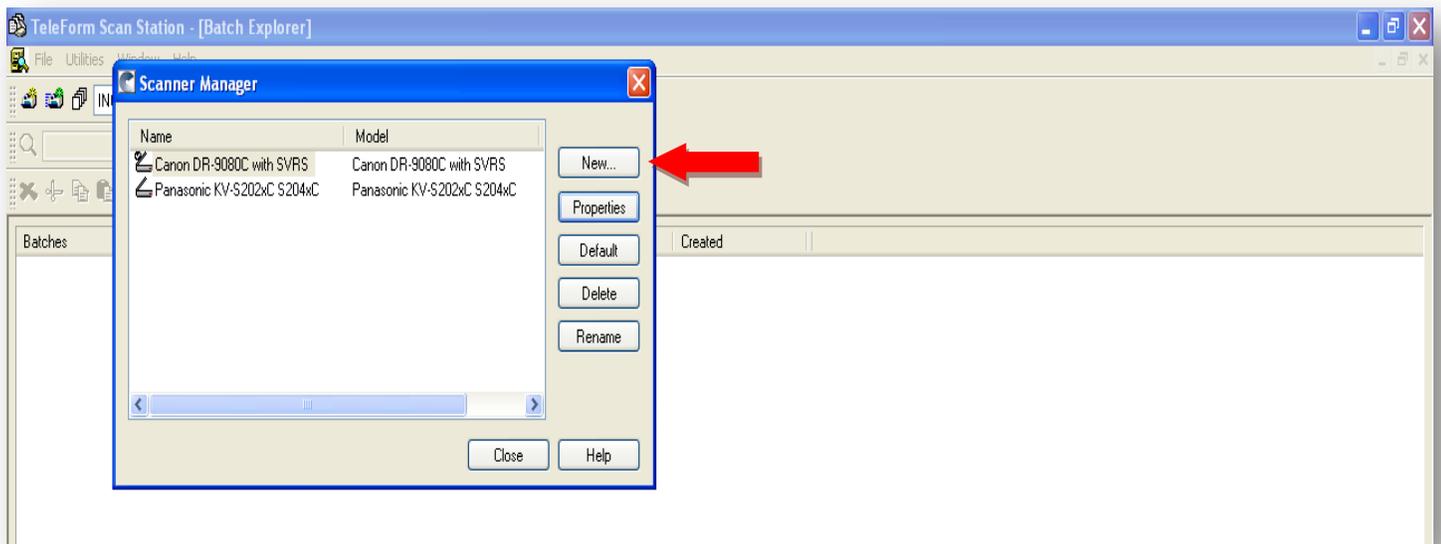
1. To **Modify** a Job Setting, select the job in the **Job Configuration** window.
2. Select **Modify** or double click on the job selected.
3. In the **Job Properties** window, make the adjustments you require and click OK.
4. To **Delete** a Job Setting, select the job in the **Job Configuration** window and click **Delete**.

## CONFIGURING SCANNER MANAGER

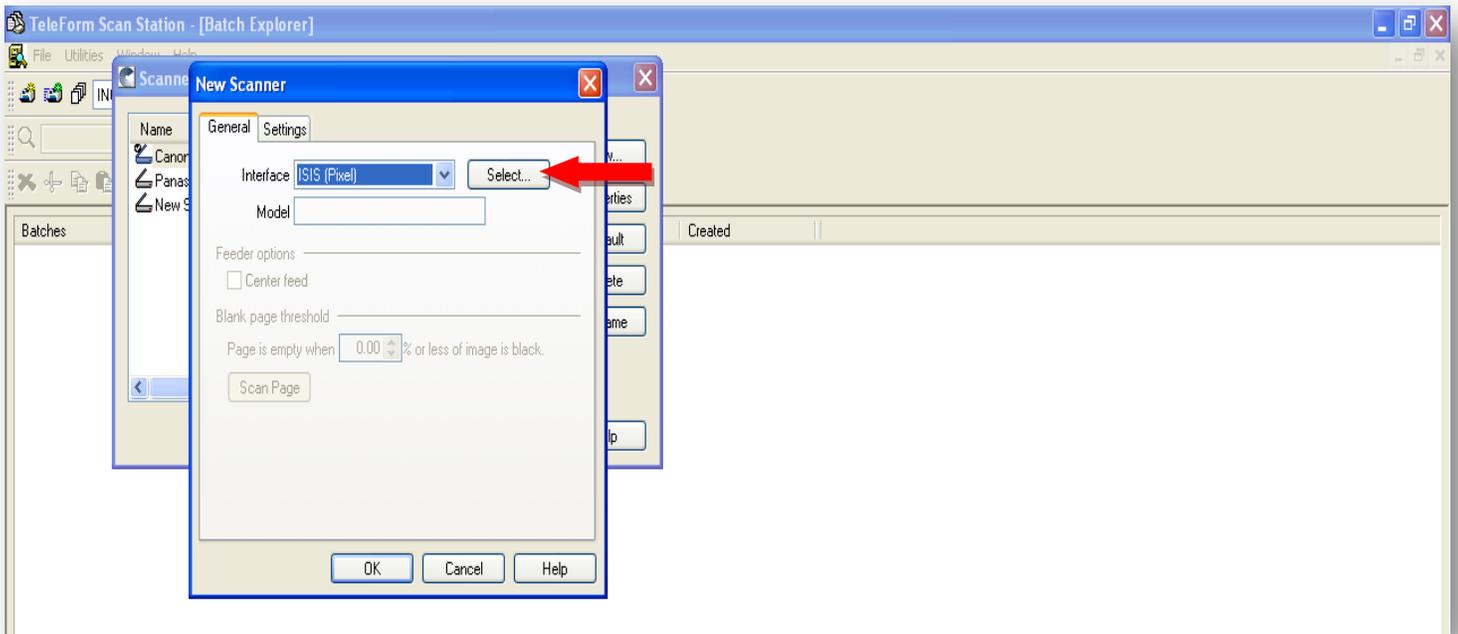
1. Select Scanner Manager located under File.



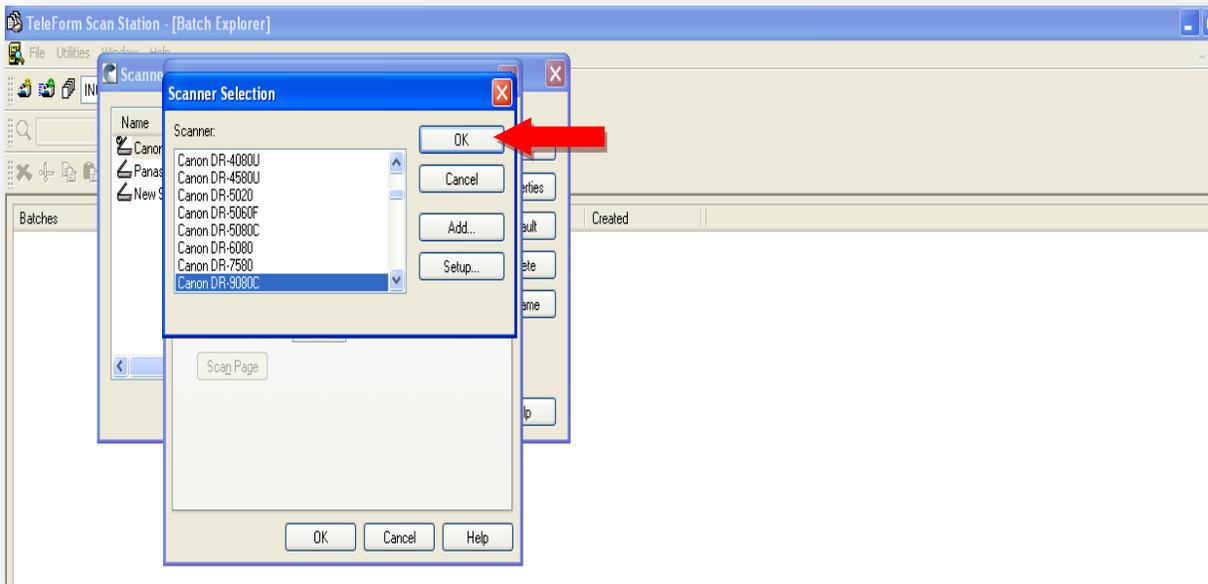
2. Select New.



3. Under General Tab, select ISIS.

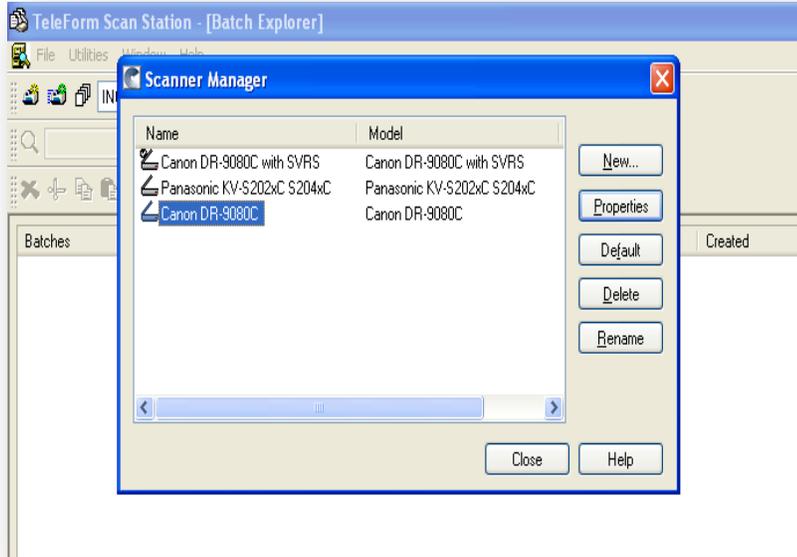


4. Select Scanner and click OK.



5. Click OK until the Scanner Manager window appears. This window displays the name and model of the scanner you have set up.

If multiple scanners have been set up, the most utilized scanner can be set as the default scanner by selecting the Default setting on the right hand side.

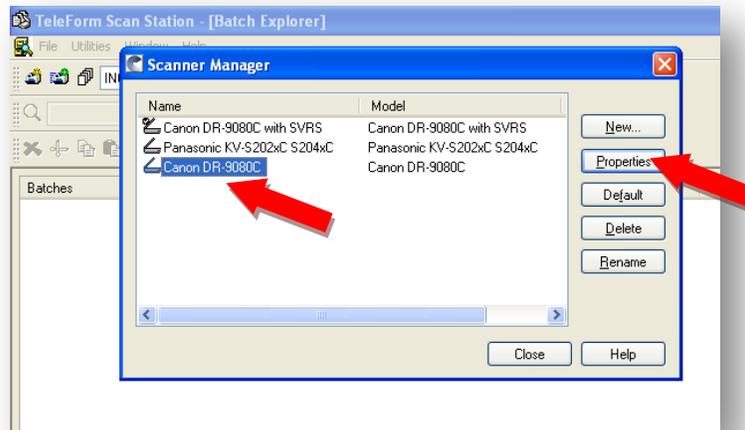


## CONFIGURING SCANNER SETTINGS

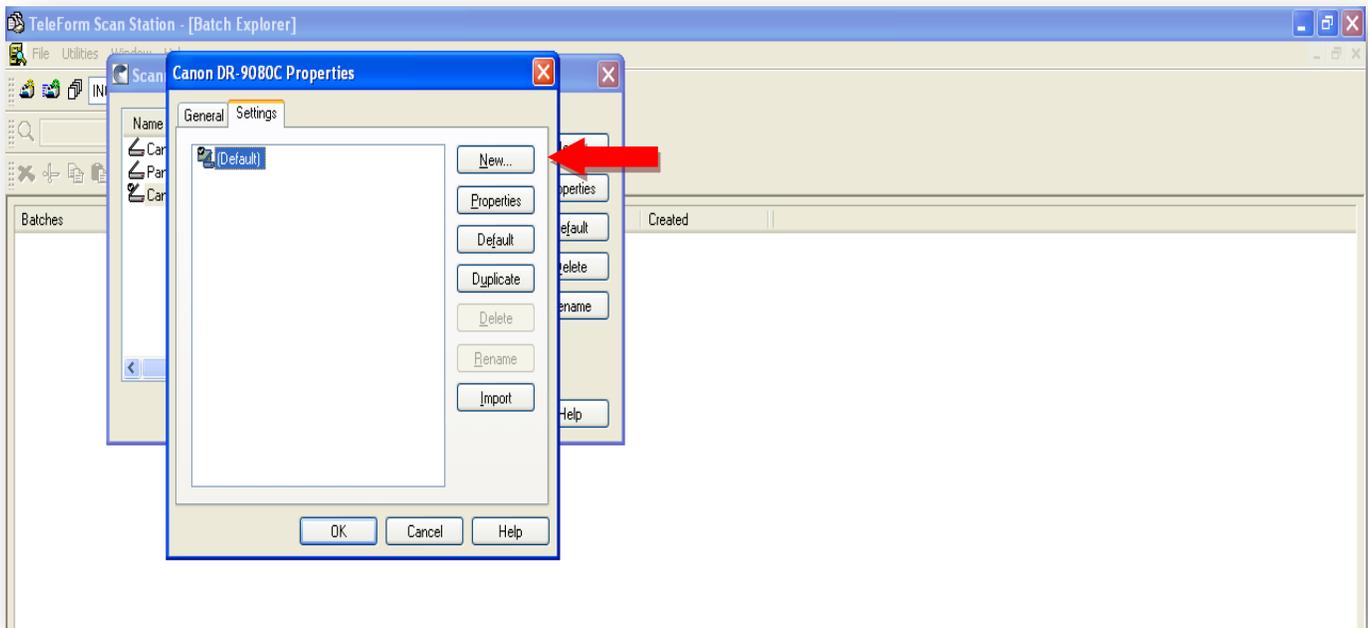
Scanner properties can be configured within Scanner Manager as well as after a new batch has been selected to begin scanning.

### How to Adjust Scanner Properties Within Scanner Manager

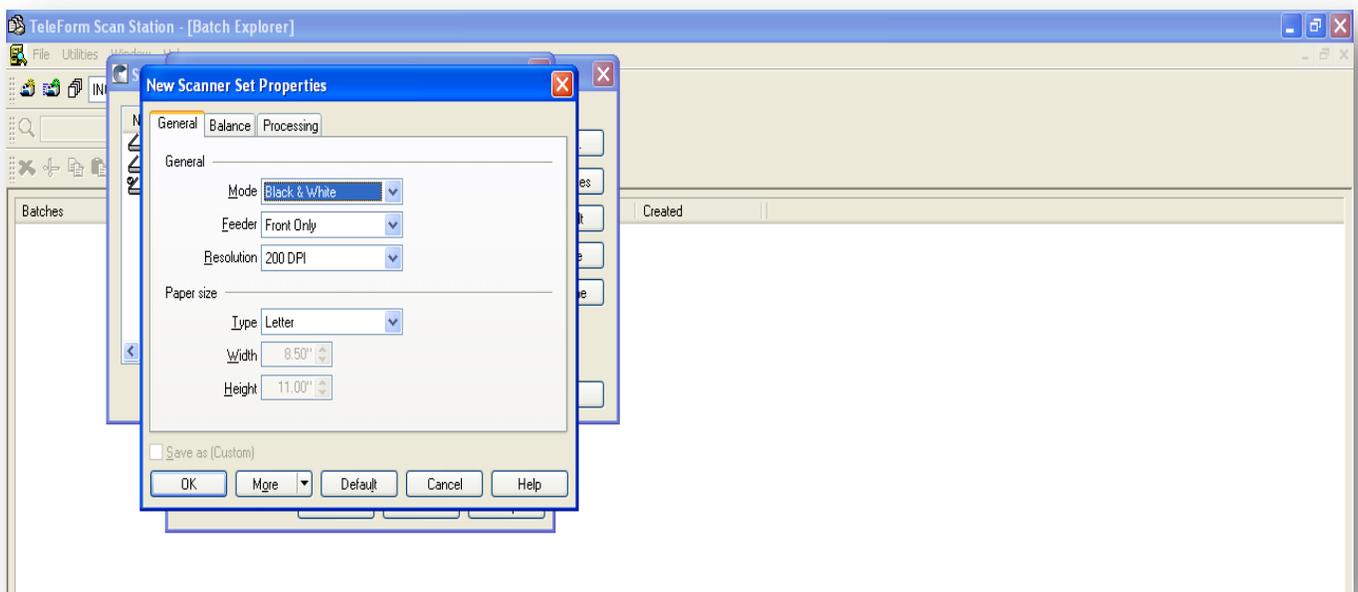
1. Within Scanner Manager window, select the scanner on which you will be configuring the settings and then select Properties.



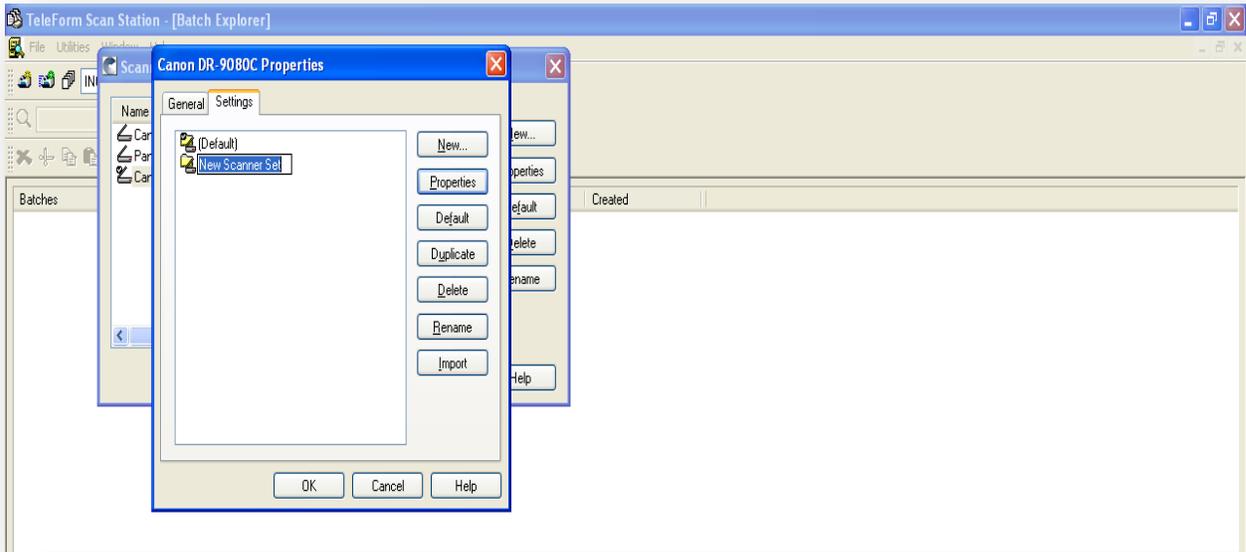
2. Under the Settings tab, select New.



A window entitled New Scanner Set Properties will open up. In this window, you will find the various settings with which to configure the scanner properties appropriate for the documents intended for scanning. These properties include colour settings, simplex or duplex (front or front and back) reading of documents, resolution of print (200 dpi – dots per inch), paper size and balance and processing tabs.

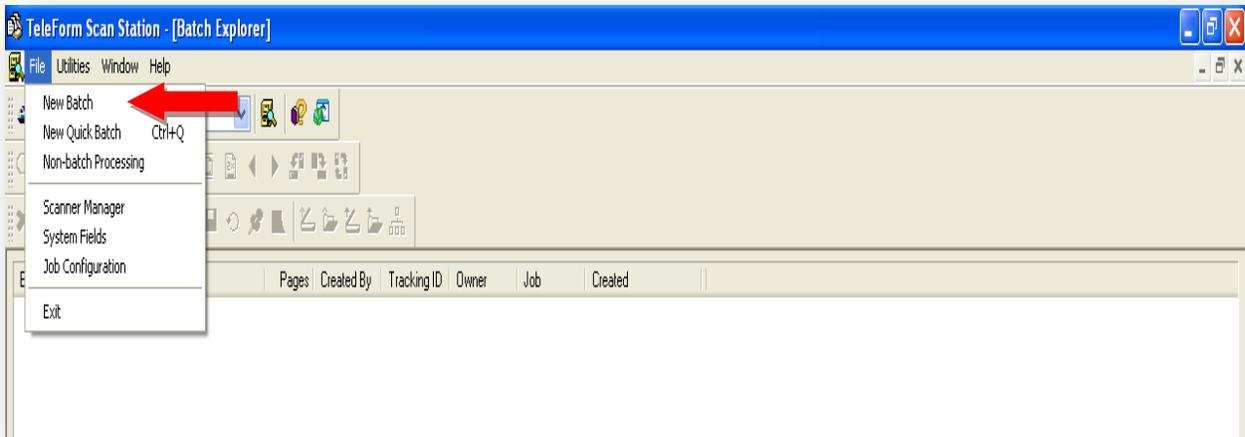


3. Once the necessary adjustments have been made to the Scanner Set Properties, click OK. You will see an item entitled New Scanner Set on the left hand side of the window. This name can be changed as appropriate. Click OK and close Scanner Manager.

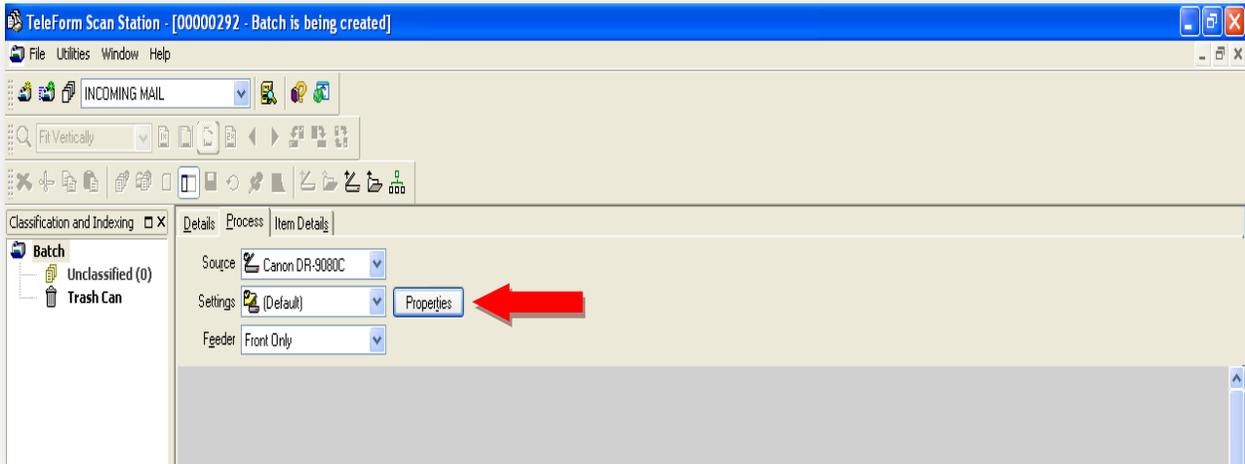


### **How To Adjust Scanner Properties at Point of Scanning**

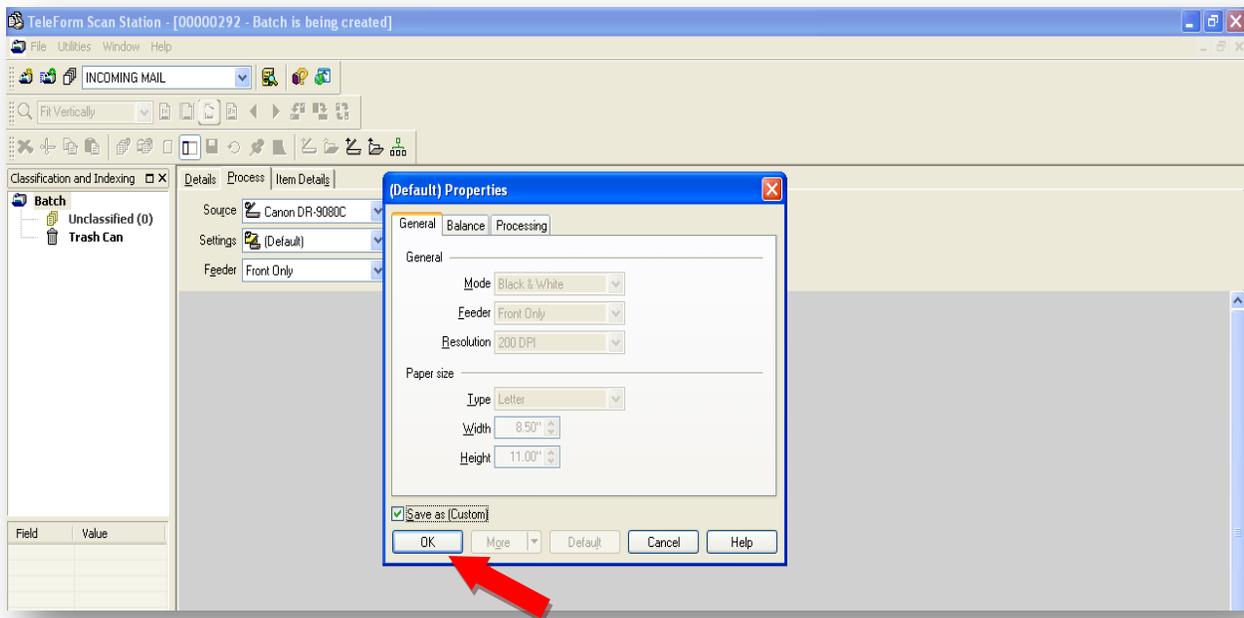
1. Select New Batch in Teleform Scan Station.



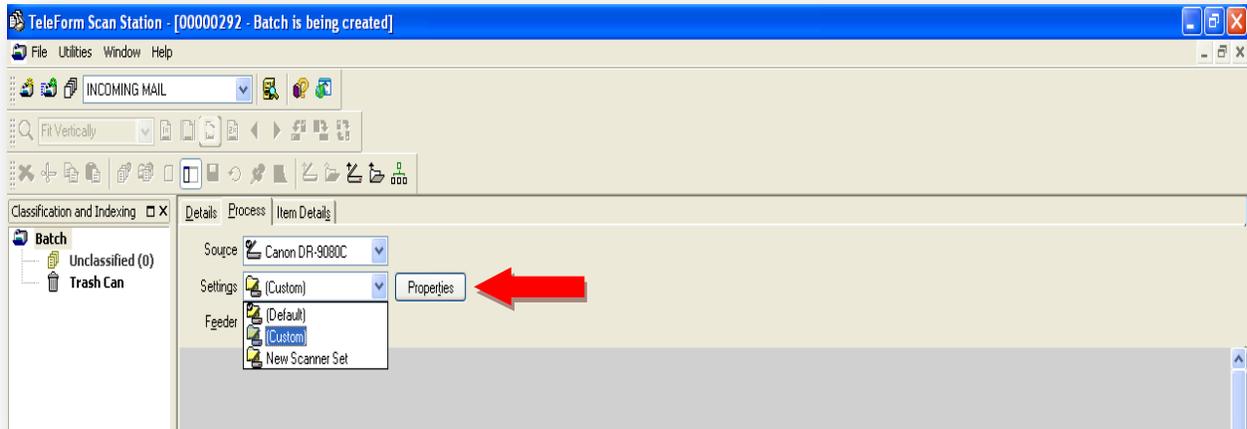
2. Under the Process tab, click on Properties.



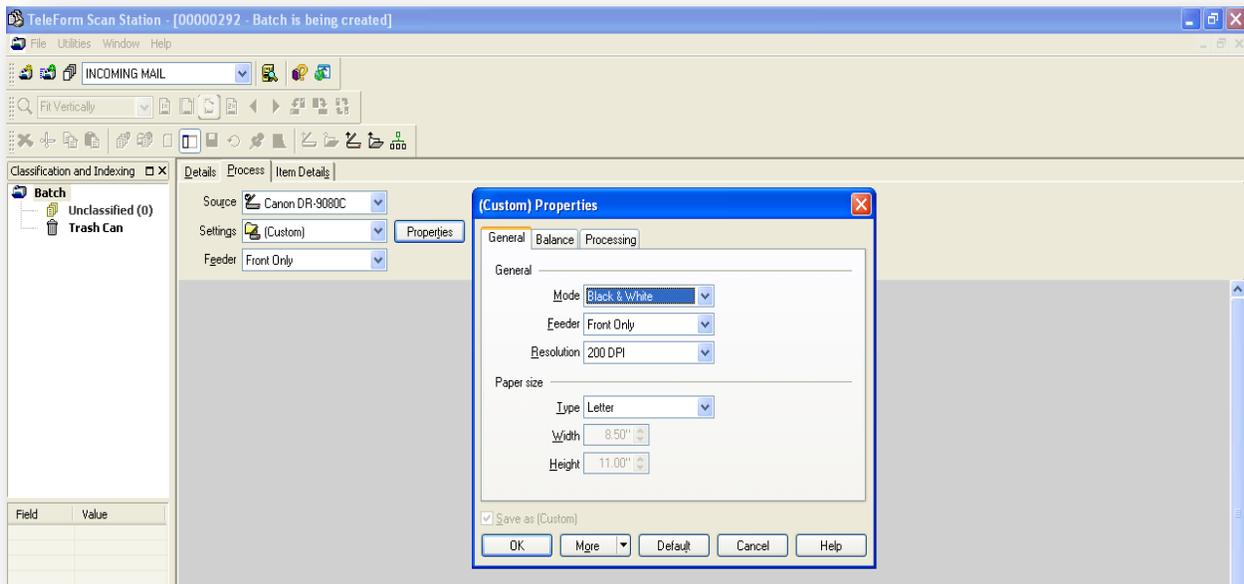
3. In the Default Properties window, under the General tab, check the Save as Custom box and click OK.



4. Select Custom from the drop down in the Settings box. Click on Properties again.



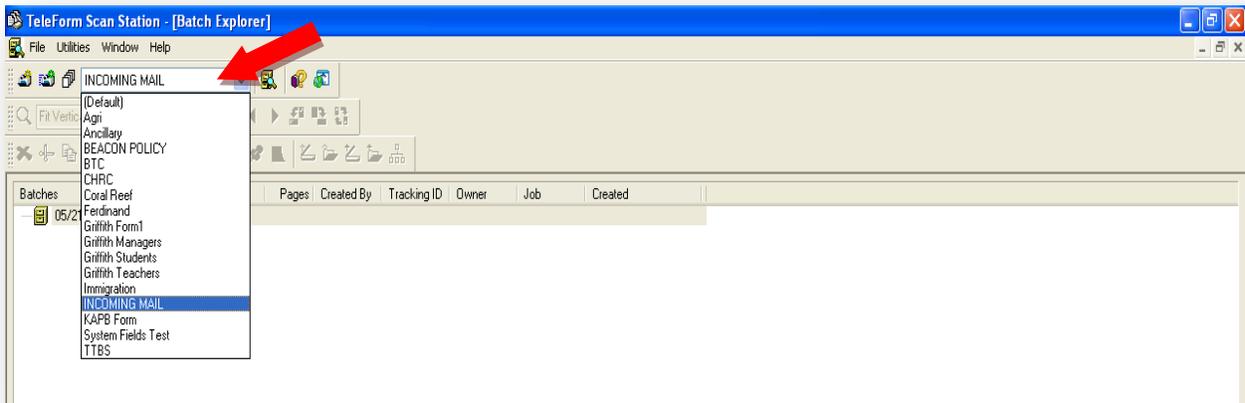
The Custom Properties window will appear. In this window, you will find the various settings with which to configure the scanner properties appropriate for the documents intended for scanning. These properties include colour settings, simplex or duplex (front or front and back) reading of documents, resolution of print (200 dpi – dots per inch), paper size and balance and processing tabs.



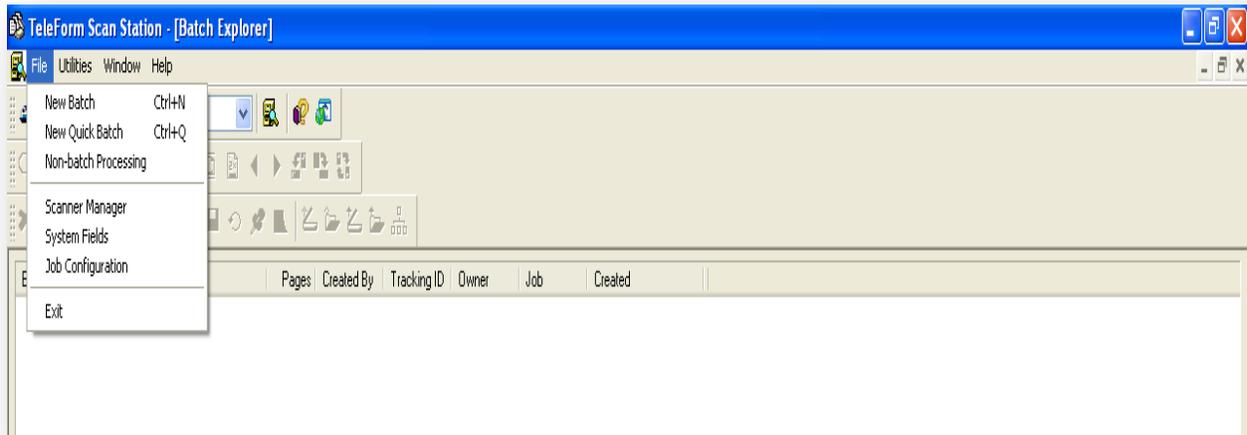
Once the necessary adjustments have been made to the Custom Properties, click OK. You can then click Start to begin scanning.

## SCANNING IN TELEFORM SCAN STATION

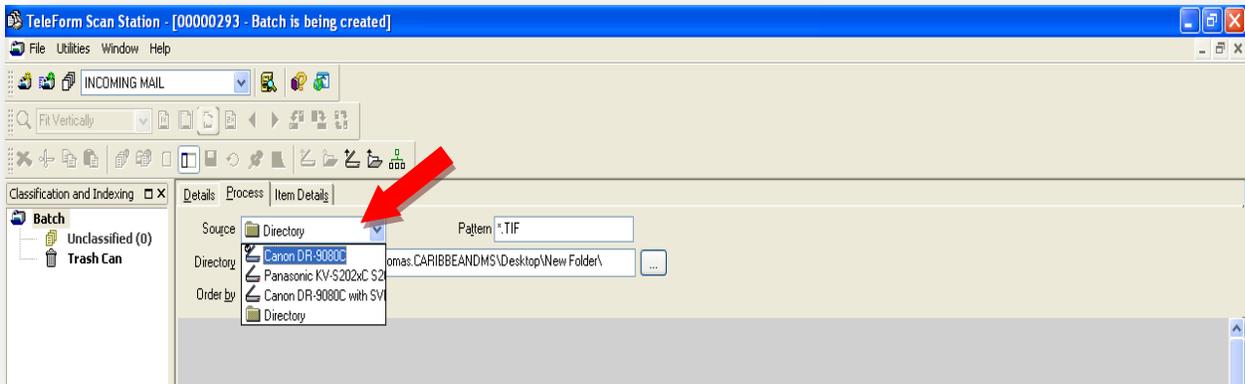
1. Select appropriate Job Configuration from the drop down menu in the Job Configuration box.



2. Select New Batch in Teleform Scan Station. (A Batch is a set of files scanned and processed together, with all the files subject to the same processing rules).

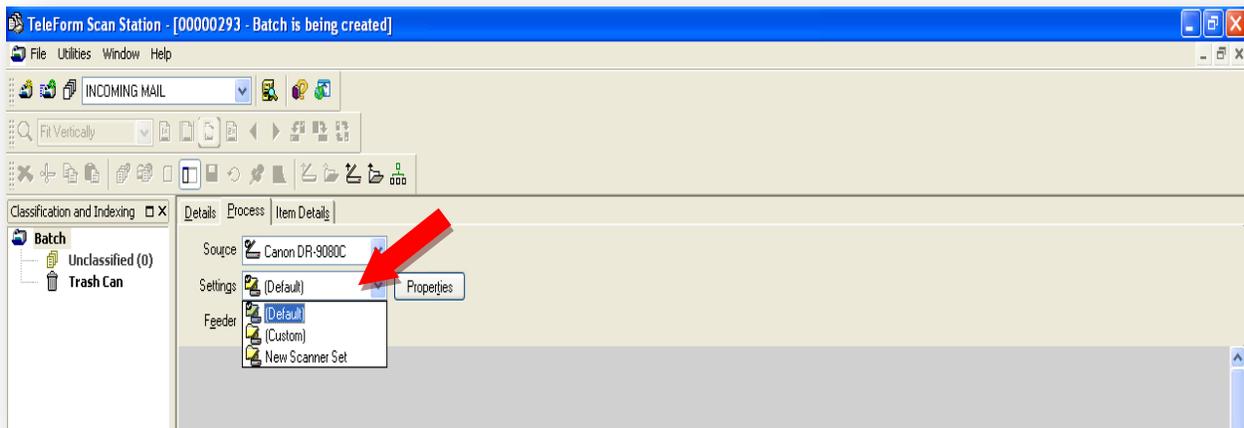


3. Under the Process tab, select the source from which the scans will be read. The source can be either a scanner or a directory. (If the source is from a directory, you have to indicate in the



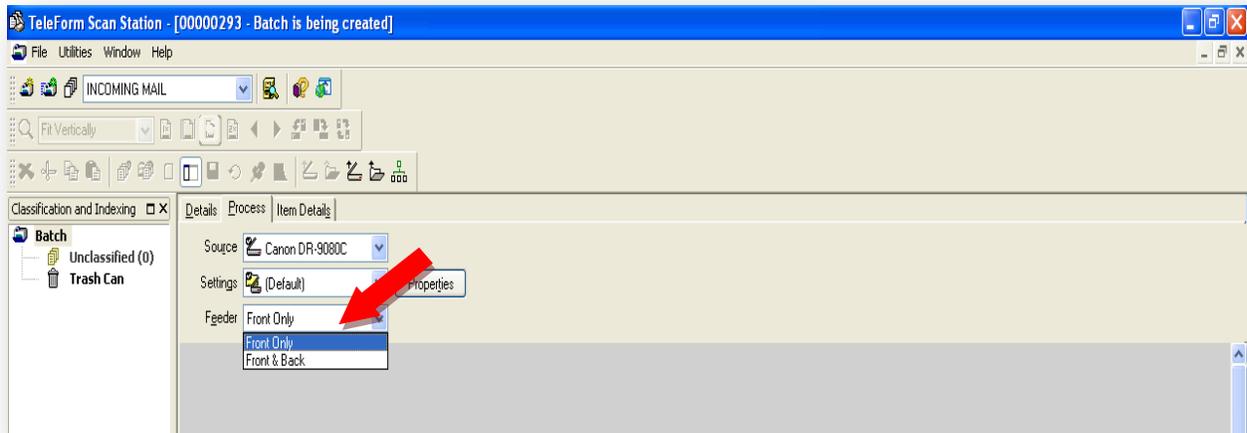
Pattern field the file type that will be scanned in, e.g. TIF, PDF, JPEG etc.

4. From the Settings option, select the settings, from the drop down menu, that would apply for the scanning of the images, whether it is the default setting in scan station or settings set up specifically for the particular scan job.

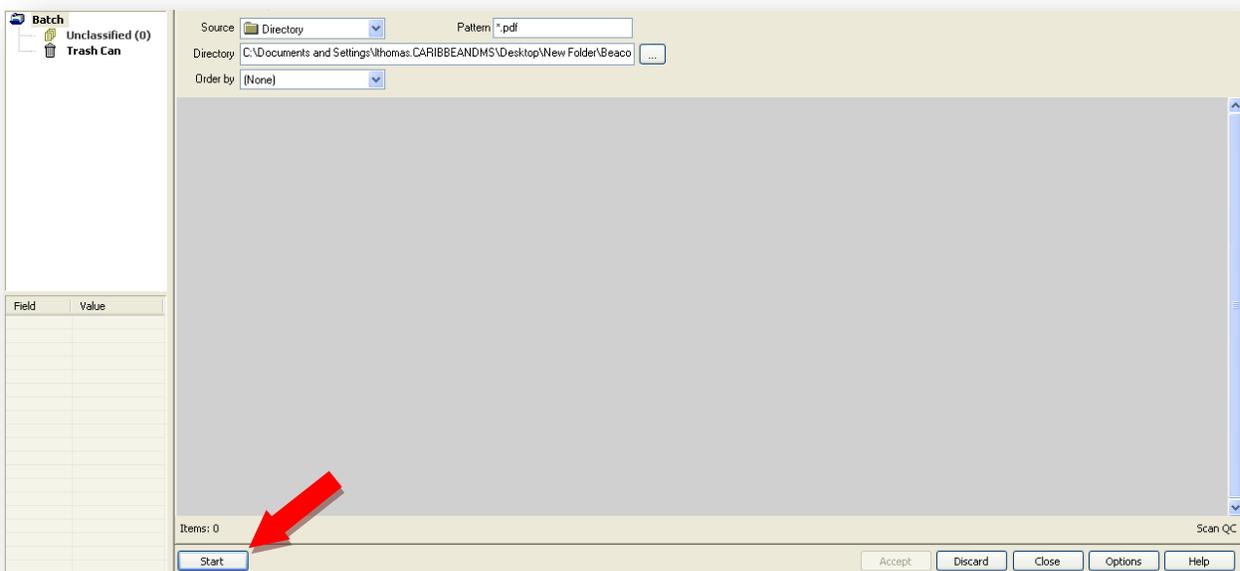


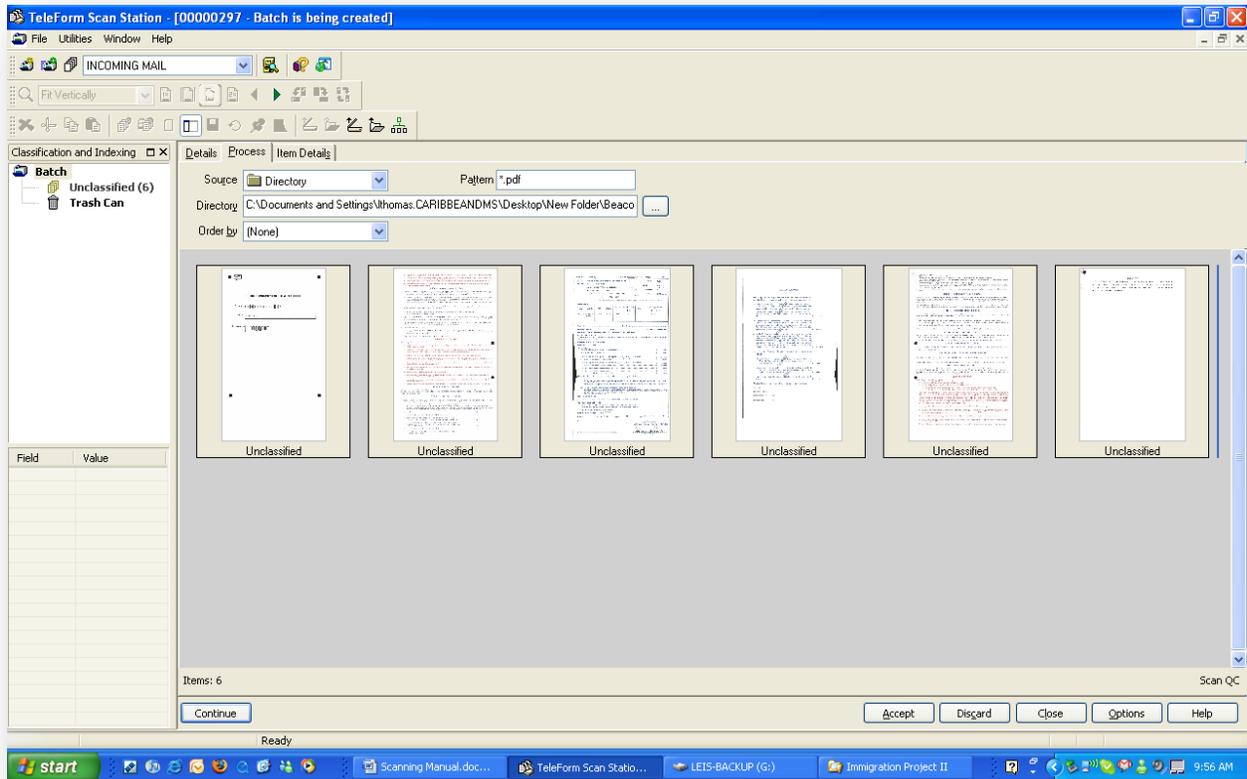
5. The feeder option applies when reading in images from a scanner. It indicates whether the document is to be scanned as a simplex (front only) or duplex (front and back) document.

If a custom setting has been applied, the feeder setting chosen will be indicated automatically in the feeder drop down menu.



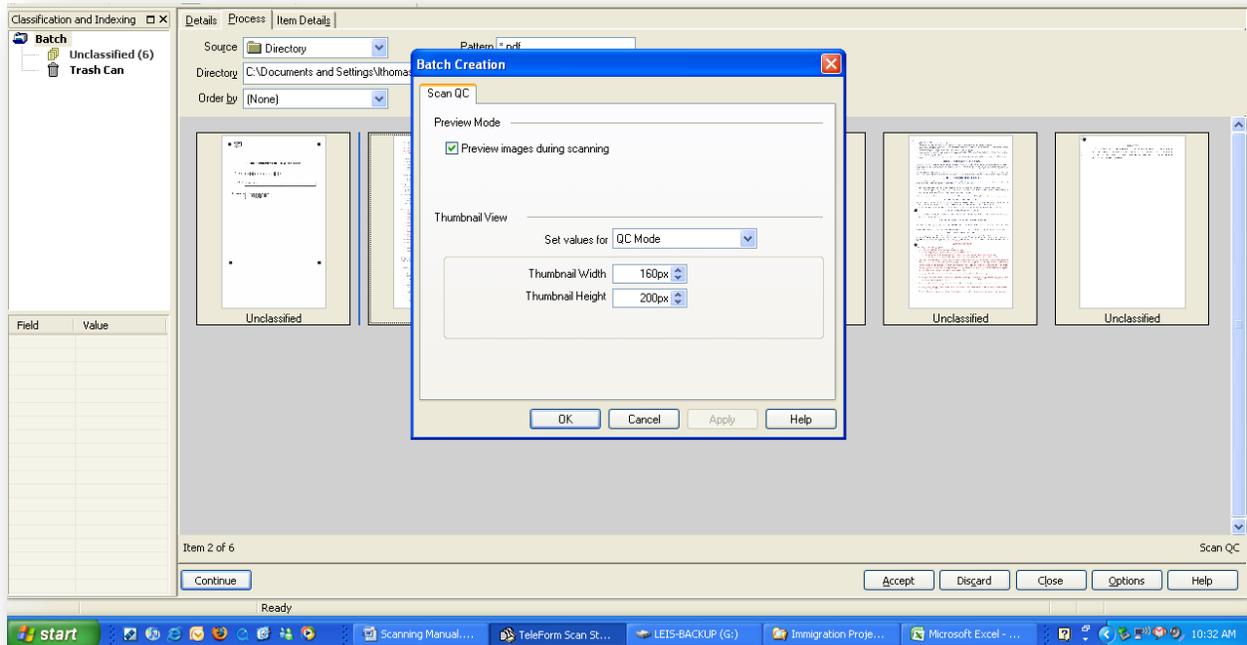
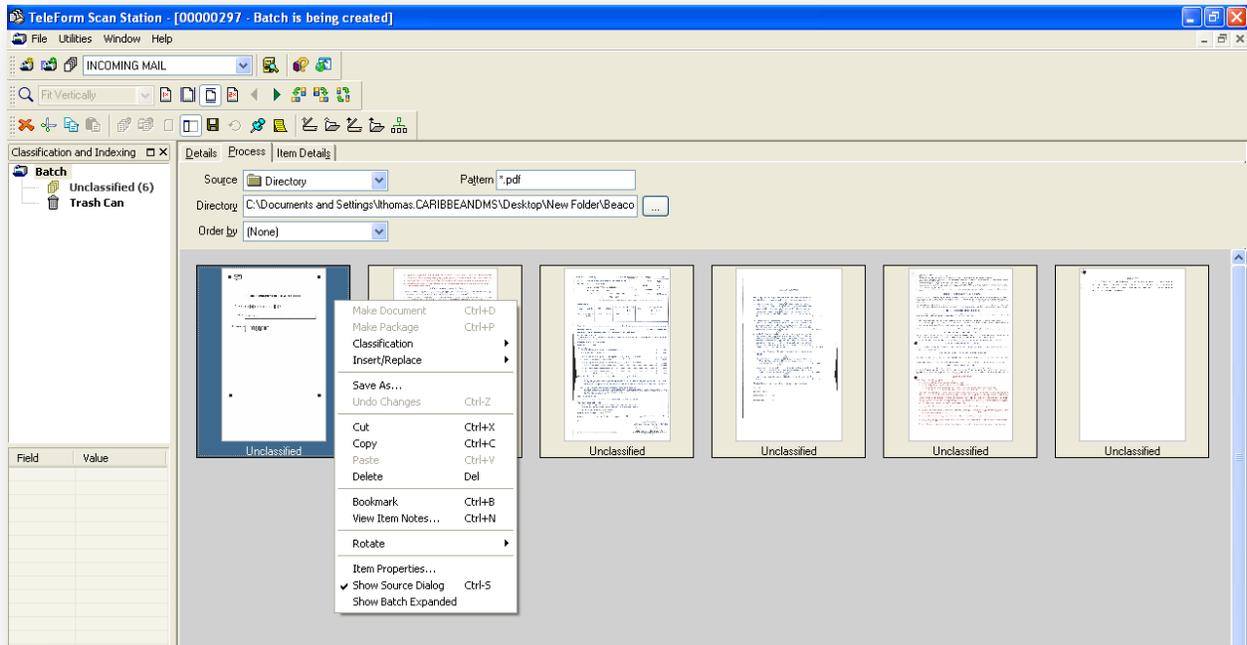
6. Click on Start to begin scanning. The pages will then be scanned into the grey window for viewing.





7. To continue scanning more pages into the same batch, click Continue. Once all pages have been scanned in, click Accept. The batch will then be released for further Teleform processing. If you want to reject the batch, click Discard.
8. Images scanned into the image viewer window can be manipulated as required by right clicking on the image to be adjusted and making the relevant selection from the drop down menu.
  - Images can be rotated, flipped, rescanned, replaced, deleted, new images inserted and the thumbnail size can be enlarged or reduced.
  - Double clicking an image brings up that image alone in the viewer window and the same action applies to return to the expanded view of the images in the window.
  - To magnify an image for closer viewing, hold down the ALT key and click on the image.





**N.B. Any adjustments to be made to the images must be done so before clicking Accept.**

