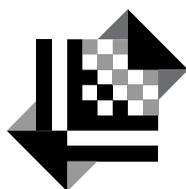




User Guide

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PAGESCOPE

Router

Ver.1.0

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Introduction

1

1.1 Introduction

1.1.1 Welcome to Minolta

Thank you for your decision to purchase the Minolta PageScope Router software.



Read this User's Manual carefully before using this software for the first time, and always keep the manual within easy reach.

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1.1.2 Roadmap of this Manual

Where to Find What in this User's Manual

You don't know exactly where to find the information you need? The following table is designed to help you.

To find information on a specific problem quickly and precisely, please refer to the index at the end of the User's Manual.

No.	Title of chapter	Content of chapter
1	Introduction	Introductory remarks and information on how to use this User's Manual.
2	About PageScope Router	This chapter contains general information on the software.
3	Installation	This chapter contains information on how to install and uninstall the software.
4	Getting Started	This chapter provides information on how to start PageScope Router, what the main window looks like and how to configure basic program settings.
5	Working with Repositories	This chapter provides information on how to manage Repositories, copy and move documents in those Repositories.
6	Working with Documents	This chapter provides information on how to copy, move, and edit documents.
7	Capturing Documents	This chapter provides information on how to import an image into PageScope Router, convert it into various formats and save it.
8	Document Routes	This chapter provides information on how to automatically send documents to other PageScope Router users from an MFP.

About Page- Scope Router

2

2.1 About PageScope Router

2.1.1 Features

PageScope Router is a software application that resides on a Windows Server and uses MFP (Multi Function Peripheral) Scan Functions to place scanned documents into the PageScope Router system.

The system manages users' files by arranging and grouping the files in collections of documents called Repository Areas, and provides the ability to manipulate the documents.

Files are also sent to the system by several methods including Email, FTP, and File Copy.

Other features include:

- Distribution of scanned data (FTP, UNC Path, SMTP e-mail, 3rd party solutions)
- Image Editing
- Management of scanned data

2.1.2 Supported Input Sources

There are several ways in which documents may be placed into a PageScope Router system. They include:

- FTP - (Document Route only)
- Email - (Document Route only)
- Twain scanner directly attached to the client PC
- Import/Copy a file directly from the user's PC into an existing Repository Area.

Supported File Types

These are the only file types supported by PageScope Router Client software.

- TIFF 6.0 (RAW, G3, G4, Pack bits, JPEG)
- Tiff Single and Multi-page
- Tiff Technical Note 2
- TIFF - F Support
- JPEG
- PDF (received from MFPs)

2.1.3 Supported MFP / Controllers

Supported MFP (Multi Function Peripheral) devices include any devices supporting the following methods of file transfer:

- Scan to FTP
- Scan to Email

Installation

3

3.1 Installation

3.1.1 Hardware Requirements

The following are the hardware requirements for the client workstation.

Hardware Requirements

- **Processor:** Pentium II 233MHz or higher
- **RAM:** 64 MB or higher
- **Hard Drive:** 500 MB or higher
- **Display:** XGA 16bit Color or higher
- **Network Protocol:** TCP/IP

3.1.2 Software Requirements

The PageScope Router client software does not require any special supporting software on the client PC.

It is supported on the following Windows operating systems that have been properly installed:

- Windows 98SE
- Windows Me
- Windows 2000 Professional (SP2)
- Windows XP Professional/HomeEdition

3.1.3 Installing the PageScope Router Client Software

The PageScope Router Client software is installed on a client workstation after being downloaded from the PageScope Router Server using an Internet Browser.

Note

Before you can download the software, you must obtain the URL of the PageScope Router Server PC. Contact the system administrator for this information.

Downloading the Client Installation File

1. At the Client workstation, start Internet Explorer.
2. Type the complete URL of the PageScope Router Server in the address field. For example, enter: `http://10.15.120.96/PSRServer` or `http://hostmachinename/PSRServer`. Go to this web page.
3. The **Minolta PageScope Router v1.0** web page should be displayed. Click one of the following links:
 - Download PageScope Router Client Application Install
 - Download 508 Compliant PageScope Router Client Application Install

Note

The 508 compliant version will install a user interface that is compliant with Section 508 of the Rehabilitation Act of 1973

4. When prompted, select **Save** to save the file on the server.
5. Select a directory location to save the `PSRClient.exe` (or `PSRClient508.exe`) file. After the file is downloaded, click **OK** to close the dialog.

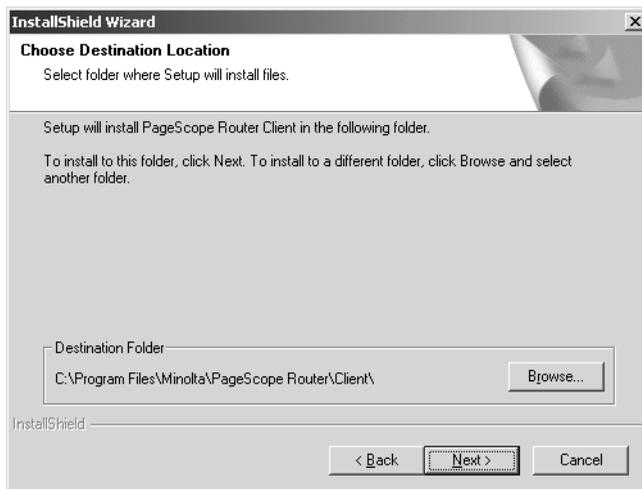
Installing the Client Software

1. Disable all anti-virus software.
2. Use Windows Explorer to locate the `PSRClient.exe` (or `PSRClient508.exe`) file saved in the last step. Select and double-click the filename.
3. The PageScope Router Client installation will begin and a **Preparing to Install** dialog will be displayed.
4. A **Welcome....** dialog will be displayed. Click **Next** to continue.
5. A **Choose Destination Location** dialog will be displayed. Enter a new directory for the software by selecting Browse, or use the recommended default location. Click **Next** to continue.
6. The installation will proceed and a **Setup Status** dialog will be displayed as the individual components are installed and configured. A percentage complete will be displayed.

3.1 Installation

7. When the installation is complete, a dialog box will be displayed indicating whether or not the installation was successful.
8. Click **Finish** to complete the installation.

PageScope Router Client Installation is complete.



Getting Started

4

4.1 Getting Started

4.1.1 Starting and Closing the Application

Note

You must have rights to access the server PC where the PageScope Router Server software is installed.

Starting PageScope Router Client

1. Install the PageScope Router Client software using the procedure in the Installing the PageScope Router Client Software section.
2. Start the PageScope Router Client by selecting the link: Start | Programs | Minolta | PageScope Router Client | PageScope Router Client
3. The first time the Client is started on your PC, the following dialog will be displayed.



4. In the “PSRouter Server URL:” field, type the URL of the PC where the PageScope Router Server software is installed. In the example above, http://hostname... refers to the PC where the PageScope Router Server software is installed.
5. If necessary, enter the correct information in the fields in the “Proxy Server:” section. Click **OK** to continue.
6. The following Log In dialog is displayed.



7. Obtain a valid PageScope Router user name and password from the system administrator. Enter these values into the Username: and Password: fields and click Login to continue.
8. The main PageScope Router Client User Interface, the Document Manager, will open on your desktop.

Closing PageScope Router Client

The PageScope Router Client application is closed by clicking the button on the Document Manager window.

4.1.2 User Interface

The User Interface for PageScope Router Client consists of two application windows:

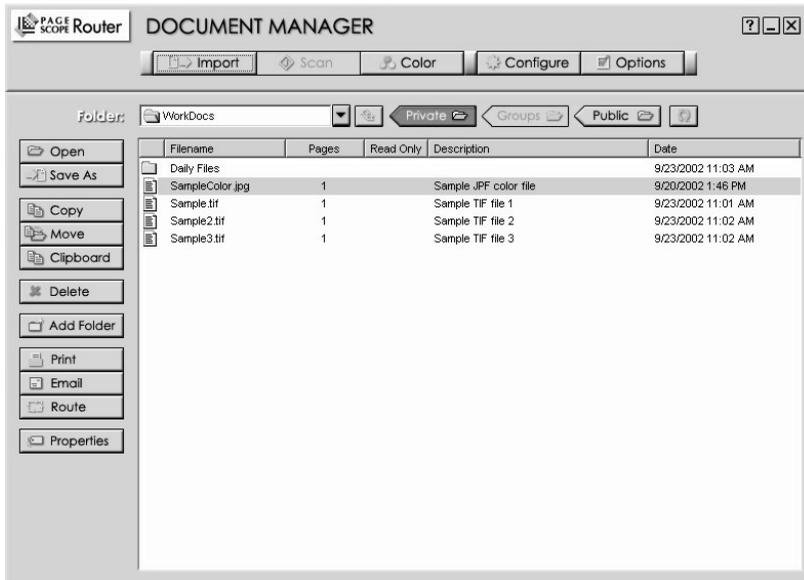
- **Document Manager window** This window is displayed when the program starts. It is used for PageScope Router operations and repository functions such as repository selection, and repository document operations.
- **Document Viewer window** This window is used to display thumbnail images of each page of a document, a selected document page, and provides controls for page operations and image editing.

Important Note

A Section 508 compliant version of the User Interface can be specified during installation of the client software.

4.1.3 Document Manager

The Document Manager is the application window that is displayed when the PageScope Router Client starts. The window is composed of groups of buttons, used for PageScope Router operations and repository functions such as repository selection, and repository document operations.



User Interface Control Group

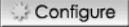
The following UI control buttons are provided:

- Opens the Help document for PageScope Router.
- Minimizes the Document Manager onto the Taskbar.
- Closes the PageScope Router Client application.

Main Group

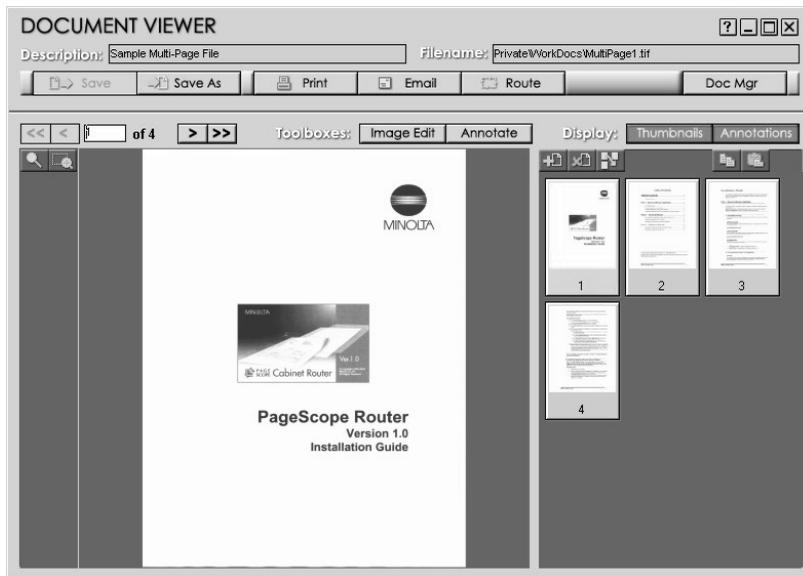
The following document and configuration buttons are provided:

- Allows you to import documents from a network location into a Repository. See *7.1.6 – Importing a File*.
- Allows the selection and launching of an interface dialog for TWAIN Scanners attached to the user's workstation. See *7.1.2 – Connecting a TWAIN Device*.
- Performs Color Management on the selected document. This allows you to modify the color space of a document by using ICC Color Profiles. See *6.1.4 – Color Management*.

-  **Configure** Opens the Document Route Configure dialog. This provides you with the ability to create and configure Document Routes, used for routing documents. See *8.1.7 – Configuring Document Route Settings*.
-  **Options** Displays a dialog list for functions needed to set up the PageScope Router software. Includes options for Cache Settings, PageScope Router Server Settings, and Document List Column Settings. See *4.1.7 – Configuring Client Options*.

4.1.4 Document Viewer

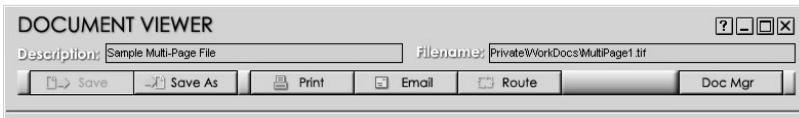
PageScope Router client provides the user with the ability to view documents that are placed in a Repository. The user selects a document using the Document Manager and clicks the Open button. The first page of the document is displayed in a section of the Document Viewer, and all of the document pages are displayed in an optional thumbnail viewer.



The Document Viewer is composed of several functional areas and groups of buttons that provide the following main functions:

- Document Page Viewer
- Document Thumbnail Viewer
- Document Control
- Page Control
- Page View Control

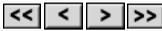
Document Control Functions

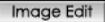
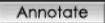
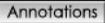


- **Description:** This field contains a description of the current document.
- **Filename:** This field contains the filename of the current document.
-  **Save** This button is only available on the Document Viewer. It is used to Save any changes that are made to the current document in the viewer window. These changes include Image Editing, Annotation, and document Page changes.
-  **Save As** This button opens a dialog and allows the user to save the selected document in other locations. It also provides the ability to convert the document into another file format.
-  **Print** This opens the Print dialog and allows the user to print the selected document.
-  **Email** This launches the user's Email client dialog and allows the user to send the selected document as an Email attachment to another user.
-  **Route** This opens the Route Document(s) dialog and uses Document Route to process and send the selected document to other users and locations.
-  **Doc Mgr** This returns you to the Document Manager, placing the dialog on top of other Windows dialogs.

Page Control Functions



-  **Page navigation controls** This group provides the user with information about the number of pages in the current document, the page number of the currently displayed page, and provides buttons to navigate through the document. The buttons will only be available if the document contains multiple pages.

-  **Image Edit Toolbox**
This button enables a set of image editing controls and makes them visible on the Viewer frame. See *6.1.3 – Image Editing Description* for complete information.
-  **Annotation Toolbox**
Selecting this button enables a set of annotation editing controls and makes them visible on the Viewer frame. The button will only be present if the current file supports annotations. See *6.1.5 – Annotation Overview* for complete information.
-  **Display: Thumbnails**
This button is used to display or hide the Thumbnail Viewer.
-  **Display: Annotations**
This button is used to display or hide annotations that may have been placed on the current image. The button will only be present if the current file supports annotations. **Note:** Annotations that have been burned into an image cannot be turned off.

Page View Control



-  **Change View**
This button allows the user to modify the way the image is displayed. These settings only affect the viewed image, not the original document. See *4.1.5 – Page Viewer* for complete information.

User Interface Control

The Document Viewer also provides the following UI control buttons:

-  Opens the Help document for PageScope Router.
-  Minimizes the Document Viewer onto the Taskbar.
-  Maximizes the Document Viewer window to the full screen size.
-  Closes the Document Viewer.

4.1.5 Page Viewer

The Document Viewer contains a Page Viewer area that displays a single full-size page of a document at a time. The size of the area is fixed within the Document Viewer window but expands if the Thumbnail view is disabled. The entire Document Viewer window can be maximized to fill the screen.

Viewer Settings

There are several functions provided to modify the way the pages are viewed in the PageScope Router Client page view. There are two buttons on the side of the Document Viewer that are used to modify the page view.



-  **Rubberband Zoom**

When this button is clicked, you can drag the mouse while holding the left mouse button to mark a section of the currently viewed image. When the button is released, the marked section of the image will expand to fill the viewer window. This function provides a fast way to zoom in on a section of an image.

-  **View Settings Dialog**

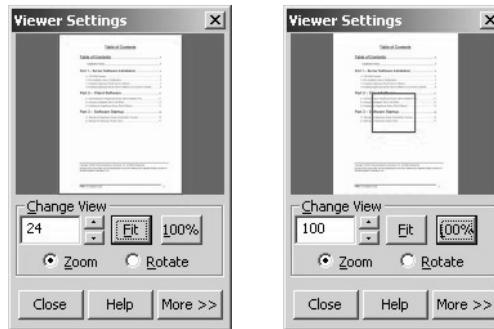
This button opens a new dialog that allows the user to modify the way the image is displayed. These settings only affect the viewed image, not the original document. When this button is clicked, one of the dialogs shown below is displayed.

These dialogs provides the ability to modify the scaling or Zoom factor of the image, the rotation angle of the image, and the ability to save these settings. The dialog controls will change their function, depending on the function being performed. Refer to the description in each section.

Important Note

These operations only affect the user's view of the document, and does not change the underlying document in any way.

Image Zoom



The displayed dialog contains a thumbnail representation of the image, along with image controls that are used to change the image display. A rectangle is placed on the image showing the section of the image that is currently being displayed in the main viewer.

Change View section:

- **Zoom** radio button This button is selected to enable the zoom controls.
- **Fit** button This button changes the image scale so that the entire image fits in the viewer window.
- **100%** button This button displays the image at 100% so that the image resolution matches the screen resolution. The rectangle on the image shows the section of the image that is currently being displayed in the main viewer.
- **Zoom Factor** field The viewer provides the ability to change the size of the viewed image to any value from 1 to 800% of the original. The zoom level may also be increased or decreased by 25% at a time. You may enter a value in this field, or use the arrow controls to change the zoom as required.
- **Close** button This button closes the dialog.
- **Help** button This button opens the help file.
- **More >>** button This button changes the dialog and adds a **View Options** section described below.

Pan Image

When an image is zoomed and only a section is displayed, the mouse pointer can be used to move the rectangle placed on the image as shown below. The section of the image that is displayed will change accordingly.

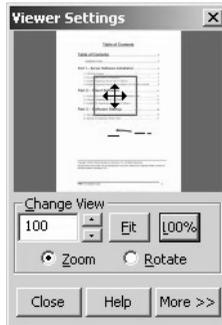
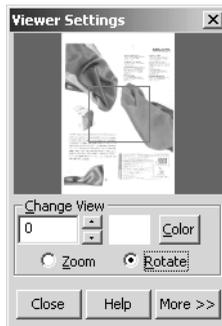


Image Rotation



- **Rotate** radio button
- **Rotation Angle** field
- **White/Black** radio buttons
- **Color** button

This button is selected to enable the rotate controls.

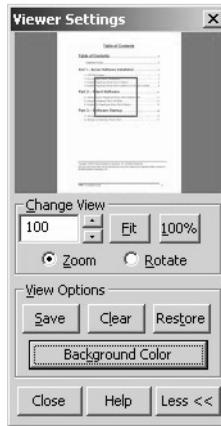
The viewer provides the ability to change the angle of the viewed image. The angle may be Clockwise (0 to 180) or Counterclockwise (0 to -180). You may enter a value in this field, or use the arrow controls to change the angle in 90-degree increments as required.

These buttons are used to set the background color of the new image outside of the rotated original image. (for monochrome image only)

This button opens color setting dialog to set background color of the new image outside of the rotated original image. (for color image only)

- **Close** button This button closes the dialog.
- **Help** button This button opens the help file.
- **More >>** button This button changes the dialog and adds a View Options section described below.

View Options



When the **More >>** button is clicked on any of the dialogs shown above, a **View Options** section is added to the dialog. The following functions are added.

- **Restore** button The user may elect to return the viewed image to its original state with regard to zooming and rotate view. **Note:** image rotations that have been saved, either by this user or by a previous user, will not be undone through the restore command.
- **Save** button You can save the scale (zoom percentage) and rotate view settings for an individual page of a document by clicking this button. This information will be associated with a page of a document, and will apply to all users. This information will persist across PageScope Router Client application sessions and may be modified by all users.
- **Clear** button This button clears currently saved persistent view settings for the page.
- **Background Color** button This button can be used to change the background color of the Page Viewer, the area on the Document Viewer where the image is displayed.

4.1.6 Thumbnail Viewer

In addition to the full-page view of the document, the Document Viewer includes a section that can be used to display thumbnail images of the selected document. The thumbnail viewer consists of small renderings of each page of the document. The **Thumbnails** button on the Document Viewer frame will display or hide the thumbnails as desired.

The thumbnails will be displayed in a fixed section of the Document Viewer, each page numbered consecutively according to the sequence in the document. If all of the thumbnail images cannot fit in the viewing area, a scroll bar will be provided to enable the user to view all thumbnails.

A document page may be selected and placed into the page viewer by clicking on the thumbnail using the mouse.

The following page management functions may be performed on the document using the thumbnail viewer.

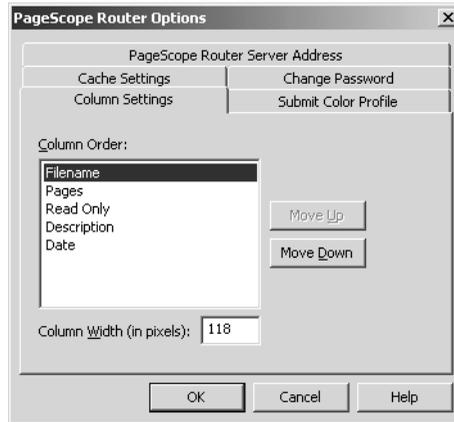
- Add Page
- Remove Page
- Reorder Page
- Copy image to clipboard
- Paste image from clipboard

See *6.1.6 – Document Editing Overview* for complete information.

4.1.7 Configuring Client Options

There are several configurable options used in PageScope Router.

When the Options button is clicked on the Document Manager, the following **PageScope Router Options** dialog will open.



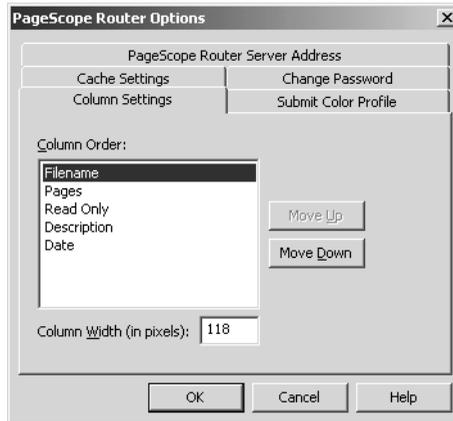
The dialog contains several dialog tabs, each used to configure a specific parameter. Click on the desired tab and use the links below for information on the specific item.

- [Document List Column Settings](#)
- [Submit Color Profile](#)
- [Changing the User Password \(for Non-OS User only\)](#)
- [Cache Settings](#)
- [PageScope Router Server Address](#)

4.1.8 Column Settings

The **Repository Viewer** displays a list of documents and folders for a selected Repository Area, showing names and basic information.

This tab dialog allows you to change the order and width of the columns of information displayed.



To Change the Column Order and Width

1. In the **Column Order:** listbox, use the mouse pointer to select the column.
2. Use the **Move Up** and **Move Down** buttons to change the position of the column.
3. In the **Column Width (in pixels):** field, you may enter a new column width if necessary.
4. Repeat for the other columns if necessary.
5. Click **OK** to accept the changes and close the dialog.

4.1.9 Submit Color Profile

The Color Management function allows you to change the color space of a document to a different one based on an ICC Color Profile. If the required Profile is not available in the PageScope Router System for the MFP being used, you may select a custom ICC Profile from the local PC or network and upload it to the PageScope Router server. The PageScope Router Administrator then assigns the profile to a particular MFP and scanning condition.

This tab dialog allows you to locate a custom ICC Profile and send it to the PageScope Router Server.

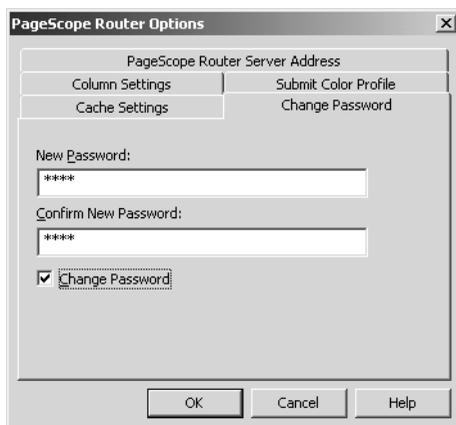


To Submit an ICC file

1. In the **Color Profile:** listbox, type the complete directory path and filename of the required ICC file, or click the **Browse** button to locate the file.
2. Click **OK** to Submit the file and close the dialog.

4.1.10 Change Password

You may change your PageScope Router user Password. This tab dialog provides the fields necessary to make this change.



To Change the Password

1. Select the **Change Password** checkbox This will enable the other fields.
2. Enter the new password in the **New Password:** and **Confirm New Password:** fields.
3. Click **OK** to accept the change and close the dialog.

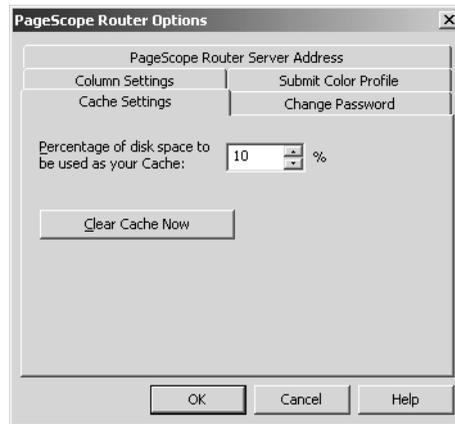
Note

This feature is for Non-OS User only.

4.1.11 Cache Settings

PageScope Router uses a portion of your disk space to hold copies of the files that are requested for viewing. This allows quick retrieval and display of frequently requested documents.

This tab dialog allows you to specify how much of the disk space can be used by PageScope Router for your cache, and also allows you to clear the cache.

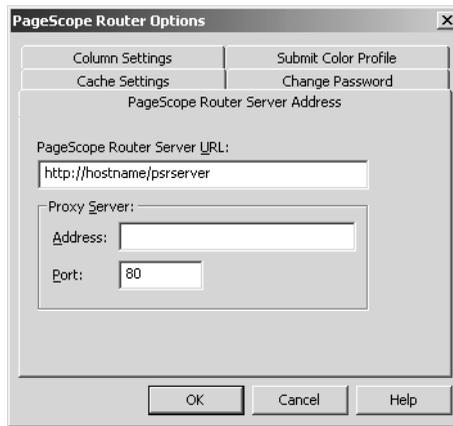


To Change the Cache Size

1. In the **Percentage...** field, enter a number or use the arrow controls to specify a new cache size. Note that this value is the percent of the disk drive where PageScope Router is installed.
2. Click the **Clear Cache Now** button to remove all files from the cache directory.
3. Click **OK** to accept the change and close the dialog.

4.1.12 PageScope Router Server Address

This tab dialog allows you to change the URL of the PageScope Router Server that you wish to access.



To Change the Server URL

1. In the **PSR Server URL:** field, enter the complete URL address of the PageScope Router Server.
2. In the **Proxy Server:** section, enter the correct information, if necessary.
3. Click **OK** to accept the change and close the dialog.

Working with Repositories

5

5.1 Working with Repositories

5.1.1 Repository Overview

PageScope Router manages users' files by arranging and grouping the files in collections of documents called Repository Areas.

The PageScope Router Repository Areas use folders and sub-folders to contain all files placed into the System by the PageScope Router users. The files are sent to the system by several methods including:

- Scanning from an MFP device
- Email
- File copy

Repository Areas

There are three types of Repository Areas:

- **Private Repository Area** A Private Repository Area is managed by an individual PageScope Router user. Only that user may view the Repository Area, add folders or documents to it, and manipulate the documents in it. The top-most level of a Private Repository Area is its owner's INBOX.
- **Group Repository Area** A Group Repository Area is managed by the PageScope Router Administrator. These Areas are created for use by users who are members of a Network Group that has been created on the main network. The designated Network Group is associated with the Repository Area, and only those members can add folders or documents to it, and manipulate the documents in it.
- **Public Repository Area** The Public Repository Area is managed by the PageScope Router administrator. All users of the PageScope Router system may view the Public Repository Area, add folders or documents to it, and manipulate the documents in it.

The Repository Viewer section of the Document Manager window provides the ability to display list of folders and documents in the Repositories, and buttons to manage the folders and documents.

5.1.2 Repository Viewer

The Document Manager provides a **Repository Viewer** section that allows you to specify a Repository Area to view, either Private, Public, or Group. The viewer displays a document list for that Repository Area, showing the documents and folders in the Repository, and provides document control buttons to allow you to manage repository documents.

Repository Management

In general, you can Create, Rename, and Delete folders within PageScope Router Repositories. However, the functions allowed vary with the type of Repository. Refer to the sections and links below for specific information:

Private Repository Area

A user's Private Repository Area is automatically created by the PageScope Router server when the user is added to the PageScope Router system. The user cannot add or delete Private Repository Areas.

- **Create folders** The user can create folders and sub-folders in their own Private Repository area. These folders are only accessible by the authorized user.
- **Rename folders** The user can rename any folder or sub-folder in their own Private Repository area.
- **Copy/Move folders** The user can copy or move any folder or sub-folder in their own Private Repository area.
- **Delete folders** The user can delete any folder or sub-folder in their own Private Repository area.

Group Repository Area

The PageScope Router administrator creates Group Repository Areas and associates them with User Groups that were created in the Network Domain environment. The user cannot add or delete Group Repository Areas.

Only PageScope Router users that are members of the designated Domain Group can access or manage the associated Group Repository Area and perform the following functions.

- **Create folders** The group member user can create folders and sub-folders in the Group Repository area. These folders are only accessible by all authorized group members.
- **Rename folders** The group member user can rename any folder or sub-folder in the Group Repository area.
- **Copy/Move folders** The group member user can copy or move any folder or sub-folder in the Group Repository area.

- **Delete folders** The group member user can delete any folder or sub-folder in the Group Repository area.

Note

- The PageScope Router administrator can designate folders within a Group Repository Area as “Read Only.” Users may add and view documents stored in folders designated as “Read Only,” but cannot Rename, Move, or Delete them.
- The PageScope Router Administrator may designate folders within a Group Repository Area as “Inaccessible.” “Inaccessible” folders may not be viewed by any PageScope Router user.

Public Repository Area

The Public Repository Area is automatically created by the PageScope Router server at installation time. The user cannot add or delete Public Repository Areas.

- **Create folders** The user can create folders and sub-folders in the Public Repository area. These folders are accessible by all users.
- **Rename folders** The user can rename any folder or sub-folder in the Public Repository area.
- **Copy/Move folders** The user can copy or move any folder or sub-folder in the Public Repository area.
- **Delete folders** The user can delete any folder or sub-folder in the Public Repository area.

Note

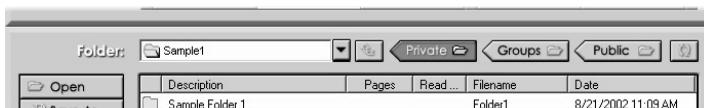
- The PageScope Router administrator can designate folders within the Public Repository Area as “Read Only.” Users may add and view documents stored in folders designated as “Read Only,” but cannot Rename, Move, or Delete them.
- The PageScope Router Administrator may designate folders within the Public Repository Area as “Inaccessible.” “Inaccessible” folders may not be viewed by any PageScope Router user.

For a description of the document manipulation functions that are available in Repository areas, see *5.1.5 – Document Control Overview*.

5.1.3 Repository Selection

The **Repository Viewer** area of the Document Manager provides a section with controls that allow the user to specify a Private, Public, or Group Repository Area. The viewer will then display a document list for the selected Repository Area.

The Repository Selection section is shown below.



To Select a Repository

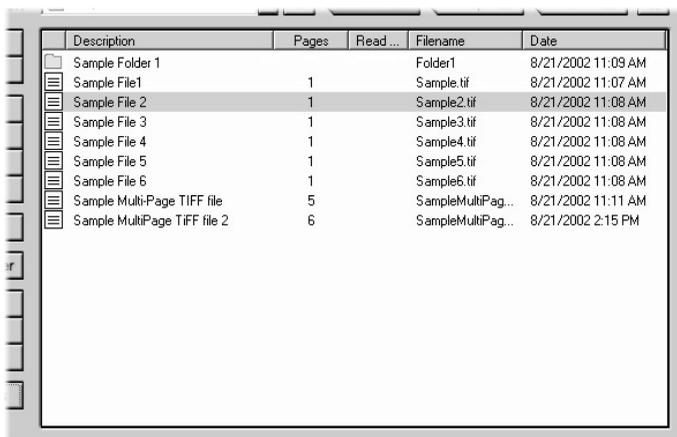
1. Open the Document Manager.
2. Click one of the following buttons to select a Repository.
 -  This button selects the user's Private repository and lists the folder and document contents of the repository in the Document List View.
 -  This button selects Group repositories and lists the folder and document contents of a selected repository in the Document List View. The Group Repositories are displayed based on the Network Group membership of the user.
 -  This button selects the Public repository and lists the folder and document contents of the repository in the Document List View.
3. You can select a folder in the Document List by double-clicking the folder name, or highlighting the folder and clicking the  button.
4. The Folder: field displays the name of the currently selected Repository folder.
5. The  (**Up**) button changes the Document List View up to the parent folder level of the selected folder.
6. The  (**Refresh**) button refreshes the content of the current repository or folder information and updates the Document List View.

Refer to 5.1.6 – Add a Repository Folder for instructions to add a folder.

5.1.4 Repository Document List

The **Repository Viewer** area of the Document Manager provides a document list for the selected repository, which lists the documents and folders in a particular Repository Area.

The Document List section is shown below.



Description	Pages	Read...	Filename	Date
Sample Folder 1			Folder1	8/21/2002 11:09 AM
Sample File 1	1		Sample.tif	8/21/2002 11:07 AM
Sample File 2	1		Sample2.tif	8/21/2002 11:08 AM
Sample File 3	1		Sample3.tif	8/21/2002 11:08 AM
Sample File 4	1		Sample4.tif	8/21/2002 11:08 AM
Sample File 5	1		Sample5.tif	8/21/2002 11:08 AM
Sample File 6	1		Sample6.tif	8/21/2002 11:08 AM
Sample Multi-Page TIFF file	5		SampleMultiPag...	8/21/2002 11:11 AM
Sample MultiPage TIFF file 2	6		SampleMultiPag...	8/21/2002 2:15 PM

Document List fields

The document list for the selected repository contains the following information about each folder or document. The information is organized as columns in the display.

- **Description** This is a description of the folder or document that was entered when the item was created.
- **Date** This is the Date & Time the document or folder was created.
- **Pages** This is the number of pages in the document.
- **Filename** This is the document filename or folder name.
- **Read Only** This indicates if the folder or document has been marked as Read-Only by the PageScope Router Administrator.

Changing the Document List Display

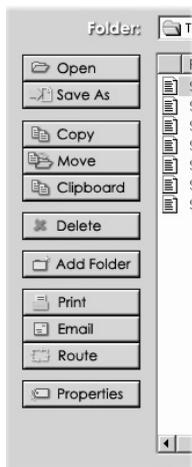
You may change the following display settings:

- **Column Order** and **Column width** See 4.1.8 – *Column Settings* for more information.
- **Sort Order** You may change the sort order of any column. You may choose between ascending and descending order on any selected column by clicking the column name.

5.1.5 Document Control Overview

PageScope Router gives you the ability to manipulate complete documents that are selected in the Document List display.

The operations, as shown on the image below, include copying/moving between Repository Folders, saving locally, emailing, and printing.



Document Control Functions:

The following buttons allow the user to manipulate documents in the Repository.

-  **Add Folder**

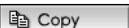
This button opens a dialog used to add a folder to the Repository that is currently selected. See *5.1.6 – Add a Repository Folder*.

Note

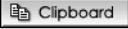
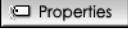
The following functions will be unavailable until a document is highlighted with the mouse pointer.

-  **Open**

This button opens the selected document and displays it in the Document Viewer window. See *5.1.7 – Open a Folder or Document*.
-  **Save As**

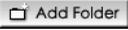
This button opens a dialog and allows you to save the selected document in a Network location. It also provides the ability to convert the document into another file format. See *5.1.10 – Saving Documents*.
-  **Copy**

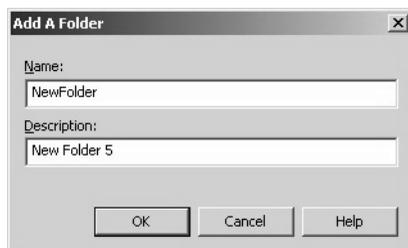
This button opens a dialog and allows you to copy the selected folder or document in a different Repository location. See *5.1.8 – Copy or Move a Folder or Document*.

-  **Move** This button opens a dialog and allows you to move the selected folder or document to a different Repository location. See 5.1.8 – *Copy or Move a Folder or Document*.
-  **Clipboard** This button places a copy of the selected document on the Windows Clipboard. See 5.1.8 – *Copy or Move a Folder or Document*.
-  **Delete** This button removes the selected folder or document from the selected Repository. See 5.1.9 – *Delete a Folder or Document*.
-  **Print** This opens the Print dialog and allows you to print the selected document. See 5.1.12 – *Printing Documents*.
-  **Email** This launches the user’s Email client dialog and allows you to send the selected document as an Email attachment to another user. See 5.1.11 – *Sending Documents by E-mail*.
-  **Route** This opens the Document Route Routing dialog and uses a Document Route to process and send the selected document to other users and locations. Documents are processed automatically using Document Routes, a method of file transfer designed into the PageScope Router system. See 8.1.4 – *Using Document Routes* for more information.
-  **Properties** This button displays a dialog containing information about the selected folder or document. See 5.1.13 – *Document Properties*.

5.1.6 Add a Repository Folder

To Add a Folder

1. Open the Document Manager.
2. Click the  **Add Folder** button. The Add a Folder dialog will be displayed.

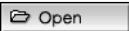


3. In the **Name:** field, enter the name of the new folder.
4. In the **Description:** field, enter an optional description for the new folder.

5. Click **OK** to proceed and add the folder or **Cancel** to stop the operation.

5.1.7 Open a Folder or Document

To Open a folder or a document

1. Open the Document Manager.
2. Select a Repository. Refer to section 5.1.3 – *Repository Selection*.
3. Use the mouse and highlight the desired folder or document. Click the  button.
4. If a folder was selected, the folder contents will be displayed in the Document List.
5. If a document was selected, the Document Viewer will open, displaying the selected document.

5.1.8 Copy or Move a Folder or Document

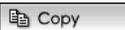
PageScope Router gives you the ability to **Copy** or **Move** one document, multiple documents, or an entire folder from the current Repository location to another folder in your own Private Repository Area, in a Group Repository Area to which you have access, or to any Public Repository Area.

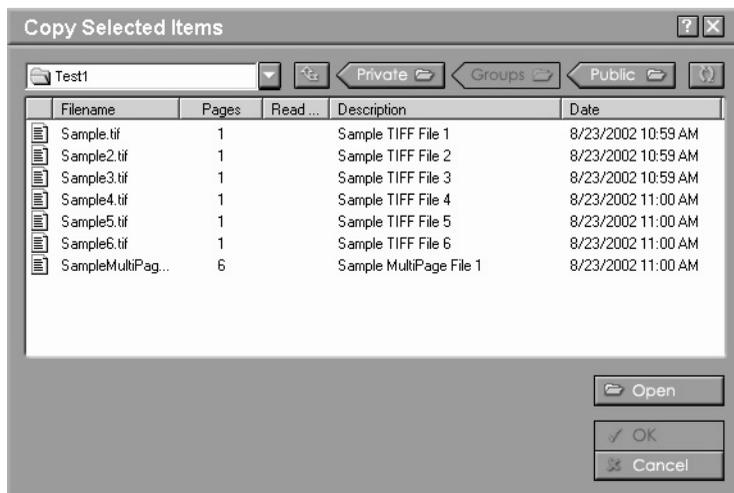
- **Copy** This button opens a dialog and allows you to copy the selected item(s) in a different Repository location. The selected item(s) will remain in their current location, and copies will be placed in the target location.
- **Move** This button opens a dialog and allows you to move the selected item(s) to a different Repository location. The selected item(s) will be removed from their current location, and moved to a new location.
- **Clipboard** This button places a copy of the selected document on the Windows Clipboard. Note that you can only place a single page document on the clipboard. You cannot copy a folder to the clipboard.

To Copy a folder or document

1. Open the Document Manager.
2. Select a Repository. Refer to section 5.1.3 – *Repository Selection*.
3. Use the mouse and highlight the desired folders or documents. You may select multiple items.

5.1 Working with Repositories

- Click the  button. The following dialog will be displayed.

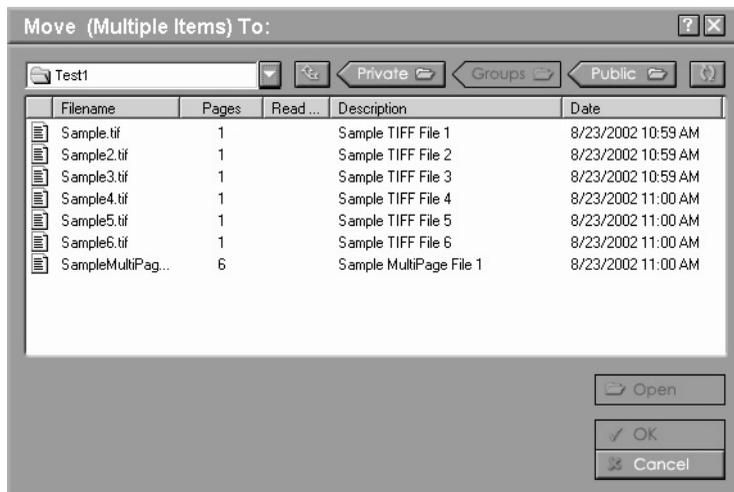


- The Copy Selected Items dialog is used to specify the Destination or Target folder where the selected items will be copied.
- Use the Repository selection buttons on the dialog to locate the desired target folder.
- When the target folder is selected, the  button will be enabled. Click this button to proceed and copy the items or Cancel to stop the operation.

To Move a folder or document

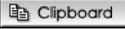
- Open the Document Manager.
- Select a Repository. Refer to section 5.1.3 – *Repository Selection*.
- Use the mouse and highlight the desired folder or document. You may select multiple items.

4. Click the  button. The following dialog will be displayed.



5. The Move (Multiple Items) To: dialog is used to specify the Destination or Target folder where the selected items will be moved. **Note:** For a single item, the dialog title will contain the name of the folder or document being moved.
6. Use the Repository selection buttons on the dialog to locate the desired target folder.
7. When the target folder is selected, the  button will be enabled. Click this button to proceed and move the items or Cancel to stop the operation.

To Copy a document to the Windows Clipboard

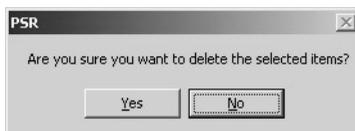
1. Open the Document Manager.
2. Select a Repository. Refer to section 5.1.3 – *Repository Selection*.
3. Use the mouse and highlight the desired document.
4. Click the  button. The highlighted document will be placed on the Windows clipboard.

5.1.9 Delete a Folder or Document

PageScope Router gives you the ability to delete one or more folders or documents from an accessible Repository Area. You may delete any item in a Repository Area to which you have access, as long as the administrator has not marked the folder in which the document resides as “read only.” The delete operation is not permitted on documents that are currently being modified by other users of the PageScope Router system.

To Delete a folder or document

1. Open the Document Manager.
2. Select a Repository. Refer to section 5.1.3 – *Repository Selection*.
3. Use the mouse and highlight the desired folders or documents. You may select multiple items.
4. Click the  button. The following dialog will be displayed.



5. Click **Yes** to proceed and delete the item or **No** to stop the operation.

5.1.10 Saving Documents

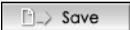
Repository documents that have been selected in the Document Manager or opened for viewing in the Document Viewer may be saved to another Repository location or saved to a local PC hard drive or network location.

To Save a Repository document from the Document Manager

1. Open the Document Manager.
2. Refer to section 5.1.2 – *Repository Viewer* and select the Repository document(s) that you want to save in another location. You may select multiple documents.
3. Click the  button on the left side of the Document Manager window.
4. Proceed to the **Save As Dialog** section below.

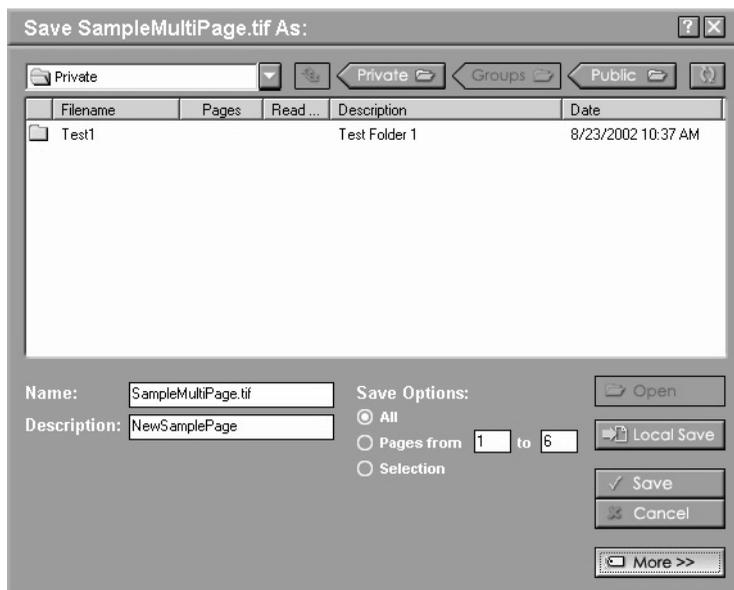
To Save a Repository document from the Document Viewer

1. Open the Document Manager.
2. Refer to section 5.1.2 – *Repository Viewer* and select a Repository document. Double-click the selection or click the  button on the left side of the Document Manager window.

- The document will be displayed in the Document Viewer. Perform all desired Image Editing, Annotation, or Page operations. Click  if the changes must be made to the original image.
- Click the  button on the top of the Document Viewer window.
- Proceed to the **Save As Dialog** section below.

Save As Dialog

- When the  button is clicked in the Document Manager or Viewer, the following dialog will be displayed.



- The Save As dialog allows you to specify the name, target location, and file format of the document to be saved. This dialog is similar to the Document List Viewer of the Document Manager window.

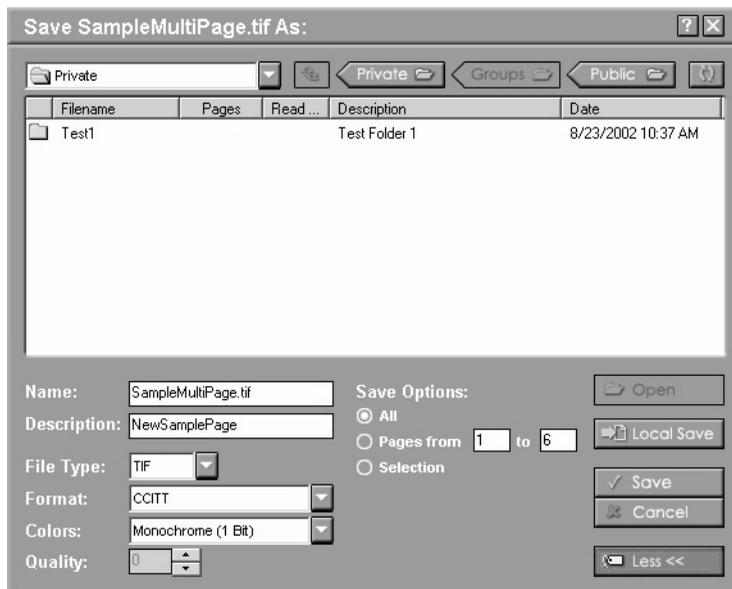
Note

To Save the document to a local PC hard drive, click the  button and proceed to the Saving Locally section.

- To Save the document to a different Repository location, use the buttons on the dialog and the following steps to specify the target Repository Folder.
 - Select a Private, Group, or Public Repository
 - Highlight a folder and click the  button. You may also double-click the highlighted folder. Repeat until the desired target folder is located.

5.1 Working with Repositories

- Enter the following information about the file in the specified fields.
 - Name:** field The name of the document is automatically entered into this field. Use the default name or enter a new name if desired. **Note:** This field will not be enabled if multiple documents are being saved from the Document Manager.
 - Description:** field Enter an optional description for the file in this field.
 - Save Options:** radio buttons If the document is a multi-page document, you may save all of the pages or a range of pages from the document. Select one of the following:
 - All** Saves all pages in the document.
 - Pages from...** Saves a range of pages. You must enter the page numbers of the pages to be saved.
 - Selection** Saves only the document page currently selected in the viewer. **Note:** This field will not be enabled if multiple documents are being saved from the Document Manager.
- File type Conversion - If the document will be converted and saved in another file format, click the  button. The following additional fields will be displayed on the dialog as shown.



6. Enter the desired information.

- **File Type:** list

This dropdown list contains the file types to which the document may be converted. The available selections are TIF, JPG, or PDF.

- **Format:** list

This dropdown list contains additional format parameters that change according to the selected file type. For a TIF or PDF file type, a file compression may be specified.

- **Colors:** list

This dropdown list contains the color resolution that is available for the selected file type. For a TIF or PDF file type, monochrome (1-bit) or color (8&24-bit) conversions are available. For a JPG file type, only the color conversion is available.

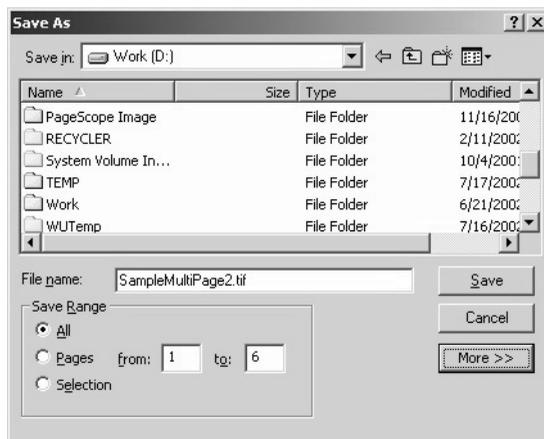
- **Quality:** field

This is only enabled when a JPG file type is selected. This number specifies the quality of the image. A value of 1 is the lowest compression (highest quality, large file) and 255 is the highest compression (lowest quality, small file). Type a value or use the arrow controls to specify a number from 1 to 255.

7. When all of the document information has been entered, click the  button. The specified document will be saved in the target location, modified as directed. The Save As dialog will be closed, and you will be returned to the Document Manager or Viewer window.

Saving Locally

1. When the  button is clicked in the **Save As** dialog, the following dialog will be displayed.



5.1 Working with Repositories

2. Use the standard Windows controls on the dialog to select the target location for the document to be saved. This may be any network location to which you have access.
3. **File Name:** field - Use the original default file name or enter a new file name in this field.
Note: This field will not be enabled if multiple documents are being saved from the Document Manager.
4. **Save Range:** radio buttons - If the document is a multi-page document, you may save all of the pages or a range of pages from the document. Select one of the following:
 - **All** Saves all pages in the document.
 - **Pages** Saves a range of pages. You must enter the page numbers of the pages to be saved. **Note:** This field will not be enabled if multiple documents are being saved from the Document Manager.
 - **Selection** Saves only the document page currently selected in the viewer. **Note:** This field will not be enabled if multiple documents are being saved from the Document Manager.
5. **More >>** button (File type Conversion) - Click this button if the document will be converted and saved in another file format. The following additional fields will be displayed on the dialog.



Enter the required information.

- **Save as Type:** list This dropdown list contains the file types to which the document may be converted. The available selections are TIF, JPG, or PDF.
- **Colors:** list This dropdown list contains the color resolution that is available for the selected file type. For a TIF or PDF file type, monochrome (1-bit) or color (8&24-bit) conversions are available. For a JPG file type, only the color conversion is available.
- **Subfile Type:** list This dropdown list contains additional format parameters that change according to the selected file type. For a TIF or PDF file type, a file compression may be specified.

- **Quality:** field
This is only enabled when a JPG file type is selected. This number specifies the quality of the image. A value of 1 is the lowest compression (highest quality, large file) and 255 is the highest compression (lowest quality, small file). Type a value or use the arrow controls to specify a number from 1 to 255.
6. When all of the document information has been entered, click the **Save** button. The specified document will be saved in the target location, modified as directed. The Save As dialog will be closed, and you will be returned to the Document Manager or Viewer window.

5.1.11 Sending Documents by E-mail

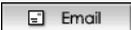
PageScope Router allows you to send documents via email. You may send the image that is currently open in the Document Viewer, or you may send one or more documents directly from the Document List in the Document Manager.

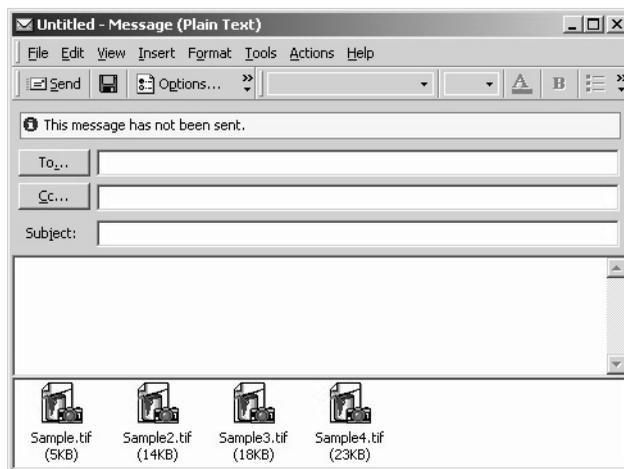
TIFF file annotations are included with the image.

Important!

You must insure that standard email client software, such as Microsoft Outlook, has been correctly installed and configured on your PC. The PageScope Router Client will interface to the user's email client using the MAPI interface defined by Microsoft and the email system used shall support POP3 and IMAP4.

To Send an Email from the Document Manager

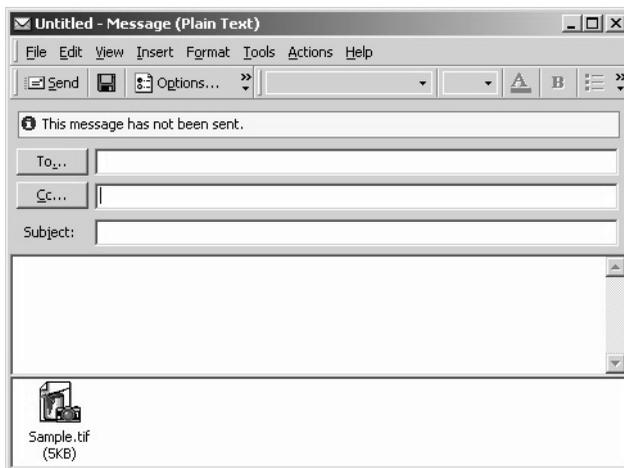
1. Open the Document Manager.
2. Refer to section 5.1.2 – *Repository Viewer* and select the Repository document(s) that you want to send. You may select multiple documents.
3. Click the  button on the left side of the Document Manager window.
4. The following sample Email dialog will be displayed.



5. All of the selected document(s) will be attached to the email to be generated. Refer to the Email software documentation for complete information on addressing and sending the Email.
6. When the Email has been sent, close the dialog.

To Send an Email from the Document Viewer

1. Open the Document Manager.
2. Refer to section 5.1.2 – *Repository Viewer*, select and open the Repository document that you want to send.
3. Click the  Email button on the top of the Document Viewer window.
4. The following sample Email dialog will be displayed.



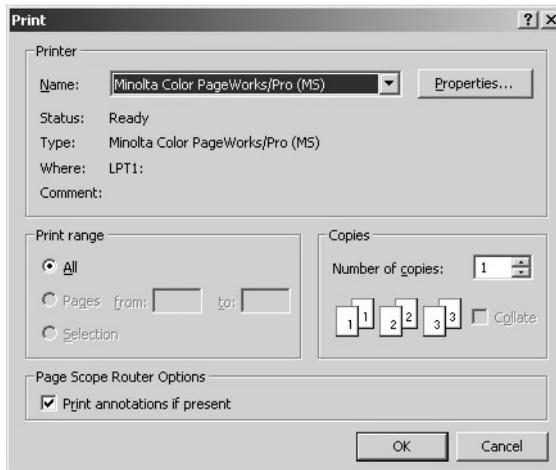
5. The selected document will be attached to the email to be generated. Refer to the Email software documentation for complete information on addressing and sending the Email.
6. When the Email has been sent, close the dialog.

5.1.12 Printing Documents

You can print documents directly from the PageScope Router client. You can print the document that is currently in the viewer, or you can select and print multiple documents from a document list.

To Print from the Document Manager

1. Open the Document Manager.
2. Refer to *5.1.2 – Repository Viewer* and select the Repository document(s) that you want to print. You may select multiple documents.
3. Click the  button on the left side of the Document Manager window.
4. The following Print dialog will be displayed.



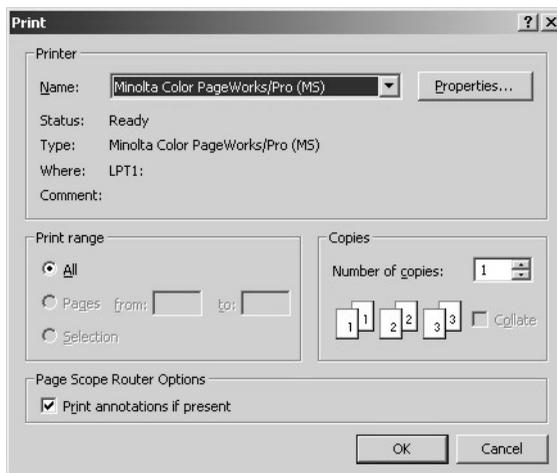
5. This dialog uses standard Windows Print functionality, and may be different for each printer type. Select the following items:

- **Printer list** Select the desired printer from the list. Use Properties to configure as necessary.
- **Print Range section** This is used for MultiPage documents only. Select All pages, the current page that is in the viewer (Selection), or a range of pages (Pages).
- **Copies** Select the number of copies, and check Collate if desired and enabled.
- **PageScope Router Options section** In this section, you may select Print annotations if present to print any annotations that may be present on the TIFF document. **Note:** Annotations that are burned into the TIFF file cannot be omitted.

- Click **OK** to print and close the dialog.

To Print from the Document Viewer

- Open the Document Manager.
- Refer to section 5.1.2 – *Repository Viewer*, select and open the Repository document that you want to view and print.
- Click the  button on the top of the Document Viewer window.
- The following Print dialog will be displayed.

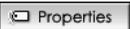


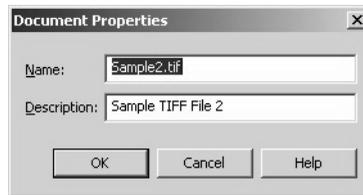
- This dialog uses standard Windows Print functionality, and may be different for each printer type. Select the following items:
 - **Printer list** Select the desired printer from the list. Use Properties to configure as necessary.
 - **Print Range section** This is used for MultiPage documents only. Select All pages, the current page that is in the viewer (Selection), or a range of pages (Pages).
 - **Copies** Select the number of copies, and check Collate if desired and enabled.
 - **PageScope Router Options section** In this section, you may select Print annotations if present to print any annotations that may be present on the TIFF document. **Note:** Annotations that are burned into the TIFF file cannot be omitted.
- Click **OK** to print and close the dialog.

5.1.13 Document Properties

PageScope Router gives you the ability to view the Name and Description of each folder and document. You may also rename a document in an accessible Repository Area as long as the administrator has not marked the folder in which the document resides as “read only.” The rename operation is not permitted on documents that are currently being modified by other users of the PageScope Router system.

To display the Properties of a folder or document

1. Open the Document Manager.
2. Select a Repository. Refer to section *5.1.3 – Repository Selection*.
3. Use the mouse and highlight the desired folder or document.
4. Click the  button. The following dialog will be displayed.



5. The title of the dialog will be Folder Properties or Document Properties depending on the type of item that was selected.
6. The **Name:** field will contain the name of the item.
7. The **Description:** field will contain an optional description for the item.

To Rename the folder or document

1. You may also change the Name and Description of the selected item. If necessary, you may enter the new Name and Descriptions in the displayed fields.
2. Click **OK** to proceed and add the folder or **Cancel** to stop the operation.

***Working with
Documents***

6

6.1 Working with Documents

6.1.1 Document Overview

PageScope Router provides you with the ability to perform a number of operations on the document files stored in the following Repository locations:

1. Your Private Repository Area
2. Group Repository Areas to which you have access
3. Public Repository Areas

These operations are grouped into several functional categories.

- **Repository Functions** These include operations that affect the entire document, such as copying or moving the whole document from one Repository location to another.
- **Document Editing** These include operations on the individual pages within a multi-page document, such as adding, copying, deleting, or reordering the sequence of pages in a document.
- **Image Editing** These include image editing operations on each page, such as scaling, rotation, and annotations (TIF images only).

See 6.1.2 – Viewing Documents.

6.1.2 Viewing Documents

The PageScope Router Client user interface provides a document viewer that is used to display the pages and content of each document.

The selected documents are displayed in the following manners:

- **Page View** The Document Viewer contains a Page Viewer area which displays a single full-size page of a document at a time.
- **Thumbnail View** The Document Viewer includes a Thumbnail Viewer area that displays thumbnail images of the selected document pages.

Important!

Only the following file types are supported by PageScope Router.

1. Tiff 6.0 (Raw, G3, G4, Pack bits, JPEG)

2. Tiff Single and Multi-page
3. JPEG
4. PDF (multi-page, Rasterized)

6.1.3 Image Editing Description

The PageScope Router Client gives you the ability to modify the image pages in each document using the page viewer, and save these changes in the original document.

The modifications are performed using an image editor that provides the ability to change the size, orientation, and brightness of the image, correct skewed images, and to “clean” images by removing background noise.

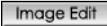
The image color may also be modified to match the output from the MFP devices to the system displays and printers. See *6.1.4 – Color Management*.

Important!

The following are important points when editing images.

- Image files that are located in folders that the administrator has marked as “read only” cannot be edited.
- Only one user may edit a particular image file at any one time. If the document is already in use by another user, a warning message will be displayed.
- Image editing may be performed on an image being viewed in the Document Viewer. It cannot be performed in the thumbnail view.
- These operations will modify the original document.

6.1.3.1 Image Editing Functions

The PageScope Router Client includes an image editor that provides several functions. When the  button is clicked, the following group of editing buttons is displayed on the user interface.



To use the image editor

1. Select the image that you want to modify.
2. Click the  button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the button corresponding to the desired editing function.

4. Perform the operation.
5. Repeat for all necessary functions.
6. Click **Save** to save the changes to the document.

Edit Functions

The following is a list of the available image editing functions.

-  **Crop** The crop operation allows you to select and save a region of the image.
-  **Despeckle** The despeckle operation removes specks from scanned images.
-  **Deskew** The deskew operation corrects image skew introduced by improper positioning of the original on the scan device at scan time.
-  **Resize** The resize operation adjusts the size of an image.
-  **Brightness** This operation adjusts the brightness of an image.
-  **Contrast** This operation adjusts the contrast of an image.
-  **Rotate image** This operation enables you to rotate images in whole degree increments.
-  **Rotate in increments** This operation enables you to rotate images in 90-degree increments.
-  **Color Management** This operation modifies the image color to match the output from the MFP devices to the system displays and printers.

Notes

For each of the functions listed above.

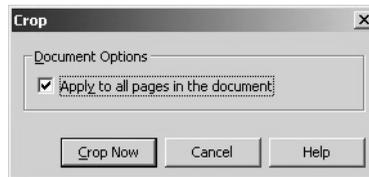
- By default, the function is applied to the current page (page currently in the viewer) only. However, the user may elect to perform the operation on all pages within the document.
- The changes are permanently applied to the document once the user has elected to Save the document. They cannot be undone.

6.1.3.2 Crop

The crop operation allows the user to select and retain a region of the image. The non-selected portion of the image is discarded.

To Crop an image

1. Select the image that you want to modify.
2. Click the  button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the  button.
4. While holding the left mouse button, drag the mouse to mark a section of the currently viewed image. When the button is released, the following dialog is displayed.



5. Click **Crop Now** to proceed and crop the image or **Cancel** to stop the operation.

Note

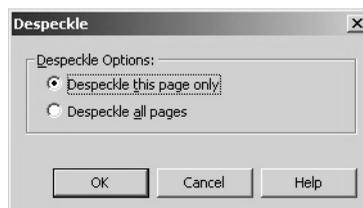
If the image is a page from a multipage document, select the **Apply to all pages in the document** checkbox to crop all pages.

6.1.3.3 Despeckle

The despeckle operation removes specks from scanned images. The despeckle functionality is limited to black-and-white images.

To Despeckle an image

1. Select the image that you want to modify.
2. Click the  button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the  button. The following dialog is displayed.



6.1 Working with Documents

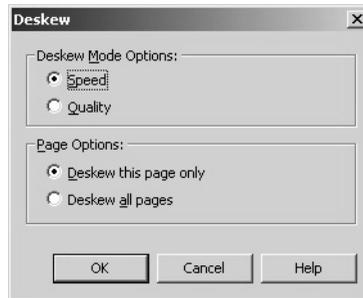
4. Select the correct radio button. **Note:** If the image is a page from a multipage document, you may select Despeckle all pages to apply the operation to all pages.
5. Click **OK** to proceed and Despeckle the image or **Cancel** to stop the operation.

6.1.3.4 Deskew

The deskew operation corrects image skew that may be introduced by improper positioning of the original on the scan device at scan time.

To Deskew an image

1. Select the image that you want to modify.
2. Click the  button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the  button. The following dialog is displayed.



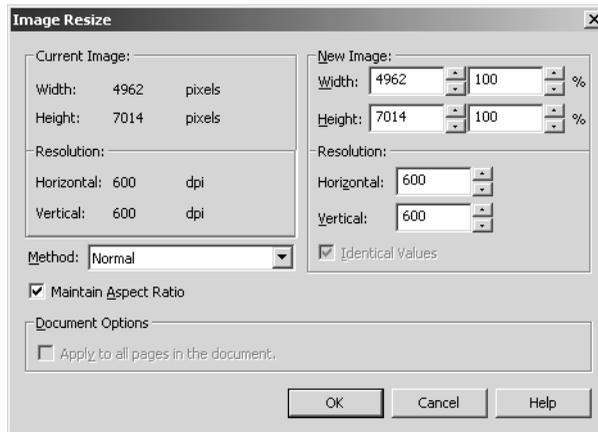
4. Select the correct radio buttons in the dialog.
 - **Deskew Mode Options:** The operation can be configured to give the processing priority to Speed or Quality. Choose Speed for large documents or when processing time is critical, or choose Quality for small documents or when processing accuracy is most important.
 - **Page Options:** If the image is a page from a multipage document, you may select Deskew all pages to apply the operation to all pages. Otherwise select Deskew this page only.
5. Click **OK** to proceed and Deskew the image or **Cancel** to stop the operation.

6.1.3.5 Resize

The resize operation adjusts the size of an image.

To Resize an image

1. Select the image that you want to modify.
2. Click the  button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the  button. The following dialog is displayed.



4. Enter the new information in the dialog as described below.

- **Current Image:** section This section displays information about the image being displayed. The information includes:
 - Image Width and Height in pixels.
 - Image Size in bytes
 - Image Horizontal and Vertical Resolution in DPI
- **New Image:** section This section provides fields for new size information.
 - **Width** fields Enter the new image width in the desired field. Values may be entered directly as pixels or as a percent of the original width. You may use the arrow controls to change the values.
 - **Height** fields Enter the new image height in the desired field. Values may be entered directly as pixels or as a percent of the original height. You may use the arrow controls to change the values.

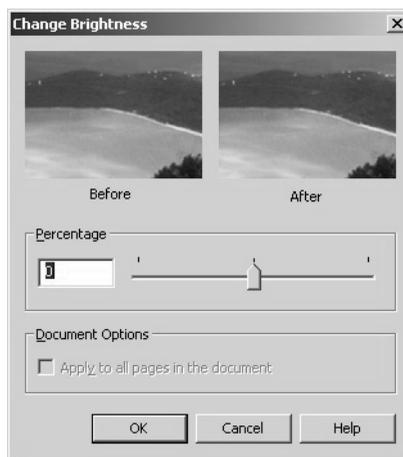
- **Resolution** fields Enter the new image horizontal and vertical resolution. You may use the arrow controls to change the values.
 - **Identical Values** checkbox If the Maintain Aspect Ratio checkbox is not checked, this checkbox is enabled. If it is checked, a value entered in either the horizontal or vertical resolution fields is automatically entered in the other field. If it is NOT checked, different horizontal and vertical resolutions may be assigned in the image.
 - **Method:** list Use this dropdown list to select the resize method.
 - **Maintain Aspect Ratio** checkbox Select this checkbox if the height to width size relationship must be maintained during the operation.
 - **Document Options:** checkbox If the image is a page from a multipage document, you may select **Apply** to all pages in the document to apply the operation to all pages.
5. After the modifications have been made, click **OK** to proceed and **Resize** the image or **Cancel** to stop the operation.

6.1.3.6 Brightness and Contrast

These operations adjust the brightness and contrast of an image. The user indicates the desired level of brightness/contrast, either by entering a number or making use of an on-screen slider control. The image is adjusted on the screen.

To adjust the image brightness

1. Select the image that you want to modify.
2. Click the  button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the  button. The following dialog is displayed.



4. The dialog contains several controls:

- **Thumbnails** section
- **Percentage** section

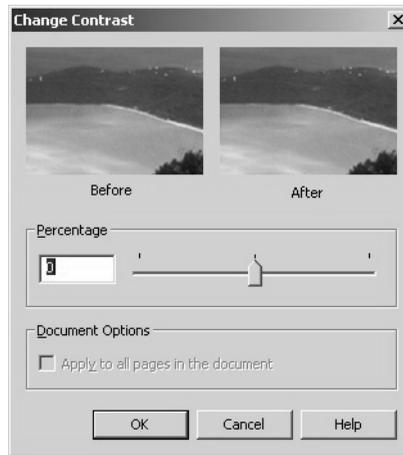
This section displays 2 thumbnail images showing the Original (Before) and Modified (After) versions of the image. These allow you to see the effect of the brightness change before it is accepted.

This section is used to specify the new brightness value. You may enter the value in the field provided, or use the slider control to specify the value. The acceptable range is -100 to +100 with 0 being the center value of the image being displayed.

5. Click **OK** to proceed and change the image or **Cancel** to stop the operation.

To adjust the image contrast

1. Select the image that you want to modify.
2. Click the **Image Edit** button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the  button. The following dialog is displayed.



4. The dialog contains several controls:
 - **Thumbnails** section This section displays 2 thumbnail images showing the Original (Before) and Modified (After) versions of the image. These allow you to see the effect of the contrast change before it is accepted.
 - **Percentage** section This section is used to specify the new contrast value. You may enter the value in the field provided, or use the slider control to specify the value. The acceptable range is -100 to +100 with 0 being the center value of the image being displayed.
5. Click **OK** to proceed and modify the image or **Cancel** to stop the operation.

6.1.3.7 Rotation

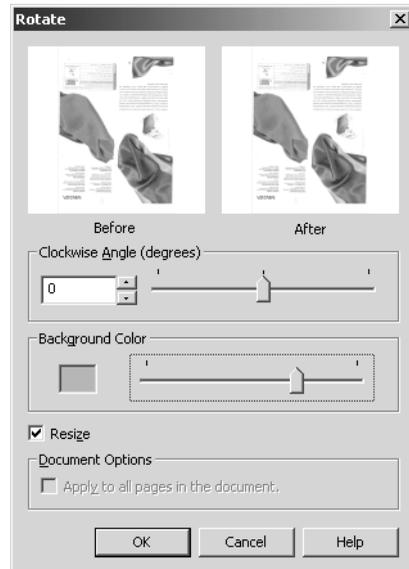
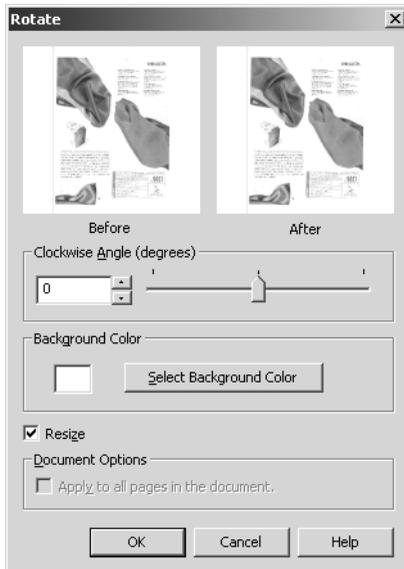
You may rotate images either in 90-degree increments, or in other whole degree increments. You may specify the direction of rotation (either clockwise or counter-clockwise) and return the viewed image to its original, non-rotated state.

To Rotate an image in 90-degree increments

1. Select the image that you want to modify.
2. Click the **Image Edit** button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the  button to rotate the image counterclockwise in 90 degree increments.
4. Click the  button to rotate the image clockwise in 90 degree increments.

To Rotate an image by degree

1. Select the image that you want to modify.
2. Click the **Image Edit** button to enable the image editor functions. The buttons will become visible on the user interface.
3. Click the  button. The following dialog is displayed.



4. The Rotate dialog contains several controls:

- **Thumbnails** section

This section displays 2 thumbnail images showing the Original (Before) and Modified (After) versions of the image. These allow you to see the effect of the applied rotation before it is accepted.

- **Clockwise Angle (degrees)** section

This section is used to specify the angle of rotation. You may enter the clockwise angle in the field provided, use the arrow controls to change the value in +/- 90 degree increments, or use the slider control to specify the value.

- **Background Color** radio buttons

These buttons are used to set the background color of the new image space that is created outside of the rotated original image. The available colors are White or Black.

- **Select Background Color** button

This button is used to set the background color of the new image space that is created outside of the rotated original image. This button opens Color Setting dialog to select desired color.

- **Resize** checkbox

If this button is checked, rotated image will be adjusted to fit the size of original image.

- **Document Options** checkbox

If the image is a page from a multipage document, you may select **Apply** to all pages in the document to apply the operation to all pages.

5. Click **OK** to proceed and Deskew the image or **Cancel** to stop the operation.

6.1.4 Color Management

The PageScope Router Client software allows the user to perform Color Matching on images. This process matches the color space of the MFP device to the output devices and displays used by the PageScope Router system.

The following notes provide useful information about Color Matching.

The purpose of color matching

When an image is scanned, the brightness and tone (color saturation/hue) of the resulting scanned image may appear to be different from the original document. This may occur with older MFP devices, for example CF2001/CF9001 “Scan to HDD”, in which color matching is not performed. PageScope Router allows you to correct these images during Document Route processing, or from a Repository folder location.

Color Space

The color space of the image can be changed according to your purpose.

- **sRGB:** The standard color space for the Windows PC or the internet

- **Apple RGB:** The standard color space for the Macintosh
- **EFIRGB:** The standard color space for the Fiery Controller used with MFP devices

Printing the Scanned Image

When you print the scanned image, you must insure that the RGB source profile in the printer driver is the same as the color space in PageScope Router. If your printer doesn't have the RGB profile setting or you don't know which color space should be chosen, please choose sRGB color space in PageScope Router.

Settings for color matching

When you perform color matching, please choose the proper ICC profile according to your MFP model. ICC profile is the color characteristic data of the scanner of MFP.

If you use older models, you may need to choose the proper setting of “the background remove” and/or “the acquisition course”.

6.1.4.1 Color Matching a Document

There are two ways to send documents to Color Management: from the Repository Document List in the Document Manager, or from the Image Editing toolkit.

To Color Match a Document from the Document Manager

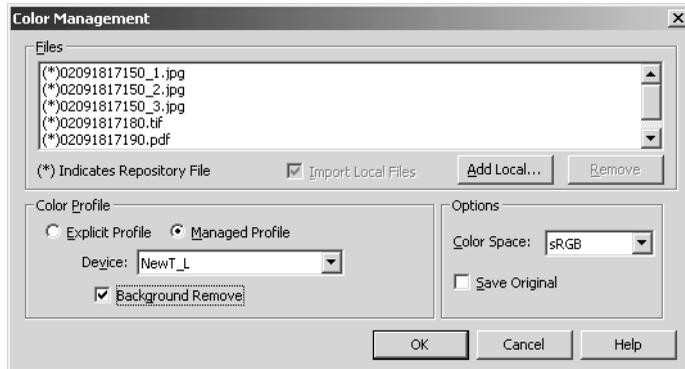
1. Open the Document Manager.
2. Refer to section 5.1.2 – *Repository Viewer* and select the Repository document(s) that you want to process. You may select multiple documents.
3. Click the  button on the left side of the Document Manager window.
4. The Color Management dialog will be displayed.
5. Proceed to Color Management Dialog below.

To Color Match a Document from the Document Viewer

1. Open the Document Manager.
2. Refer to 5.1.2 – *Repository Viewer*, select, and open the Repository document that you want to process.
3. Click the  button to enable the image editor functions. The buttons will become visible on the user interface.
4. Click the  button. The Color Management dialog will be displayed.
5. Proceed to Color Management Dialog below.

Color Management Dialog

1. The Color **Management** dialog will be displayed.



2. **Files** section - This section contains a list of the Repository documents that were selected in the Document List view, as well as any local documents that were added. The Repository Files are noted with (*) before the filename. The following controls are also included in this section:

- **Import Local Files** checkbox Select this checkbox to import the selected files.
- **Add Local...** button Use this button to open a dialog and select a file(s) from your local file system. The selected file(s) will be added to the File list.
- **Remove** button Select a file in the list and click this button to remove the file from the list.

3. **Color Profile** section - This section is used to specify an ICC Color Profile to be used for the Color Matching process.

- **Explicit Profile** radio button This selection allows you to specify and use a custom color profile with the MFP.
- **Managed Profile** radio button This selection allows you to use the default color profile with the MFP.
- **Device:** field This dropdown list is used to select the MFP device that is used to obtain the document. (Available when Managed Profile is selected)
- **Background Remove** checkbox When checked, this indicates to the system the setting that should be used when selecting the appropriate ICC profile for color management. (Available when Managed Profile is selected)

-
- **Color Profile:** field This field contains the ICC Color Profile to be used during the color matching process. You can use the Browse button to search for a new ICC Profile to be used. (Available when Explicit Profile is selected)
4. Options section - This section provides the ability to set the following options:
- **Color Space:** list Use this dropdown list to select the color space to be used for the selected documents.
 - **Save Original** checkbox Select this checkbox to save an unmodified copy of the original document.
5. When all of the options have been selected, click **OK** to proceed or **Cancel** to stop the operation.

6.1.4.2 ICC Color Profiles

The PageScope Router Client allows the user to upload custom ICC Color Profiles to the PageScope Router Server. There are two ways to upload the files: automatic and manual.

Automatic Upload

A custom ICC Profile will be automatically uploaded to the PageScope Router server when the user selects a custom “override” profile as part of a Document Route. An ICC Profile uploaded in this manner is only accessible through the Document Route to which it has been assigned. See *8.1.4 – Using Document Routes*.

Manual Upload

The user may select a custom ICC Color Profile from the local PC or network and upload it to the PageScope Router server by selecting ICC Profile Upload from the user interface. An ICC Profile uploaded in this manner is accessible only to the administrator, who may assign that profile to a particular MFP and scanning condition. See *4.1.9 – Submit Color Profile*.

6.1.5 Annotation Overview

Annotations are a way to attach additional information to a file.

Annotations, known collectively as “annotation marks”, may be text messages, graphical symbols, or graphical markings. They are placed directly on the image using a special annotation editor feature available on the PageScope Router user interface. This editor is used to add, delete, or edit annotations.

Important!

The following are important points for using annotations.

- Annotation operations may only be performed on TIFF files. They are stored in the TIFF file itself as annotation “tags”, but are not burned directly into the page image.
- Annotations cannot be added to files in folders the administrator has marked as “read only”.
- Only one user may perform an annotation operation on a particular document at any one time. If the document is already in use by another user, a warning message will be displayed.
- Annotation may be performed on a document being viewed in the Document Viewer. It cannot be performed in the thumbnail view.
- When a document is printed, the user can choose whether or not to print annotations.

When the  button is clicked, the annotation editor will open and the editing controls will be displayed on the Document Viewer as shown below.



6.1.5.1 Annotation Marks

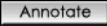
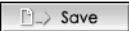
The following Annotations are supported.

-  **Typed Text** mark Add descriptive text to the image in various fonts, sizes, and colors.
-  **Highlight** mark Highlights an important area of an image.
-  **Line** mark Adds a single line on a document.
-  **Redaction** mark Creates a black-filled rectangle, useful for covering areas of an image.
-  **Sticky Note** mark Add notes to the image.
-  **Rectangle** mark Adds a rectangle on a document.

-  **Ellipse** mark Adds an ellipse on a document.
-  **Image reference stamp** mark
Adds a predefined stamp on the document.

6.1.5.2 Adding annotations

To add a new annotation:

1. Click the  button to open the annotation editor.
2. Click the button corresponding to the desired annotation mark.
3. Place or draw the annotation.
4. Repeat for all annotations.
5. Click  to add the annotations to the document.

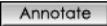
Note

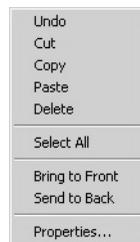
These annotations may be burned into the image using the “burn annotation” function.

6.1.5.3 Editing Annotations

There are several editing functions available.

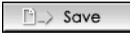
To edit an annotation

1. Click the  button to open the annotation editor.
2. Click the  button and select the annotation mark to be edited.
3. Click the right mouse button on the selected annotation. The dialog below is displayed.



The following editing functions are available:

- **Undo** Undo the last edit action.
- **Cut** Remove the annotation from the image and place it on the clipboard.
- **Copy** Place a copy of the annotation on the clipboard.

- **Paste** Place the annotation from the clipboard to the image.
 - **Delete** Delete the annotation.
 - **Select All** Select all of the annotations. This can be used to remove all of the annotations in one action.
 - **Bring to Front** Annotations are placed in layers on the image. This action places the annotation on the front visible layer.
 - **Send to Back** This action sends the annotation to the back layer.
 - **Properties...** This opens the annotation properties dialog.
4. Perform the desired edit operation.
 5. Repeat for all annotations.
 6. Click  to save the document.

Note

Annotations that have been “burned into” the image file cannot be deleted.

6.1.5.4 Deleting Annotations

To delete an annotation

1. Click the  button to open the annotation editor.
2. Click the  button and select the annotation mark to be deleted.
3. Click the keyboard Delete key to remove the annotation.
4. Repeat for all annotations.
5. Click  to save the document.

Note

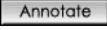
Annotations that have been “burned into” the image file cannot be deleted.

6.1.5.5 Permanent Annotations

Standard annotations are stored in the TIFF file itself as information contained in annotation “tags” in the file. They can be added, deleted, or edited as needed and are not part of the file image itself.

However, it is possible to “burn” annotations into the page image itself using a separate operation. This operation modifies the underlying image data for the page and removes the annotation tags from the page. These changes are applied to the underlying document once the user has elected to “save” the document, and cannot be undone once saved. Note that once annotations are “burned into” the TIFF file, they are considered to be part of the image, and are not subject to the operations that can be performed on annotations.

This operation is performed when adding or editing annotations.

1. Click the  button to open the annotation editor.
2. Click the  button and select the annotation mark to be burned-in.
3. Click the  Burn Annotation button.
4. Repeat for all desired annotations.
5. Click  to save the document.

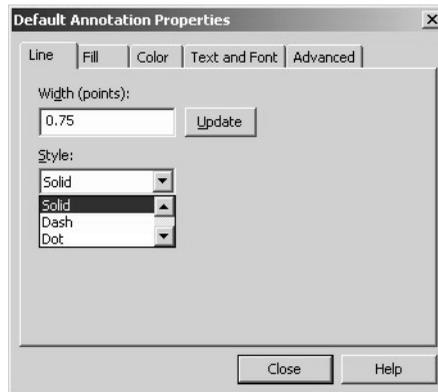
6.1.5.6 Annotation Properties

The default properties of the annotations may be changed.

To view or change annotation properties

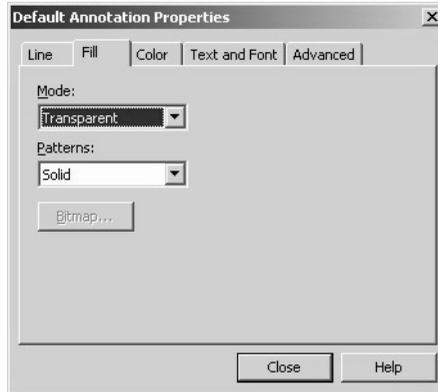
1. Click the  button to open the annotation editor.
2. Click the  button. The Default Annotation Properties dialog is displayed.
3. There are 5 tab dialogs, all shown below, with configuration information for different types of annotations. Select the desired tab and refer to the information below. Modify as necessary.
4. When complete, click Close to accept the changes.

Line tab



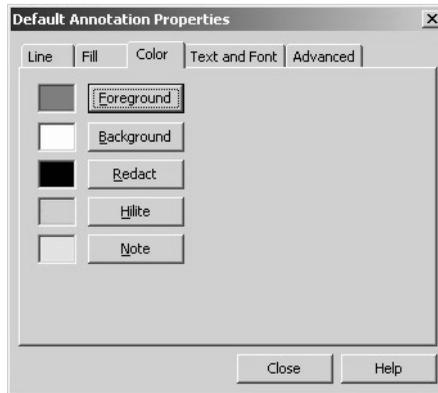
- **Width (points):** field This is used to change the width of the lines used in annotations.
- **Update** button This button is used to make the change.
- **Style:** list Use this dropdown list to select different line styles.

Fill tab



- **Mode:** list Use this dropdown list to select different fill opacities.
- **Patterns:** list Use this dropdown list to select different fill patterns.
- **Bitmap** button Use this button to select bitmap image (for Stamp annotation only)

Color tab



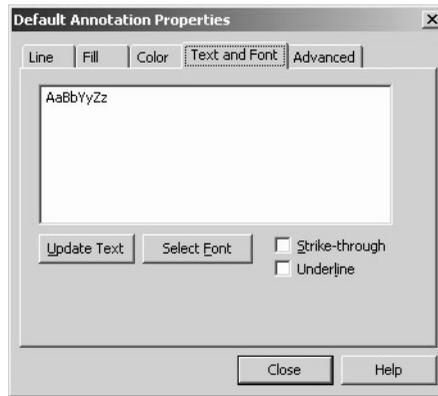
These buttons are used to set the color of several annotation types. Each button opens a color dialog for selection.

- **Foreground** button This is used to set the primary line color of the annotation.
- **Background** button This is used to set the background color of the annotation.
- **Redact** button This is used to set the color of the Redaction annotation.
- **Hilite** button This is used to set the color of the Hilite annotation.

- **Note** button

This is used to set the background color of the Note annotation.

Text and Font tab



- **Update Text** button

This button is used to make the change.

- **Select Font** button

This is used to select the font to be used in Text and Note annotations.

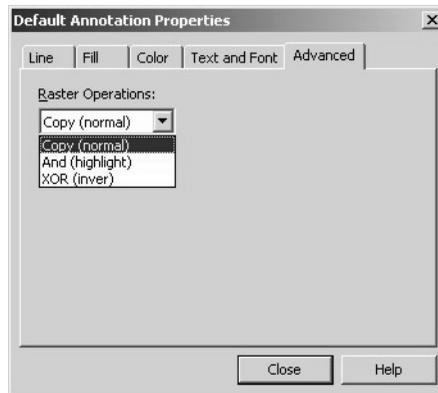
- **Strike-through** checkbox

This is used to add a strike-through (slanted line) to the displayed text

- **Underline** checkbox

This is used to add an underline to the displayed text.

Advanced tab



- **Raster Operations:** list

Select a Boolean operator from the list. This controls the way the annotations are displayed on the image.

6.1.6 Document Editing Overview

PageScope Router gives you the ability to edit and modify the page content of documents. This type of editing allows the document pages to be added, deleted, or reordered.

Important!

The following are important points when editing documents.

- Documents that are located in folders that the administrator has marked as “read only” cannot be edited.
- Only one user may edit a particular document at any one time. If the document is already in use by another user, a warning message will be displayed.
- You will be able to edit documents that are in multi-page TIFF file format, and multi-page Raster PDF format.
- These changes are applied to the underlying document once you have elected to “save” the document. Deleted pages cannot be retrieved once you have saved the document.

See 6.1.6.1 – Document Editing Functions.

6.1.6.1 Document Editing Functions

The following are the functions that are available to you. These functions are selected using the buttons found on the Thumbnail Viewer as shown below.



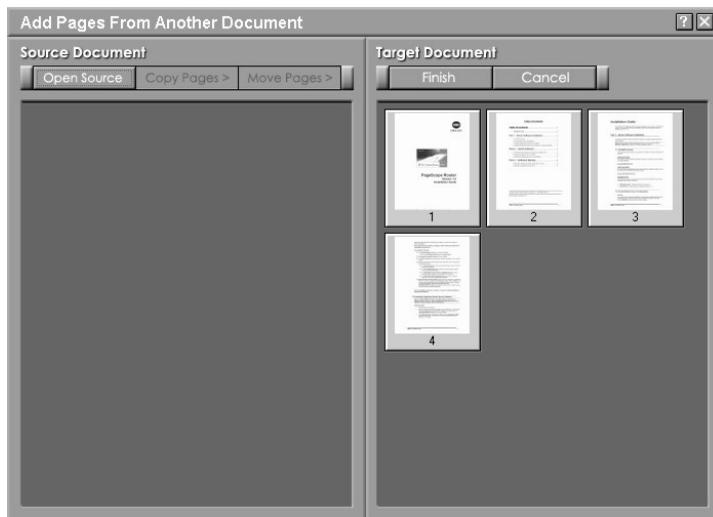
-  **Add pages** This feature enables you to add pages to a document.
-  **Remove pages** This operation removes the current page (page currently in the viewer).
-  **Reorder pages** This feature enables you to change the order of pages within a document.
-  **Clipboard support**
The PageScope Router Client provides the ability to use the Windows clipboard. You can copy a single page to the clipboard, and paste a page from the clipboard into a document.

6.1.6.2 Add Page

 **Add pages** - This feature enables you to add pages to a document by copying or moving pages from one document into another document. Using the mouse and a drag and drop interface, select the page(s) to be copied or moved from one document, and indicate where in the other document to place those pages. The additional pages become part of the target document once you have elected to “save” that document.

To Add a page

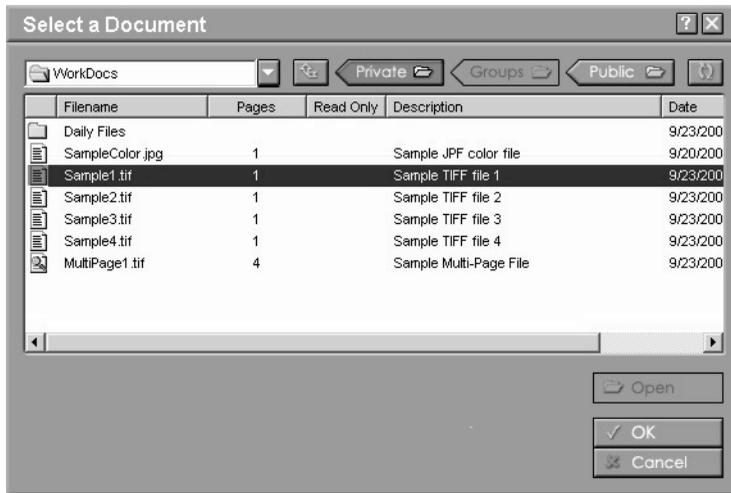
1. Select the document that you want to modify.
2. Enable the Thumbnail Viewer by clicking the  button. The document page thumbnail images will be displayed.
3. Click the  button. The following **Add Pages From Another Document** dialog is displayed.



4. The **Add Pages From Another Document** dialog allows you to open a different document, display the document pages, and copy or move specific pages to your current document. There are 2 sections in the dialog, the **Source Document** and **Target Document** sections. Each section displays thumbnail images of the pages in each document.

6.1 Working with Documents

5. In the **Source** Document section, click the button. The following **Select A Document** dialog is displayed.



6. The **Select A Document** dialog allows you to locate a document to add to the current document. This dialog is similar to the Document List Viewer of the Document Manager window. Use the buttons on the dialog and the following steps to obtain a document.
 - Select a Private, Group, or Public Repository
 - Highlight a folder and click the button. You may also double-click the highlighted folder. Repeat until the folder is located.
 - Highlight the desired document(s) and click the button.
 - The dialog will close and you will return to the Add Pages From Another Document dialog. The new document pages will be displayed in the Source Document section.
7. In the Source Document section, use the left mouse button to select the specific pages that will be copied or moved.
8. Click the button to insert a copy of the selected pages in the Target Document window.
9. Click the button to insert a copy of the selected pages in the Target Document window, and remove them from the Source Document.
10. In the Target Document section, use the left mouse button to select the specific page where the new pages will be inserted.
11. When you have completed the changes, click the button to accept the changes and close the dialog, or click to cancel the operation and close the dialog.
12. You will return to the Document Viewer and the new pages will be displayed in the thumbnail viewer.

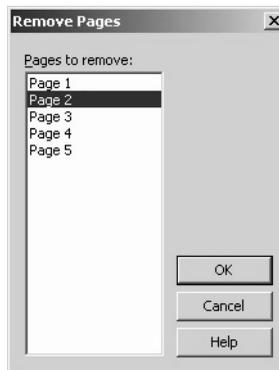
- When all document editing is completed, be sure to click the  button to save the changes to the document.

6.1.6.3 Remove Page

 **Remove pages** - This operation removes the current page (page currently in the viewer). After removal, the viewer will display the next page without any gaps in the document. If the page deleted was the final page in the document, the previous page is displayed. This change is applied to the underlying document once you have elected to “save” the document, and the page cannot be retrieved once the document has been saved.

To Remove a page

- Select the document that you want to modify.
- Enable the Thumbnail Viewer by clicking the  button. The document page thumbnail images will be displayed.
- In the Thumbnail Viewer, use the left mouse button to select the specific page(s) that will be removed. You may select multiple pages.
- Click the  button. The following dialog is displayed.



- The selected pages will be highlighted. Change the selections if desired.
- Click **OK** to proceed and remove the pages or **Cancel** to stop the operation.
- When all document editing is completed, be sure to click the  button to save the changes to the document.

To Remove a page (alternate method)

1. Select the document that you want to modify.
2. Enable the Thumbnail Viewer by clicking the  button. The document page thumbnail images will be displayed.
3. In the Thumbnail Viewer, use the left mouse button to select the specific page(s) that will be removed. You may select multiple pages.
4. Press the Delete key on the keyboard.
5. A dialog will be displayed with the question “Are you sure you want to delete the selected pages?”
6. Click **Yes** to proceed and remove the pages or No to stop the operation.
7. When all document editing is completed, be sure to click the  button to save the changes to the document.

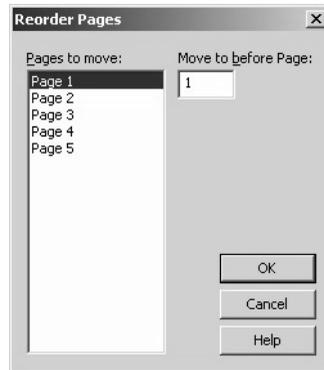
6.1.6.4 Reorder Page

 **Reorder pages** - This feature enables you to change the order of pages within a document. The feature will be available on the thumbnail view, and uses a drag and drop interface to move one or more pages from their current location within the file to another location. You may also use this interface to delete a selected page or pages. The change is applied to the underlying document once you have elected to “save” the document.

To Reorder pages

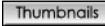
1. Select the document that you want to modify.
2. Enable the Thumbnail Viewer by clicking the  button. The document page thumbnail images will be displayed.
3. In the **Thumbnail Viewer**, use the left mouse button to select the specific page(s) that will be moved. You may select multiple pages.

- Click the  button. The following dialog is displayed.



- The selected pages to be moved will be highlighted. Change the selections if desired.
- Enter the destination page position in the Move to before Page: field. This is the location where the moved pages will be inserted.
- Click **OK** to proceed and move the pages or **Cancel** to stop the operation.
- When all document editing is completed, be sure to click the  button to save the changes to the document.

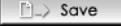
To Reorder pages (alternate method)

- Select the document that you want to modify.
- Enable the Thumbnail Viewer by clicking the  button. The document page thumbnail images will be displayed.
- In the Thumbnail Viewer, use the left mouse button to select the specific page that will be moved. You may only move single pages.
- While holding the left mouse button, drag the pointer from the selected page to the desired new target page position. Note: The selected page will be inserted **BEFORE** the target page.
- Release the left mouse button. The selected page will be inserted in the correct position.
- When all document editing is completed, be sure to click the  button to save the changes to the document.

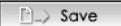
6.1.6.5 Clipboard Support

 **Clipboard support** - The PageScope Router Client provides the ability to use the Windows clipboard. You can copy a single page to the clipboard, and paste a page from the clipboard into a document.

To Copy a page to the clipboard

1. Select the document that you want to modify.
2. Enable the Thumbnail Viewer by clicking the  button. The document page thumbnail images will be displayed.
3. In the Thumbnail Viewer, use the left mouse button to select the specific page that will be copied. You may only select a single page.
4. Click the  button. The page will be copied onto the Windows clipboard.
5. When all document editing is completed, be sure to click the  button to save the changes to the document.

To Paste a page from the clipboard

1. Select the document that you want to modify.
2. Enable the Thumbnail Viewer by clicking the  button. The document page thumbnail images will be displayed.
3. Click the  button. The page will be pasted from the Windows clipboard into the thumbnail viewer.
4. When all document editing is completed, be sure to click the  button to save the changes to the document.

Capturing Documents

7

7.1 Capturing Documents

7.1.1 Capturing Overview

There are several ways in which documents may enter Repository Areas in a PageScope Router system. They include:

- FTP - (Document Route only)
- Email - (Document Route only)
- Twain scanner attached to the client PC
- Copy a file from the user's PC directly into an existing Repository Area.

The system also tracks the following information about each file entered into a Repository Area:

1. Color Management Completed (yes or no.)
2. Destination Color Space (sRGB, EFI RGB, or Apple RGB)

When the file first enters PageScope Router, Color Management Completed is always “no,” and the Destination Color Space is always blank. The values are updated after Color Management is performed. Color Management may only be performed on a file once.

7.1.2 Connecting a TWAIN Device

The PageScope Router system is capable of receiving images from a TWAIN device (scanner, digital camera, etc.) directly connected to the PageScope Router Client PC.

To use this ability, you must connect your TWAIN device correctly, and an appropriate device driver corresponding to the TWAIN device must be installed on your computer.

Refer to the instructions provided with your TWAIN device for information about device drivers and installation.

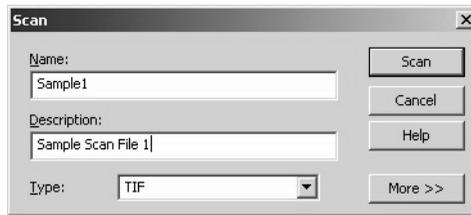
Once the TWAIN is correctly connected and installed, you may Scan with the TWAIN Device.

7.1.3 Scanning with a TWAIN Device

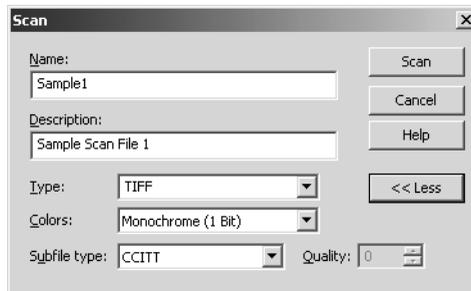
PageScope Router will use the software provided with your TWAIN scanner to perform the scan operation. You must first select a Repository Folder in which to store the scanned image.

To Scan with a TWAIN Device

1. Insure that the scanner is connecting properly. See *7.1.2 – Connecting a TWAIN Device*.
2. Open the Document Manager.
3. Select a Repository. Refer to section *5.1.3 – Repository Selection*.
4. Use the mouse and select the destination folder where the image will be stored.
5. Click the  button. The following dialog will be displayed.

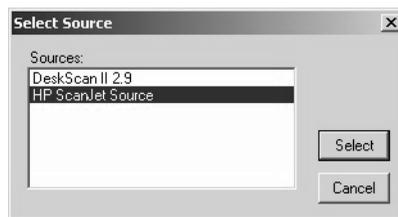


6. You must assign a name and specify a file format for the image that will be scanned and saved. Enter this information about the file in the specified fields.
 - **Name:** field Enter the desired name of the new image file into this field.
 - **Description:** field Enter an optional description for the file in this field.
 - **Type:** list This drop-down list contains the file formats in which the image may be saved. Select the desired format.
 - **More >>** button Click this button to display the following additional format configuration fields on the dialog. The available selections are TIF, JPG, or PDF.



- **Colors:** list This drop-down list contains the color resolution that is available for the selected file type. For a TIF or PDF file type, monochrome (1-bit) or color (8&24-bit) conversions are available. For a JPG file type, only the color conversion is available.
- **Subfile Type:** list This drop-down list contains additional format parameters that change according to the selected file type. For a TIF or PDF file type, a file compression may be specified.
- **Quality:** field This is only enabled when a JPG subfile type is selected. This number specifies the quality of the image. A value of 1 is the lowest compression (highest quality, large file) and 255 is the highest compression (lowest quality, small file). Type a value or use the arrow controls to specify a number from 1 to 255.

7. When all of the image file information has been entered, click the Scan button. The following **Select Source** dialog will be displayed.



8. This dialog will list all of the TWAIN Devices that are currently recognized by the PC. Select the TWAIN device you want to use in the **Sources:** list.
9. Click the **Select** button. The User Interface for the selected TWAIN scanner will be displayed. Refer to the manufacturer's documentation for information on completing the scan and performing any image editing. When scanning is complete and the image is accepted, the TWAIN scanner User Interface will close and the image will be placed in the selected Repository folder.

7.1.4 Receiving Documents by E-Mail

Documents can be entered into the PageScope Router system as E-mail attachments.

The PageScope Router Server monitors a mail queue that is configured by the PageScope Router Administrator. E-mails properly addressed can be sent to a user's Inbox or sent to a Private or Public Document Route to be processed according to the rules of the Route.

Below are the rules for addressing E-mails in a PageScope Router system for typical destinations. You may send E-mails directly to a PageScope Router User's Inbox, a User's Private Document Route, or a Public Document Route.

In each example, substitute the actual PageScope Router User Name, Server Name, and Document Route Name for the names in *italics* shown in each example.

E-mail Addressing Rules

1. Route to a PageScope Router OS Users Inbox
 - “*UserName@PSRServerName*”
2. Route to a PageScope Router Non-OS Users Inbox
 - “*PSR.UserName@PSRServerName*”
3. Route to a PageScope Router OS Users Private Document Route
 - “*UserName.DocumentRouteName@PSRServerName*”
4. Route to a PageScope Router Non-OS Users Private Document Route
 - “*PSR.UserName.DocumentRouteName@PSRServerName*”
5. Route to a Public Document Route
 - “*DocumentRouteName@PSRServerName*”

See 8.1.6 – Document Route Routing.

7.1.5 Receiving Documents by FTP

Documents can be entered into a PageScope Router Repository folder by sending them to an FTP site.

The PageScope Router Server monitors one or more FTP directories that are configured by the PageScope Router Administrator. Files arriving in these directories are then processed according to the appropriate Document Route. After processing, the file is removed from the FTP directory.

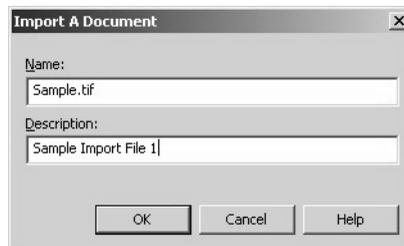
See 8.1.6 – Document Route Routing.

7.1.6 Importing a File

PageScope Router allows you to Import or copy a file directly from your PC into a Repository folder.

To Copy a file from a PC

1. Open the Document Manager.
2. Select a Repository. Refer to 5.1.3 – Repository Selection.
3. Use the mouse and select the destination folder where the file will be saved.
4. Click the  button.
5. The standard Windows File Open browse dialog will be displayed. Select the desired file.
Note: Only supported file types (TIF, JPG, PDF) may be selected.
6. The following **Import a Document** dialog will be displayed.



7. Enter the following information about the file in the specified fields.
 - **Name:** field Enter the desired name of the new image file into this field.
 - **Description:** field Enter an optional description for the file in this field.
8. Click **OK** to finish the operation and copy the file into specified location.

Document Routes

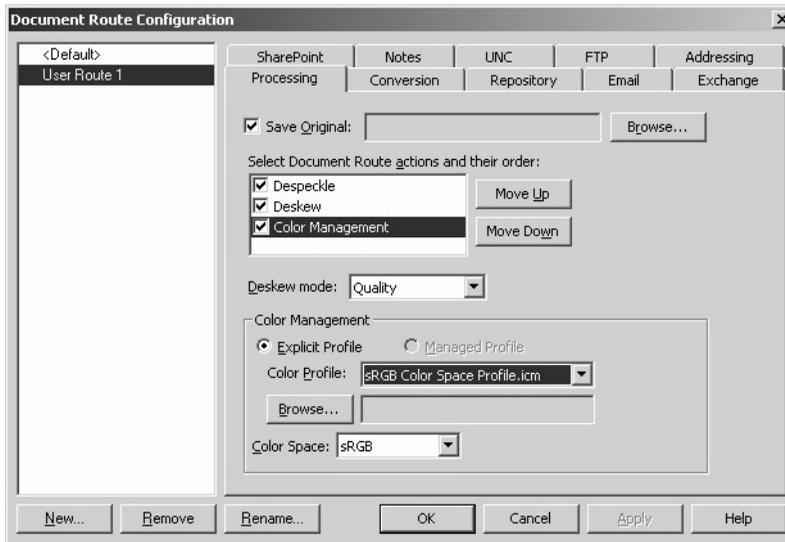
8

8.1 Document Routes

8.1.1 Creating a Document Route

A new Document Route is created using the following steps.

1. Start the PageScope Router client and Login.
2. Click the **Configure** button on the Document Manager window.
3. The **Document Route Configuration** dialog will open.



4. The dialog contains various dialog “tabs” used to configure the processing and routing functions of the Document Route, and the default tab is the Processing tab.
5. Click the New button. The **Name Document Route** dialog is displayed.
6. Type a name for the new Document Route. Click **OK** to accept the name or **Cancel** to return to the previous dialog.
7. Click the **Apply** button on the **Document Route Configuration** window.
8. The new Document Route has been created, and will now appear on the drop-down list in all of the Configuration dialog tabs. Before using it, you must first configure the Document Route. See *8.1.7 – Configuring Document Route Settings* for information to setup the Document Route.

8.1.2 Remove a Document Route

To Remove a Document Route

1. Start the PageScope Router client and Login.
2. Click the **Configure** button on the Document Manager window.
3. The **Document Route Configuration** dialog will open.
4. Select a Document Route from the list. Click the Remove button at the bottom of the dialog.
5. The Document Route name status indicator will change to a ✕.

Note

The Remove button will change to a Restore button. Click this Restore button to restore a Document Route that was selected accidentally. The Document Route name status indicator will return to a ✓.

6. Click **Apply** to remove the Document Route. **Note:** You cannot restore a Document Route once you click **Apply**.

8.1.3 Rename a Document Route

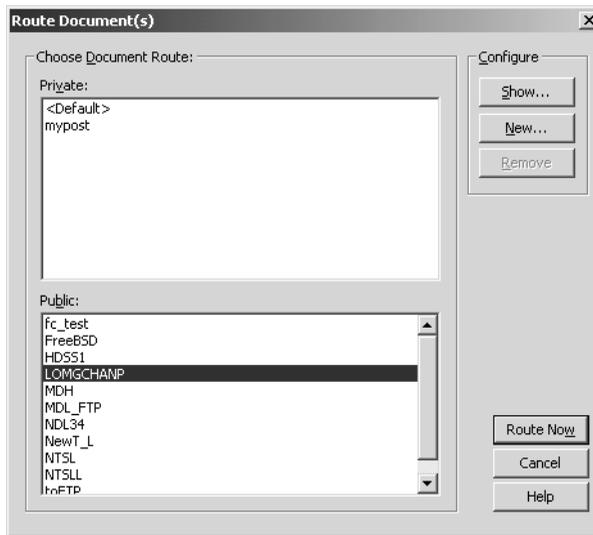
To Rename a Document Route

1. Start the PageScope Router client and Login.
2. Click the **Configure** button on the Document Manager window.
3. The **Document Route Configuration** dialog will open.
4. Select a Document Route from the list. Click the **Rename** button at the bottom of the dialog.
5. The **Name Document Route** dialog will open.
6. Enter a new Document Route name, and click **OK** to apply the change.

8.1.4 Using Document Routes

To Route a Document

1. Open the Document Manager.
2. Refer to 5.1.2 – *Repository Viewer* and select the Repository document(s) that you want to route. You may select multiple documents.
3. Click the  button on the left side of the Document Manager window.
4. The following **Route Document(s)** dialog will be displayed.



This dialog will list all of the Document Routes that are available. This will include all of the Public Document Routes, and any Private Document Routes that you have created.

Note

You cannot access Private Document Routes that belong to another user.

5. **Choose Document Route:** section - Select the desired Document Route from those listed in the Private: or Public: lists.
6. **Configure** section - If necessary, the buttons in this section allow you to view Document Route information, create a new route, or remove a route.

- **Show...** button

This will display the current configuration of the selected Document Route. It will open the Document Route Configuration dialog. You may select all of the tab dialogs to view the information, but you cannot change any settings.

- **New...** button This may be used to create a new Document Route. It will open the Confirmation dialog. See *8.1.1 – Creating a Document Route*.
 - **Remove** button This may be used to remove a Document Route. It will open the Confirmation dialog. See *8.1.2 – Remove a Document Route*.
7. Once the Document Route has been selected, click the **Route Now** button. An acknowledgement message will be displayed stating that the document has been successfully submitted for processing. The selected document(s) will be processed and routed according to the Document Route configuration.

Important!

Once the document has been submitted for processing, the specified action may not take place immediately. The Routing action is placed in a queue on the PageScope Router Server, and the delay will depend on the volume of Routing actions to accomplish, other server loading factors, and whether the PageScope Router Routing Service is running. This method prevents the loss of important document routing.

8.1.5 Document Route Processing

PageScope Router allows you to automatically perform image processing on documents that are routed by a Document Route. The processing functions are selected for each Document Route using the Document Route Configuration dialog, and the functions are performed on the selected documents, in the selected order, before the documents are routed.

The functions available are:

- Despeckle
- Deskew
- Color Management or Color Matching using ICC Color Profiles

Despeckle

Documents sometimes contain black specks due to faulty printing or copying. The Despeckle function removes those specks from scanned black and white images.

Deskew

The deskew operation corrects image skew introduced by improper positioning of the original on the scan device at scan time.

Color Management

The Color Matching process matches the color space of the MFP device used to obtain the document to the output devices and displays used by the PageScope Router system. See *6.1.4 – Color Management* for more information.

8.1.6 Document Route Routing

The PageScope Router system routes the modified documents after all image-processing operations have been completed. You may specify a set of destinations to which the documents should be distributed, and at least one destination must be specified. **Note:** The order in which a document is distributed to these destinations cannot be specified.

The destinations are configured by using the appropriate “Tab Dialog” on the Document Route Configuration dialog. The following is a list of destination types that can be specified.

Routing Destinations

- **PageScope Router Repository Folder Routing**

The modified documents can be placed into a Repository Folder to which you have access. The user specifies the PageScope Router folder into which a copy of the modified document(s) shall be placed. If you are using a Private Document Route, you may specify a folder or subfolder within your own Private Repository Area, a folder within the Public Repository Area, or a folder within the Repository Area of any Group of which you are a member.

- **Email Server Routing**

The modified documents can be sent as an attachment via the server’s SMTP Service. You only need to provide a valid list of email addresses.

- **Microsoft Exchange Server Routing**

The modified documents can be placed in a Microsoft Exchange folder. You must provide an authorized User name and Password to access the Exchange folder.

- **Microsoft SharePoint Portal Server Routing**

The modified documents can be placed in a Microsoft SharePoint Portal Server folder. You must provide an authorized User name and Password to access the SharePoint Portal Server folder.

- **Lotus Notes Routing**

The modified documents can be placed into a Lotus Notes database folder. You must provide an authorized User name and Password to access the Lotus Notes database folder. Note that only Lotus Domino Version 5.0 will be supported.

- **UNC Path Routing**

The modified documents can be placed in a UNC Path location. A UNC path location is the Universal Naming Convention identifier for a folder residing at a network location. To access this location you must have a User-name and Password for an account with the correct read and write security rights.

- **FTP Server Routing**

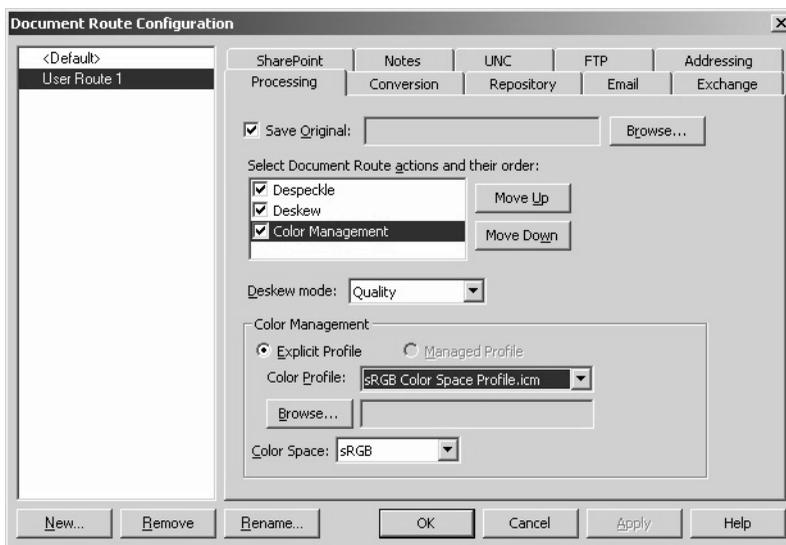
The modified documents can be placed in an FTP folder. You must provide an authorized User name and Password to access the FTP folder.

8.1.7 Configuring Document Route Settings

The Document Routes used in PageScope Router are configured by modifying information displayed on a Document Route Configuration dialog.

To access the configuration dialog

1. Start the PageScope Router client and Login.
2. Click the **Configure** button on the Document Manager window.
3. The **Document Route Configuration** dialog will open.



This dialog contains several “tab dialogs” used to configure the processing and routing functions of the Document Route.

4. Select a Document Route from the list displayed on the left.

8.1 Document Routes

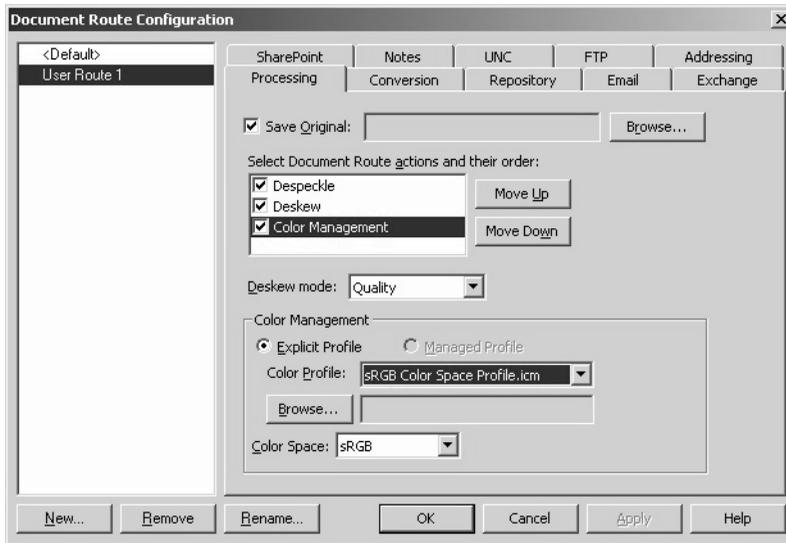
5. Select the Tab Dialog for each required operation and enter the appropriate information using the fields and controls provided on each Tab. **Note:** The Document Route name status indicator will change to a ✓, indicating that the selected Document Route is the route being edited.
6. When the configuration has been completed, click the **OK** button to accept the entered information and close the dialog or the **Cancel** button to cancel the operation.

Refer to the following sections for information to configure each function.

- *8.1.7.1 – Processing Tab*
- *8.1.7.2 – Conversion Tab*
- *8.1.7.3 – Repository Tab*
- *8.1.7.4 – Email Tab*
- *8.1.7.5 – Exchange Tab*
- *8.1.7.6 – SharePoint Tab*
- *8.1.7.7 – Notes Tab*
- *8.1.7.8 – UNC Tab*
- *8.1.7.9 – FTP Tab*

8.1.7.1 Processing Tab

The Processing tab dialog contains the following data fields and buttons to configure Color Management and image processing during Document Routing.



Document Route Selection

- **Document Route** list box This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button This button is used to create a new Document Route.
- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Dialog Functions

- **Save Original** checkbox When checked, an unmodified copy of the original document will be saved in the Repository folder specified.
- **(Save Original) Repository Folder:** field This field contains the name of the Repository location where the original document will be saved. Enter the location or use the Browse button to specify a location. See the section **Save “Original” to PageScope Router Folder Option** below for additional information.

- **Select Document Route** actions and their order: section
This box contains the image processing functions that can be applied to the document during routing. Each function is controlled by a checkbox, and the order in which the functions are applied can be changed. You can select any or none of the functions.
- **Despeckle** checkbox
When checked, the despeckle operation is performed on all pages of the document during routing. This function removes specks from scanned black and white images only.
- **Deskew** checkbox
When checked, the deskew operation is performed on all pages of the document during routing. The deskew operation corrects image skew introduced by improper positioning of the original on the scan device at scan time.
- **Color Management** checkbox
When checked, the color management operation is performed on all pages of the document during routing. The Color Management section controls listed below are also enabled. This process matches the color space of the MFP device used to obtain the document to the output devices and displays used by the PageScope Router system.
- **Move Up/Down** buttons
These buttons are used to change the order of the functions. A function is highlighted and the buttons used to move the placement.
- **Deskew mode:** list
The operation can be configured to give the processing priority to Speed or Quality. Choose Speed for large documents or when processing time is critical, or choose Quality for small documents or when processing accuracy is most important.
- **Color Management** section
This section contains controls for specifying the ICC color profile for the routed document, as well as the Color Space for the document. They are enabled when the Color Management checkbox is checked.

1. **Managed Profile** radio button selected - This is the default selection, and the color profile that will be used for the selected MFP is specified by the PageScope Router Administrator.

- **Device:** field
This drop-down list is used to select the MFP device that is used to obtain the document.

- **Background Remove** checkbox
When checked, this indicates to the system the setting that should be used when selecting the appropriate ICC profile for color management.
 - **Color Space:** field
This drop-down list is used to select the Color Space for the modified document. It can be sRGB, EFI RGB, or Apple RGB.
2. **Explicit Profile** radio button selected - This selection allows you to specify and use a custom color profile with the MFP.
- **Color Profile:** list
This drop-down list contains the ICC Color Profiles available in the PageScope Router system.
 - **Browse** button
You can use the Browse button to search for a new ICC Profile to be used. The selected file will be used and also uploaded into the PageScope Router system.
Note: You must select a color profile in this mode.
 - **Color Space:** field
This drop-down list is used to select the Color Space for the modified document. It can be sRGB, EFI RGB, or Apple RGB.

Dialog Controls

- **OK** button
This button is used to accept the entered information and close the dialog.
- **Cancel** button
This button is used to cancel the operation.
- **Apply** button
This button is used to accept the entered information.

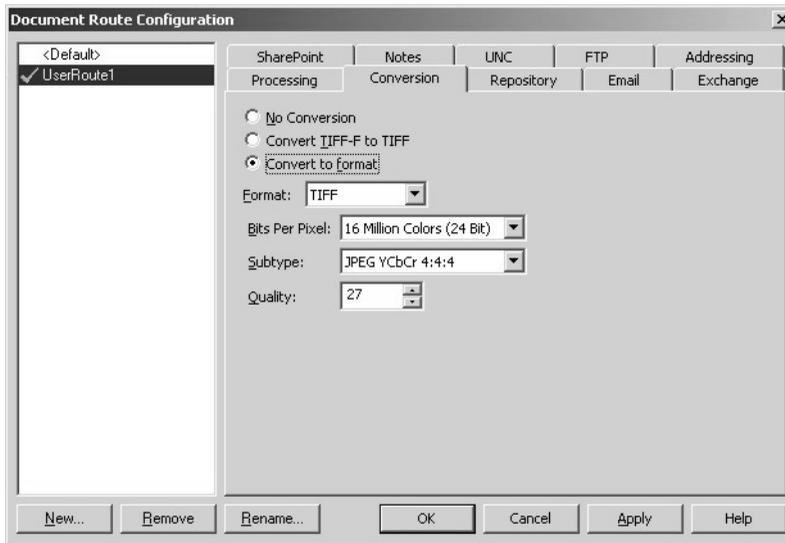
Save “Original” to PageScope Router Folder Option

You may specify a PageScope Router Folder into which the “original” document shall be saved by enabling the checkbox on the Processing Tab dialog. The following rules are used for selecting the destination folder when Save Original is selected.

- **Private Document Route**
Valid destinations are limited to the user’s Private Repository Area, Repository Areas of Groups of which the user is a member, or Public Repository Areas.
- **Private Document Route**
If no destination is entered, the “original” document will go to your inbox.
- **Public Document Route**
Valid destinations are limited to all Group Repository Areas and all Public Repository Areas.
- **Public Document Route**
A destination must be specified.

8.1.7.2 Conversion Tab

The Conversion tab dialog contains the following data fields and buttons to configure File Format conversion during Document Routing.



Document Route Selection

- **Document Route** list box This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button This button is used to create a new Document Route.
- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Dialog Functions

- **No Conversion** radio button When this button is selected, no file format conversion is performed by the Route, and the format controls are disabled.
- **Convert TIFF-F to TIFF** radio button When this button is selected, the only file format conversion that is performed by the Route is TIFF-F to TIFF.

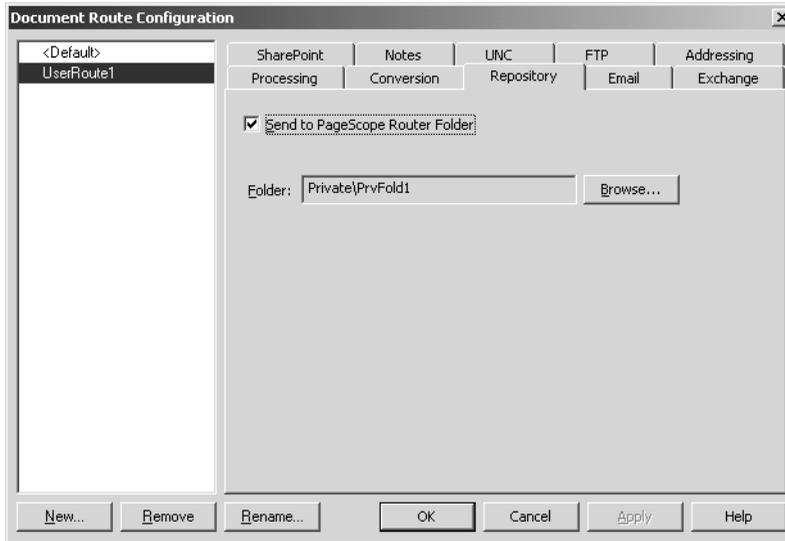
- **Convert to Format** radio button
When this button is selected, file format conversion is enabled and the following controls are enabled.
- **Format:** list
This drop-down list contains the file types to which the document may be converted. The available selections are TIFF, JPEG, PDF or TIFF (Single Page).
- **Bits Per Pixel:** list
This drop-down list contains the color resolution that is available for the selected file type. For a TIF or PDF file type, monochrome (1-bit) or color (8&24-bit) conversions are available. For a JPG file type, only the color conversion is available.
- **Subtype:** list
This drop-down list contains additional format parameters that change according to the selected file type. For a TIF or PDF file type, a file compression may be specified.
- **Quality:** field
This is only enabled when a JPG subfile type is selected. This number specifies the quality of the image. A value of 1 is the lowest compression (highest quality, large file) and 255 is the highest compression (lowest quality, small file). Type a value or use the arrow controls to specify a number from 1 to 255.

Dialog Controls

- **OK** button
This button is used to accept the entered information and close the dialog.
- **Cancel** button
This button is used to cancel the operation.
- **Apply** button
This button is used to accept the entered information.

8.1.7.3 Repository Tab

The Repository tab dialog contains the following data fields and buttons to configure Document Routing to a Repository Folder.



Document Route Selection

- **Document Route** list box This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button This button is used to create a new Document Route.
- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Dialog Functions

- **Send to PageScope Router Folder** checkbox When this is checked, the modified documents are routed to the Repository folder specified in the Folder field.
- **Folder:** field This field contains the Repository folder to which the documents are routed. You can either type the folder name or use the Browse button to search for a folder.

- **Browse** button

This button opens the Repository folder for routing dialog used to locate a specific Repository folder.

Note

You may specify a folder or subfolder within your own Private Repository Area, a folder within the Public Repository Area, or a folder within the Repository Area of any Group of which you are a member.

Dialog Controls

- **OK** button

This button is used to accept the entered information and close the dialog.

- **Cancel** button

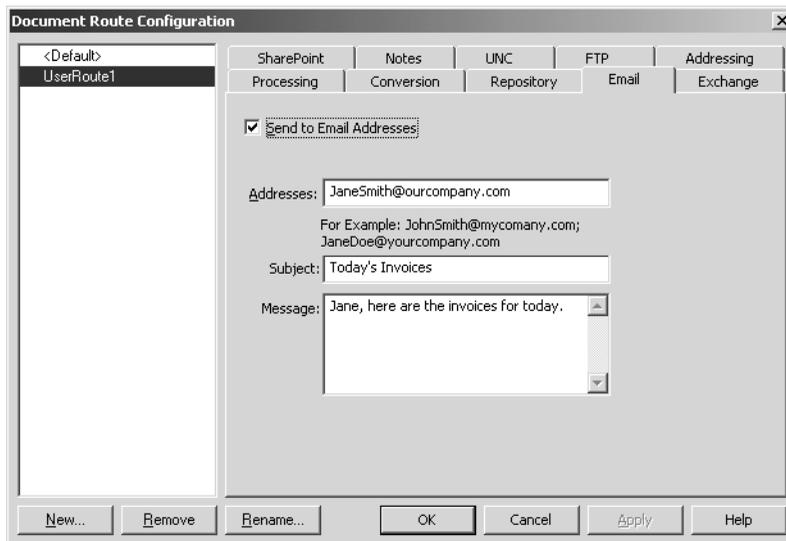
This button is used to cancel the operation.

- **Apply** button

This button is used to accept the entered information.

8.1.7.4 Email Tab

The Email tab dialog contains the following data fields and buttons to configure Document Routing to Email Addresses.



Document Route Selection

- **Document Route** list box

This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.

- **New** button

This button is used to create a new Document Route.

- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Dialog Functions

- **Send to Email Addresses** checkbox
When this is checked, the modified documents are routed to the Email addresses specified in the Addresses field.
- **Addresses:** field This field contains the list of Email Addresses to which the documents are routed.
- **Subject:** field This field contains a subject for the email to be sent.
- **Message:** field This field contains a message for the email to be sent.

Note

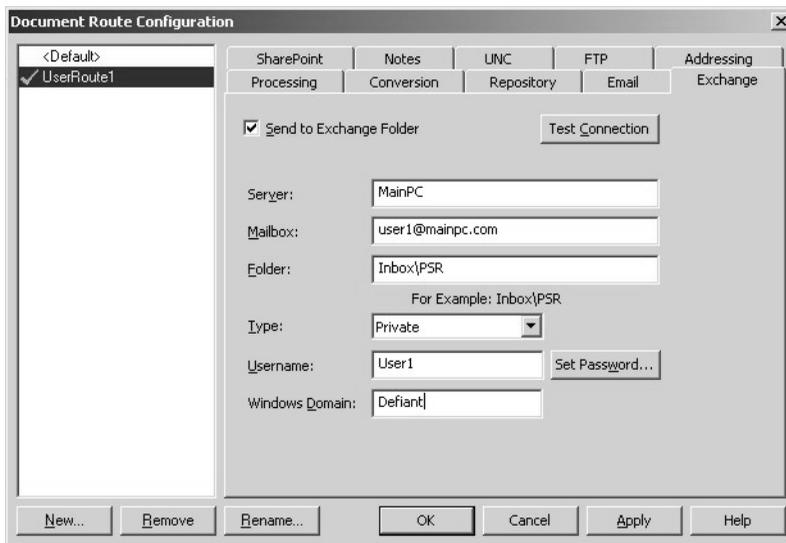
The PageScope Router system will verify each email address listed for proper format (e.g. user@domain), but will NOT verify that the email addresses exist or are otherwise valid.

Dialog Controls

- **OK** button This button is used to accept the entered information and close the dialog.
- **Cancel** button This button is used to cancel the operation.
- **Apply** button This button is used to accept the entered information.

8.1.7.5 Exchange Tab

The Exchange tab dialog contains the following data fields and buttons to configure Document Routing to a Microsoft Exchange server.



Document Route Selection

- **Document Route** list box This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button This button is used to create a new Document Route.
- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Dialog Functions

- **Send to Exchange Folder** checkbox When this is checked, the modified documents are routed to the Microsoft Exchange Folder specified by the data in the following fields.
- **Test Connection** button This button is used to verify the network access and security credentials for the connection that is specified by the data field information to insure that PageScope Router will be able to perform the routing.

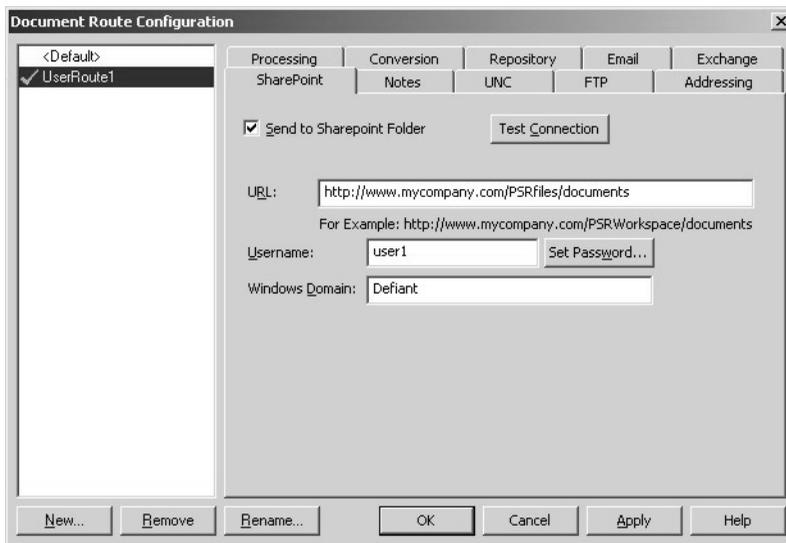
- **Server:** field This field contains the name of the Microsoft Exchange Server.
- **Mailbox:** field This field contains the Mailbox name in the Microsoft Exchange Server.
- **Folder:** field This field contains the name of the Microsoft Exchange Folder to which the documents are routed.
- **Type:** list Select the Exchange folder type from the list.
- **Username:** field This field contains the Username that PageScope Router should use to authenticate to the Microsoft Exchange Server.
- **Set Password...** button Use this button to set the Password that PageScope Router should use with the Username to authenticate to the Microsoft Exchange Server.
- **Windows Domain:** field This field contains the name of the Network Domain in which the Microsoft Exchange Server is located.

Dialog Controls

- **OK** button This button is used to accept the entered information and close the dialog.
- **Cancel** button This button is used to cancel the operation.
- **Apply** button This button is used to accept the entered information.

8.1.7.6 SharePoint Tab

The SharePoint tab dialog contains the following data fields and buttons to configure Document Routing to a Microsoft SharePoint Portal server.



Document Route Selection

- **Document Route** list box This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button This button is used to create a new Document Route.
- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Dialog Functions

- **Send to SharePoint Folder** checkbox When this is checked, the modified documents are routed to the SharePoint Portal Server Folder specified by the data in the following fields.
- **Test Connection** button This button is used to verify the network access and security credentials for the connection that is specified by the data field information to insure that PageScope Router will be able to perform the routing.

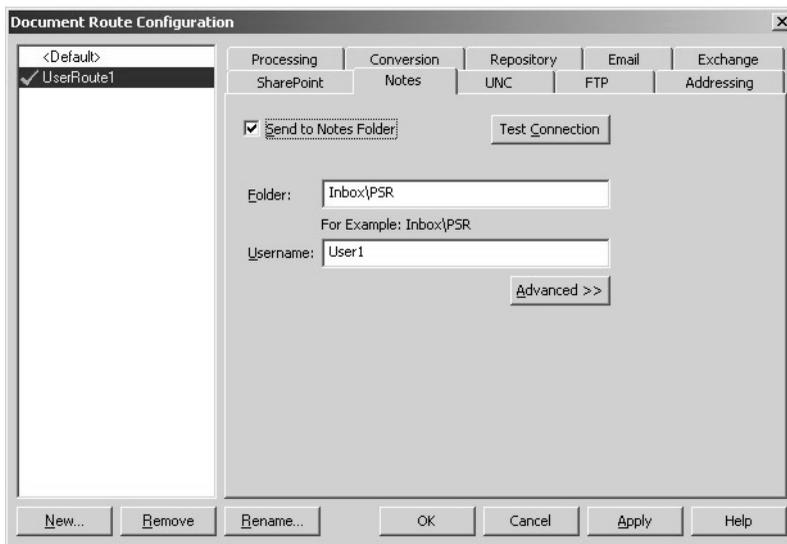
- **URL:** field This field contains the URL address of the SharePoint Portal Server Folder to which the documents are routed.
- **Username:** field This field contains the Username that PageScope Router should use to authenticate to the Microsoft SharePoint Portal Server.
- **Set Password...** button Use this button to set the Password that PageScope Router should use with the Username to authenticate to the Microsoft SharePoint Portal Server.
- **Windows Domain:** field This field contains the name of the Network Domain in which the Microsoft SharePoint Portal Server is located.

Dialog Controls

- **OK** button This button is used to accept the entered information and close the dialog.
- **Cancel** button This button is used to cancel the operation.
- **Apply** button This button is used to accept the entered information.

8.1.7.7 Notes Tab

The Notes tab dialog contains the following data fields and buttons to configure Document Routing to a Lotus Notes Folder.



Document Route Selection

- **Document Route** list box This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button This button is used to create a new Document Route.
- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Dialog Functions

- **Send to Notes Folder** checkbox When this is checked, the modified documents are routed to the Lotus Notes Folder specified by the data in the following fields.
- **Test Connection** button This button is used to verify the network access and security credentials for the connection that is specified by the data field information to insure that PageScope Router will be able to perform the routing.
- **Folder:** field This field contains the name of the Lotus Notes Folder to which the documents are routed.
- **Username:** field This field contains the Username that PageScope Router should use to authenticate to the Lotus Notes Server.
- **Advanced >>** button When clicked, additional fields will be displayed as shown below.

The screenshot shows a dialog box with the following fields and controls:

- Send to Notes Folder:** (checkbox)
- (button)
- Folder:** (text field)
- For Example: Inbox\PSR. (text)
- Username:** (text field)
- (button)
- Database:** (text field)
- Server:** (text field)

- **Database** field This field contains the name of the Lotus Notes database to be used.

8.1 Document Routes

- **Server** field This field contains the name of the Lotus Notes Server.
- **Simplified <<** button When clicked, the database and server selection fields will not be displayed on the dialog.

Note

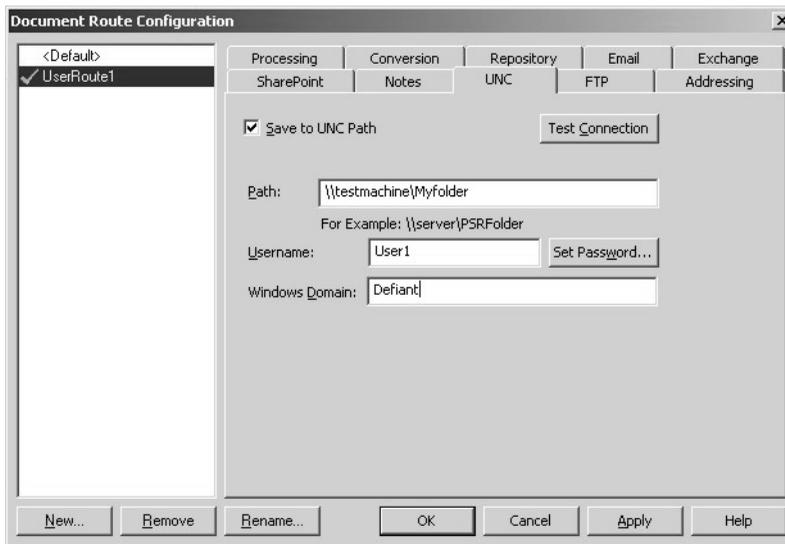
Only Lotus Domino Version 5.0 will be supported.

Dialog Controls

- **OK** button This button is used to accept the entered information and close the dialog.
- **Cancel** button This button is used to cancel the operation.
- **Apply** button This button is used to accept the entered information.

8.1.7.8 UNC Tab

The UNC tab dialog contains the following data fields and buttons to configure Document Routing to a UNC Path.



Document Route Selection

- **Document Route** list box This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button This button is used to create a new Document Route.

- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Dialog Functions

- **Save to UNC Path** checkbox When this is checked, the modified documents are routed to the UNC path specified by the data in the following fields.
- **Test Connection** button This button is used to verify the network access and security credentials for the connection that is specified by the data field information to insure that PageScope Router will be able to perform the routing.
- **Path:** field This field contains the UNC path to which the documents are routed.
- **Username:** field This field contains the Username of an account that has read-and-write access to the UNC path specified. The PageScope Router Server will use these credentials to access the UNC path or the location used.
- **Set Password...** button Use this button to set the Password that PageScope Router should use with the Username.
- **Windows Domain:** field This field contains the name of the Network Domain in which the UNC Path is located.

Note

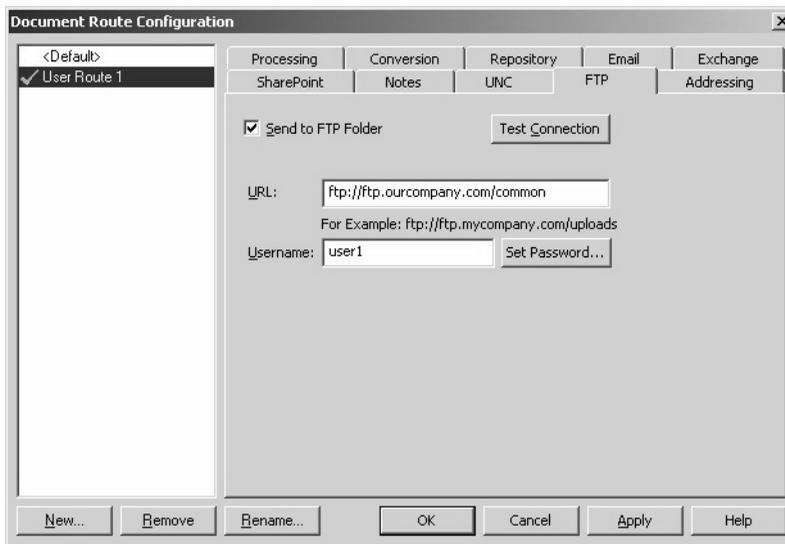
If the destination location contains a file with the same name as the file being written, the PageScope Router Server follows the Windows convention for multiple similar filenames in a directory (e.g. "filename.ext", "filename (2).ext", "filename (3).ext")

Dialog Controls

- **OK** button This button is used to accept the entered information and close the dialog.
- **Cancel** button This button is used to cancel the operation.
- **Apply** button This button is used to accept the entered information.

8.1.7.9 FTP Tab

The FTP tab dialog contains the following data fields and buttons to configure Document Routing to an FTP Folder.



Document Route Selection

- **Document Route** list box
This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button
This button is used to create a new Document Route.
- **Remove** button
This button is used to remove the selected Document Route.
- **Rename** button
This button is used to rename the selected Document Route.

Dialog Functions

- **Send to FTP Folder** checkbox
When this is checked, the modified documents are routed to the FTP Folder specified by the data in the following fields.
- **Test Connection** button
This button is used to verify the network access and security credentials for the connection that is specified by the data field information to insure that PageScope Router will be able to perform the routing.

-
- **URL:** field This field contains the FTP Folder to which the documents are routed.
 - **Username:** field This field contains the authorized Username for the location used.
 - **Set Password...** button Use this button to set the Password that PageScope Router should use with the Username.

Note

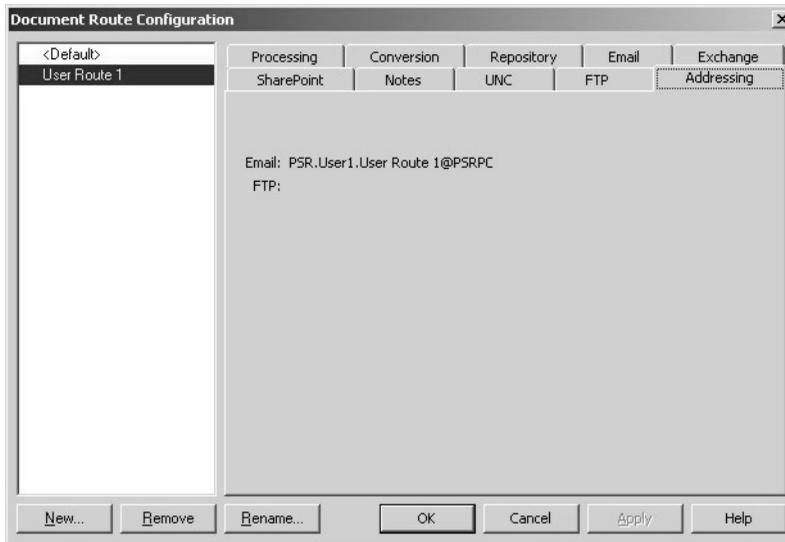
If the destination location contains a file with the same name as the file being written, the PageScope Router Server follows the Windows convention for multiple similar filenames in a directory (e.g. "filename.ext", "filename (2).ext", "filename (3).ext")

Dialog Controls

- **OK** button This button is used to accept the entered information and close the dialog.
- **Cancel** button This button is used to cancel the operation.
- **Apply** button This button is used to accept the entered information.

8.1.7.10 Addressing Tab

The Addressing tab dialog contains the following information fields.



Document Route Selection

- **Document Route** list box This is a list of available Document Routes, used to select the Document Route that will be modified. A ✓ next to a Document Route name indicates that the selected Document Route is being edited.
- **New** button This button is used to create a new Document Route.
- **Remove** button This button is used to remove the selected Document Route.
- **Rename** button This button is used to rename the selected Document Route.

Information Fields

- **Email:** field This is the email address of this Document Route.
- **FTP:** field This is the FTP folder that is configured with this Document Route.

Dialog Controls

- **OK** button This button is used to close the dialog.
- **Cancel** button This button is used to cancel the operation.

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- For the preservation of forests, this manual was made using bagasse (sugar cane fibers used in the production of wood-free paper).

TREEFREE



- For the protection of the global environment and human welfare, this manual was printed using soy ink.



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