



REQUIREMENTS EXPRESS SYSTEM TECHNICAL MANUAL size estimation results(CTRL + CLICK)

Version 1.0.5 <u>Last revision</u> date: 04th October 10

CS-18/2010 - "Requirement Express System"



Requirements Express System – *i***View scanning utility Installation steps** and screen shots

Before starting installation ensure that you have the following files to run setup.

- iview425_setup
- irfanview_plugins_425_setup

Double click on the "iview425_setup", a new window will appear as in Figure 1.

0.000				
s program will install	IrfanView version	4.25 on your syste	m.	
reate shortcuts:				
Create IrfanView	shortcut on the D	esktop		
Z Create IrfanView	Thumbnails short	cut on the Desktop		Uncheck all
Z Create IrfanView	shortcut in Start 1	Menu Programs		
For current user (only			
For all users				
stallation folder:				12 Januari Martina da Ka
D:\Program Files\Irf	anView∖			Browse
1 N S				
):\Program Files\Irf	anView\			Browse

Figure 1

Select the path where you want to install requirementExpress iViewer followed by clicking "Next" twice.

This will open a new window as shown in Figure 2.



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3D Format * Bitmap era Format (JPG only) * Clipboard W Format *
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Click "Select all" button followed by clicking "Next".

Irfan¥iew Setup	
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Simply, click "next" on this screen, without any changes.



Figure 4

By clicking "Next" button, a new popup will appear as shown in Figure 5.



Accept by clicking "Yes", to begin the installation process.



Figure 6

LIFE

Click "Done" to complete installation on your system.

Congratulations! You have successfully configured and installed viewing and scanning software utility.



Section 2

Requirements Express System - *i***View configuration steps and screen views**



Figure 7

Double click the shortcut shown in Figure 7, as available on your desktop. This will open up a new window shown in Figure 8.



Figure 8

Click "File > Select TWAIN Source"... A pop up window will prompt you to select the scanning device.

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Select the "scanning device, and click "select".



Now again click on "File> Acquire/Batch scanning..." A new window will appear as shown in Figure 10.

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Output file name:	ScanImage	
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Increment:	1	
Number of digits:	2	
	Skip existing files	
	Remember last scan counter (set as start)	
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	Save as: TIF - Tagged Image File Format	Options
	🔲 Save as multipage image (if TIF format us	ed)
n.	OK Cancel	

Figure 10

Click on the "browse" button to set the standard destination folder for saving the electronic documents. You can choose any folder name but it's recommended that you choose "RequirementExpress" as shown in Figure 10.



Click "Options" button, to set the saving options

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ile loaded (use File->Open	mend)			

Figure 11

Ensure, settings are configured, as in the figure above then click the "OK" button.

Congratulations your one time "configuration settings" are done!



Section 3

Electronic conversion procedure – Requirements Express – *i*View

Next we are ready to being the scanning and electronic conversion process. Lets begin!

It is recommended that you make batches of single page files and multi page files, for quick conversion.



Figure 12

Double click on the shortcut snap, to open the scanning utility



Figure 13

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Scanning procedure for a single page document:

<u>STEP 1:</u> Click "File > Select TWAIN Source..."

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Select Source	x
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Sele	ect
Can	
No nie loaded (use File->Open menu)	11.

Figure 14

Select the scanning device and click "select".



STEP 2: Click on "File > Acquire/Batch scanning..."

cquire/Batch Scannin	a - Setup	
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• Multiple images (bai	ch mode): save acquired images as hies	
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Number of digits:	2	
	Skip existing files	
	Remember last scan counter (set as start)	
Destination director	y: D:\requirementExpress\	Browse
	Save as: TIF - Tagged Image File Format	Options
	🔲 Save as multipage image (if TIF format u	used)

Figure 15



<u>STEP 3:</u>

Click "browse" to set the destination folder for saving electronic documents. You can choose any folder name recommend is "RequirementExpress".

EIrfan¥iew		<u>- 0 ×</u>
ile Edit Image Options	View Help	
Acquire/Batch Scannin	a - Setup	
Acquire method:		
C Single image: Show	acquired image in viewer	
Close TWAIN	lialog after acquiring an image	
 Multiple images (Ba 	tch mode): Save acquired images as files	
Output file name:	ScanImage	
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Increment:	1	
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Destination director	y: D:\requirementExpress\	Browse
	Save as: TIF - Tagged Image File Format	Options
	📕 Save as multipage image (if TIF format u	sed)
1		
	UK Cancel	



Click "OK" on this window, a new window will open as shown in Figure 17.



STEP 4:

Place the single page paper document on the scanner tray. Click "preview" button to view the Image on screen.

STEP 5:

Select "Scan Type > Gray "(as shown in the Figure 18).



Figure 18



<u>STEP 6:</u>

Select "Purpose > OCR Text" (as shown in Figure 19).





STEP 7:

Select "area to be scanned" by using the "red dashes" selection line through your mouse.

Ensure that in the status bar, it is showing a similar status.

i Gray Text 8.32 x 10.65 Inches 100% 300dpi 7.60 MB 📝

Figure 20

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"Gray Text" and "300 dpi", are parameters that you should be careful about. This will ensure good document quality.

<u>STEP 8:</u>

Next, click the "SCAN" button.

The electronic image of the document will be saved to the folder you have specified earlier. (E.g. Requirements Express)

To scan another single page, place the new document page paper on the scanner tray and repeat STEPS from 4 to 8 and so on.

Scanning procedure for a multi page document:



Figure 21



STEP 1:

Click "File > Select TWAIN Source…" A pop up window will appear as shown below.



Figure 22

Simply click "select".



STEP 2:

Click on "File> Acquire/Batch scanning..." A new window will appear as shown below.

cquire/Batch Scanning	- Setup	
Acquire method:		
C Single image: Show	acquired image in viewer	
🗖 Close TWAIN di	alog after acquiring an image	
 Multiple images (Bate 	h mode): Save acquired images as files	
Output file name:	ScanImage	
	P	
Starting counter:	1	
Increment:	1	
Number of digits:	2	
	🔽 Skip existing files	
	Remember last scan counter (set as start)	
Destination directory	D:\requirementExpress\	Browse
	Save as: TIF - Tagged Image File Format	Options
	🧧 Save as multipage image (if TIF format u	ised)

Figure 23

<u>STEP 3:</u>

Click the "browse" button to set the destination folder for saving the electronic documents. recommend folder name should be "requirementExpress".

Please ensure that you "click the check box" showed in "red circle" to scan multi-page paper documents as shown.

Requirements Express System-El .

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File Edit Image Options	View Help	
Acquire/Batch Scanni	ng - Setup	×
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Close TWAIN	dialog after acquiring an image	
 Multiple images (B) 	atch mode): Save acquired images as files	
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Number of digits:	2	
	Skip existing files	
	Hemember last scan counter (set as start)	
Destination directo	ory: D:\requirementExpress\	Browse
	a TIE Transduran Ele France	
	Save as: TIF - Tagged Image File Format	Uptions
	Save as multipage image (if TIF formal	used)

Figure 24

Click "OK" to continue.



<u>STEP 4:</u>

Place the document on the scanner tray Click the "preview" button. Document to be scanned will be viewable on screen.



<u>STEP 5:</u> Click "Scan Type > Gray "



Figure 26



<u>STEP 6:</u> Next click "Purpose > OCR Text"

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<u>STEP 7:</u> Select the area to be scanned by using the red dashed selection line through your mouse. As shown in Figure 27.



Make sure that in the status bar, it is showing the status as circled in red in figure 28.

i Gray Text 8.32 x 10.65 Inches 100% 300dpi 7	.60 MB 📈
---	-----------

Figure 28

Gray Text and 300 dpi, settings should be ensured.

<u>STEP 8:</u>

Next, click the **SCAN** button.

After you have scanned first page of the document, turn to the other side of the document and place it on the scanner tray, to continue scanning.

Repeat <u>STEPS 4 to 8</u> for scanning multipages until last page.

Your multipage TIFF file is created and stored into the specified directory.

To scan another multipage file, repeat steps from 1 to 8 and so on.



Section 4

Requirements Express – *i***View utility**

To view the files that you have selected you can use the "pre-configured viewing utility". To launch this utility see the snap of the shortcut below on your desktop.



Figure 29

Double click on the shortcut, to launch the "Requirements Express Iview viewer utility"

🐼 Irfan¥iev Thumbnaila	
File Options View Stop	
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Figure 30

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Next, browse through the local drive and select the specified directory where you saved your electronic documents. Say **D:\requirementExpress**\

Open "requirementExpress" folder to view your electronic copies



Figure 31

If you want to check details of each electronic copy, simply double click on the image thumbnail.

ofu	Requirements Express System- Electronic format conversion
S. S	
LIFE Zaroori Hai	Endorsment.tif - Irfan¥iew (Zoom: 452 x 642)
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	ENDORSEMENT
	For valuable consideration received LWE <u>TOSEPH DAS</u> do hereby assign all my rights and interest in the within policy and the sum thereby assured to <u>MANGHOPE Dov. Programme</u> their successors, representatives or assigns and declare that receipt or receipts of the said <u>MANGHOPE Dav. Programme</u> their successors, representatives or assigns for any sum of money to be received by them under or on account of the said policy by reason of my death/death of the assured or by maturity or by surrender of the said Policy No. <u>3185(9)33-1</u> P notwithstanding that such surrender may be without my/our wishes shall discharge the EFU LIFE ASSURANCE LTD from all responsibility in respect of the application of the said money as effectually and to all intents and purposes as is such receipt or receipts were signed by myself/ourselves. My/Our heirs, Executors, Administrators. Witness <u>Cemtype</u>
	OccupationS/c
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Simply using your mouse wheel scroll or the page down key on the keyboard, you can take a quick walk through the electronic document



For your ease of use the total numbers of pages in each electronic document are also shown on top right, with button options to navigate through the pages.

7	🔜 🗡 😹 🗞 🐴 🏐 🗊 🗞 🗞 🗢 🖒 🚺 🚺 Page 1/2
1	EFU LIFE ASSURANCE LTD
	Financial Supplementary Statement for Personal Covers
	RE: PROPOSAL NO7859/22 [P
	This statement should be completed by the person to be assured. Full name: $\mathcal{J} \cap S \in PH$ $DA \leq S$ Date of birth: $1/4 - 9 - 51$
	Occupation: Administrator Rah. e-NIJat (MDP) Co
	Please answer each question and where appropriate provide particulars.
	1. What is the purpose of this Protection + Saving throw
	2. Have proposals been made concurrently to any other N.O. life insurance offices?
Ċ	3. How much life insurance cover is presently in force on your life? (Please indicate the reason for this cover.)
	Please answer the following questions if cover is required for family protection, investment or loan protection purposes:
	 Please give details of the income you received in the last tax year from
	a) your own occupation: 360,000
	b) investments:
	5. What is your approximate net worth (i.e. assets minus) / くとみにせ - liabilities)?
	6. How many dependents do G
~	7. If a loan is being covered, please provide a copy of the loan agreement and indicate
	a) the object of the loan:
	b) the amount of the loan:
1	c) the duration and





BEST PRACTICES

Now, that you have successfully configured and scanned your first test document, its time to walk through some best practices to storing your work on your local drives. Below are some recommendations for the same.

RECOMMENDATION OF DIRECTORY STRUCTURE OF PROPOSALS/POLICY AND PROVISIONAL REF NUMBER

Start the Requirements Express - iView as mentioned in the above guidelines and come to the window where you set your directory for saving files.

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e Edit Image Options	View Help				
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Single image: Show	v acquired image in viewer				
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 Multiple images (Ba 	tch mode): Save acquired images as files				
Output file name:	ScanImage				
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	Save as: TIF - Tagged Image File Format	Options			
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(i)-	OK Conset				
	UN Lancei				





Now lets suppose that you are saving the data of some client with some reference no.

Make sure you should follow the following guidelines.

Always save your electronic documents in the directory: D:\requirementExpress\

Suppose the client has a ref no. R/07/1000750, then you should save it in a folder like shown in figure below. You should replace "/" (slash) with "_" underscore.

Acquire method: Single image: Show acquired image in viewer © Dose TWAIN dialog after acquiring an image Multiple images (Batch mode): Save acquired images as files Output file name: ScanImage Starting counter: Increment: Number of digits: Skip existing files Remember last scan counter (set as start)	en ex botter sconning			
Single image: Show acquired image in viewer □	Acquire method:			
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Increment: 1 Number of digits: 2 ✓ Skip existing files	Starting counter:	1		
Number of digits: 2 ✓ Skip existing files ☐ Bemember last scan counter (set as start)	Increment:	1		
Skip <u>existing</u> files <u>Remember last scan counter (set as start) Destination directory: D:\requirementExpress\B_07_1000750 B</u>	Number of digits:	2		
Bemember last scan counter (set as start) Destination directory D:\requirementExpress\B_07_1000750 B		Skip existing files		
Destination directory D:\requirementExpress\B_07_1000750		<u>Bemember last scan counter (set as start)</u>		
	Destination directory:	D:\requirementExpress\R_07_1000750	<u>B</u> rows	
Save as: TIF - Tagged Image File Format		Save as: TIF - Tagged Image File Format	<u>O</u> ptior	
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Figure 35

Click Ok on this window. You will be sent to the scanning mode. Once you scan the image according to the guidelines described in section 3, the above mentioned folder will automatically be created in the requirementExpress directory as shown below. Now scan all the electronic documents regarding to this reference no. in the above folder.



Now you can go into the D:\requirementExpress\ $R_07_1000750$, you will find your image.

Again if you want to save another reference, then just make the folder with reference no according to the above guidelines.

Now you go to the Thumbnail Viewer as mentioned in the section 4. Your directory structure in the thumbnail mode should look like the Figure 36.

Irfan¥iew Thumbnails	
File Options View Stop Exit	
D:\requirementExpress\R_07_1000750\	
 DISK1_VOL1 (C:) DISK1_VOL2 (D:) Changed Branch(final zahid i Copy of Changed Branch Filenet-Integration Group Life Illustration Illustration v8.0.0 INSTALL j2sdk1.4.2_11 Program Files RECYCLER RECYCLER RECYCLER R_10_1000750 R_10_1000744 R_10_1023412 R_10_1651131 Softwares from SHMA for Pr System Volume Information DISK1_VOL3 (E:) 	ScanImage01.tif ScanImage03.tif

Figure 36

You can see the directory structure highlighted in red. All the references are going to be saved in the requirementExpress folder separately.



When you upload the requirements through requirementExpress and the process starts, than your reference no. is changed to proposal no., than from now on you have to save the files into the proposal no. directory. You should follow the steps given below.

Single image: Show a	cquired image in viewer	
Close TWAIN dia	log after acquiring an image	
Multiple images (Batc	h mode): Save acquired images as files	
Output file name:	ScanImage	
Starting counter:	1	
Increment:	1	
Number of digits:	2	
	 Skip existing files Remember last scan counter (set as start) 	
Destination directory:	D:\requirementExpress(78954)	Browse
	Save as: TIF - Tagged Image File Format	Options
	🥅 Save as multipage image (if TIF format u	used)
	OK Cancel	

Figure 37

Specify the folder name as proposal no. as highlighted in the above diagram against the ref no. say $R_07_{1000750}$

Click "OK and scan" the image(s) according to the procedures described in section 3. Lastly, store all the required electronic documents in the folder named say 78954 which are against ref no $R_07_1000750$, as an example.



You may come across situations when initial parts of your uploads via requirementExpress system are done using a provisional reference number, the remainder part of the upload through the proposal number. In such scenarios you should make a base folder of the proposal number and copy the sub folder (the provisional reference number folder) as a child folder into the base folder as shown in figure 38, which is now the proposal number folder. The figure 39 shows a graphical sample of how this might look like.



Figure 38

Now cut the folder $R_07_{1000750}$ and paste it into the 78954 folder as this policy no is against the particular ref. no. as shown in figure. 38





This is the procedure of how we scan and maintain our scanning directories.



Best practice for regular monthly clean-up of your drives

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	image image001	image002 image003	image004 image005	ScanImage03 ScanIma	uqe01 ScanImaqe01	
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C in the last 🛛 🚆 days						
⊙ _{between} 01/09/2010 🔽						
and 30/09/2010 💌						
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Search slow files						
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Figure 40

- 1. In the "search files and folders", write, "***.tif**".
- 2. Next, in the "look in" box select "**D:\requirementExpress**".
- 3. In "Search Options <<", tick mark the check box "Date" and then select the dates of previous one month e.g. if today's date is 31st of Oct., then you have to



delete the previous one month files from your folders i.e. you have to select the radio button "**between**" as shown in fig. 40. Then select the dates between 1st September, 2010 and 30th September, 2010.

- 4. Then tick mark the "Advanced Options" check box and in it tick mark "Search Subfolders" check box.
- 5. After all of the above steps, click on the Search Now button, images will be shown on the right hand side of the window. Select all of them by "Ctrl + A".
- 6. Now press "Shift + Delete" and then click "Ok".

The above steps will be followed once a month in order to clean up your directory and to save you from mess.

Common Terminologies

Requirements Express A web based tool available on branch connectivity for sending electronic documents to head office.

*i***View :** The tool configured on with the branch administrator for converting paper documents into electronic format.

Microtek: name of the scanning device.

DPI: Image quality. DPI settings should be exactly 300.

TWAIN is the driver that is used to connect imaging hardware to your computer. You must select the TWAIN device during the electronic conversion process.

Single page The file or a document that has text on only one side of the paper.

Multi page It is a file or a page having text written on both sides, forward and backward.

TIFF the format of the electronic document.

Scan Type for most optimum electronic copy, 'Scan Type' should be selected as gray.

Purpose for most optimum electronic copy, 'Purpose', should be selected as OCR text.

Frequently Asked Questions

Q1. If the branch administrator sends policy documents to head office in electronic format via 'requirements express system' does he still need to send hard copies?

Ans: Client Services...

Q2. Can the branch administrator send multiple documents of a single policy at one time? **Ans:** Client Services...

Q3. What is the total number of documents that can be send during single upload to head-office? Ans: Client Services...

Q4. Which documents should not be sent, in electronic format, via 'Requirements Express'? Ans: Client Services...

Q5. How can the branch administrator ensure that electronic documents are of good printable quality? **Ans:** Client Services...

Q6. How can the branch administrator ensure electronic policy documents are not send repeatedly to head office? **Ans:** Client Services...

More Q and A...



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