

REQUIREMENTS EXPRESS SYSTEM TECHNICAL MANUAL

size estimation results(CTRL + CLICK)

Version 1.0.5
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Requirements Express System – iView 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.



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.

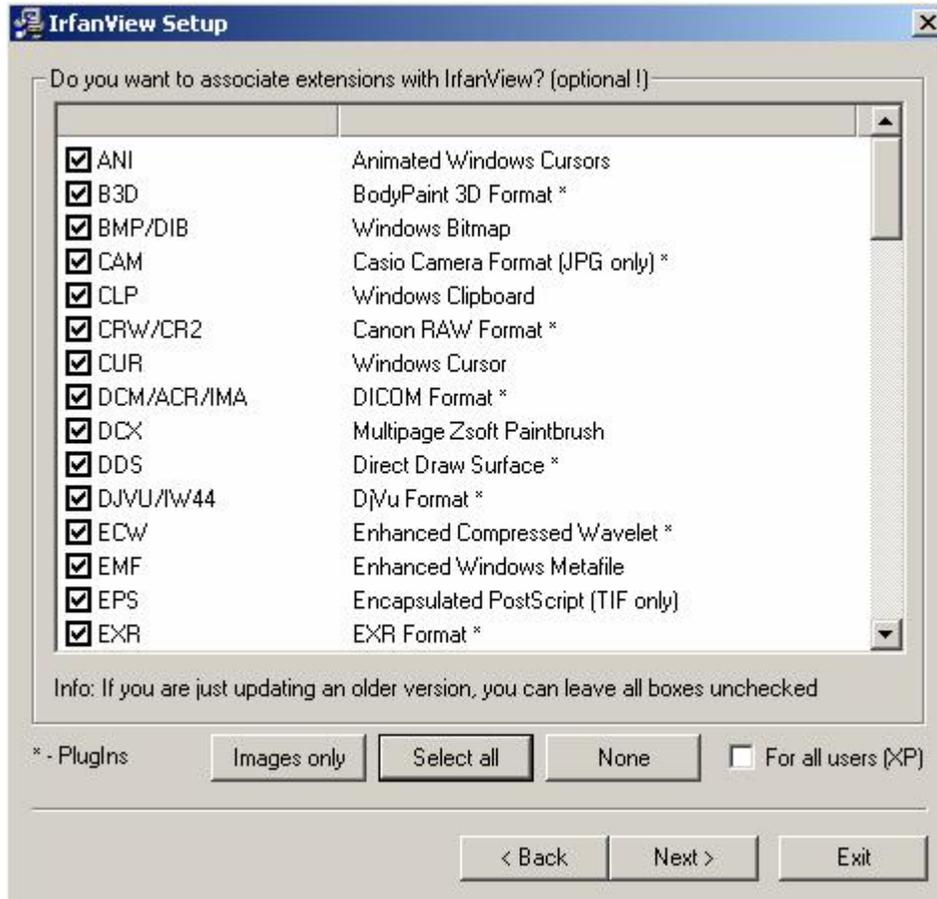


Figure 2

Click “Select all” button followed by clicking “Next”.



Figure 3

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.

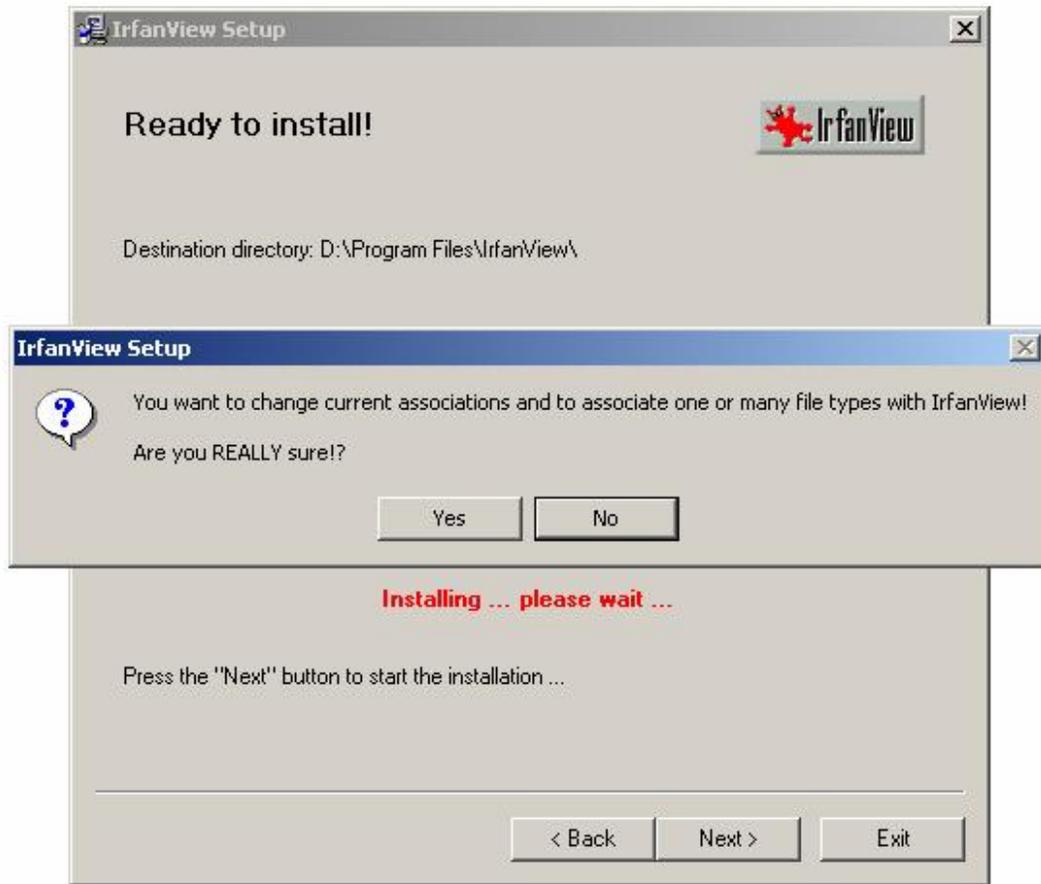


Figure 5

Accept by clicking “Yes”, to begin the installation process.



Figure 6

Click “Done” to complete installation on your system.

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

Requirements Express System - iView 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.

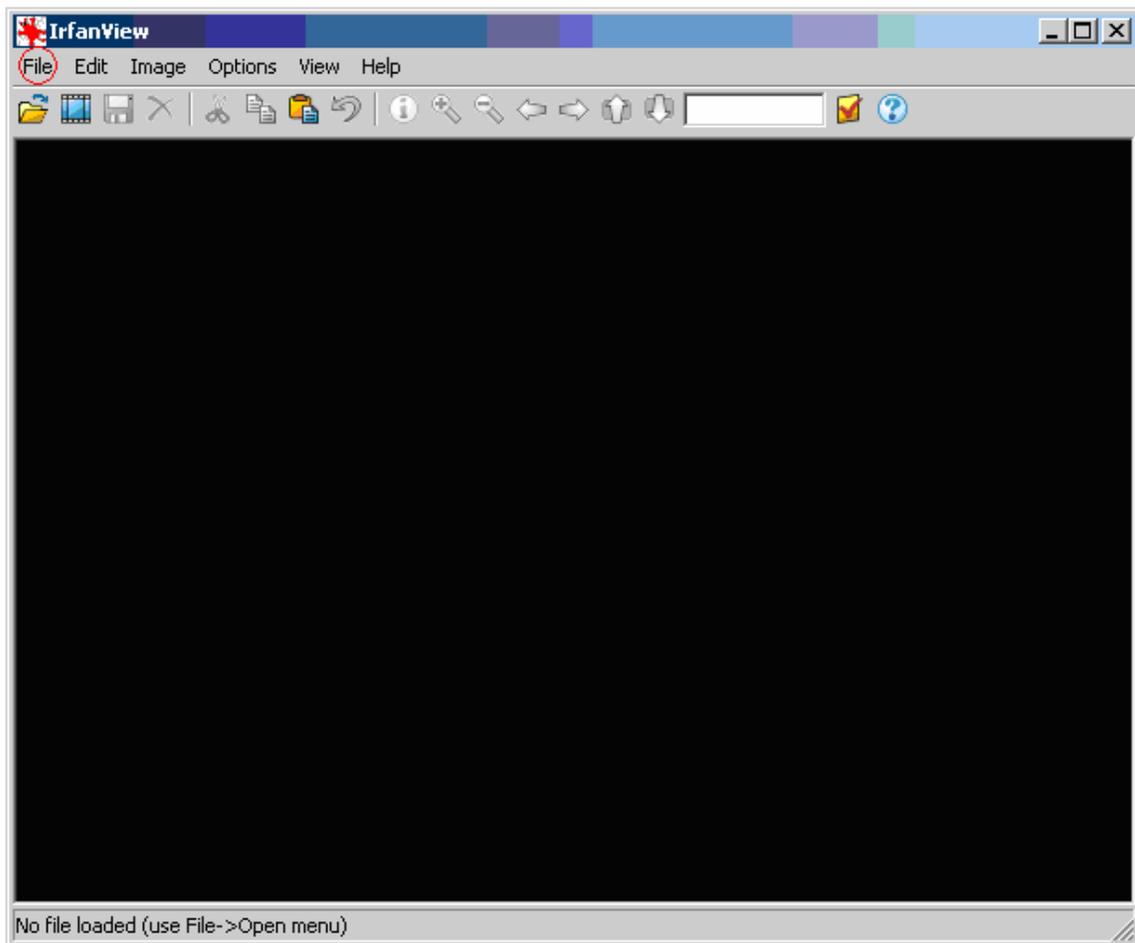


Figure 8

Click “File > Select TWAIN Source”...

A pop up window will prompt you to select the scanning device.

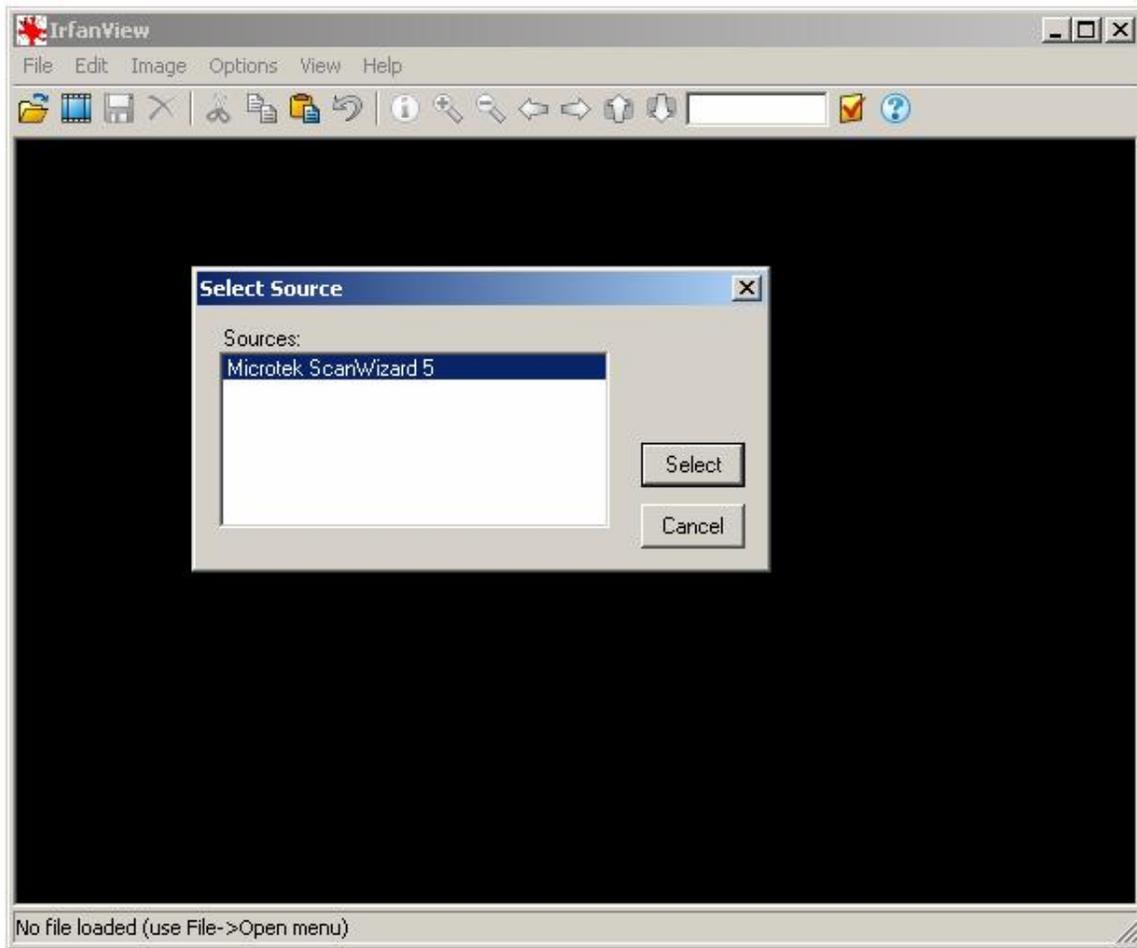


Figure 9

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.

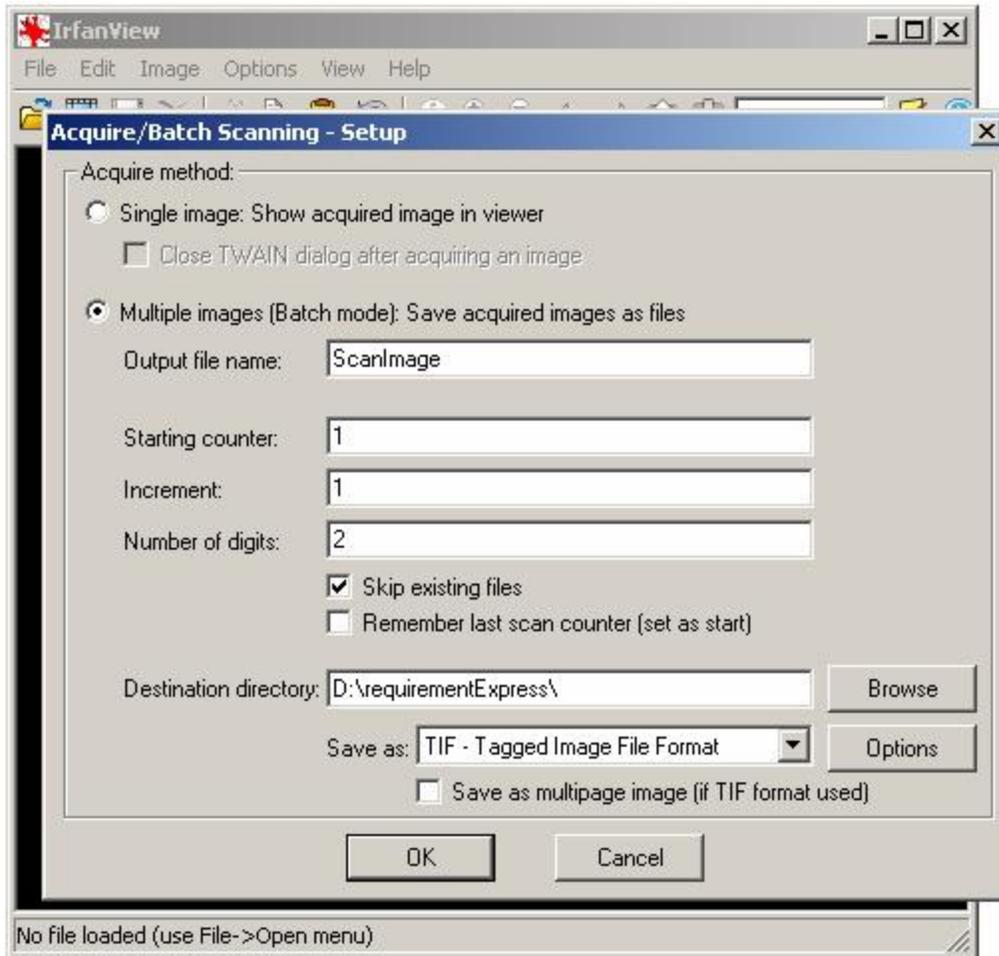


Figure 10

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

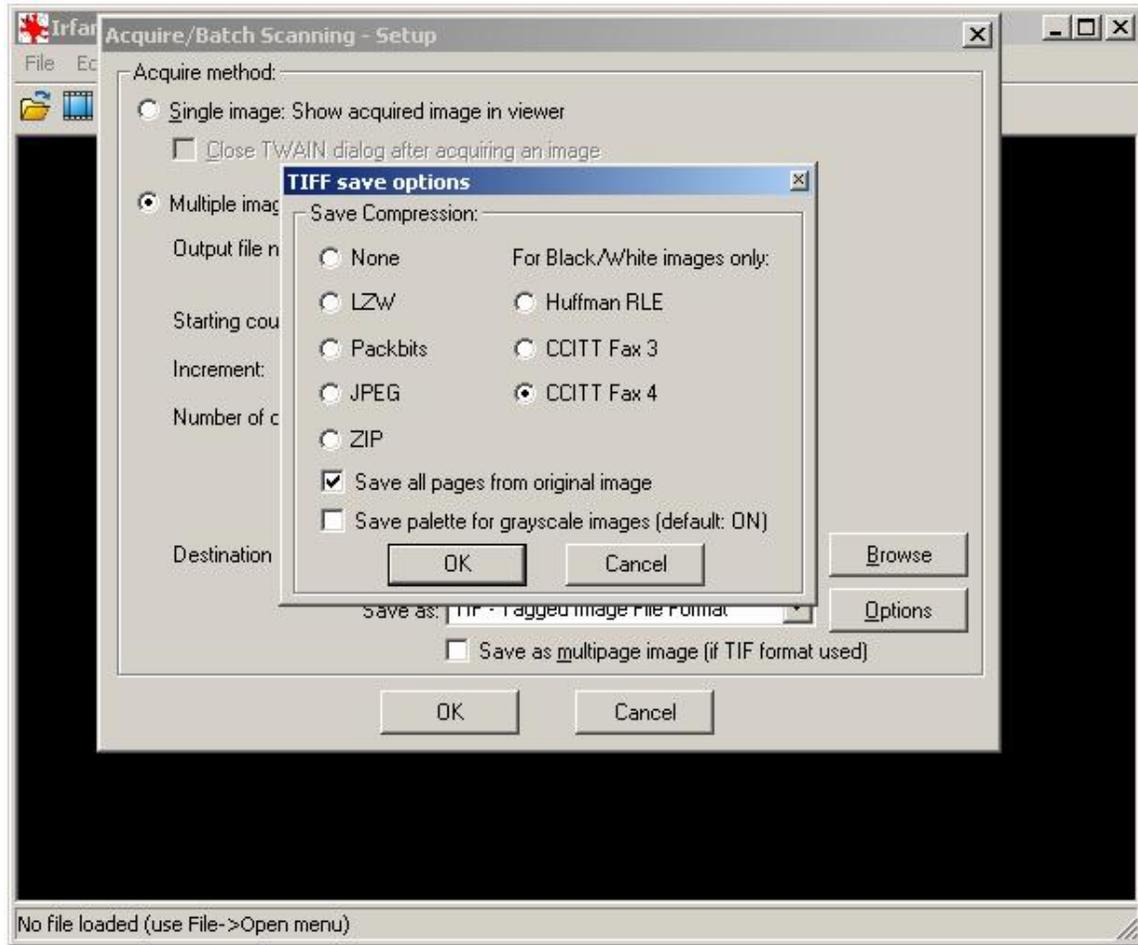


Figure 11

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

Congratulations your one time “configuration settings” are done!

Electronic conversion procedure – Requirements Express – iView

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

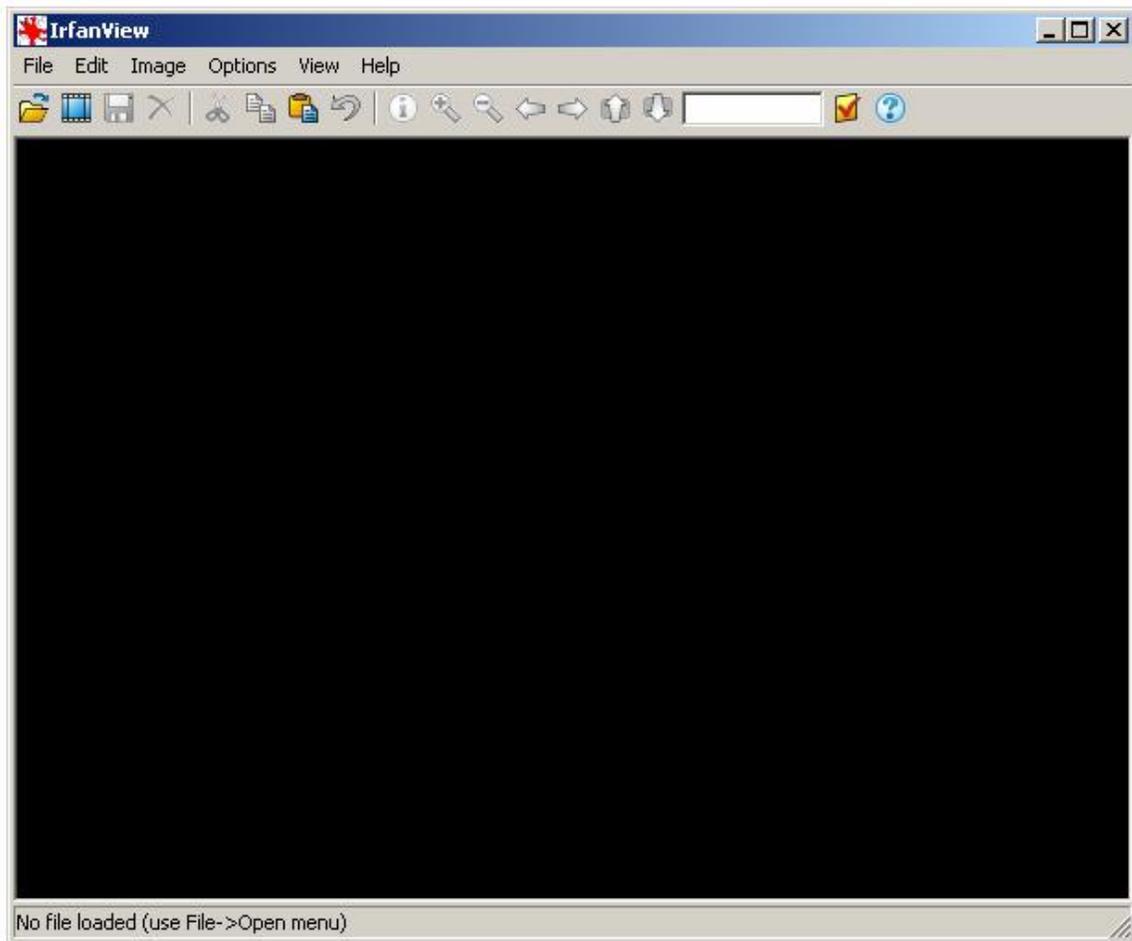


Figure 13

Scanning procedure for a single page document:

STEP 1:

Click “File > Select TWAIN Source...”

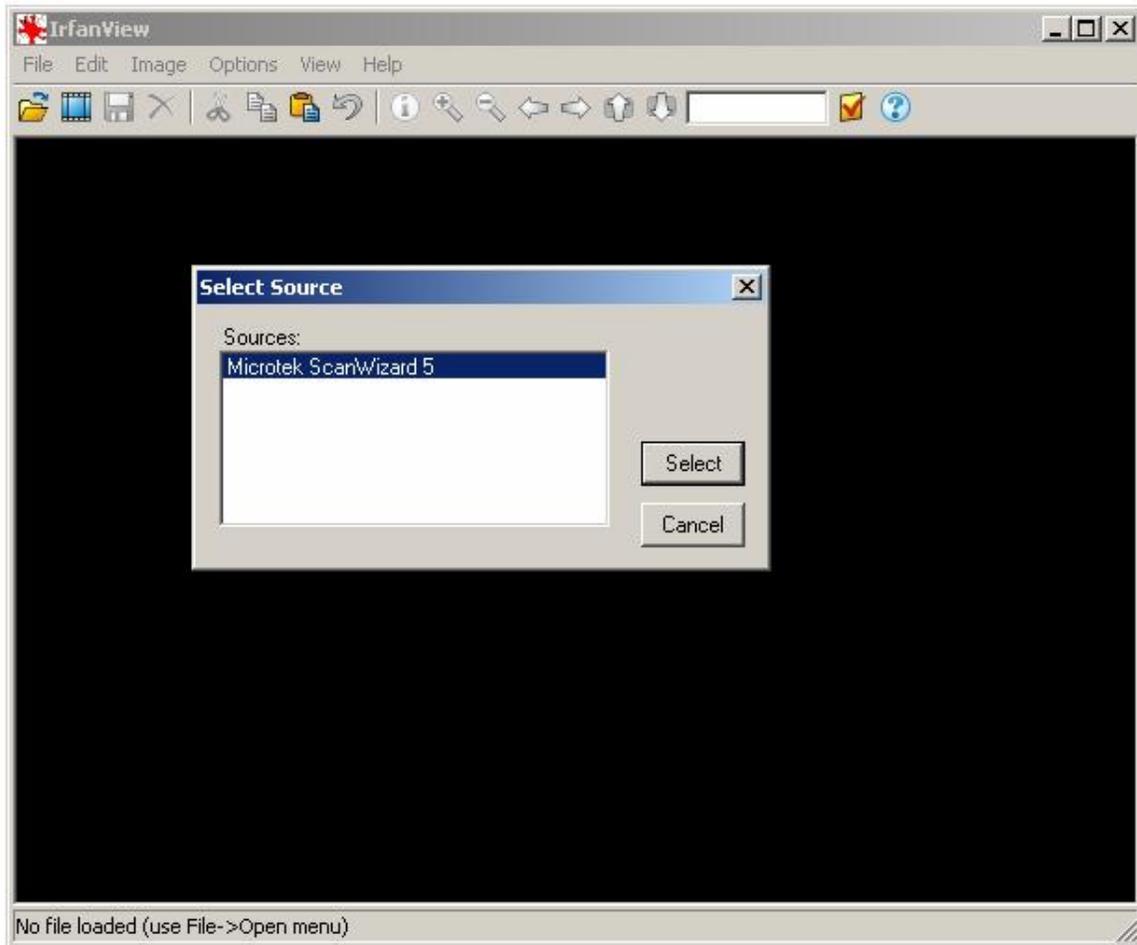


Figure 14

Select the scanning device and click “select”.

STEP 2:

Click on “File > Acquire/Batch scanning...”

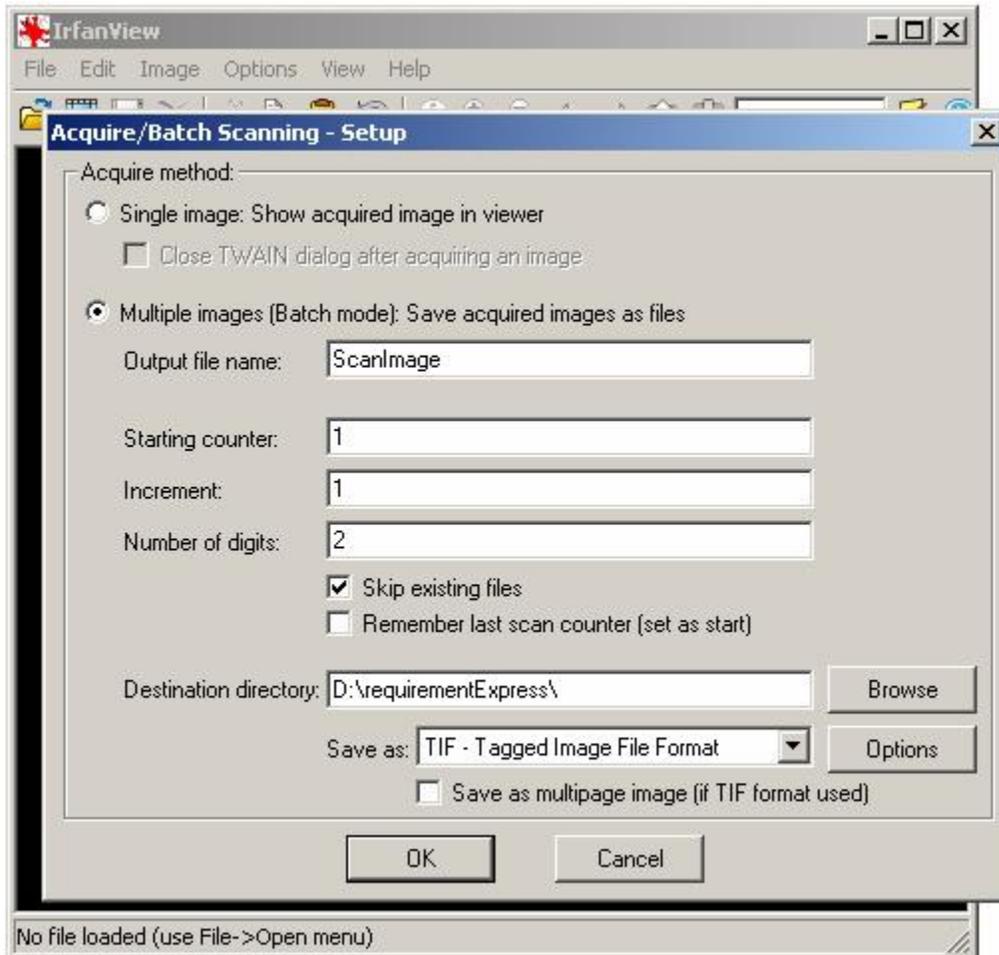


Figure 15

STEP 3:

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

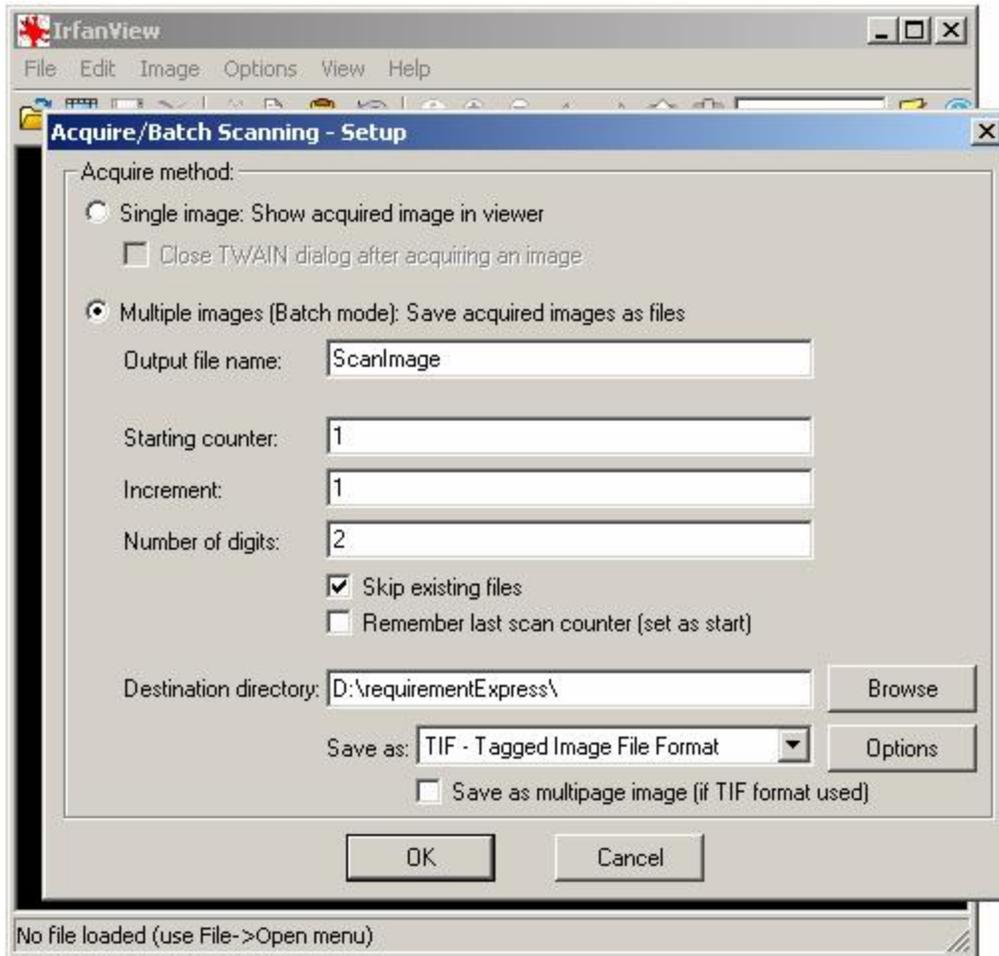


Figure 16

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

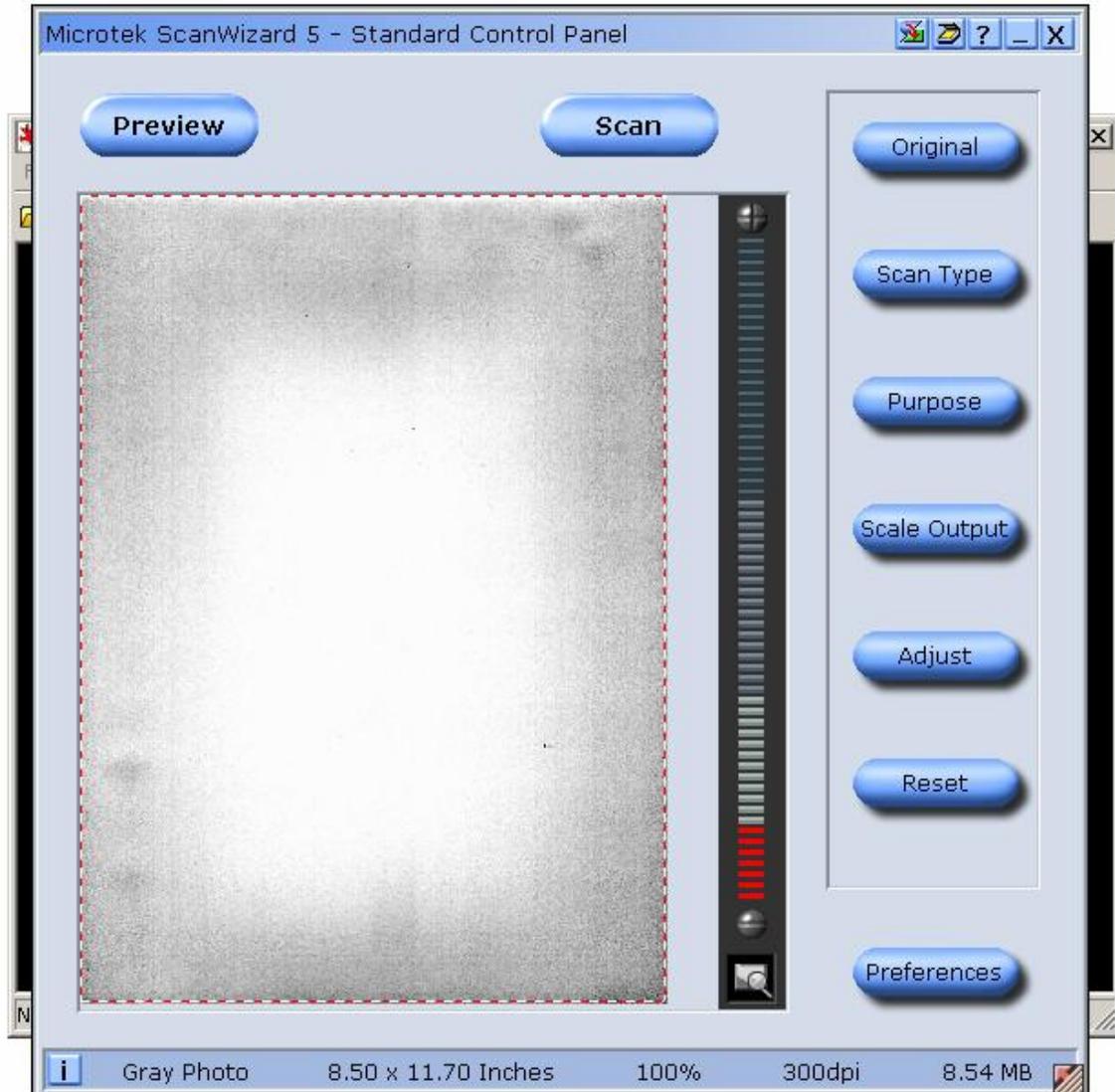


Figure 17

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).



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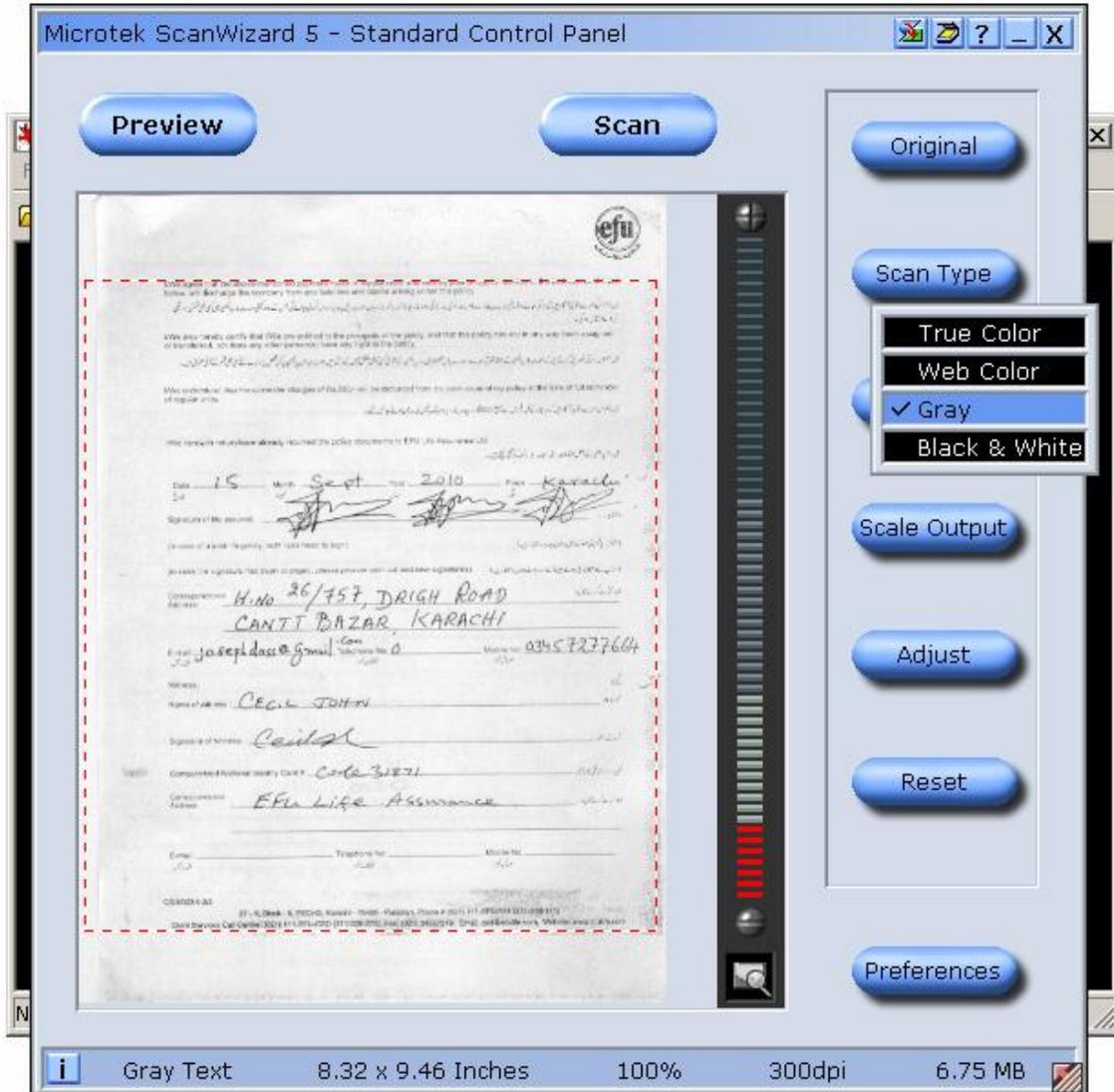


Figure 18



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STEP 6:

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

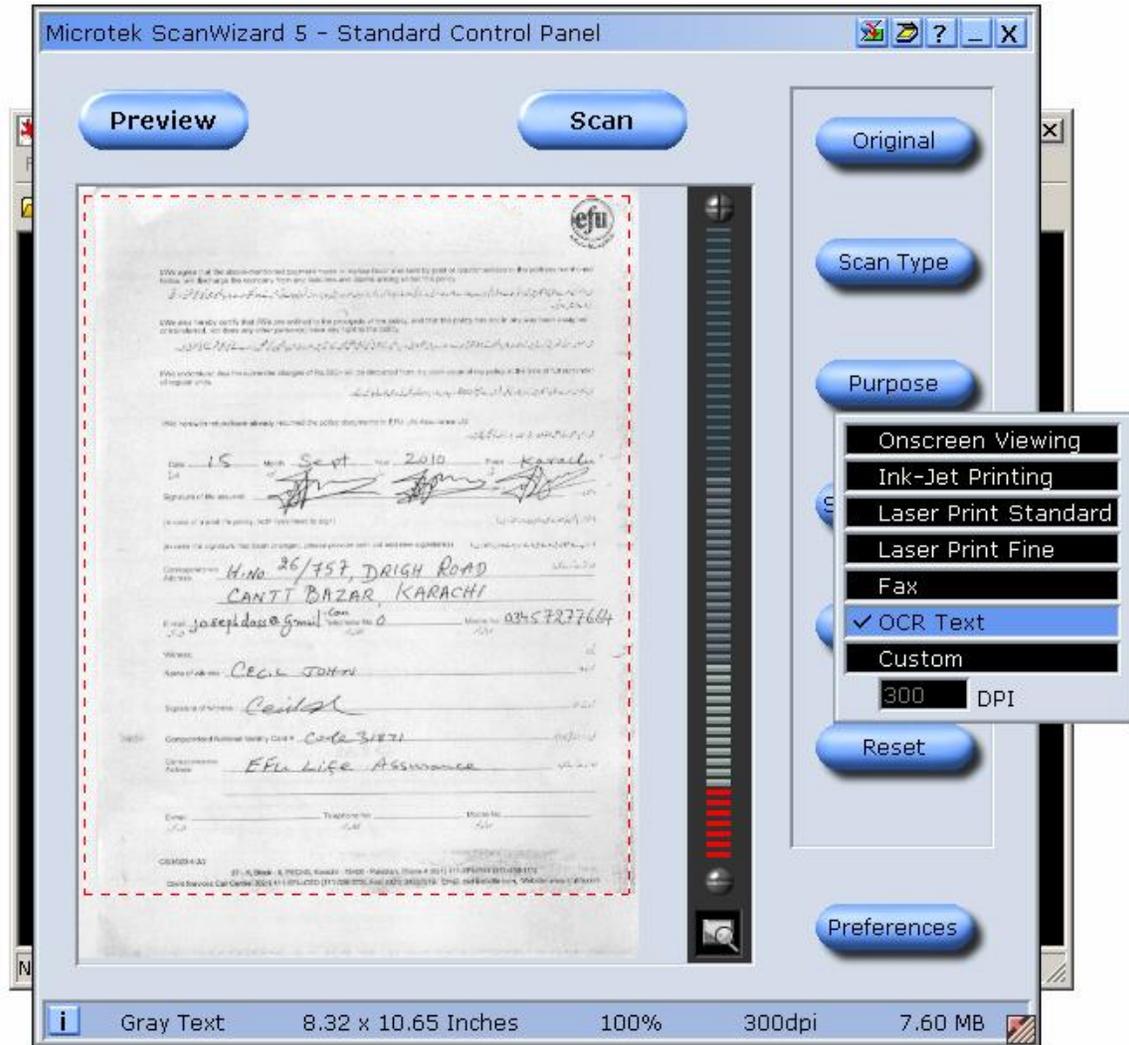


Figure 19

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.



Figure 20

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

STEP 8:

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:

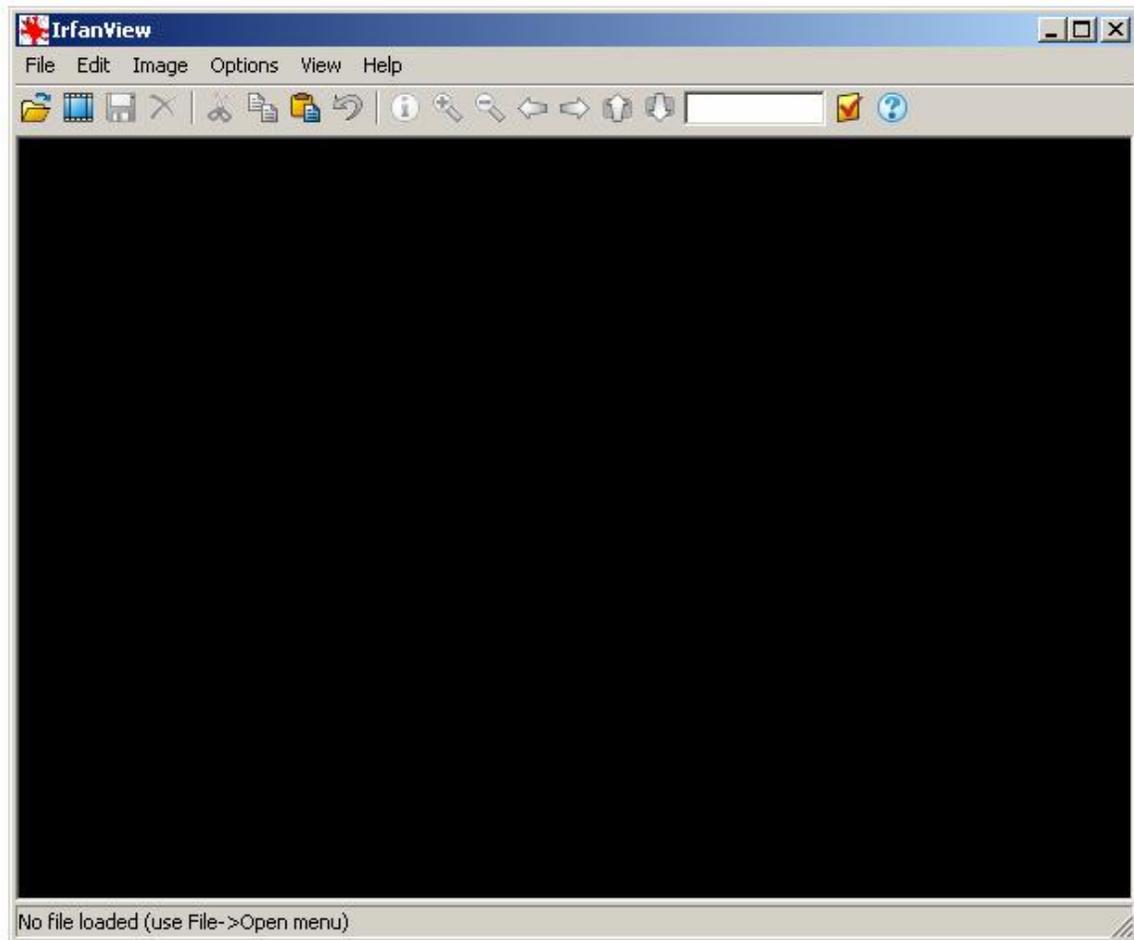


Figure 21

STEP 1:

Click “File > Select TWAIN Source...”

A pop up window will appear as shown below.

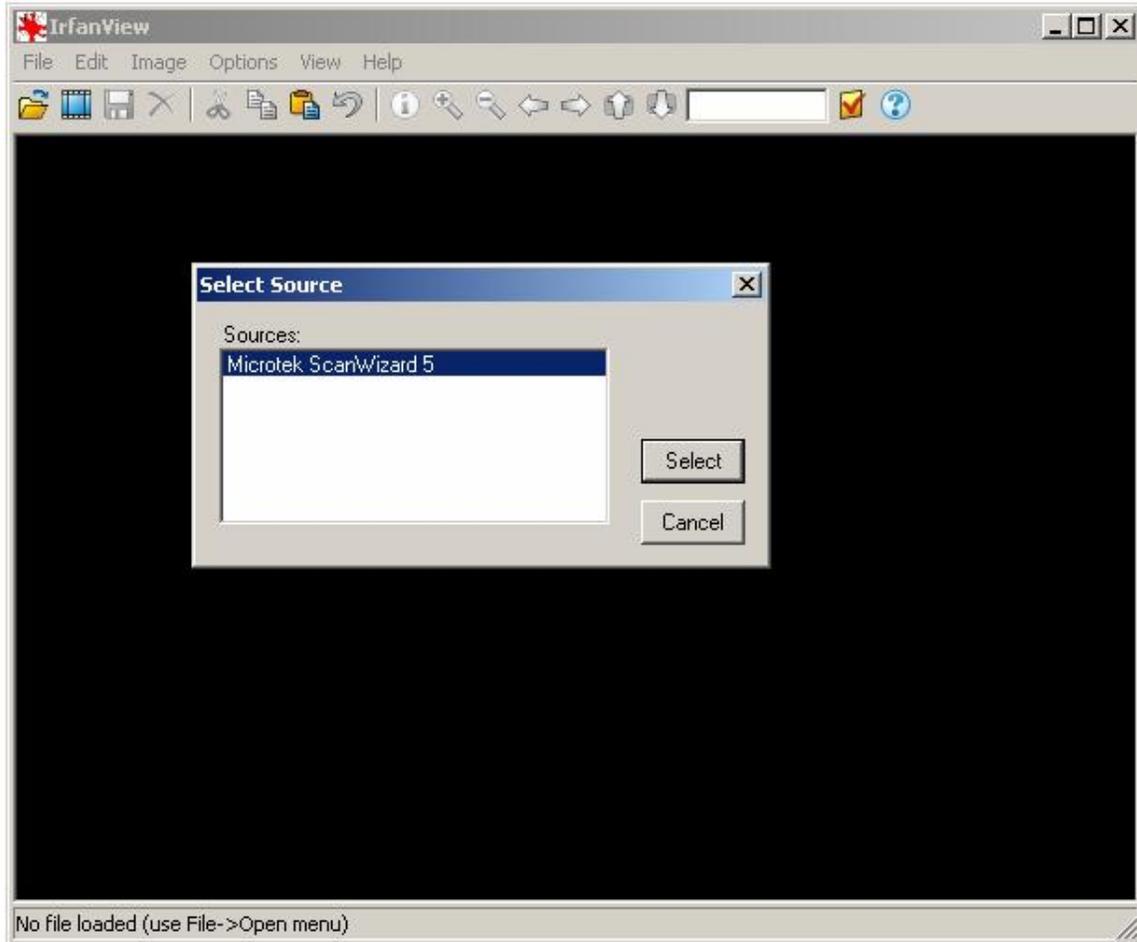


Figure 22

Simply click “select”.

STEP 2:

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

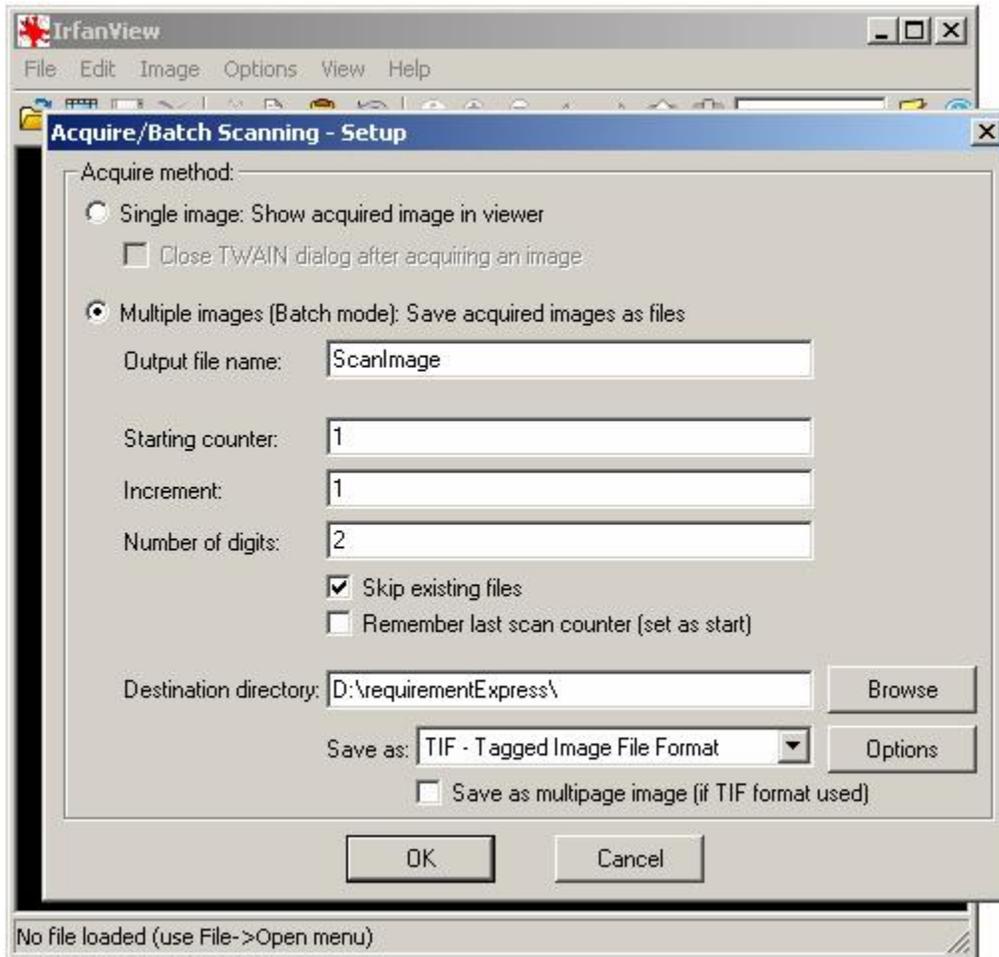


Figure 23

STEP 3:

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.

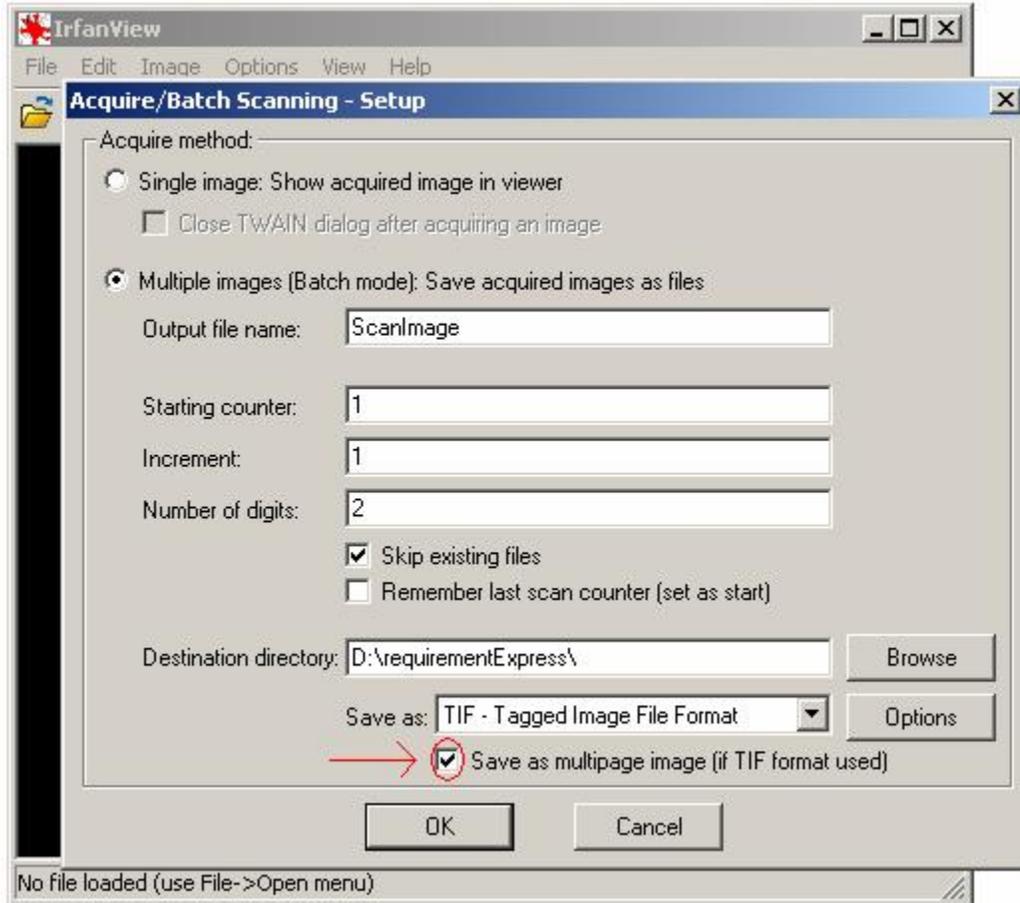


Figure 24

Click “OK” to continue.

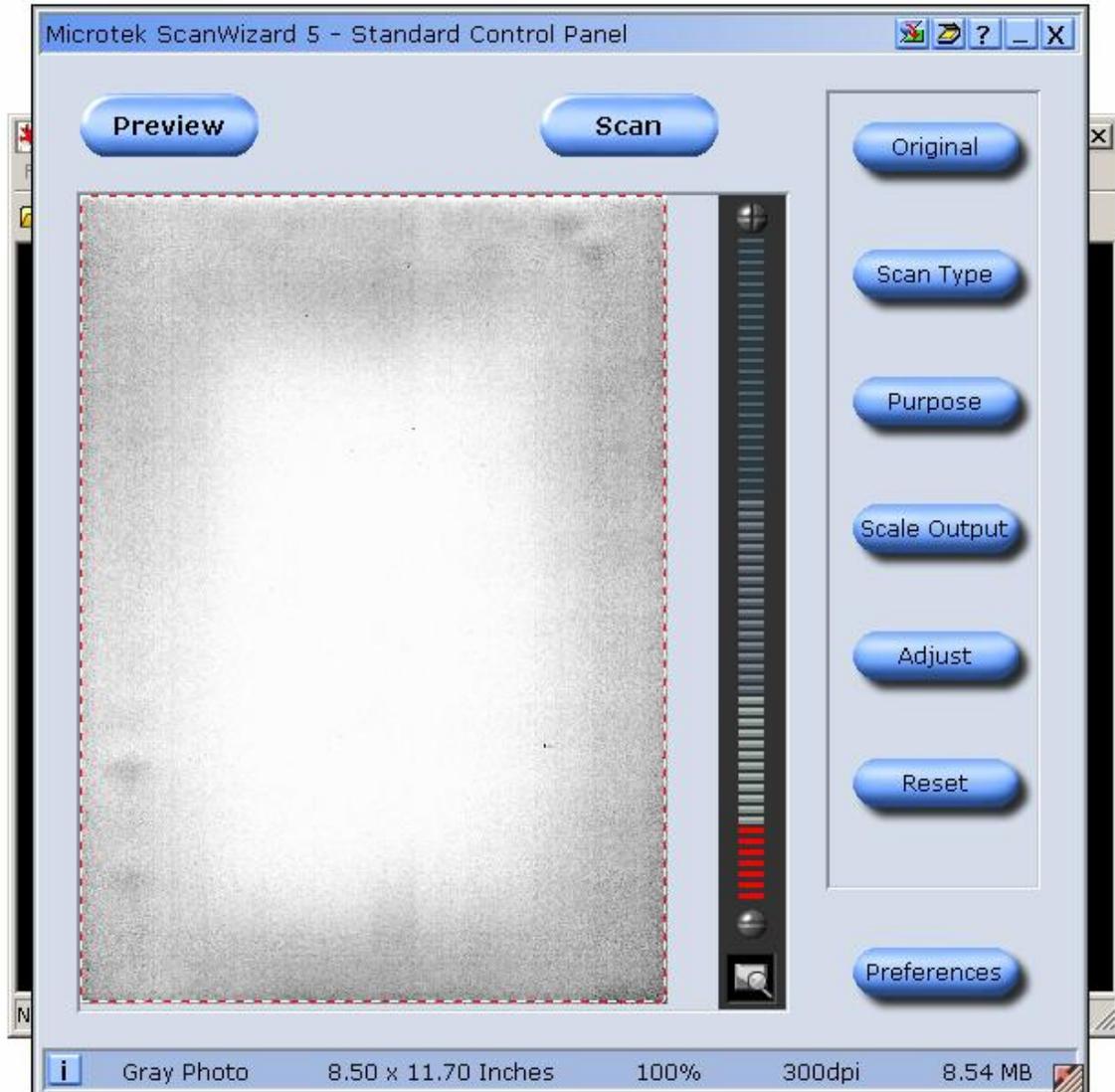


Figure 25

STEP 4:

Place the document on the scanner tray

Click the “preview” button.

Document to be scanned will be viewable on screen.



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STEP 5:

Click “Scan Type > Gray “

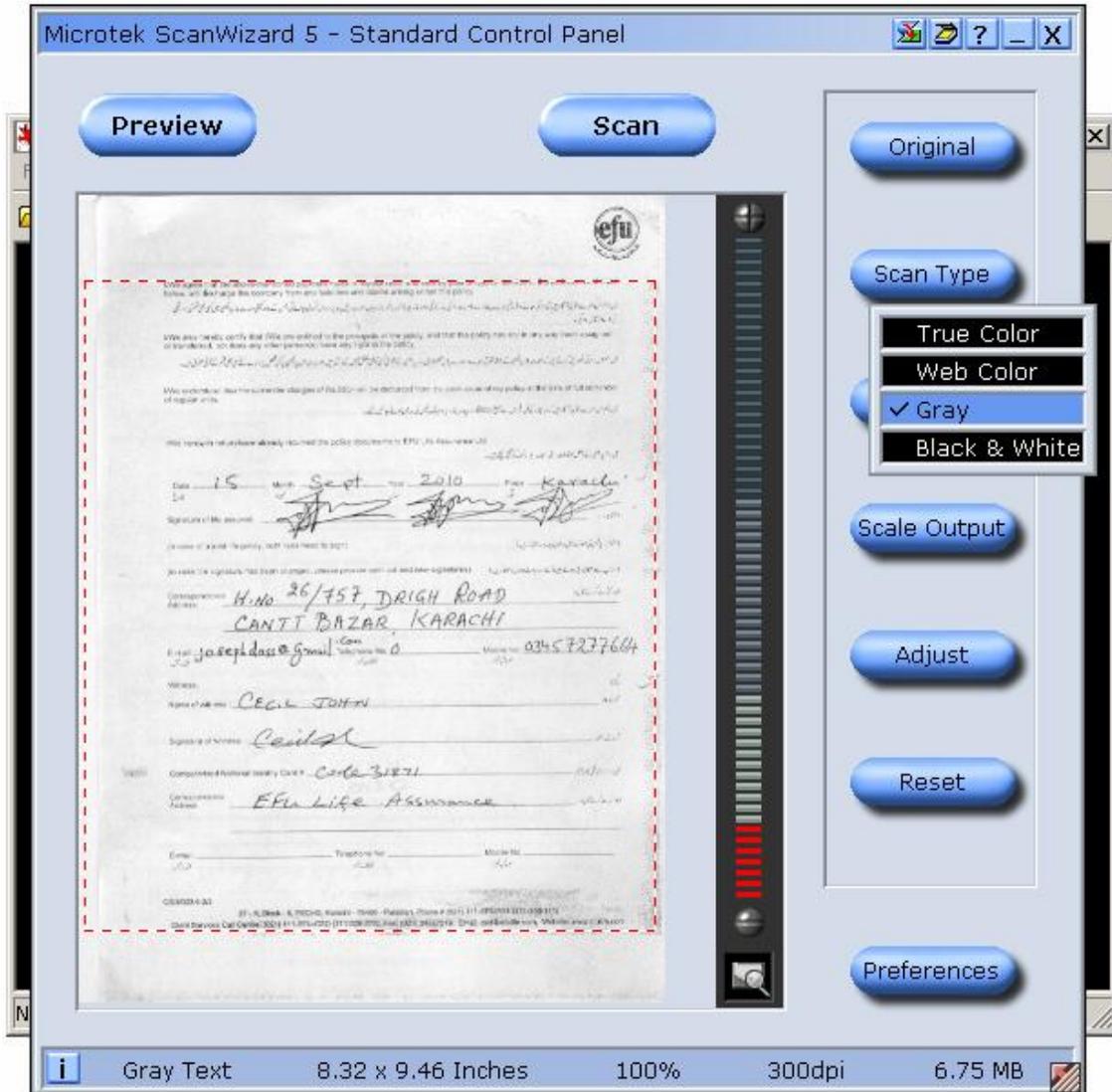


Figure 26

STEP 6:

Next click “Purpose > OCR Text”

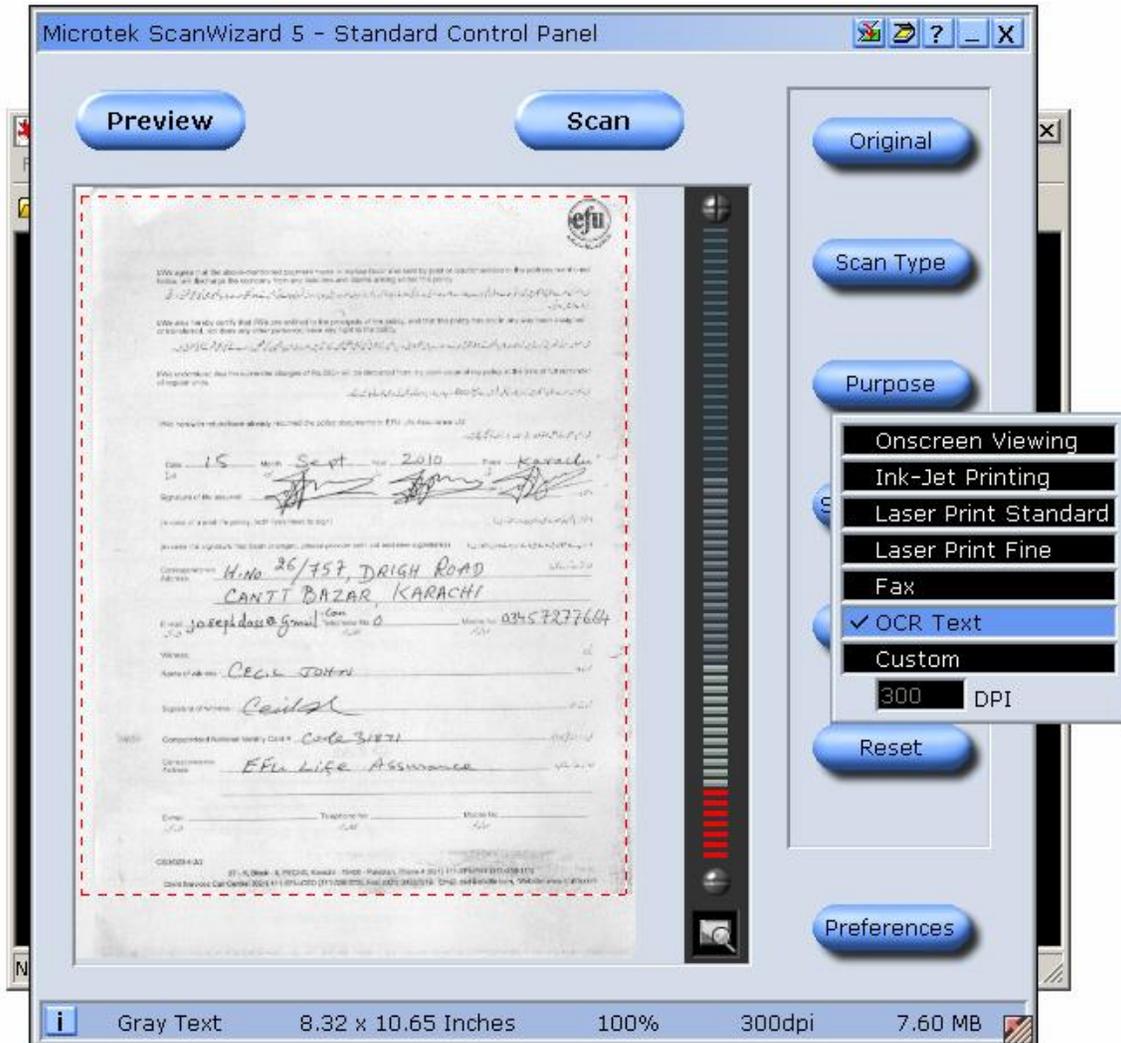


Figure 27

STEP 7:

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.

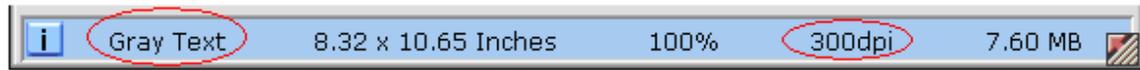


Figure 28

Gray Text and **300 dpi**, settings should be ensured.

STEP 8:

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 STEPS 4 to 8 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.

Requirements Express – iView 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”

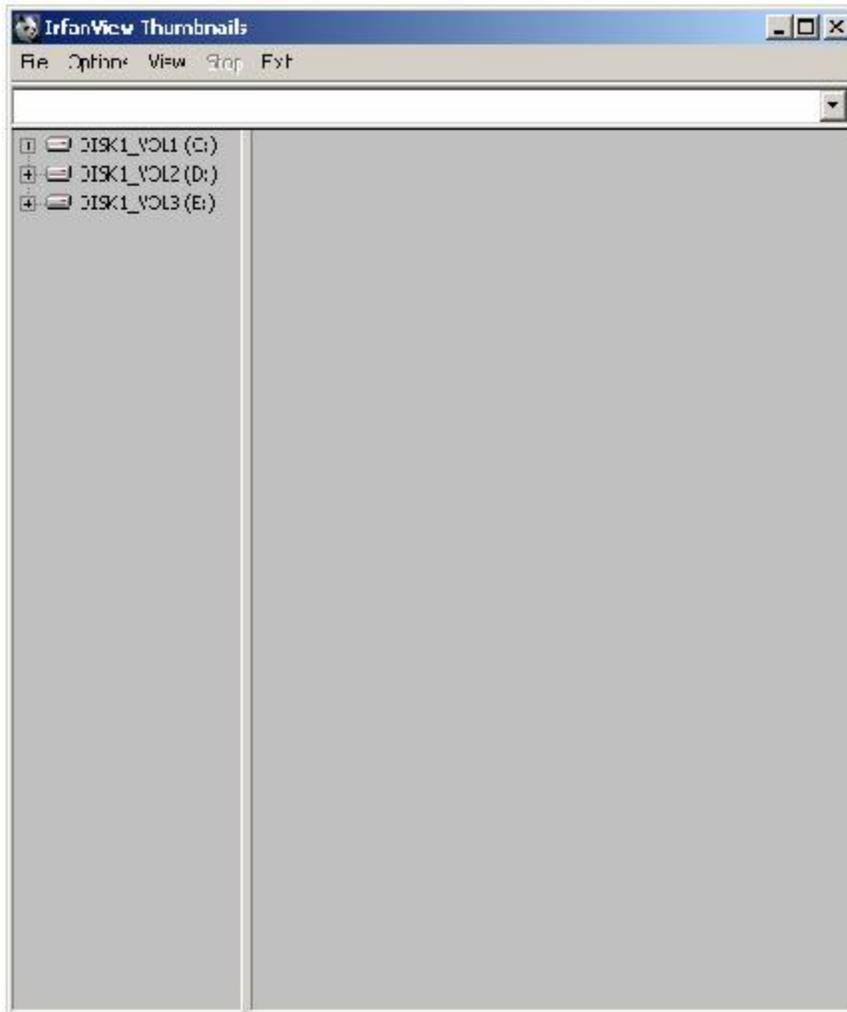


Figure 30

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

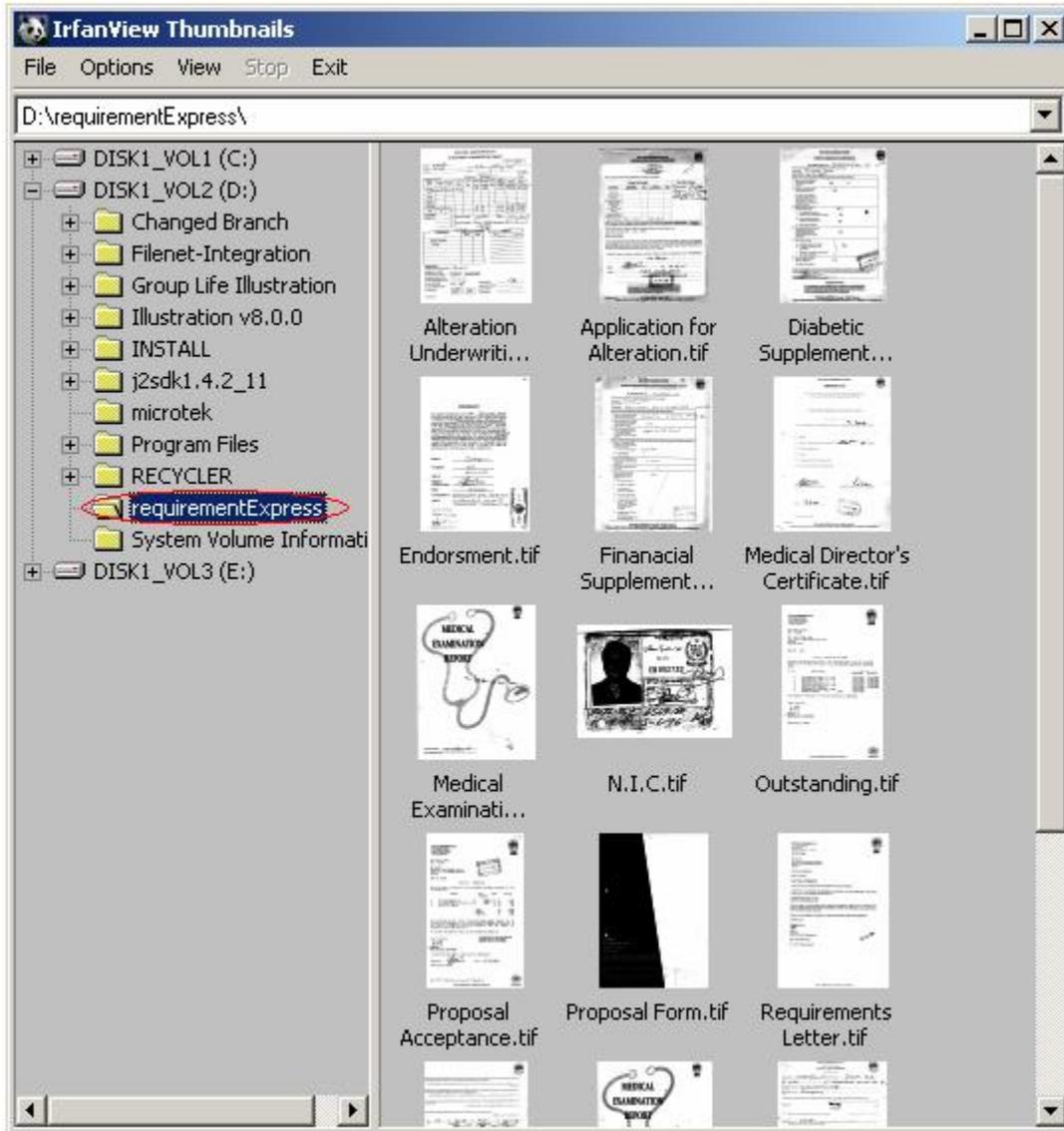


Figure 31

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



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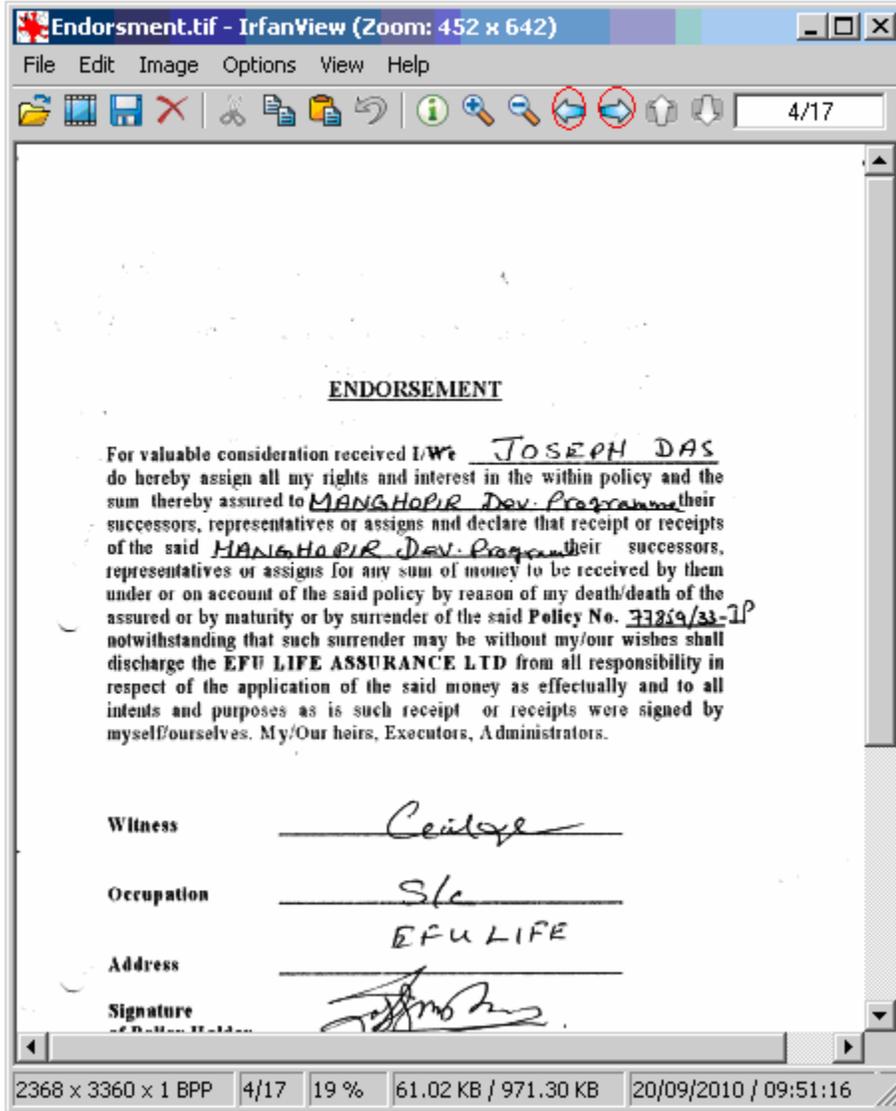


Figure 32

Simply using your mouse wheel scroll or the page down key on the keyboard, you can take a quick walk through the electronic document



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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.

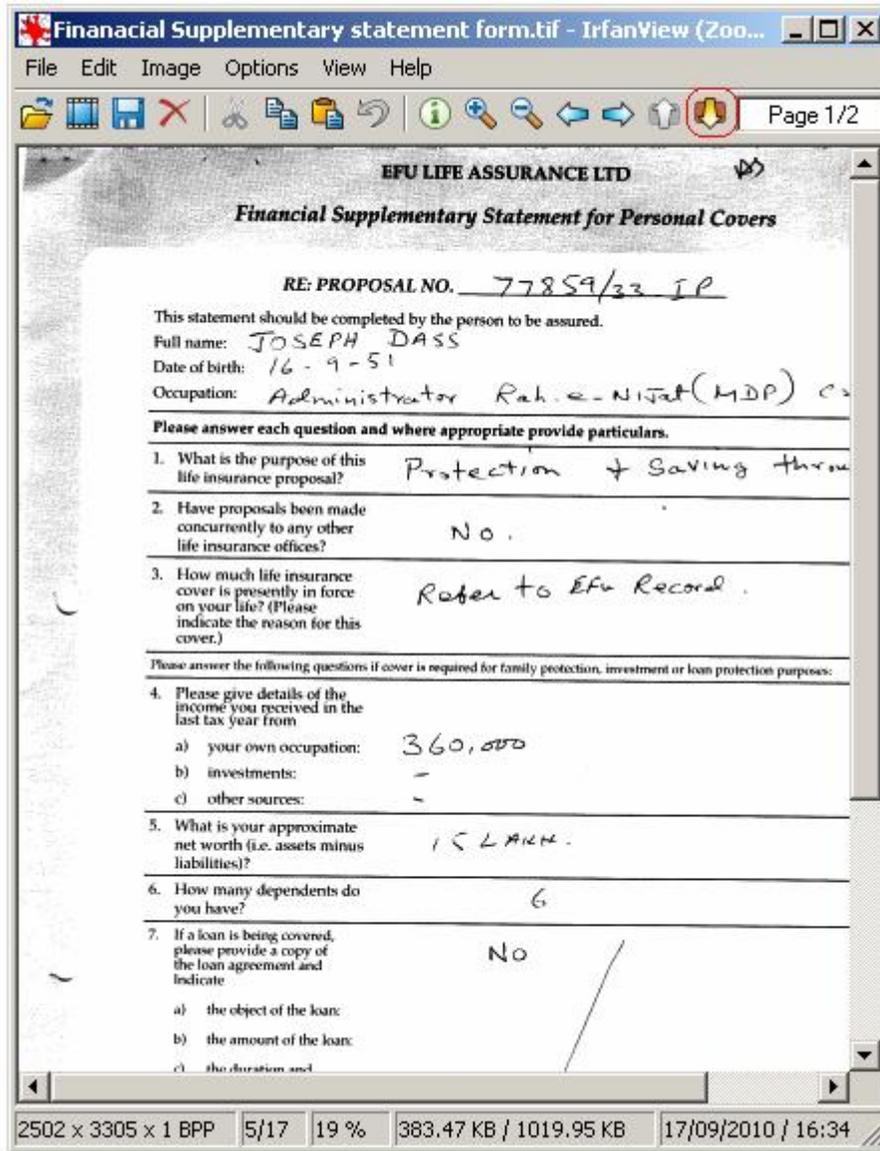


Figure 33

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.

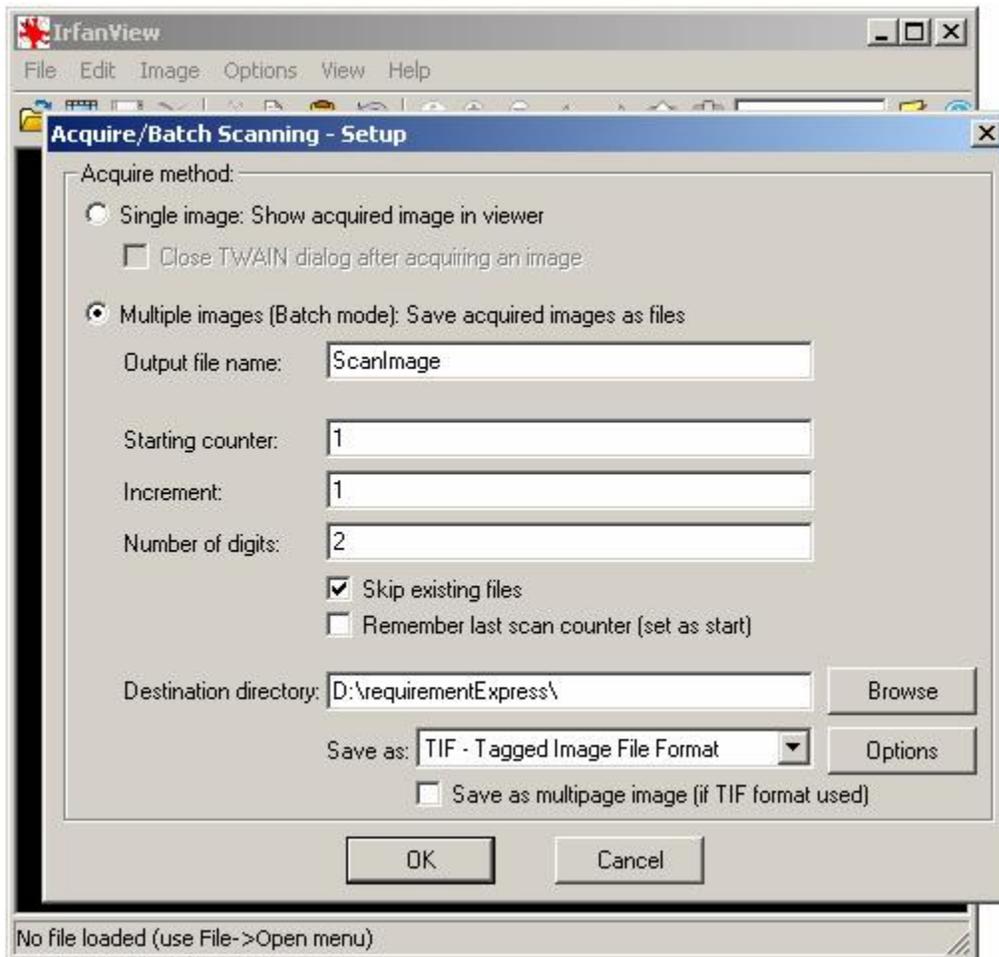


Figure 34

Now let's 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.

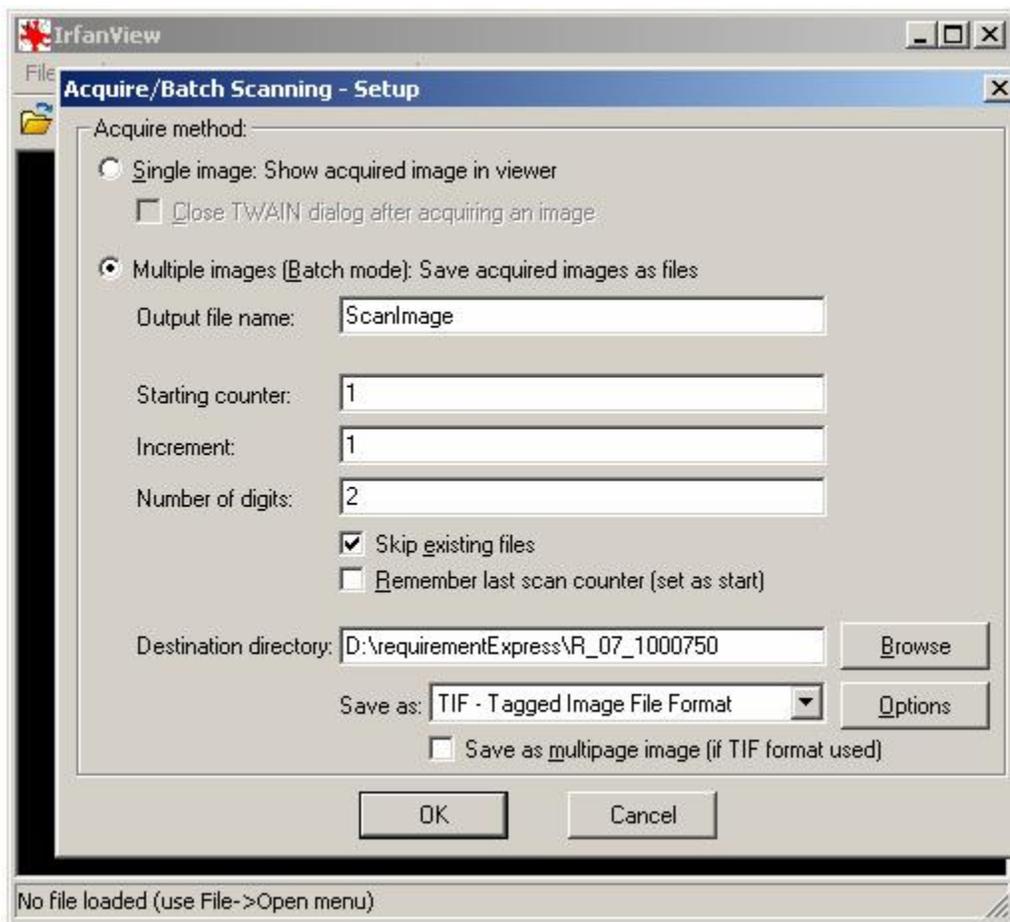


Figure 35

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.

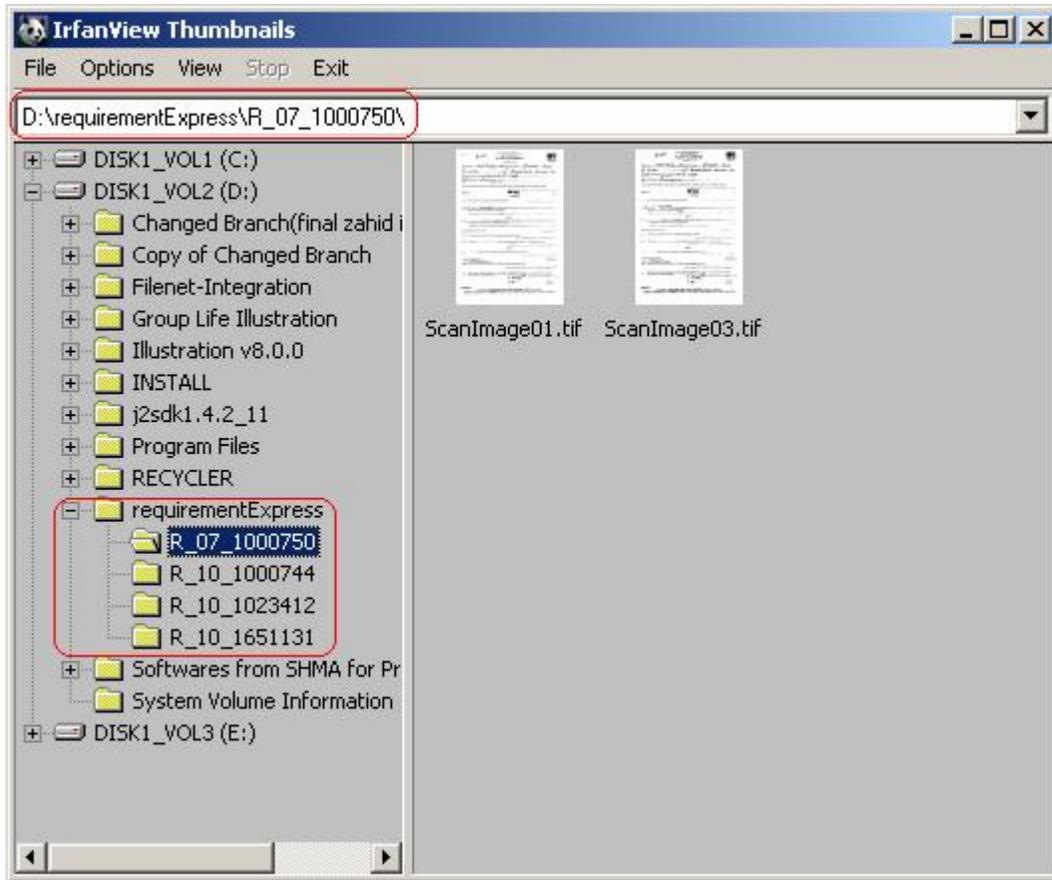


Figure 36

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.

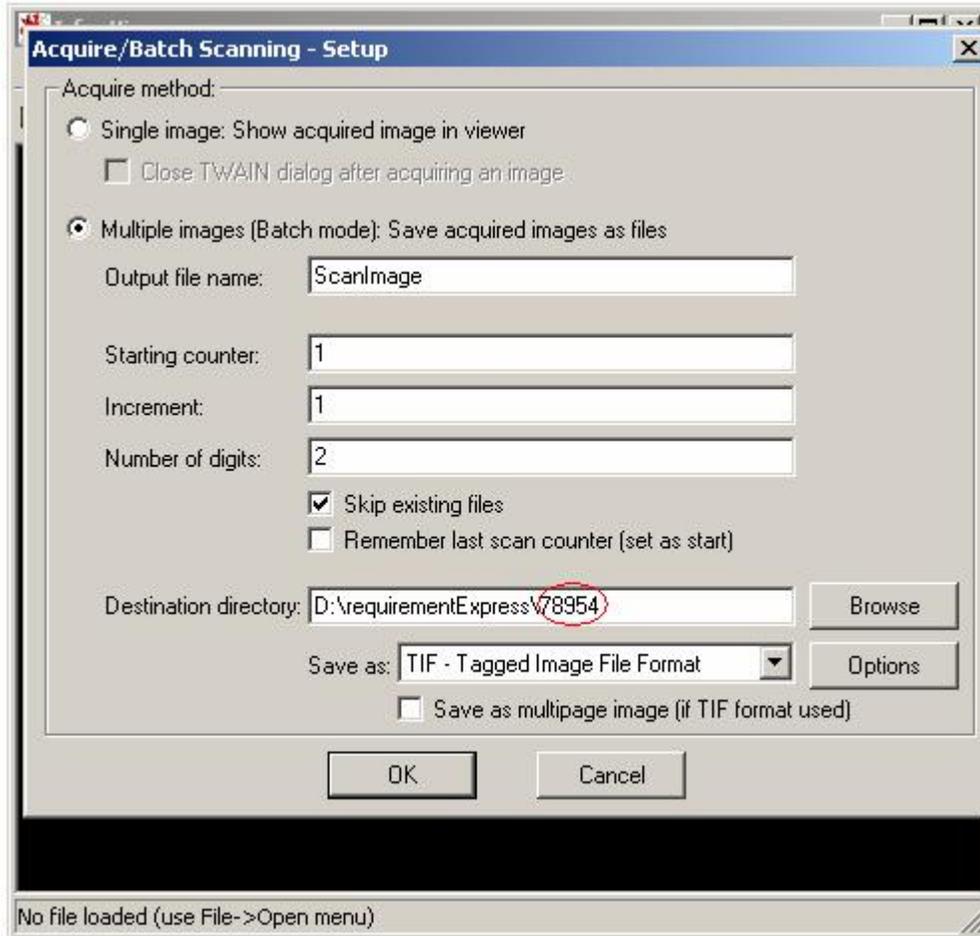


Figure 37

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.

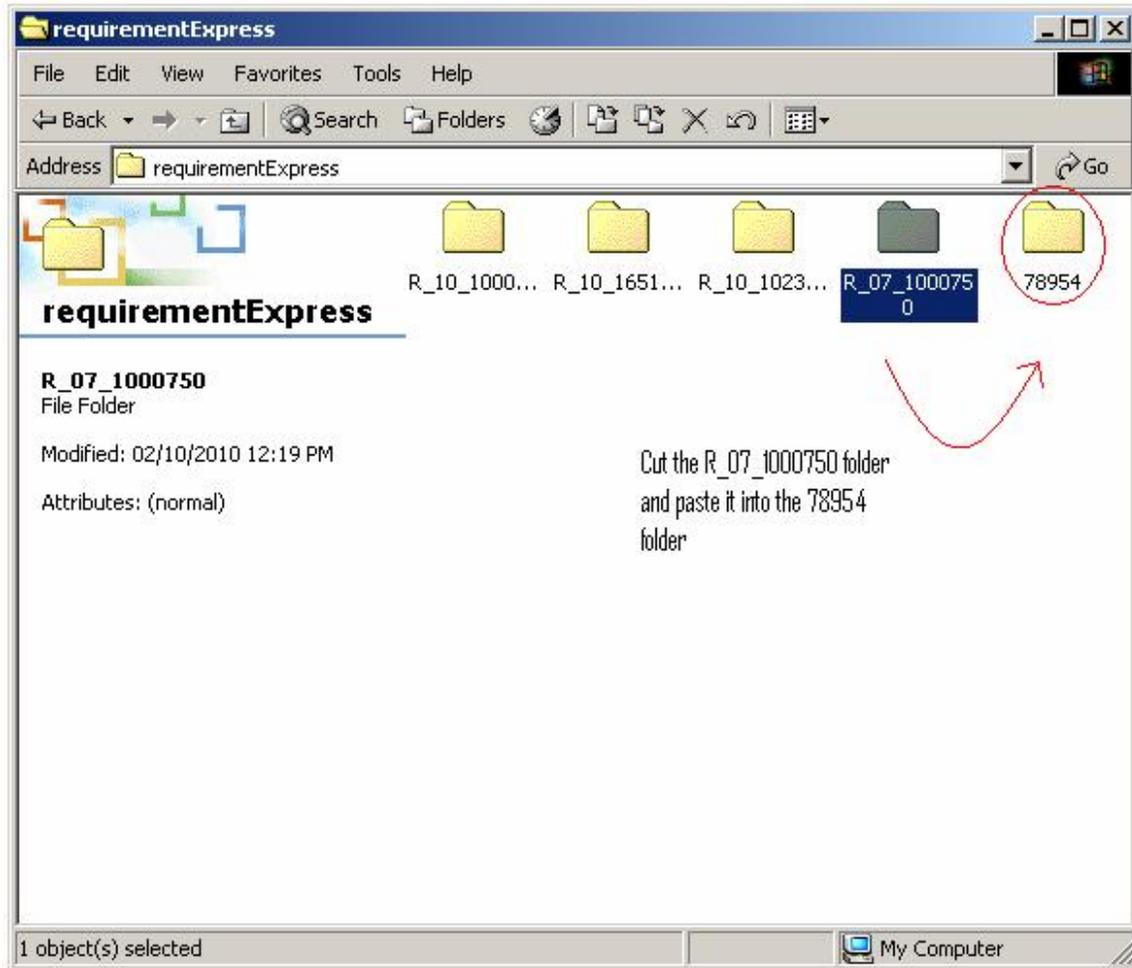


Figure 38

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

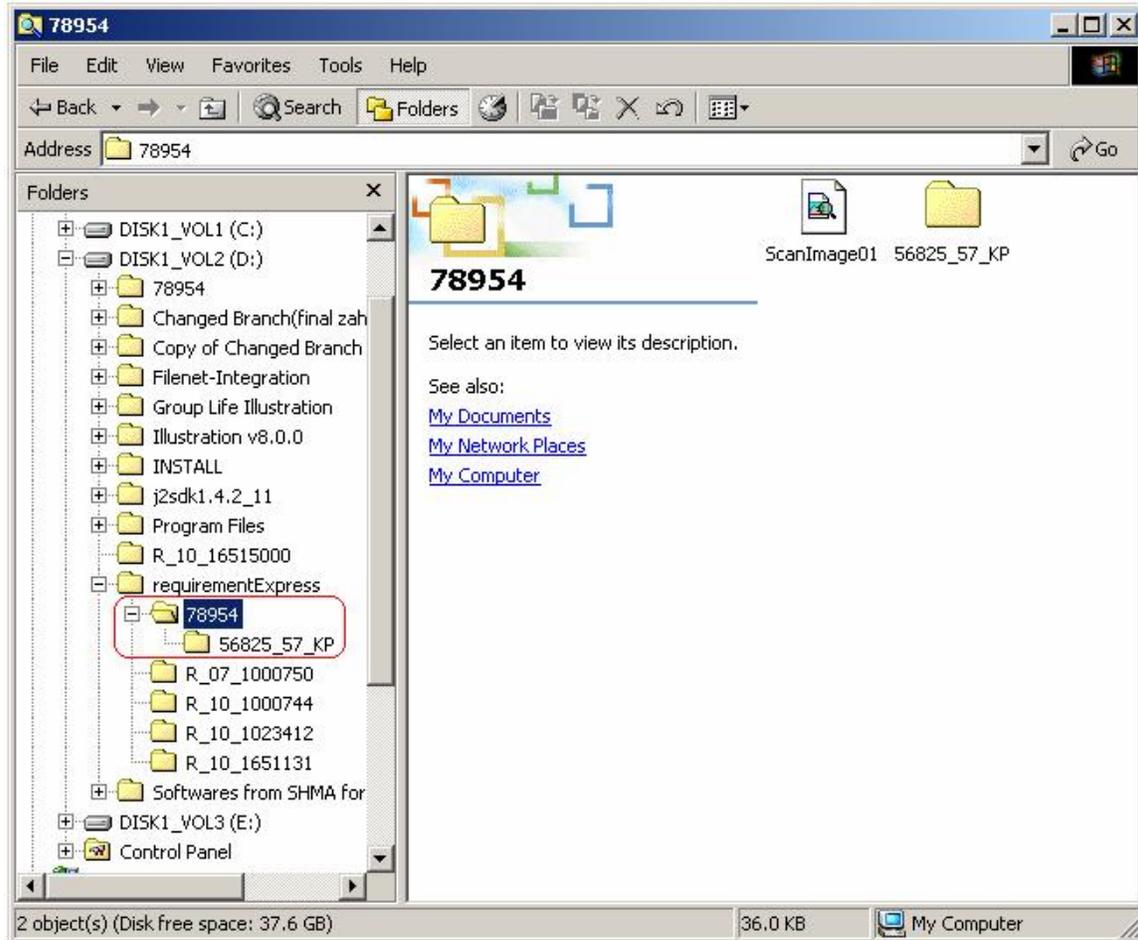


Figure 39

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

Best practice for regular monthly clean-up of your drives

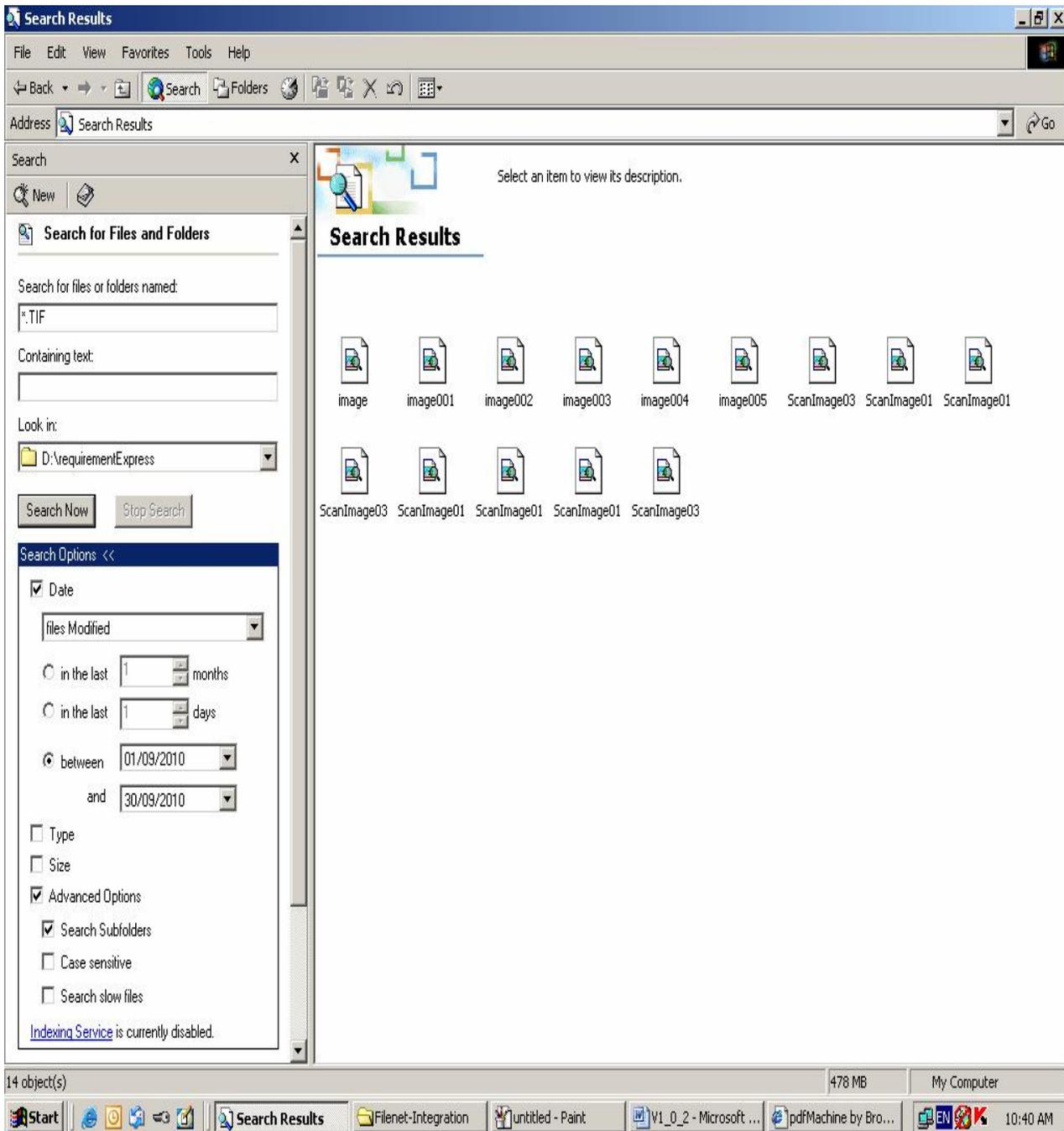


Figure 40

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



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- 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.

iView : 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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