

User Guide aivika Capture



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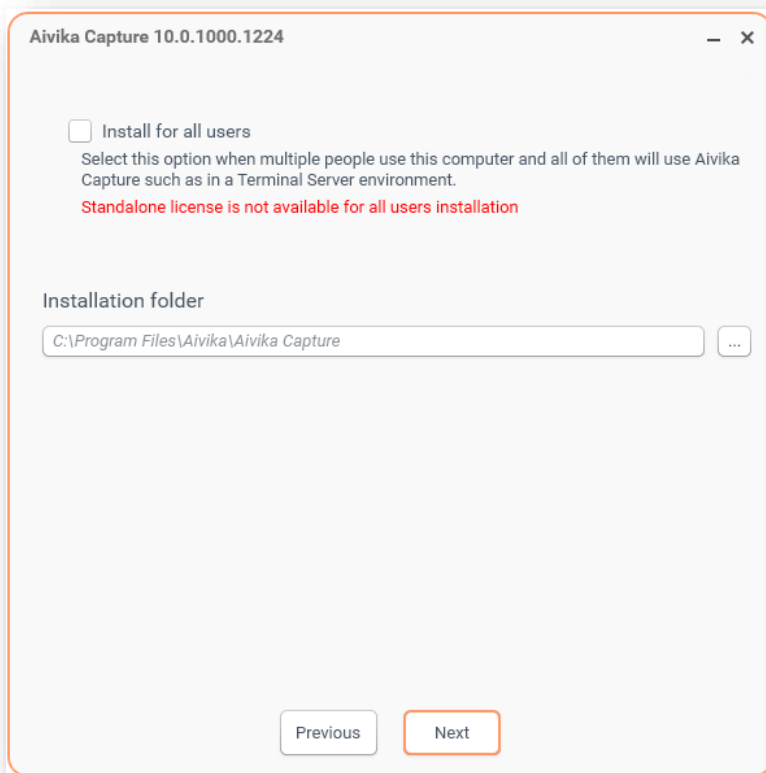
1.

Installation / Uninstallation

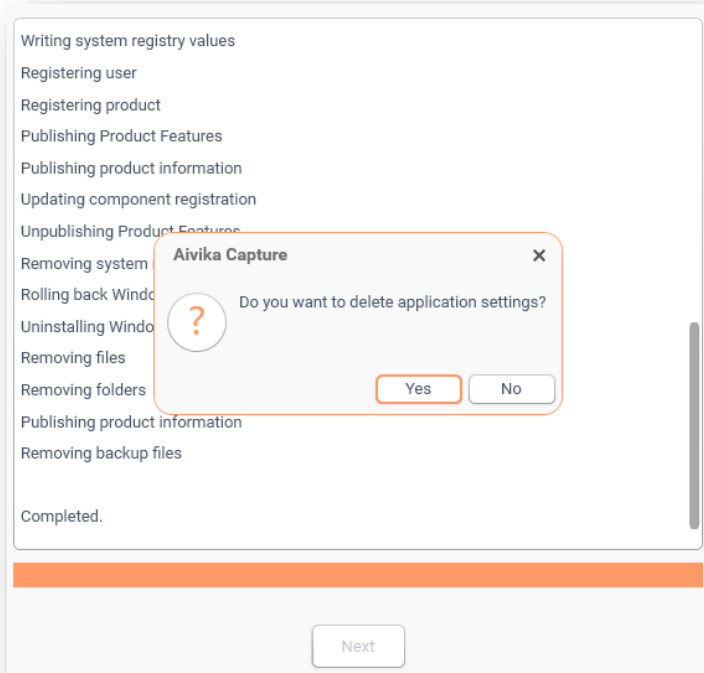
1.1. Install aivika

aivika offers two modes of installation,

- **Single user mode** – Recommended mode if only one user is using the computer. User should be able to access and modify all settings in **aivika**
- **All users mode** – Recommended mode if more than one user is using the same computer. Some settings are only accessible with administrator privileges



! CAUTION: Outlook plugin component will only be available if **Microsoft Outlook** is installed on the machine.

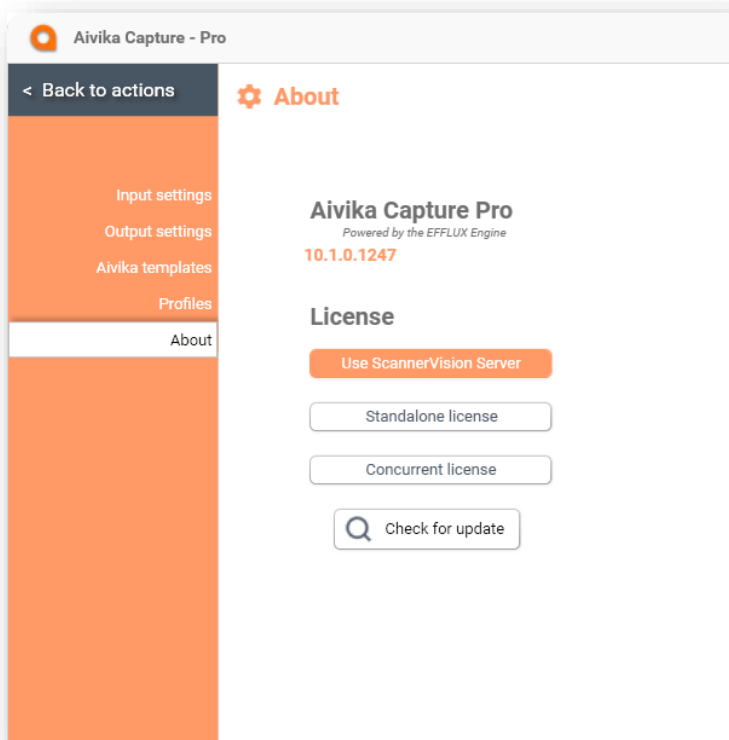


1.2. Uninstall aivika

During removal of **aivika**, the installer will prompt whether to delete user settings. By clicking **Yes**, all user settings will be deleted, **No**, user settings will be retained.

2.

Licensing



aivika licensing information is under the **About** section. There are 3 types of licenses.

Use ScannerVision Server – This license is validated from **ScannerVision** server. Documents can be upload to **ScannerVision** for further processing.

Standalone – This is a standalone license that allow document processing and upload to configured connector.

Concurrent license – This license can be use on multiple devices. However, it can only be activated on one device at a time from the licensing server.

! CAUTION: This setting is only available with administrator privileges for **aivika** installed in all users mode. Please run **aivika** as administrator.

2.1. Activating aivika License to Use ScannerVision Server

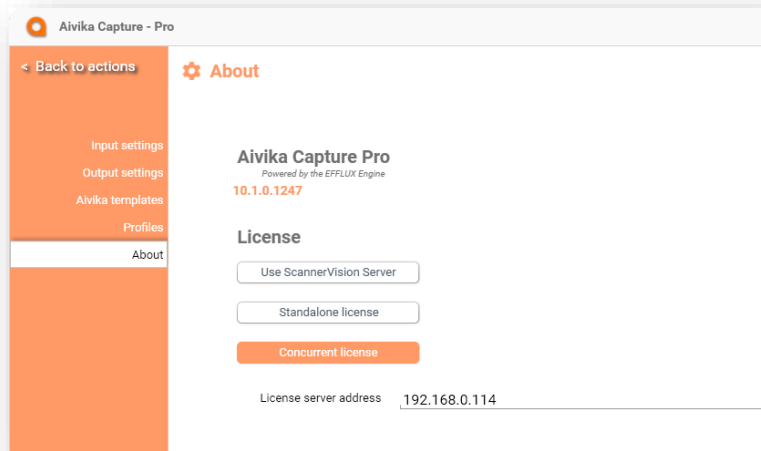
To activate a license to use a **ScannerVision** server

1. Select **Use ScannerVision Server**
2. Go to **Output settings**
3. Select **ScannerVision** tab
4. Configure **ScannerVision** setting as in [5.1](#)

2.2. Activating aivika Standalone License

To activate Standalone license

1. Select **Standalone license** to show **License Manager** button
2. Click on **License Manager**
3. Enter the license key provided via email and click **Verify**
4. It will show the status of the license, remaining activation on how many devices and license information
5. Click **Activate** button to activate the license
6. Click **Close**



2.3. Activating aivika Concurrent License

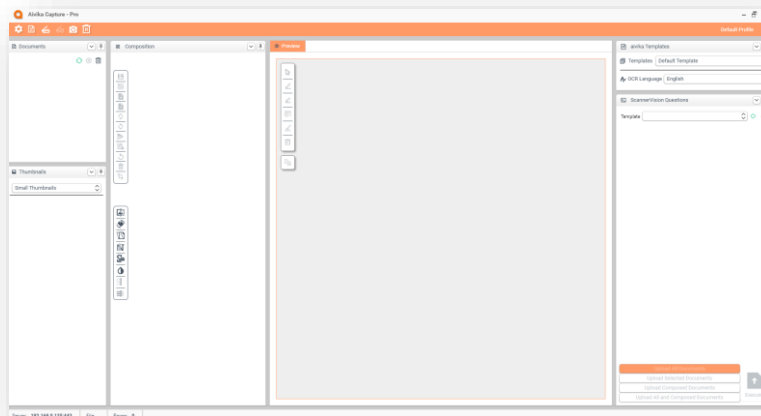
To activate Concurrent license

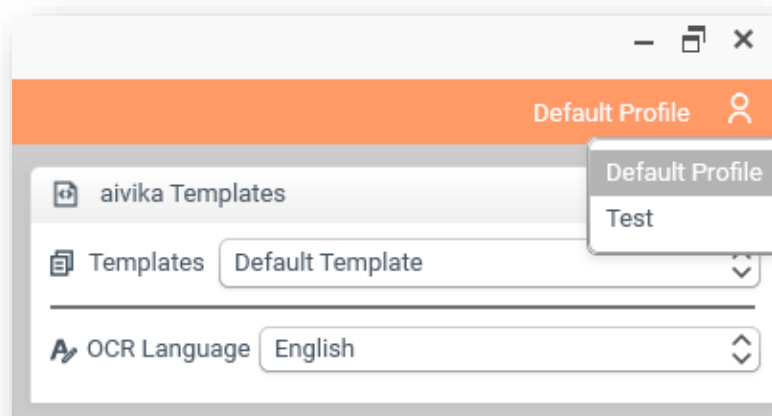
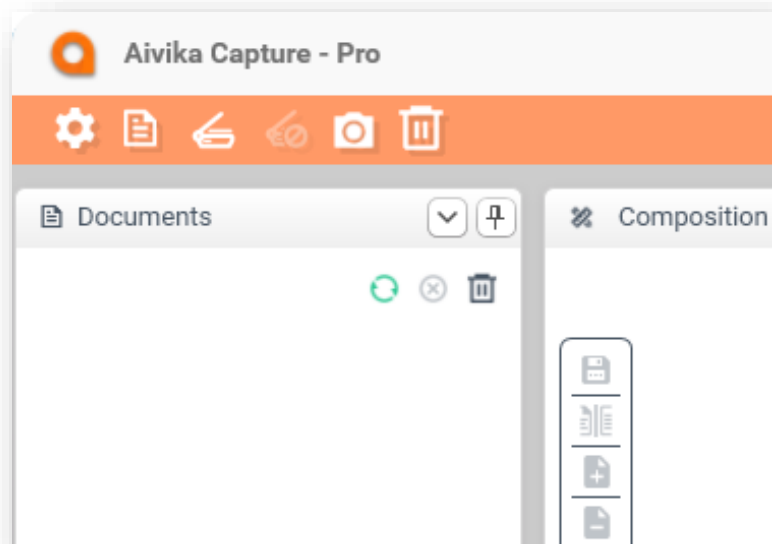
1. Select **Concurrent license**
2. Enter **License server address**
3. Login screen will appear on the main screen

3. aivika Main Interface

aivika main interface consists of:

- Toolbar
- Documents panel
- Thumbnails panel
- Composition panel
- Preview panel
- **aivika** Templates panel
- Questions/Metadata panel
- Status bar at the bottom





3.1. Toolbar

Toolbar consists of few different items which are listed below:

- Configure
- Open
- Scan
- Camera
- Clear
- Profile



3.1.1. Configure

Configure button will open **aivika settings** page. The Settings page includes **Input settings, Output settings, aivika templates, Profiles** and **About**. On top of the menu there is a **Back to actions** button.

! CAUTION: Remember to always click **Back to actions** button to save the changes.



3.1.2. Open

Open button will always open a dialog box to browse and select files. Multiple selection is supported in the open dialog box.



3.1.3. Scan

Scan button will open the Twain driver source list. The process can be suppressed in Twain Scanner settings to automatically select preferred scanning device.



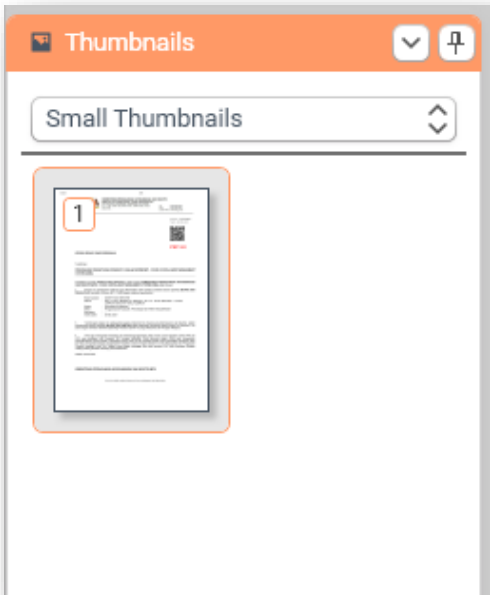
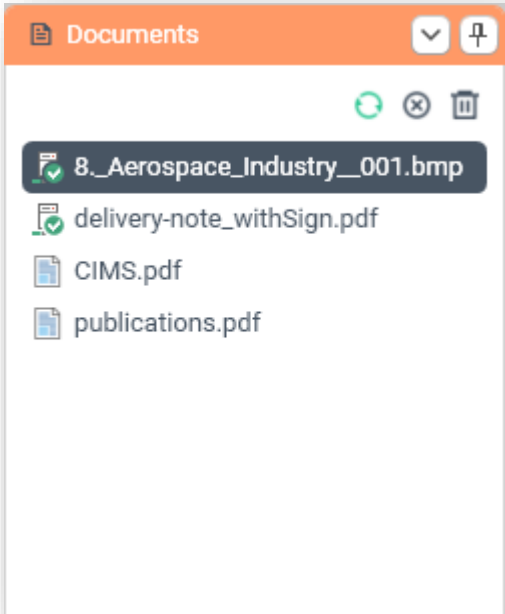
3.1.4. Camera

Camera button will open a separate preview window which lists the webcams. The user can select one of the listed webcams to capture documents from it.



3.1.5. Clear

Clear button will clear everything in **aivika** including values in Metadata and Questions panel.



3.1.6. Profile

Profiles can be switched by clicking profile icon. Drop down list will appear to choose the appropriate profile.

3.2. Documents Panel

Documents panel is where the loaded documents will be listed. There are 3 icons visible in the **Documents** pane.

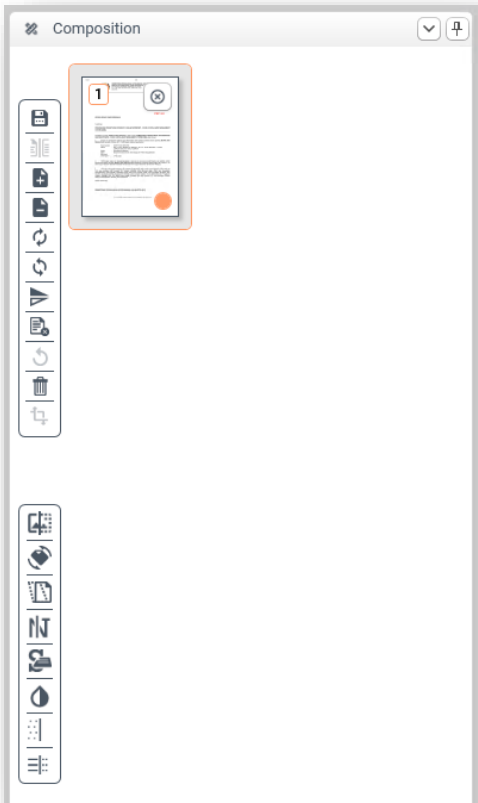
Reload Hot folders – Reload documents in the hot folders.

Remove – Remove selected item in **Documents** pane.

Clear – Clear all documents loaded in **Documents** pane.

3.3. Thumbnails Panel

Thumbnail panel will display all pages from the document. Thumbnail size can be selected in small, medium, large, and X-large.



3.4. Composition Panel

Loaded documents can be manually edited in the Composition panel. Image processing tasks also supported in this panel.

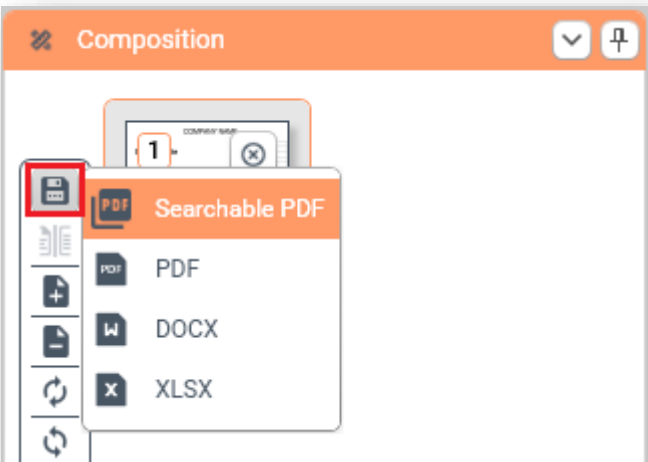
The orange dot in the composition thumbnail indicate that redaction tool was being applied in the preview panel.

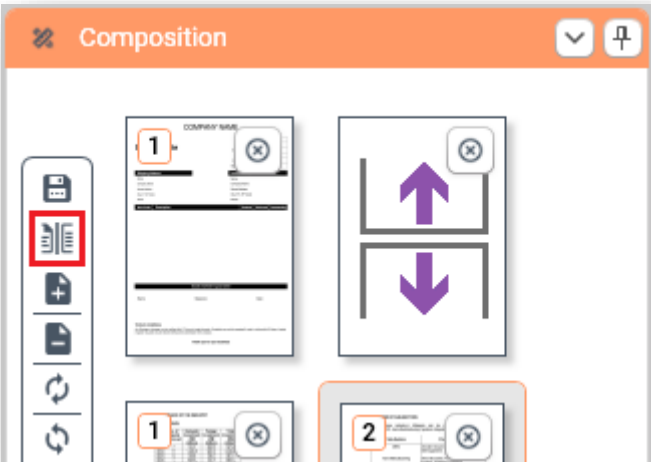
3.4.1. Composition Toolbar

3.4.1.1. Save

Save button support saving the document composition to

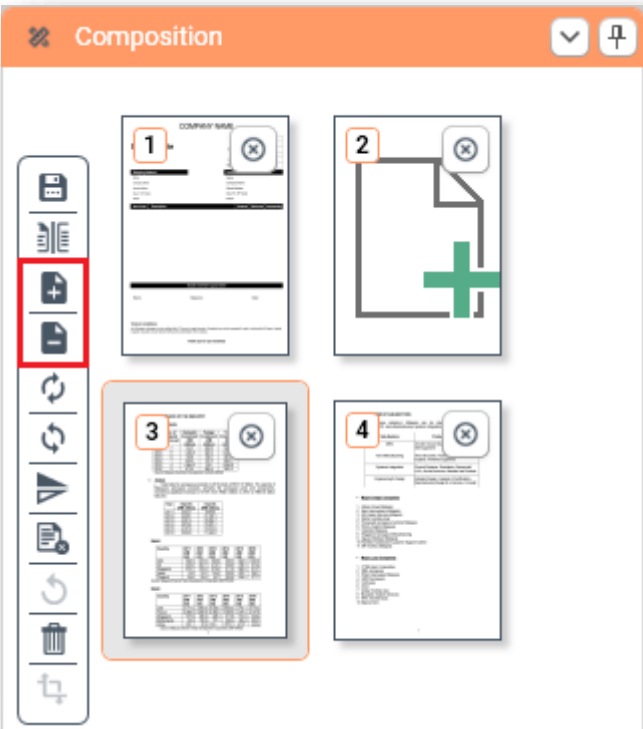
- **Searchable PDF**
- **PDF**
- **DOCX** (Microsoft Office Word)
- **XLSX** (Microsoft Office Excel)





3.4.1.2. Split

Split button allow document composition to be split into multiple files.



3.4.1.3. Insert Blank Page

Insert Blank Page button will add one or more blank pages to the document composition.

3.4.1.4. Delete Blank Page

Delete Blank Pages button will remove all blank pages added to the composed document by the **Insert Blank Page** button in the document composition.

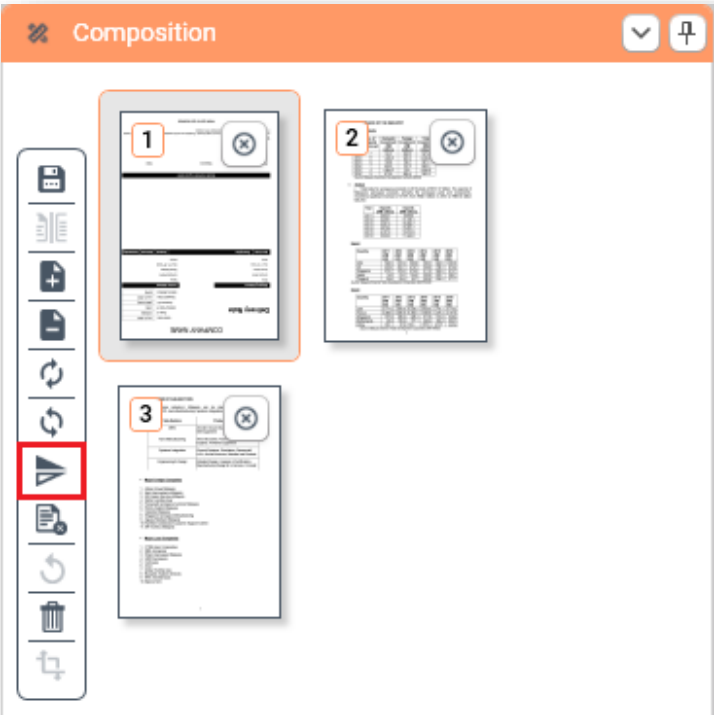


3.4.1.5. Rotate Clockwise

Rotate Clockwise button will rotate the selected page in composition 90 degree clockwise.

3.4.1.6. Rotate Counter-clockwise

Rotate Counter-clockwise button will rotate the selected page in composition 90 degree counter-clockwise.



3.4.1.7. Flip

Flip button will flip the selected page in composition vertically.



3.4.1.8. Delete Pages

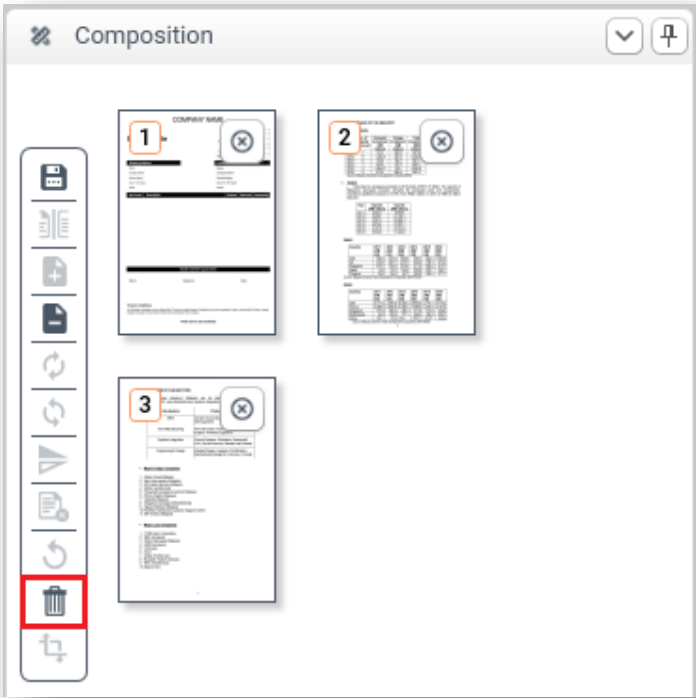
Delete Pages button will delete selected page in the document composition.

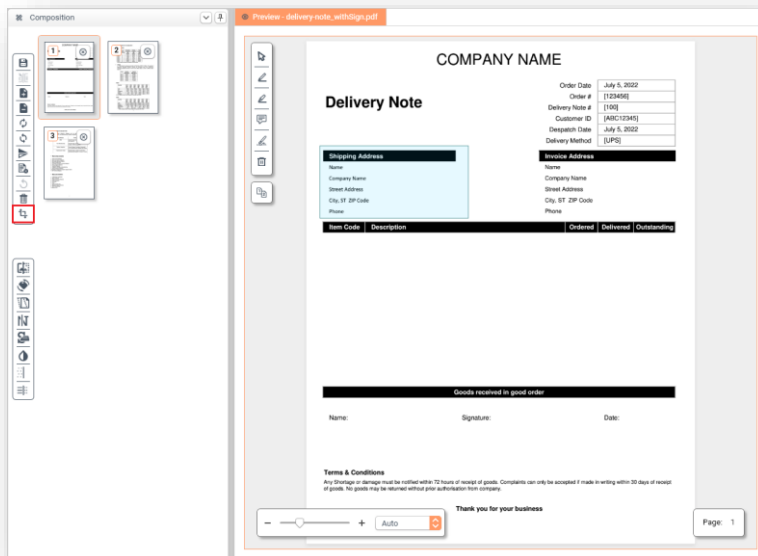
3.4.1.9. Undo

Undo button will undo the deletion of pages.

3.4.1.10. Clear

Clear button will delete everything in the document composition.





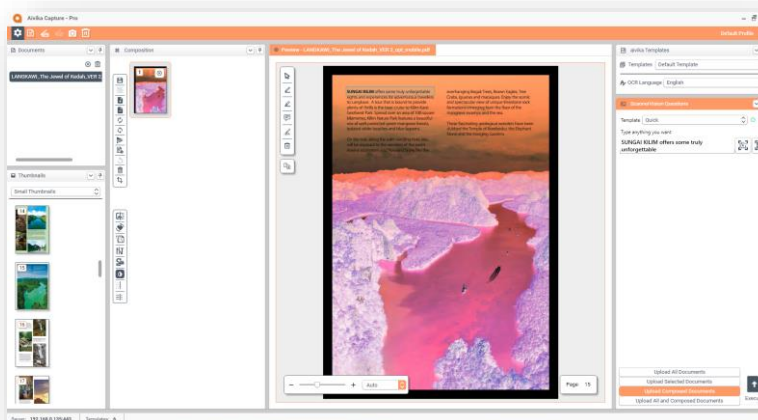
3.4.1.11. Crop

Crop button will crop the selected area made in preview panel.

3.4.2. Image Processing Toolbar

aivika now support image processing from the composition panel.

- Binarization
- Orientation
- Deskew
- Denoise
- Smoothing
- Invert text
- Dot removal
- Line removal



Example of image processing task **Invert text** applied to a page in composition panel.



3.4.2.1. Binarization

Binarization button will convert the document into monochrome level.



3.4.2.2. Orientation

Orientation button will automatically rotate the page to the upright position if it is rotated.



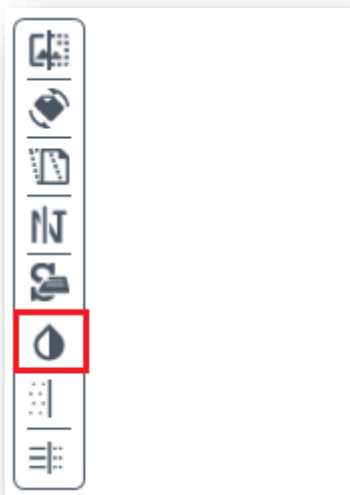
3.4.2.3. Deskew

Deskew button will automatically correct slight skewing of scanned documents.



3.4.2.4. Denoise

Denoise button will removes noise from documents such as faxes or images scanned on a scanner with a dirty exposure glass.



3.4.2.5. Smoothing

Smoothing button will smooth the bumps in text in black and white documents.

3.4.2.6. Invert text

Invert Text button will invert white text on darker background to black text on brighter background and vice versa.



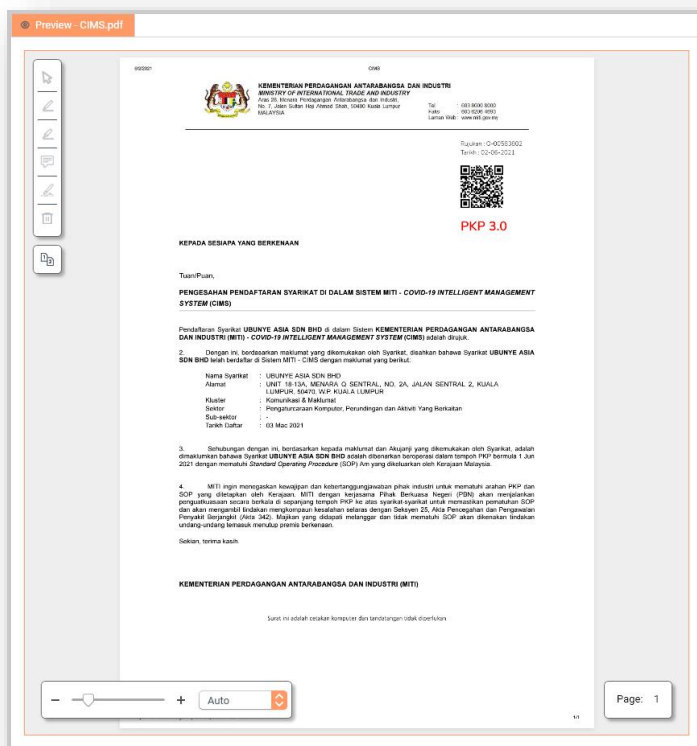
3.4.2.7. Dot Removal

Dot Removal will remove dots from black and white documents.



3.4.2.8. Line Removal

Line Removal will remove horizontal lines from scanned document.



3.5. Preview Panel

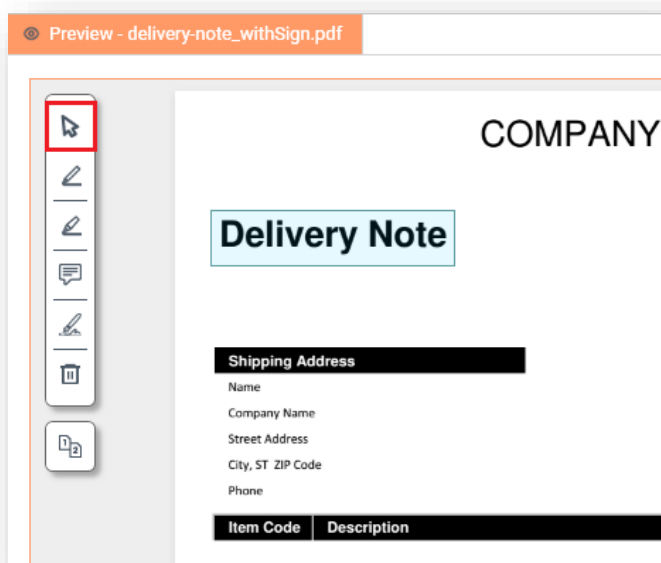
Preview panel will display a selected page from Thumbnails panel or Composition panel. OCR region can be draw here by left clicking the mouse and drag the cursor to select the area. Zoom is also supported in this panel.

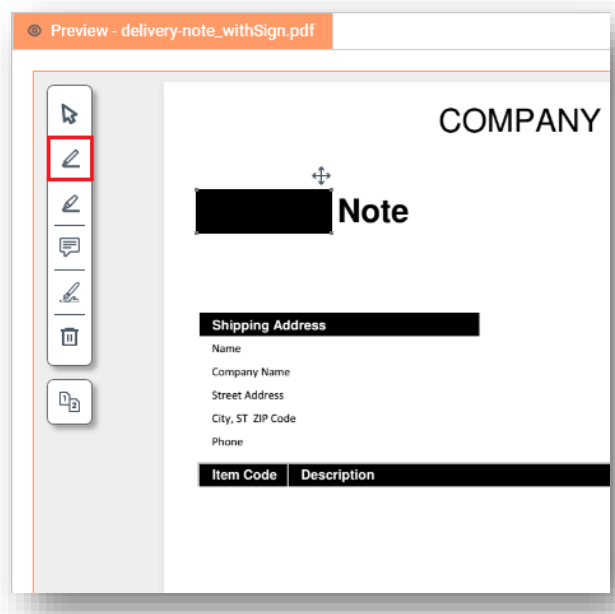
Document redaction toolbar will only be enabled if composition page is selected.

3.5.1. Document Redaction Toolbar

3.5.1.1. Select

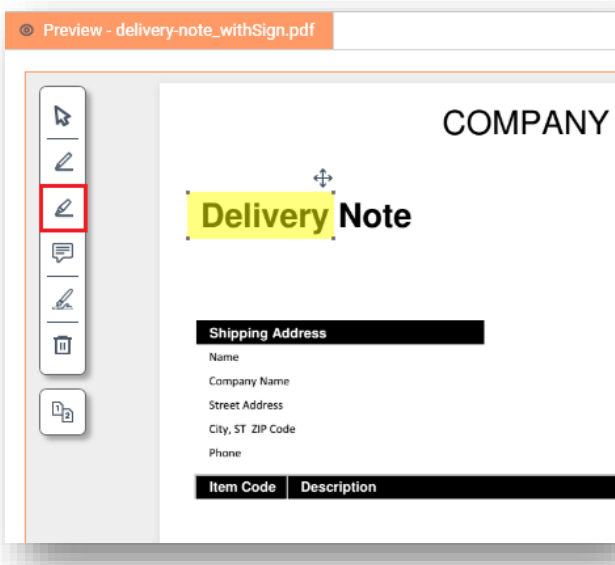
Select button allow selection of area within document preview.





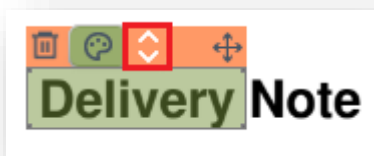
3.5.1.2. Mask

Mask button allow masking the selected area within document preview.



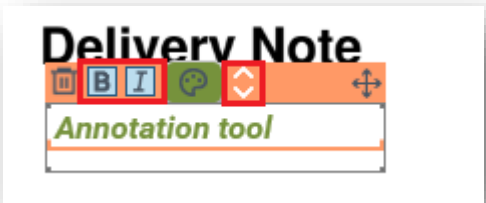
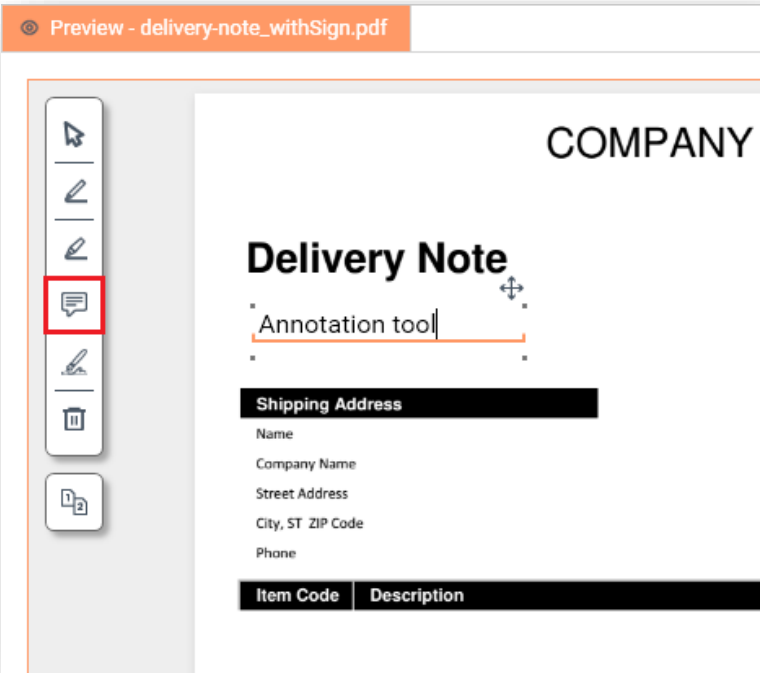
3.5.1.3. Highlight

Highlight tool allow highlighting text within document in the preview panel. The color can be change by hovering the highlighted area



3.5.1.4. Annotation

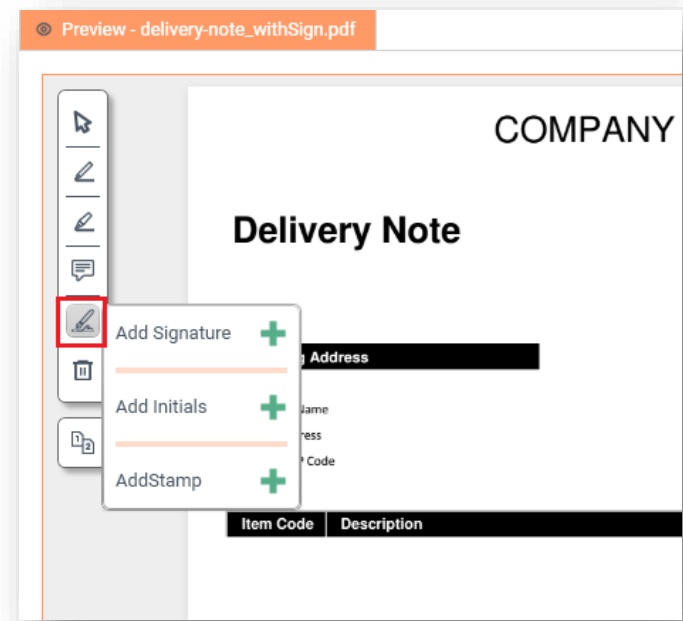
Annotation tool allow user to annotate the document



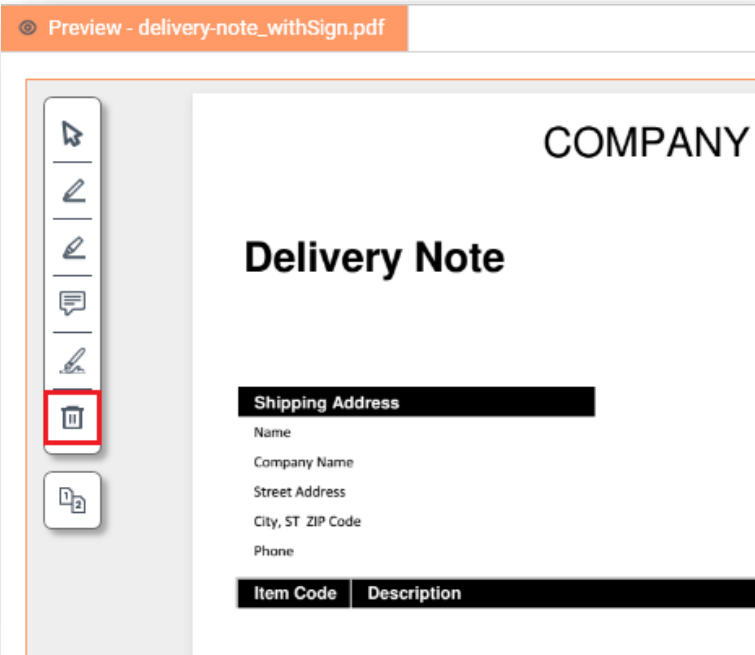
Font style and color can be change by hovering to the annotation area

3.5.1.5. Signature, Initials and Stamp

Signature, Initials and Stamp button allow to add signature, initial and stamp into **aivika**. Click **+** button to open the new window with sign pad.

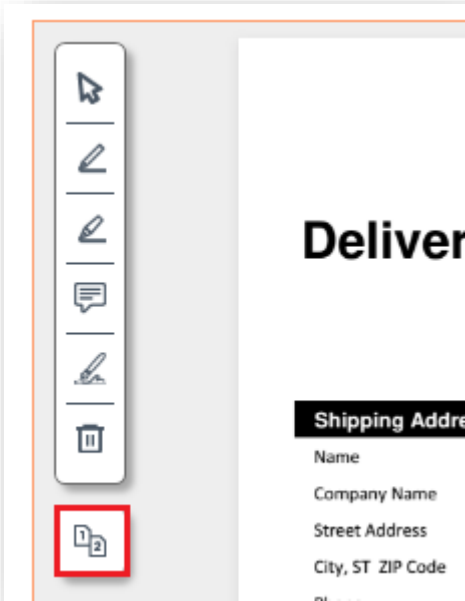


- **Apply** button will save the signature.
- **Cancel** button will close the signature window
- **Clear** button will delete the unsaved signature in sign pad.
- **Import** button will allow to import a signature from image file.



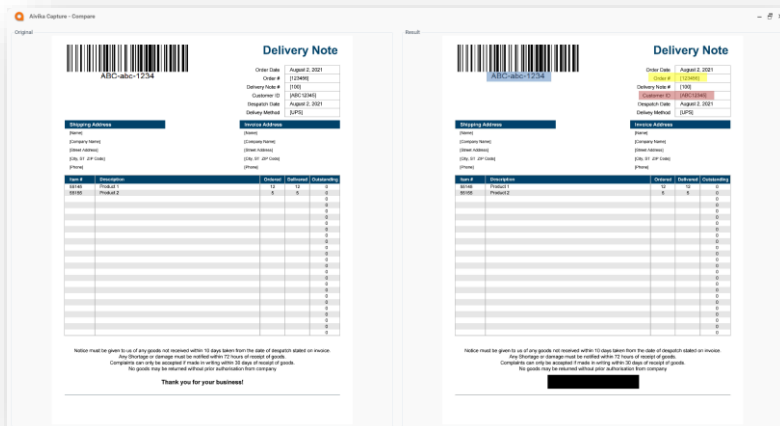
3.5.1.6. Delete

Delete button will delete all redaction made in the document

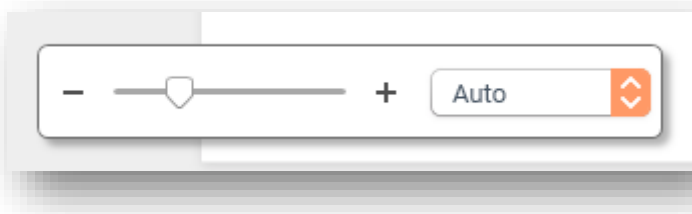


3.5.2. Compare

Compare button will compare the redacted document in **Preview** panel and in **aivika** template with the original document side by side.

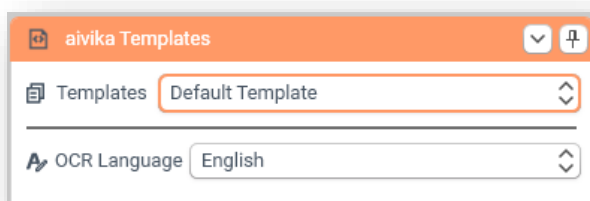


3.5.3. Zoom

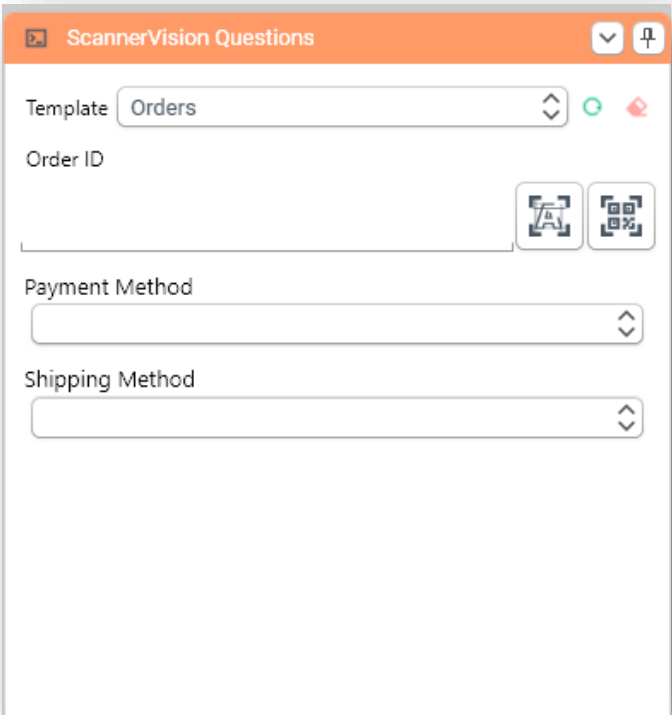


Zoom tool allow user to zoom the preview document composition. **Scroll bar**, **Ctrl + mouse scroll**, **drop down** and **manually enter the percentage number** are allowed in this feature.

3.6. aivika Template Panel



Pre-configured **aivika** templates in the settings page and OCR Language can be selected here.



3.7. Questions/Metadata Panel

This panel will display questions from **ScannerVision** templates and **DocVolante** metadata according to is chosen in the **aivika** template panel.

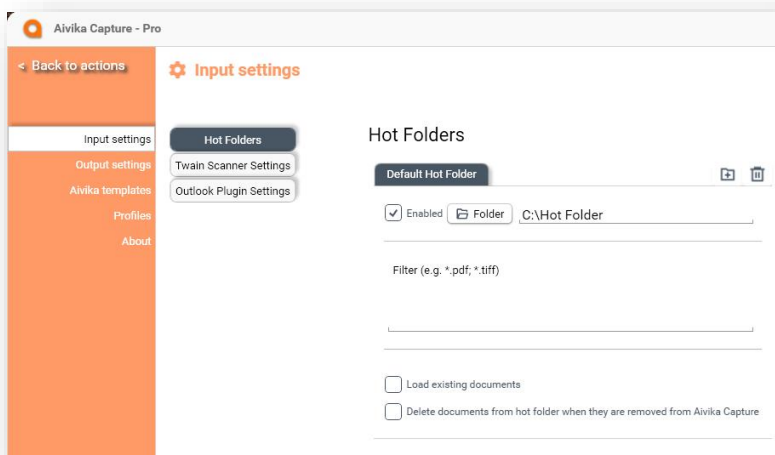
4.

Input Settings

The new **aivika** now has the ability to load all supported files within a specified directory. This directory can be located on local or network drives.

4.1. Hot Folder

4.1.1. Enable Hot Folder



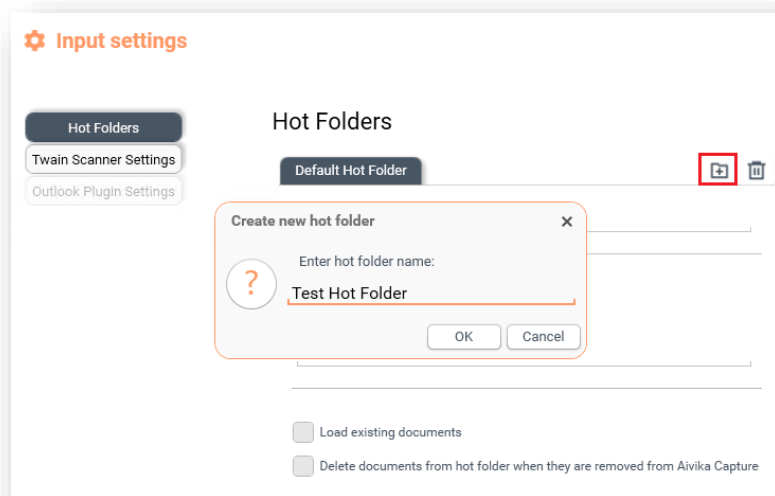
1. Go to **Settings** page
2. Under **Input settings**, click **Hot Folders** tab
3. Under **Default Hot Folder** tab, Check **Enabled**
4. Click **Folder** button to browse and select the hot folders
5. Go back to main page to save the settings

Other options which are available within hot folder settings.

Filter – **aivika** will only load file type specified here from the hot folder.

Load existing documents – **aivika** will load all documents that currently exist in the hot folder.

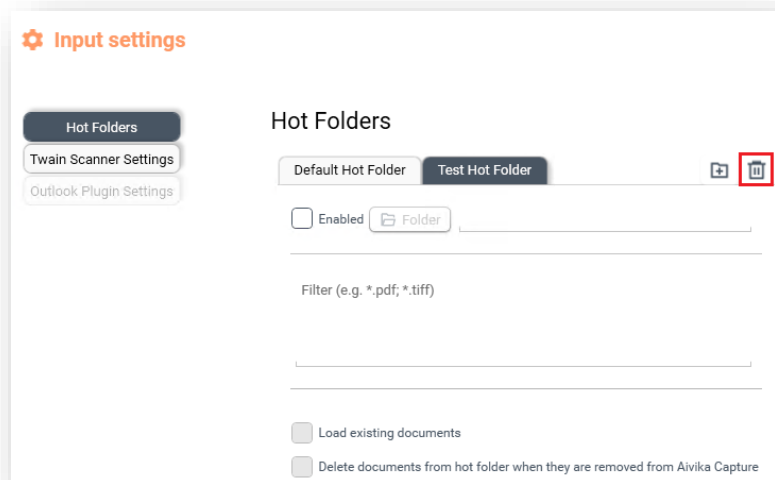
Delete documents from hot folder when they are removed from Aivika Capture – **aivika** will delete the document permanently from the computer when it is being removed or cleared in **aivika**.



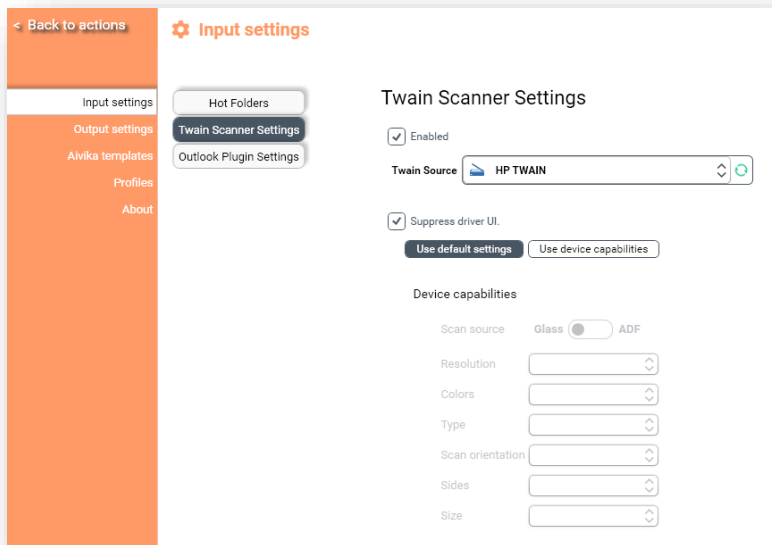
4.1.2. Create additional hot folder

1. Go to **Settings** page and select **Input settings**
2. Click **Hot Folders** tab
3. On the same row of **Default Hot Folder** tab, click add folder icon
4. Give a name to the new hot folder and click **OK**
5. Go back to main page to save the setting

4.1.3. Remove additional hot folder



1. Go to **Settings** page and select **Input settings** and
2. Click **Hot Folders** tab
3. Select additional hot folder tab that needs to be deleted
4. Click delete icon on the same row of hot folder tab
5. Go back to main page to save the settings



4.2. Twain Scanner Settings

Twain scanning can be automated by preconfiguring it in this setting.

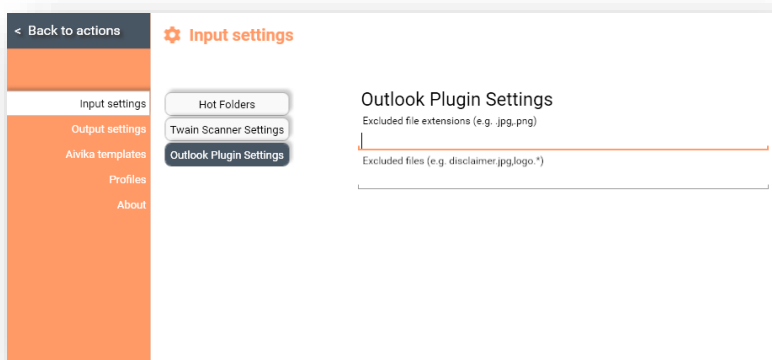
Enabled – Is to activate this setting.

Twain Source – Selected scanner will be use as default when scanning

Supress driver UI – activate this option to suppress scanner window. By activating this, these 2 options will be available to choose.

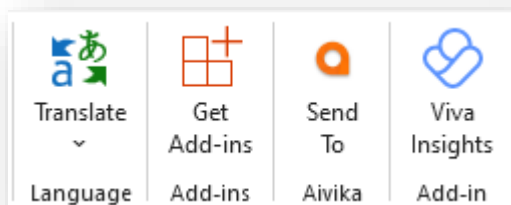
- **Use default settings** – by selecting this option, **aivika** will use scanner default settings
- **Use device capabilities** – supported device will allow some settings to be enable within this option

4.3. Outlook Plugin Settings



Outlook plugin allows email to be send into **aivika** for processing. Specific file name or extension can be excluded when sending the email which can be specified in the filter settings. There are 2 types of filters.

1. Filter by file extension – File with specified extension will not be send to **aivika**.
2. Filter by file name – File with specified name will not be send into **aivika**. Wildcards are allowed in the text area.



View in Microsoft Outlook banner

Output settings

ScannerVision

User Name

Password

IP Address or Hostname
192.168.0.135

Port
443

Connection timeout (seconds)
10

☒ Use SSL

☒ Automatically select last used template when application starts

Elevate

5.

Output Settings

5.1. ScannerVision

This setting allows **aivika** to connect and upload documents to **ScannerVision** server for processing.

Username – Enter username to automatically authenticate with **ScannerVision** server

Password - Enter username to automatically authenticate with **ScannerVision** server

IP Address or Hostname – Enter **ScannerVision** server IP or Hostname

Port – Default port is 443

Connection timeout – Provides a process timeout in seconds

Use SSL – Check SSL to enable Secure Socket Layer

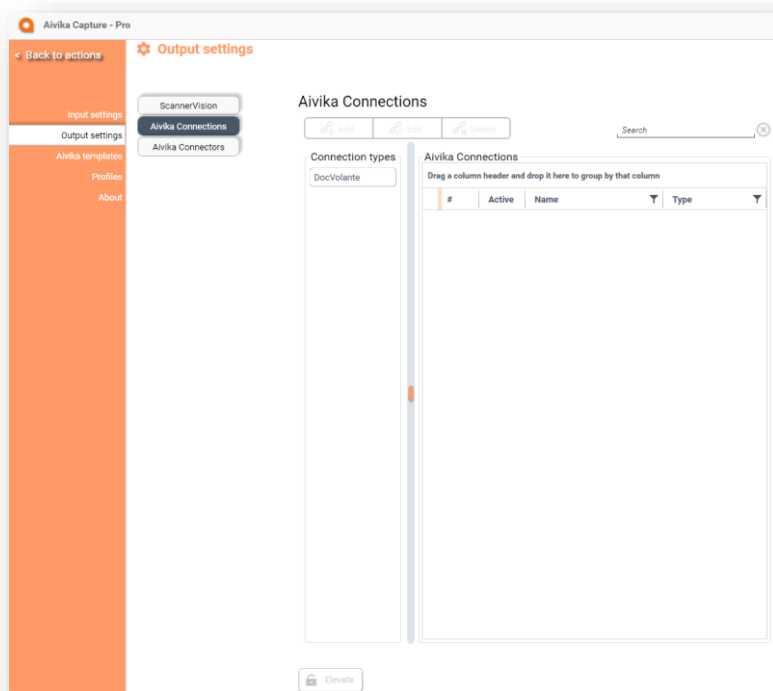
Automatically select last used template when application start – **aivika** will launch with last used template selected

Elevate – Elevate button will only enable if **aivika** installed in all users mode. It allows only administrator to do the changes.

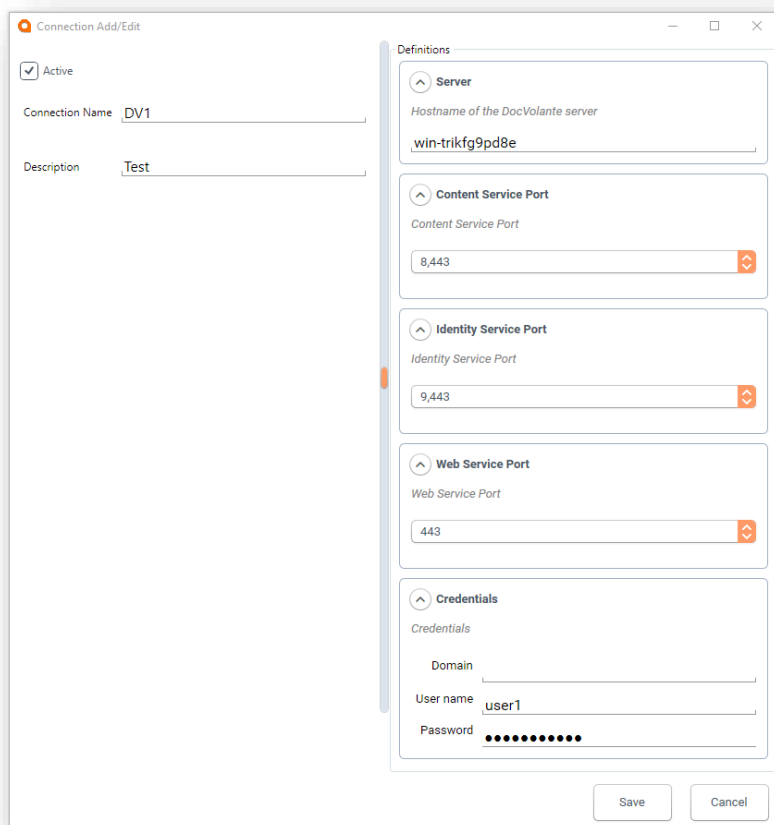
5.2. DocVolante Connector

DocVolante Connector is now built in to **aivika**. The integration enables **aivika** to process and upload documents to **DocVolante** server, without requirement for a ScannerVision installation.

5.2.1. Create DocVolante Connection

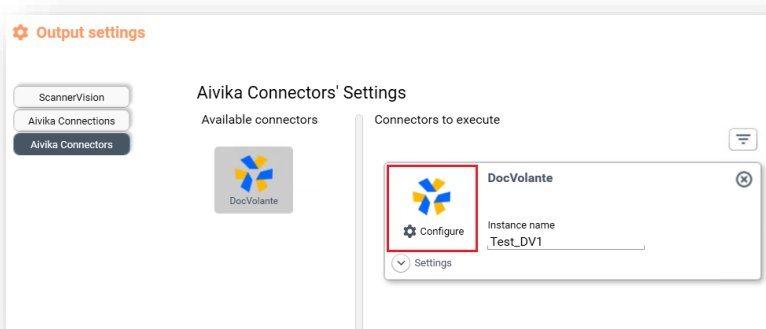


1. Go to **Settings** page and select **Output settings**
2. Select **aivika Connections** tab
3. If **aivika** was installed in all users mode, **aivika Connections** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credential to enable **aivika Connections**
4. Under **Connection types**, select **DocVolante**
5. Click **Add** at the top to create a new connection



6. Verify that **Active** checkbox is ticked and type in **Connection Name** and **Description**
7. Under **Server**, type in **DocVolante** server hostname
8. Leave the default value under **Content Service Port**, **Identity Service Port** and **Web Service Port** (unless advised to change)
9. Under **Credentials**, type in **DocVolante** user credentials and click **Save**

5.2.2. Configure DocVolante Connector



1. Go to **Settings** page and select **Output settings**
2. Select **aivika Connectors** tab
3. If **aivika** was installed in all users mode, **aivika Connectors** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credentials to enable **aivika Connectors**
4. Under **aivika Connectors Settings**, drag **DocVolante** icon from **Available connectors** to **Connectors to execute**
5. Type in the name under **Instance name**

DocVolante

Target folder
 \Folder 1

Upload file title
 Test_DV

Root document type
 Invoice

Applied document type
 Invoice

If the destination exists
☒ Overwrite file ☐ Append to file ☐ Prepend to file ☐ Abort operation

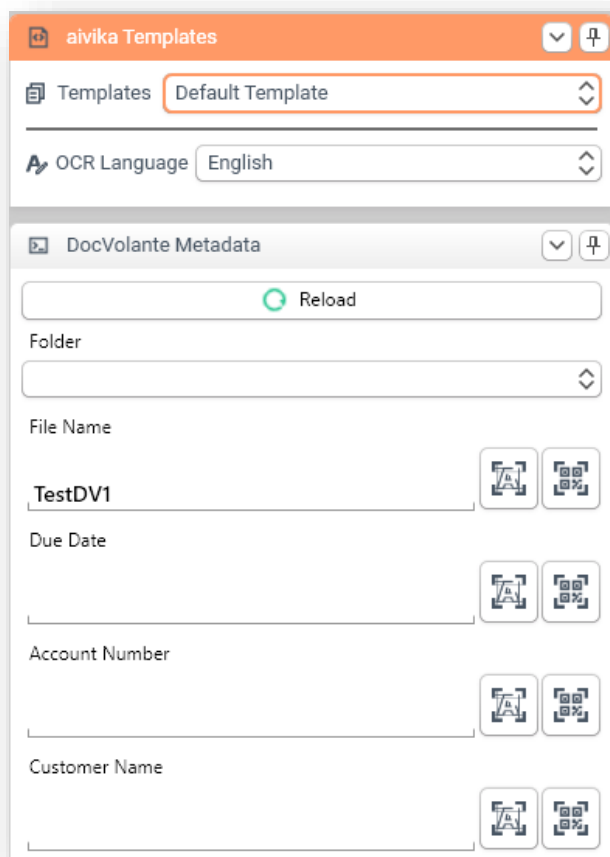
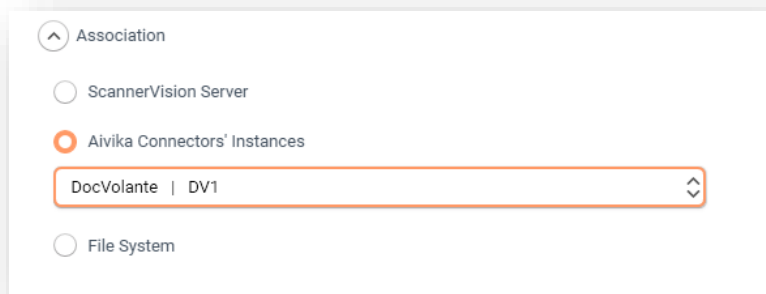
Field mappings

Field name	Value
Account Number	
Amount Due	

*Required

OK Cancel

6. Click **Configure** to open login page
7. Select appropriate connection and click **Login** button
8. On **DocVolante** configuration window, click 3 dots button to browse and select a folder under **Target folder**
9. Type in file title under **Upload file title**, this will appear later in **aivika** main page under **DocVolante metadata** panel as File Name
10. Select **Root document type**
11. Under **If the destination exists**, select desired action when **aivika** finds out that the same filename already exists in **DocVolante** upload folder
 - a. **Overwrite file** – This option will replace the current existing file
 - b. **Append to file** – This option will add the upload document at the end of the existing file
 - c. **Prepend to file** – This option will add the upload document at the beginning of the existing file
 - d. **Abort operation** – This option will cancel the upload entirely
12. Click **OK** and go back to main page to save the settings



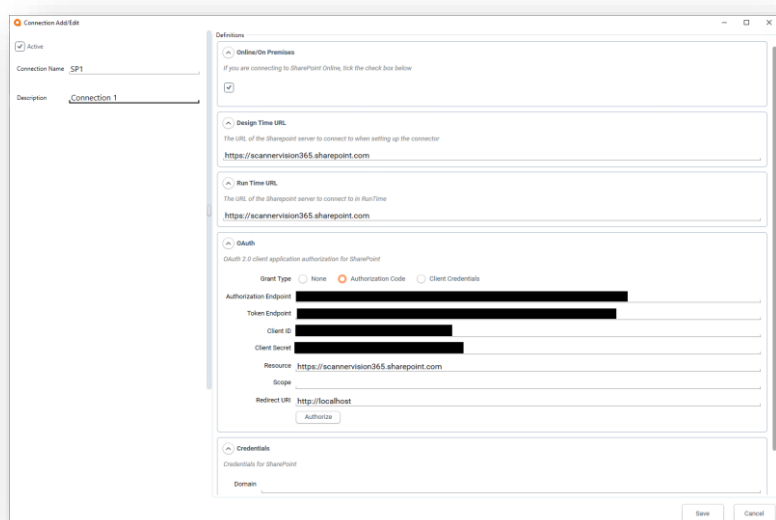
5.2.3. Associate aivika template with DocVolante Connector

1. Go to **Settings** page and select **aivika templates**
2. Under the **Default Template** tab, Leave other options as default
3. Go down and expand the **Association** section
4. Select appropriate **DocVolante** Connector Instances
5. Go back to main page to save the settings
6. On main page, select **aivika Template** associated with **DocVolante** Connector
7. **DocVolante Metadata** fields will appear below
8. **Reload** button use to reload **DocVolante metadata** fields in **aivika**
9. The user should be able to upload the file to any subfolder under the default folder that was configured in the connector. Documents will be upload to default folder if left empty.

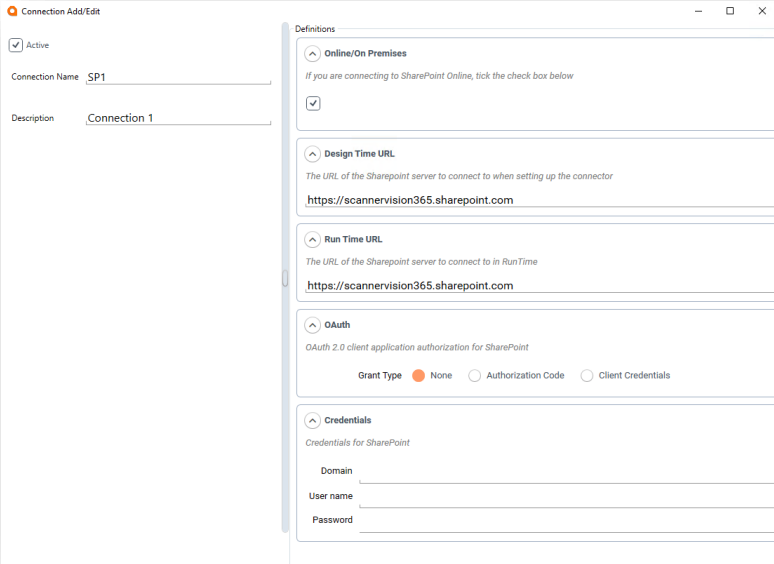
5.3. SharePoint OneDrive Connector

SharePoint OneDrive Connector is now supported in **aivika** with separate installation required.

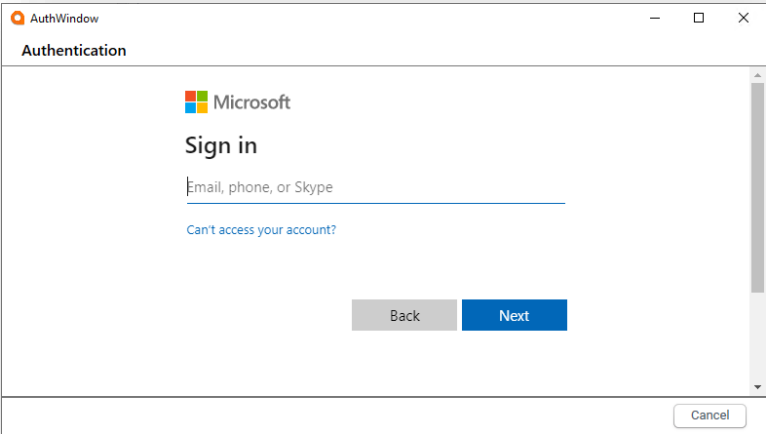
5.3.1. Create SharePoint OneDrive Connection



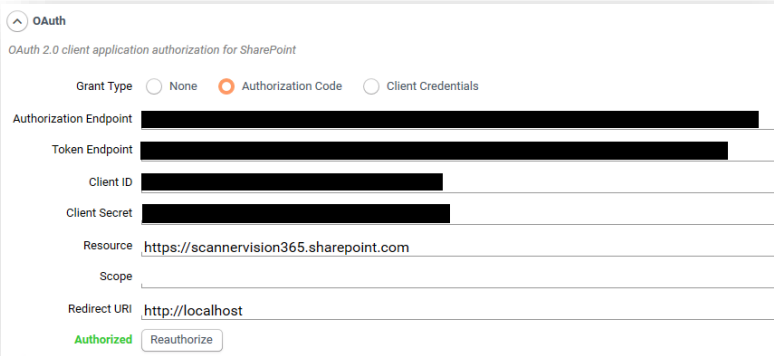
1. Go to **Settings** page and select **Output settings**
2. Select **aivika Connections** tab
3. If **aivika** was installed in all users mode, **aivika Connections** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credential to enable **aivika Connections**
4. Under **Connection types**, select **SharePoint OneDrive Connector**
5. Click **Add** at the top to create a new connection
6. Verify that **Active** checkbox is ticked and type in Connection Name and Description
7. Under **Online/On Premises**, tick the checkbox if the SharePoint environment is online
8. **Design Time URL** need to be fully qualified which contain http:// or https://
9. The **Runtime URL** is used when the connector uploads a document to SharePoint. The runtime URL can contain metadata tags so in principle you could connect to a different instance of SharePoint as long as the configuration you have set up applies to this instance.



10. Select oAuth 2.0 grant type if applicable and fill in the necessary information. If not applicable select **None** and fill in the SharePoint **Credentials** part.

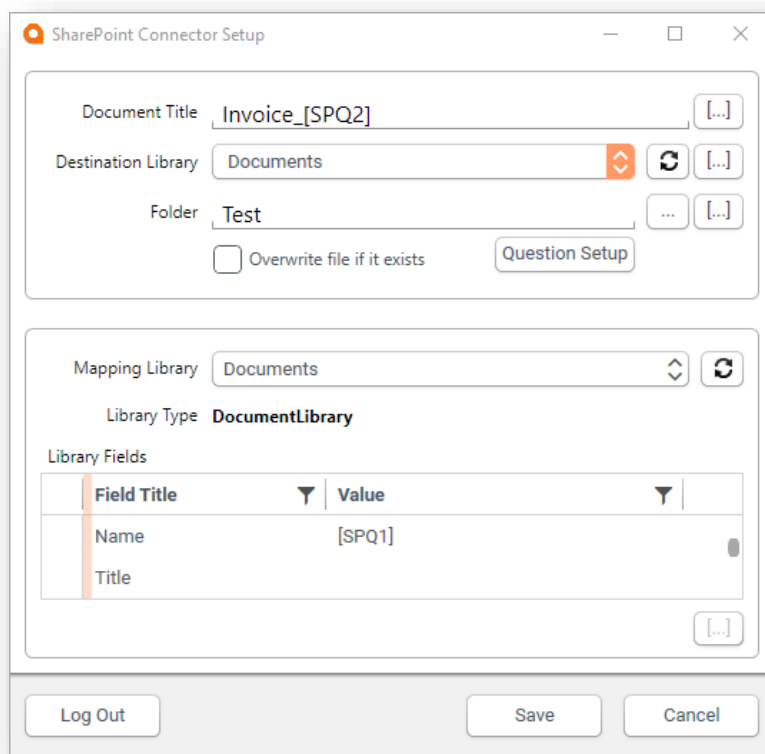
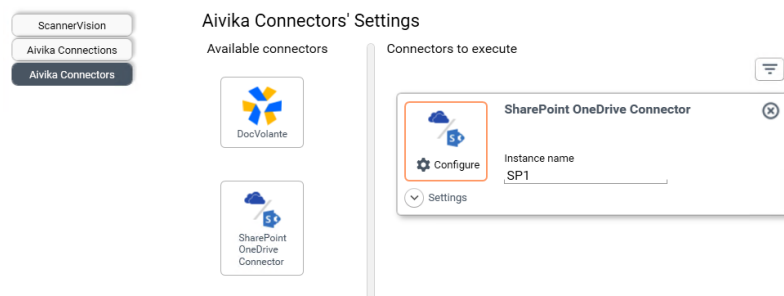


11. If Authorization Code option selected, authorize is require by clicking the **Authorize** button. An AuthWindow will appear to fill in the credential.



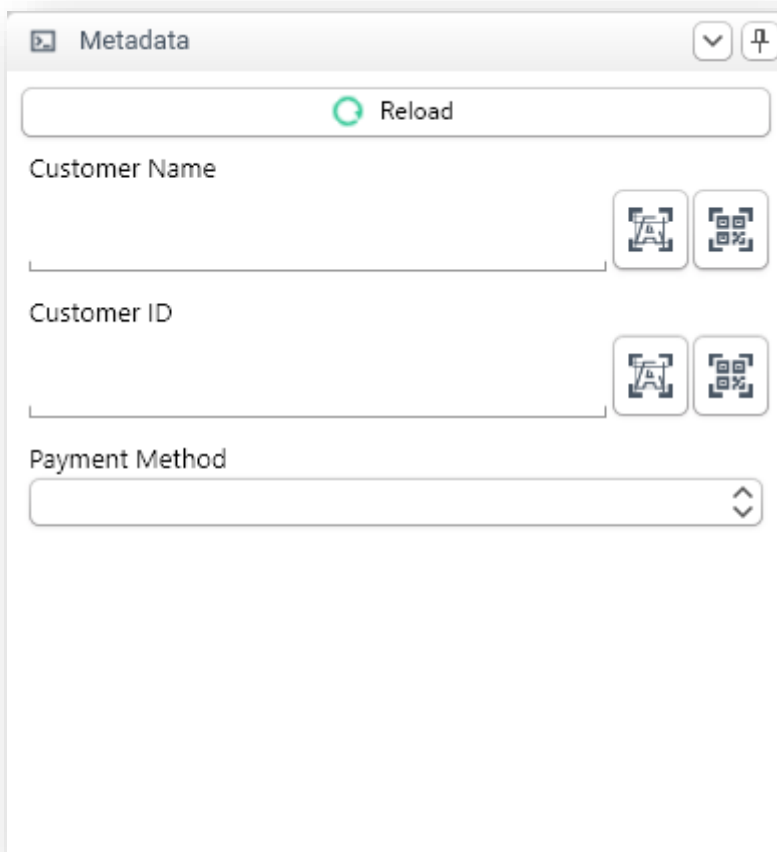
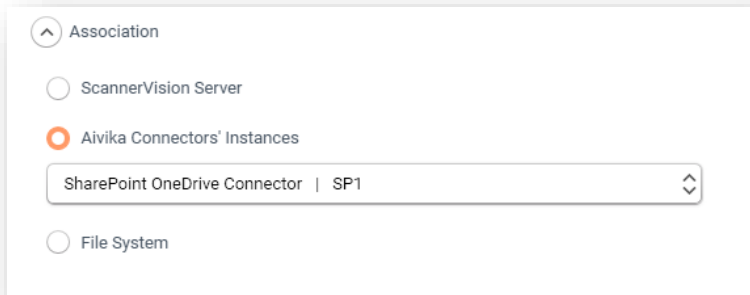
12. If authorization successful, the status will appear beside the button.

Output settings



5.3.2. Configure SharePoint OneDrive Connector

1. Go to **Settings** page and select **Output settings**
2. Select **aivika Connectors** tab
3. If **aivika** was installed in all users mode, **aivika Connectors** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credentials to enable **aivika Connectors**
4. Under **aivika Connectors Settings**, drag **SharePoint OneDrive** icon from **Available connectors** to **Connectors to execute**
5. Type in the name under **Instance name**
6. Click **Configure** to open login page
7. Select appropriate **Connection Name** and click **Log In** button
8. On **SharePoint** Connector setup window, enter Document Title.
9. [...] Metadata button can be used to obtain the value answer by user by calling the question tag name.
10. Select folder in SharePoint from browse button.
11. Tick **Overwrite file if it exists** to overwrite file if the destination exists.
12. Select appropriate **Mapping Library**. User can configure this setting which allows user to determine which properties the document will get by specifying the Value field.
13. Click **Question setup** to configure (refer [5.5](#)) questions for Metadata pane.
14. Click **Save** and go back to main page to save the settings.



5.3.3. Associate aivika template with SharePoint OneDrive Connector

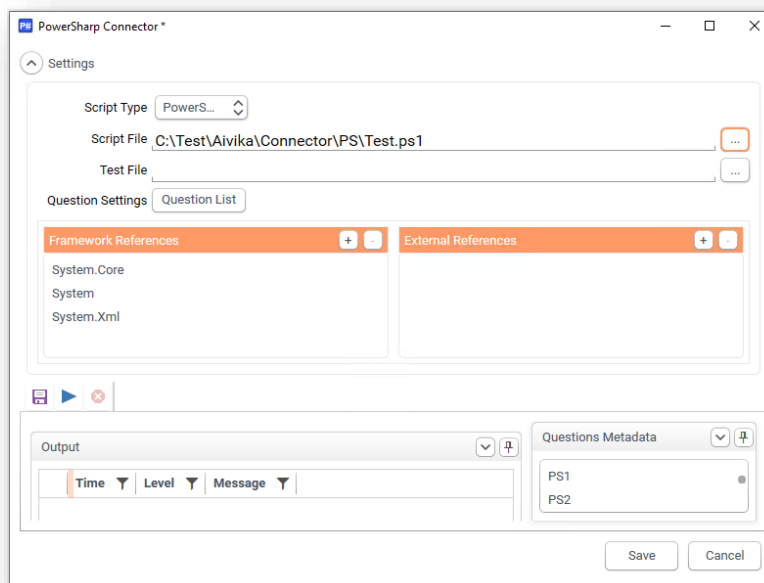
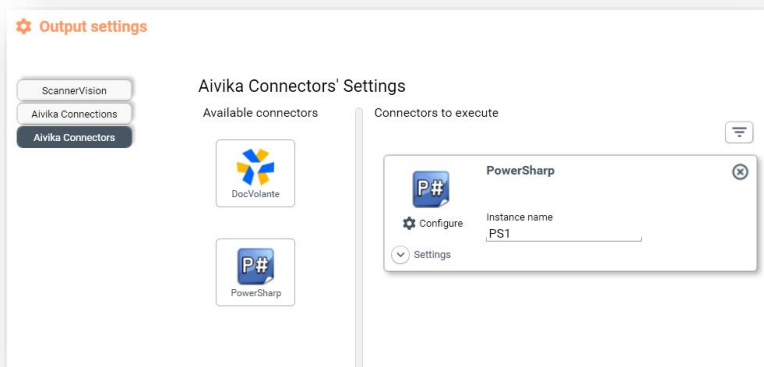
1. Go to **Settings** page and select **aivika templates**
2. Under the **Default Template** tab, Leave other options as default
3. Go down and expand the **Association** section
4. Under **Aivika Connectors' Instances**, select appropriate **SharePoint OneDrive Connector** Instances
5. Go back to main page to save the settings
6. On main page, select **aivika Template** associated with **SharePoint OneDrive** Connector
7. **DocVolante Metadata** fields will appear below
8. **Reload** button use to reload **SharePoint OneDrive metadata** fields in **aivika**

The user should be able to upload the file to any subfolder under the default folder that was configured in the connector. Documents will be upload to default folder if left empty.

5.4. PowerSharp Connector

PowerSharp Connector is now supported in **aivika** with separate installation required. The PowerSharp Connector allows you to execute Microsoft C# or PowerShell code.

5.4.1. Configure PowerSharp Connectors



1. Go to **Settings** page and select **Output settings**
2. Select **aivika Connectors** tab
3. If **aivika** was installed in all users mode, **aivika Connectors** is disabled and **Elevate** button is enabled by default. Click **Elevate** button and enter the computer administrator credentials to enable **aivika Connectors**
4. Under **aivika Connectors Settings**, drag **PowerSharp** icon from **Available connectors** to **Connectors to execute**
5. Type in the name under **Instance name**
6. Click **Configure** to open the connector settings window
7. Under Settings section, choose **Script Type** to execute
8. Browse and select script file. The code will be loaded in script editor. To view script editor, click icon ^ beside the Settings or maximize **PowerSharp Connector** window
9. Select Test File to test the file against the script
10. Click **Question list** to configure (refer [5.5](#)) questions for Metadata pane.
11. Click **Save** and go back to main page to save the settings.

Aivika templates

Default Template

☒ Upload Original File

☒ Upload Settings

OCR Language
English

*Select the language that appears in the source document for more accurate result in searchable pdf generation.

☒ Image processing settings

☒ Document redaction

☒ Composed documents save action before upload

Association

☐ ScannerVision Server

☒ Aivika Connectors' Instances

PowerSharp | PS1

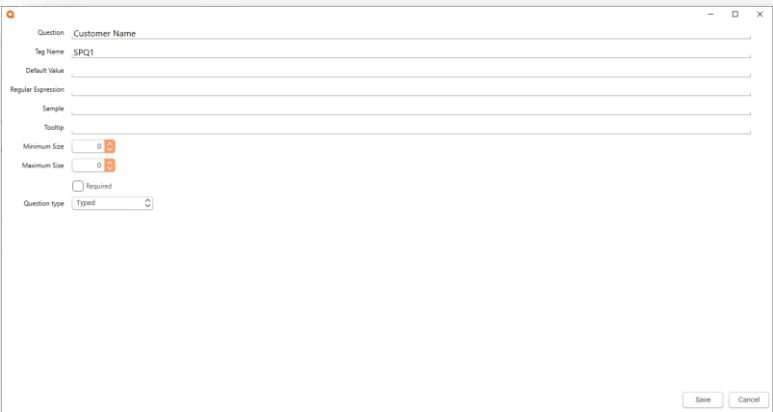
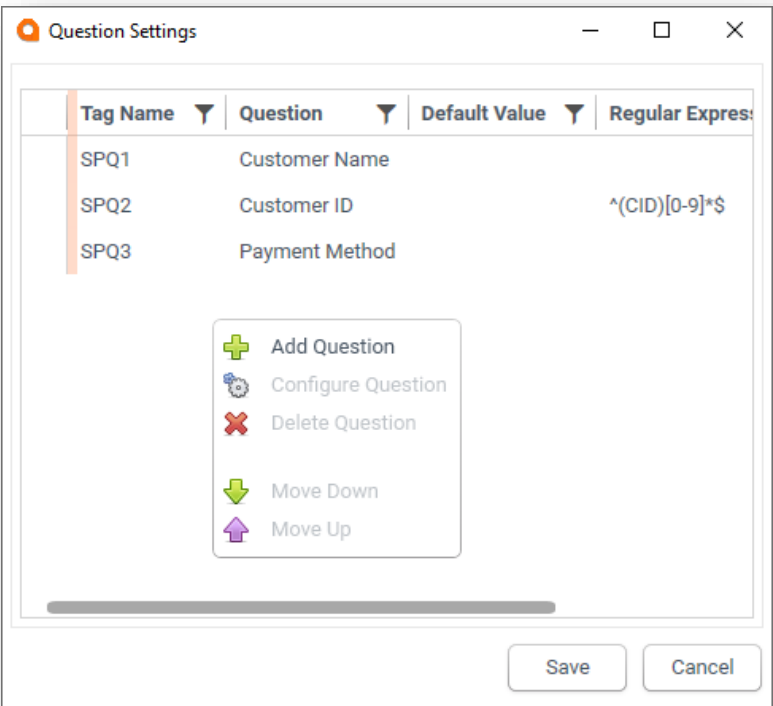
☐ File System

☐ Overwrite ☒ Save With Index ☐ Abort Operation

5.4.2. Associate aivika template with PowerSharp Connector

1. Go to **Settings** page and select **aivika templates**
2. Under the **Default Template** tab, Leave other options as default
3. Go down and expand the **Association** section
4. Select appropriate **PowerSharp Connector** Instances
5. Go back to main page to save the settings
6. On main page, select **aivika Template** associated with **PowerSharp Connector**
7. **PowerSharp Metadata** fields will appear below
8. **Reload** button use to reload **Metadata** pane in **aivika**

The user should be able to upload the file to any subfolder under the default folder that was configured in the connector. Documents will be upload to default folder if left empty.



5.5. Question Settings

SharePoint and **PowerSharp Connector** support **Question Settings** configuration. These configured questions will appear in Metadata pane when user choose specific template. The description for each function as below.

- a. **Add question** - Adds a question to the connector
- b. **Configure question** - Configures an existing question.
- c. **Move down** - Moves the selected question down.
- d. **Move up** - Moves the selected question up.

When adding a question, there are several requirements that need to be entered to make the question and capturing data more accurate: -

- e. **Question** (Required) - Question that is displayed to the user on the **aivika**.
- f. **Tag name** (Required) - The metadata tag name by which this information is identified in the connector.
- g. **Default** (Optional) - The default answer to the question if the user does not provide one. The user will see this value in the respective edit field on the **aivika**.
- h. **Regular expression** (Optional) - The data that is entered by the user can be validated by specifying a Regular Expression. **aivika** will try

to find a match for the provided regular expression in the data that is entered by the user. By providing a regular expression, the quality and/or correctness of the captured information can be improved which if left unverified could potentially lead to problems later during the processing of the document.

- i. **Sample** (Optional) - The sample value you specify here is included in the message to show the user what the expected format of the data is.
- j. **Tooltip** (Optional) - A short description of the question will appear when the user hovers the mouse pointer over the question.
- k. **Minimum size** (Required) - The minimum number of characters that must be entered by the user.
- l. **Maximum size** (Required) - The maximum number of characters that can be entered by the user.
- m. **Required** (Optional) - Indicates that the question is required to be filled in by the user.
- n. **Question type** (Required) - This selection determines what options the user has for entering information on the client.

Question: Select folder

Tag Name: PSS

Default: \\192.168.0.135\Receipt

Regular expression:

Sample:

Tooltip:

Minimum size: 0

Maximum size: 0

☐ Required

Question type: Browse

Save Cancel

- **Typed** - The user is required to manually type in a value.
- **Typed & Selected** - The user has the option to either type in a value or to select a value from a drop-down list.
- **Selected** - The user is required to select a value from a drop-down list.
- **Browse** - The user is required to browse and select a folder. The folder path needs to be specified in the **Default. Network shared folder** also supported.

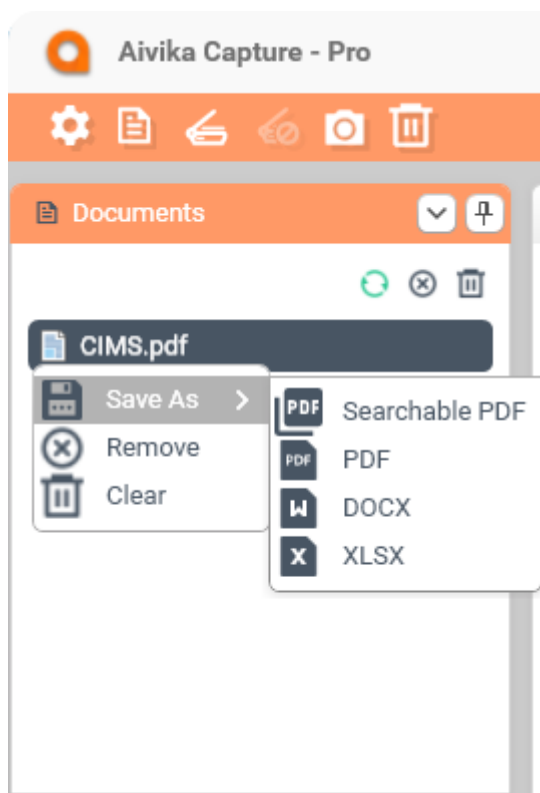
6.

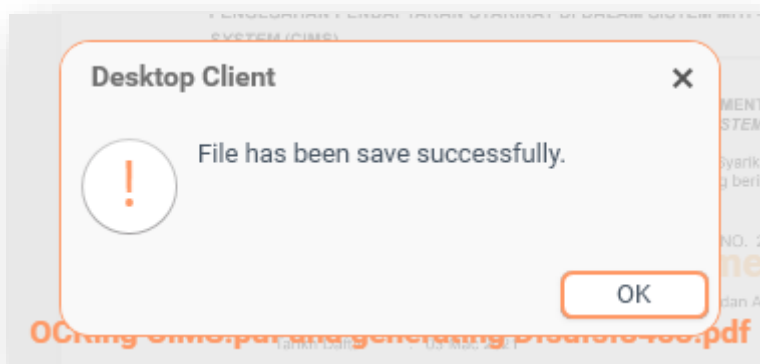
Optical Character Recognition

aivika contains the new **Ubunye** OCR engine (**EFFLUX Engine**) which enables document processing before it uploads to **ScannerVision** or **DocVolante** server.

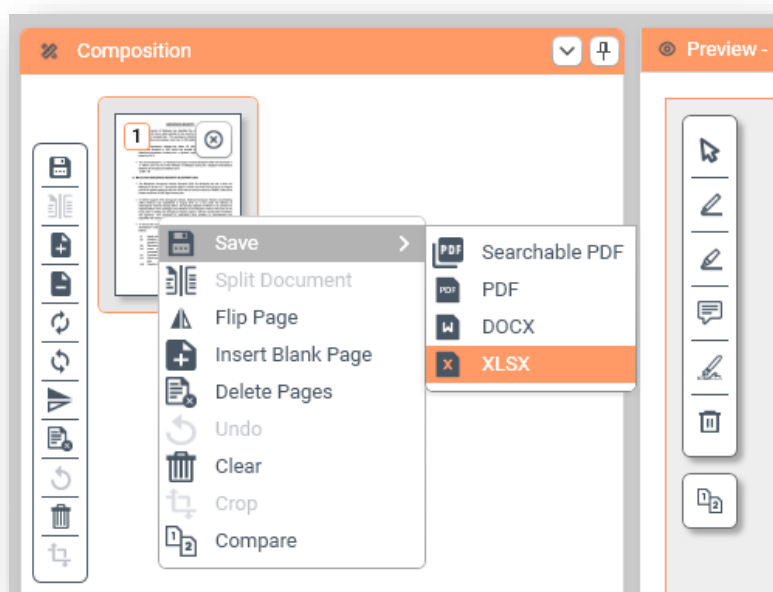
6.1. Converting File to Other Formats

1. Load a document into **aivika**
2. In the **Documents** panel, right click the file and hover to **Save As**
3. Select desired file format
4. Choose a filename and location to save in the Save dialog box
5. Click **Save** to start the conversion





6. Below message will appear when the task complete



7. The conversion menu also available in Composition panel



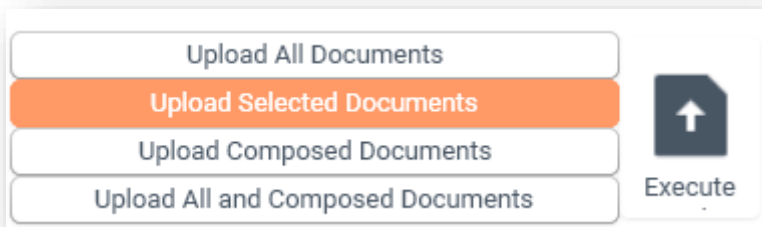
6.2. Zone OCR and Barcode Reader

Once the **aivika** template has been configured, the Zone OCR and barcode reader button are now available to use.

To use the Zone OCR and Barcode reader,

1. Go to **Preview** panel
2. Draw a region anywhere within the document page
3. Click **Zone OCR** button to read a zone with text
4. Or click **Barcode reader** to read zone with barcode

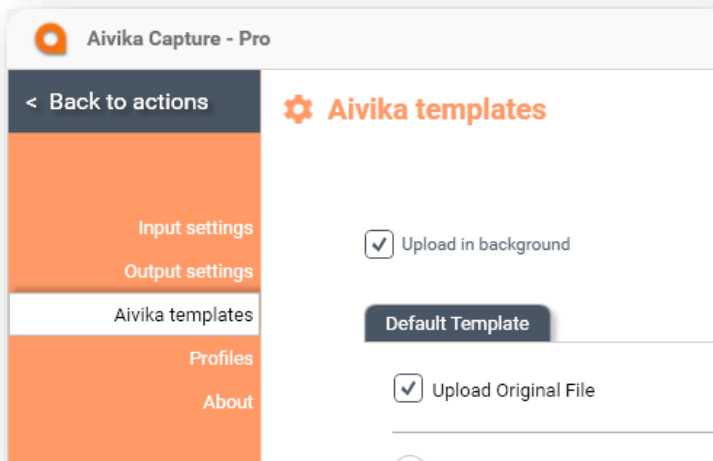
6.3. Upload File to DocVolante or ScannerVision



1. Load a file in **aivika**
2. Select the file in in **Documents** panel
3. In **aivika templates** panel, select appropriate template
4. Answer **ScannerVision questions** or **DocVolante metadata** fields
5. Select the appropriate Upload button and click **Execute**

7.

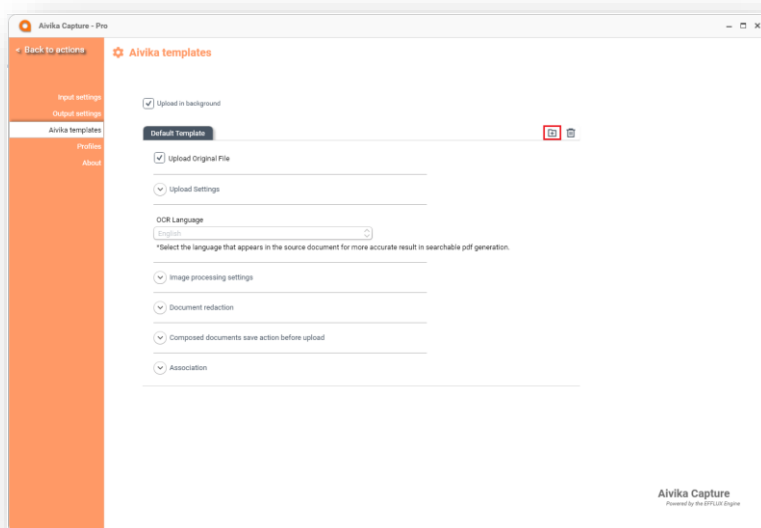
aivika Template



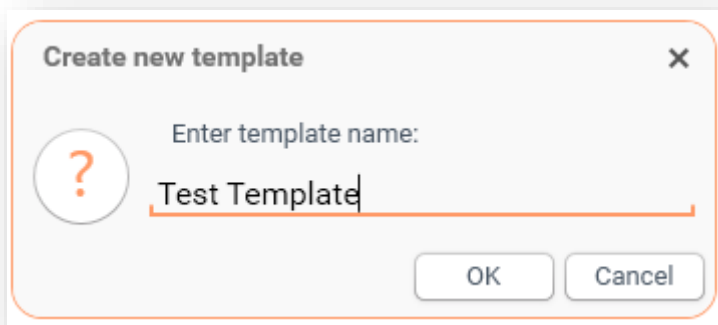
In **aivika Template**, enabling **Upload in background** will allow user to do other tasks within **aivika** while uploading documents in the background.

To associate more connectors to the template, additional templates can be added.

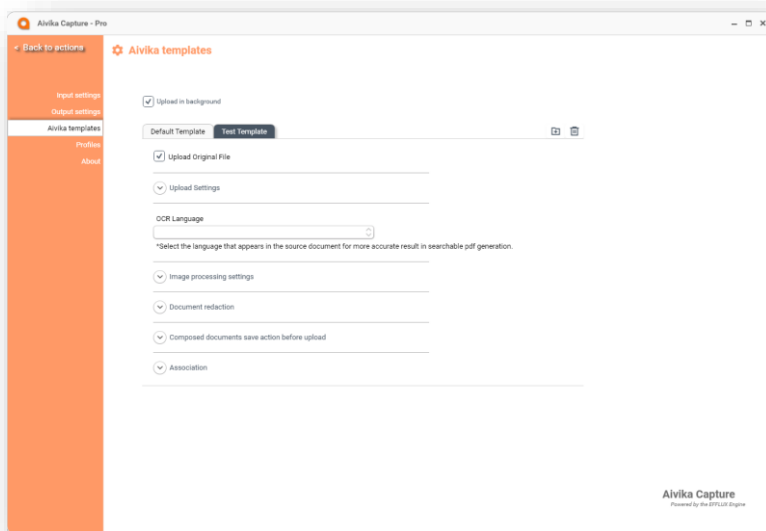
7.1. Create Additional Template



1. Go to **Settings** page and select **aivika templates**
2. In the same row as **Default Template** tab, click Add button



3. Give a name to the new template and click **OK**



4. Associate the **DocVolante** connector or **ScannerVision** server to this new template
5. Go back to main page to save the settings



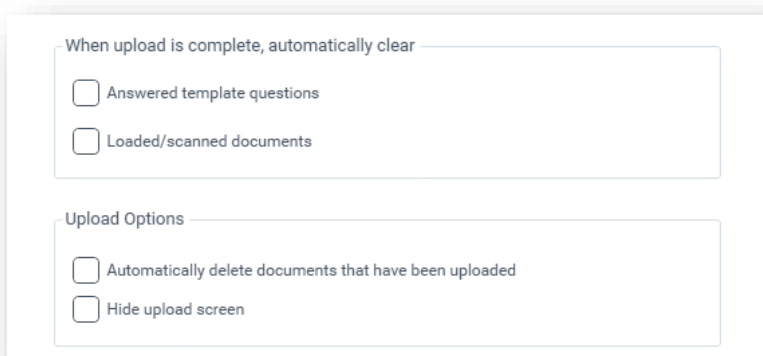
7.2. Upload Settings

In **aivika template** settings, uploaded documents can be converted to other formats. Supported format as below.

- **Searchable PDF** (also supported in **PDF/A-2B**, **PDF/A-2U**, **PDF/A-3B** and **PDF/A-3U** format)
- **PDF**
- **DOCX** (Microsoft Office Word)
- **XLSX** (Microsoft Office Excel)

1. Go to **Settings** page and select **aivika templates**
2. Under the **Default Template** tab, Untick **Upload Original File** to enable OCR and image processing
3. Expand **Upload Settings**, output file type is now enabled
4. Select the appropriate file type
5. Go back to main page to save the settings

Other options under **Upload Settings** includes.

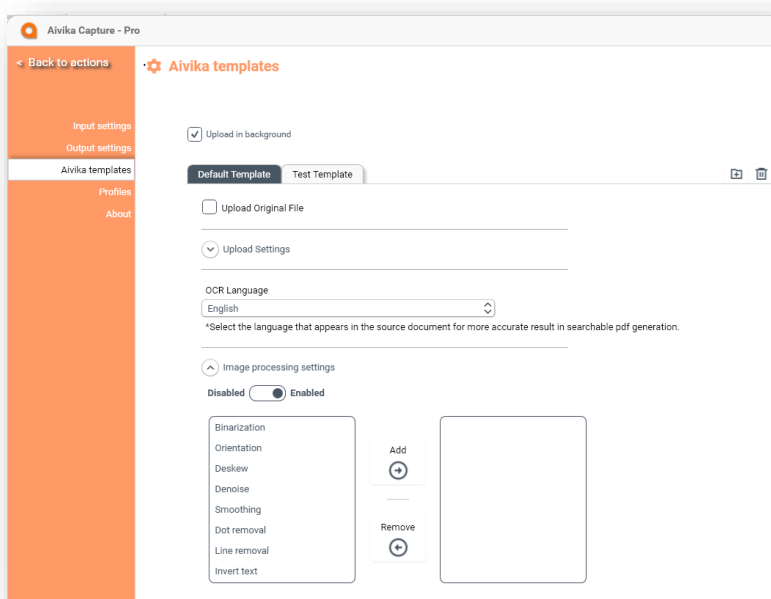


Answered template question – This option, when enabled will clear all **ScannerVision** questions and **DocVolante** metadata fields in **aivika** when upload is complete

Loaded/scanned documents – This option, when enabled will clear loaded or scanned document when upload is complete

Automatically delete document that have been uploaded – This option, when enabled will delete the loaded documents permanently from the computer when upload is complete.

! CAUTION: This option will be disable if **Upload Original File** is unticked.



Hide upload screen – This option, when enabled will hide upload progress window in **aivika** when upload is complete

7.3. Image Processing Settings

Apart from converting documents, **aivika** can also perform image processing before it uploads the document.

1. Go to **Settings** page and select **aivika templates**
2. Under the **Default Template** tab, Untick **Upload Original File**
3. Expand **Image processing settings**, toggle left or right to enable or disable the feature
4. Once enabled, select desired image processing task on the left, then click **Add** button
5. To remove the task, select task on the right and click **Remove** button
6. Multiple image processing tasks also supported
7. Go back to main page to save the settings

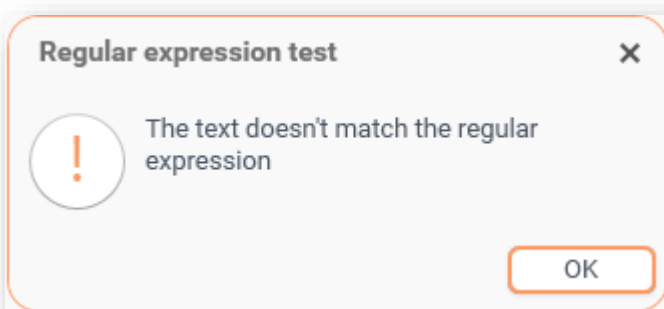
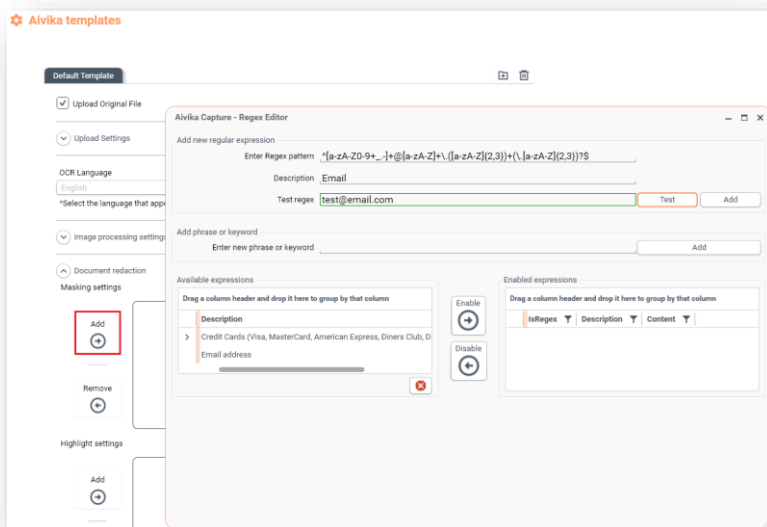
7.4. Document Redaction

Document redaction settings in **aivika** allows word masking and highlighting within the document. Regular expressions (RegEx) and key word matching are supported in this feature.

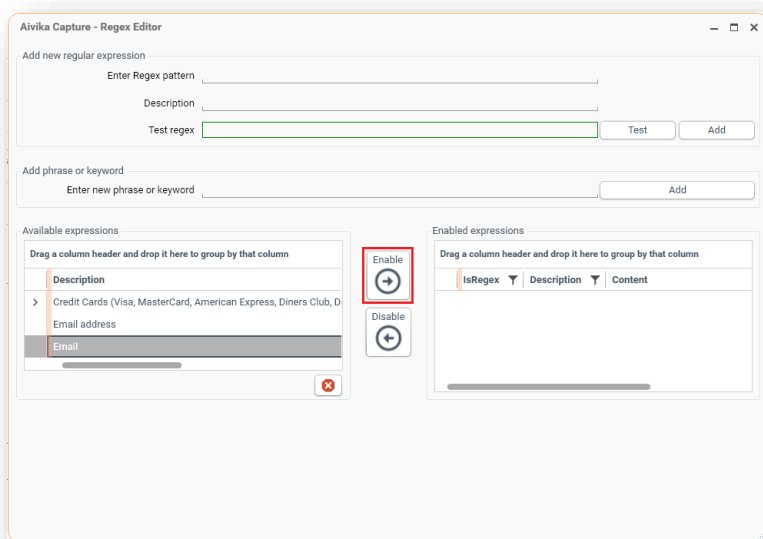
7.4.1. Adding new regex

Add new regular expression: -

1. Click **Add** to open the editor
2. Enter RegEx pattern and description
3. To test the regex, click **Test** button



4. If the regex doesn't match, the **Test regex** field outline will turn to red, and an error message will be thrown
5. If regex does match, the **Test regex** field outline will turn to green
6. Click **Add** button next to the **Test regex** field to add this newly created regex to the list of **Available Expressions**

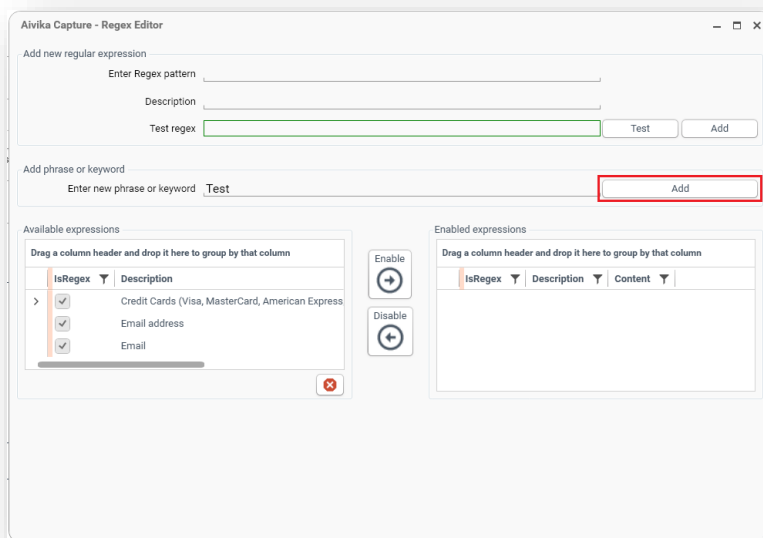


7. Select the new regex and click button **Enable** to enable it. It will be added to the **Enable Expressions** list
8. Close the editor and return to main screen to start using the feature.

7.4.2. Adding new phrase

Add new phrase or keyword: -

1. Click **Add** to open the editor
2. Enter the desire phrase and then click **Add**
3. The phrase will now add to the list of **Available Expressions**
4. Select the phrase and click **Enable** to enable it. It will be added to the **Enabled Expressions** list.
5. Close the editor and return to main screen to start using the feature.

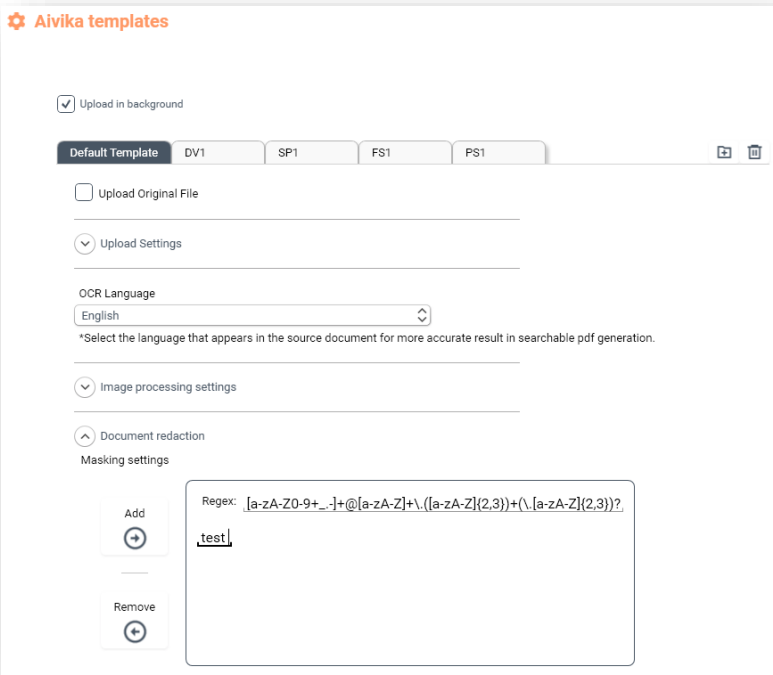


To preview the result of Document Redaction, click button **Compare** in preview panel on the main screen. See [3.5.2.](#)

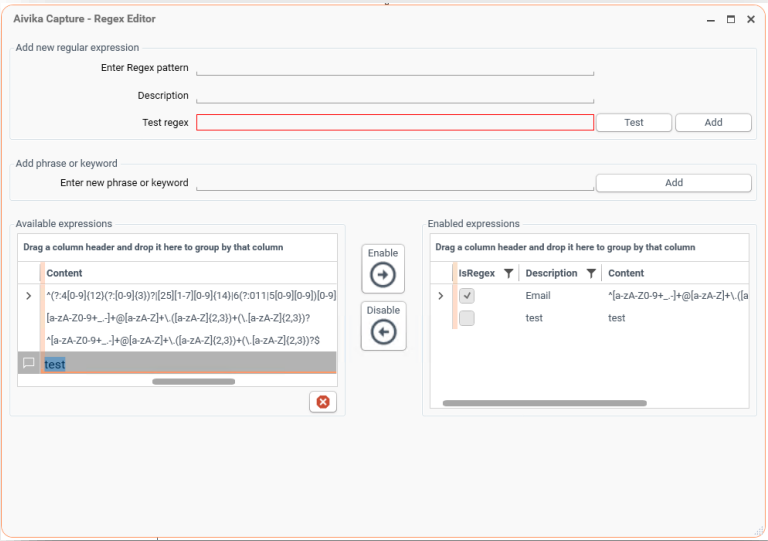
7.4.3. Modifying regex or phrase

Modify the regex or phrase: -

- 1. Editing the regex can be done directly from Document redaction settings section under the **aivika template** page **or**



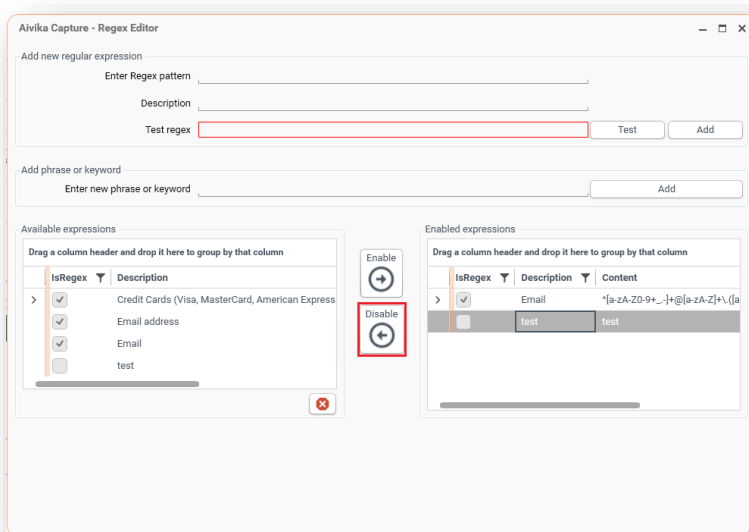
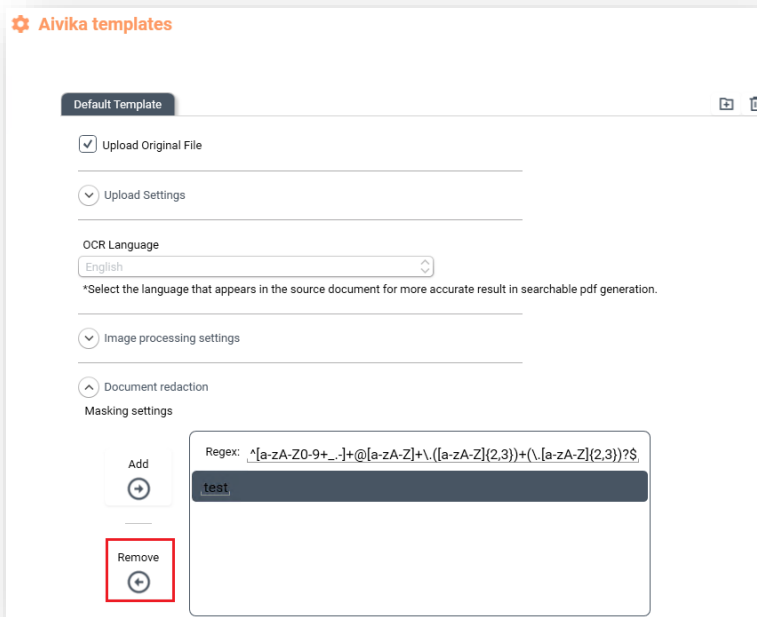
- 2. It also can be done from the **Regex Editor** in both Available and Enabled expressions list



7.4.4. Disabling regex or phrase

Disabling the regex or phrase: -

1. The regex or phrase can be disabled directly from the Document redaction settings section **or**

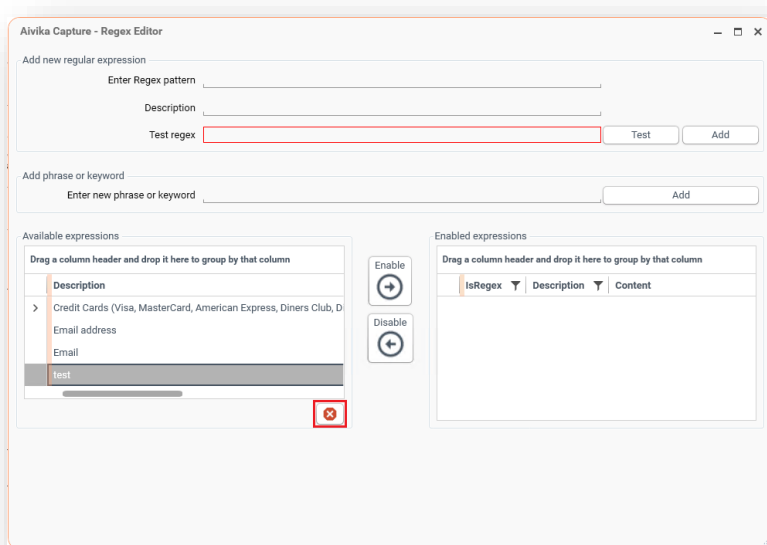


2. from the editor (Open the editor window by clicking **Add** button).

7.4.5. Deleting regex or phrase

Delete Regex from Available expressions list: -

1. Open Regex Editor
2. Go **Available expressions** list
3. Select a regex that need to be deleted
4. Click on **X** icon under the list



7.5. Composition Save Action

aivika can automate saving files in the composition panel. Available options as listed below:

1. **Always ask** – **aivika** will always ask whether it should or should not save a composition before uploading or saving it
2. **Do not save composed document before uploading** – **aivika** will not save composed document
3. **Always save composed document before uploading** – **aivika** will always try to save the composed document uploading or saving it

Other options available under **Composed documents save action before upload** includes:

4. **Use default settings to save the composition** – When enabled, the two options below will be available.
 - **Folder** – Browse and select a directory for saving location
 - **File name prefix** – This prefix will be added at the beginning of randomly generated composition file name

aivika will automatically save the composition according to the settings specified above.

Composed documents save action before upload

☒ Always ask.

☐ Do not save composed document before uploading.

☐ Always save composed document before uploading.

☐ Use default settings to save the composition

Folder

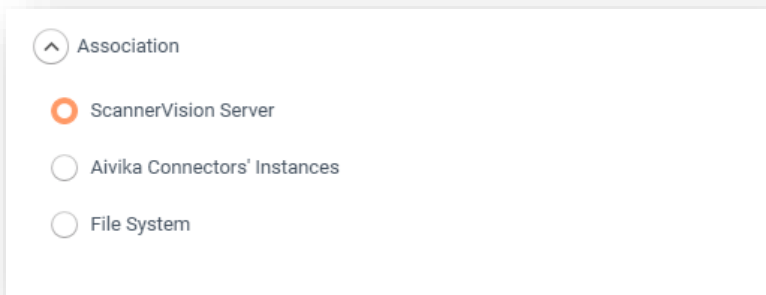
File name prefix

7.6. Association

This setting is to associate the template with **ScannerVision** server, **aivika** connector or File System. The template can be selected in the **aivika** template panel in the main page.

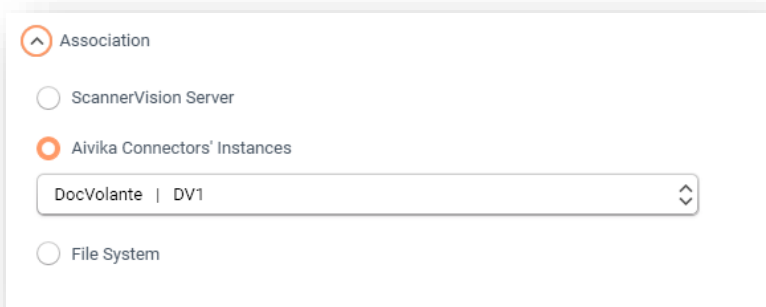
7.6.1. ScannerVision Server

1. Make sure **ScannerVision** in **Output settings** is configured
2. Go to **aivika templates**
3. Expand **Association**
4. Tick **ScannerVision Server**
5. Go back to main page to save the settings
6. **ScannerVision Template** drop down list will appear after appropriate template selected



7.6.2. Aivika Connectors' Instances

1. Make sure **aivika connector** in **Output settings** is configured
2. Go to **aivika templates**
3. Expand **Association**
4. Tick **Aivika Connectors' Instances**
5. Select appropriate connector instance from drop down list
6. Go back to main page to save the settings
7. Connector metadata will appear in **Metadata** panel after appropriate template is selected



Association

☐ ScannerVision Server

☐ Aivika Connectors' Instances

☒ File System

Folder
 \\192.168.0.106\\Aivika

User name
 shared1

Password

If destination exists

☒ Overwrite ☐ Save With Index ☐ Abort Operation

Default Profile

aivika Templates

Templates File System

OCR Language English

Questions

Reload

Subfolder
 C:\\FS Folder\\Folder 1

OK

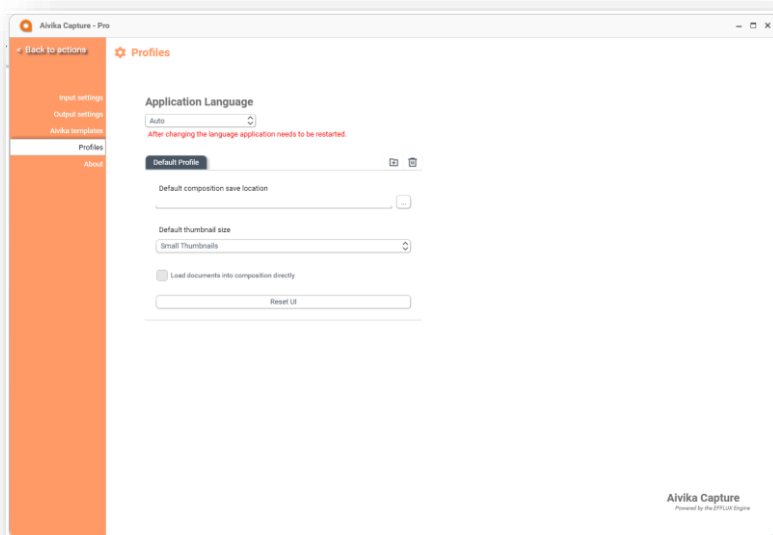
Folder 1

Folder 2

Folder 3

7.6.3. File System

1. Go to **aivika templates**
2. Select a template that needs to be associated with File System and expand **Association**
3. Tick **File System**
4. Select appropriate folder by clicking button in **Folder** field to store the output of the processed documents. It also supports path on **network shared folder**. **Username** and **Password** field will appear if user enter a network path.
5. Under **If destination exist**, select what should happen if the similar filename exists in the output folder
 - **Overwrite** – aivika will overwrite the existing file
 - **Save With Index** – aivika will proceed to store the file with addition of index after filename. E.g
 Filename(1).pdf,
 filename(2).pdf
 - **Abort Operation** – aivika will cancel the process
6. Go back to main page to save the settings
7. Select the template associated with File System
8. The **Subfolder** dropdown will list all available subfolders in the specified folder.



8.

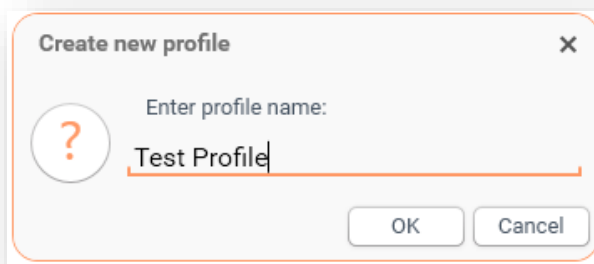
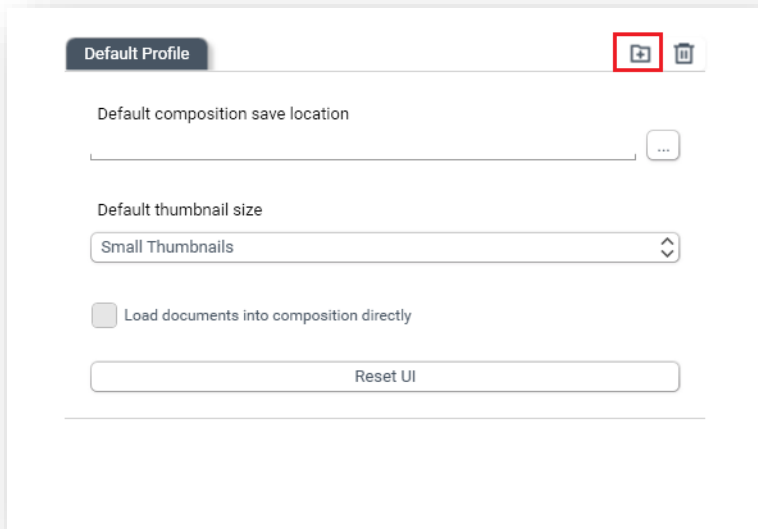
Profile

Profile allows the use of multiple settings of screen layout and the look and feel of **aivika**. Profiles contain 5 different settings.

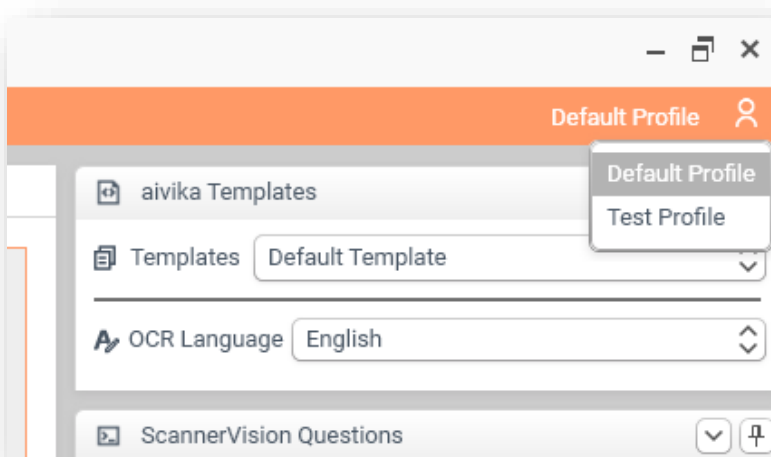
1. **Application Language** – This setting allows user to change the **aivika** language to the desired language. This setting requires an application restart to be applied.
2. **Default composition save location** – This option is used to set a default saving location for the composition. When this is enabled, **aivika** will open a save dialog box under the specified location when saving or uploading a composition.
3. **Default thumbnail size** – This option is used to set the default thumbnail size for that profile.
4. **Load documents into composition directly** – This option is only enabled for additional profiles created. The default profile does not support this feature. When enabled, documents will be added automatically into the composition after opening or loading files from the hot folder.
5. **Reset UI** – This button is used to reset layout changes in **aivika** profiles. After reset, the original default layout will be loaded again.

8.1. Create Additional Profiles

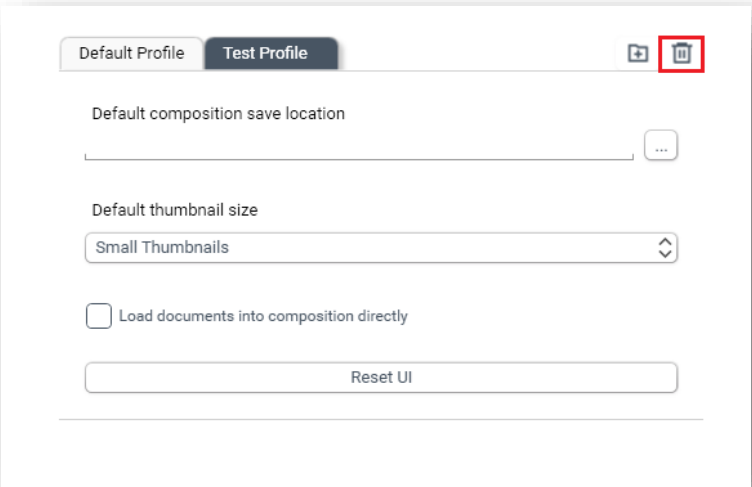
1. Go to **Setting** page and select **Profiles**
2. On the same row of **Default Profile** tab, click add profile icon



3. Give a name to the new profile and click **OK**



4. Go back to main page to save the settings
5. Switching to new profile can be done from top right of **aivika**



8.2. Remove Additional Profiles

1. Go to **Setting** page and select **Profiles**
2. Select additional profile tab, click delete profile icon
3. Go back to main page to save the settings