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**OPEX<sup>®</sup>**



**CertainScan<sup>®</sup> Edit 6.0/6.10 User Manual**

9306900CE6.10-EN

Revision 24-01

Original Instructions



**OPEX<sup>®</sup>**  
**CertainScan<sup>®</sup>**  
**edit**

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## Document History

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Doc Rev	Date	Changes (click blue text to go to that page)
22-01	Nov. 14, 2022	Initial release of CertainScan Edit 6.0
23-01	June 16, 2023	Branding and minor format updates throughout.
24-01	March 19, 2024	For this revision, updated the title to indicate CertainScan Edit versions 6.0 and 6.10. <a href="#">page 60</a> - Updated the “Indexing Data” section.

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# 1. Introduction

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## 1.1. About CertainScan® Edit 6.0/6.10

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OPEX CertainScan® Edit 6.0/6.10 is an independent, license-activated software option for editing scanned batches and pages. It enables Operators to insert, delete, and move pages, manage blank pages, and rescan pages to insert back into a batch for completion. CertainScan Edit also includes Image enhancement tools enabling operators to clean up and improve the appearance of scanned pages.

CertainScan Edit can be installed on a single computer or multiple computers, based on your scan workflow requirements. For example, it can be installed on the host computer of the OPEX scanner to create a stand-alone batch processing workstation, or installed separately on independent batch editing workstation computers. CertainScan Edit is designed to integrate with OPEX Transform to provide customized batch output files. OPEX also offers a purchasable computer with both CertainScan Edit and OPEX Transform pre-installed.



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## 1.2. About the Manual

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This manual provides instructions for the operation of CertainScan® Edit 6.0/6.10, a user interface software designed for use with the following OPEX scanners:

- Gemini™
- Falcon+® and FalconV+®
- Falcon® and FalconV®

Throughout this document, when information pertains to all of the above, the machine will be referred to as the “scanner.” If information refers to a specific machine, it will be identified by name.

The manual is intended for both standard scanning & remittance processing operations. Please refer to your product’s Operator Manual to learn more about the scanner(s).

This manual will be updated to reflect equipment design changes, part number changes, or to correct errors (a table detailing the document revision history can be viewed on [page 3](#)). Be sure to retain the latest electronic release of the manual for your reference. The latest release can be downloaded in PDF format at [www.opexservice.com](http://www.opexservice.com).

### 1.2.1. Manual Navigation Aids

This manual is designed primarily for use on a tablet device. To improve navigation, the manual contains blue underlined links you can click on or tap to go directly to a particular page or web address. In addition, all items in the [“Table of Contents”](#) as well as the bookmarks in the side bar of the PDF file can be clicked or tapped to navigate directly to a particular page. Make sure to use the latest version of Adobe® Acrobat Reader®\* for optimal performance.

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## 1.3. Safety Message Conventions

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This manual uses the following conventions to alert you about safety hazards associated with certain procedures and situations. Please be aware of these conventions when reading the manual and operating the equipment:



### **DANGER**

Indicates a hazardous situation that, if not avoided, will result in death or severe injury. The use of this signal word is limited to the most extreme situations.



### **WARNING**

Indicates a hazardous situation that, if not avoided, could result in death or serious injury.



### **CAUTION**

Indicates a hazardous situation that, if not avoided, could result in minor or moderate injury.

### **NOTICE**

Indicates information considered important, but not hazard related (e.g. messages relating to property damage).

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## 2.1. CertainScan Edit Login

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1. Double-click on the **CertainScan Edit** icon on the desktop (Figure 2-1).

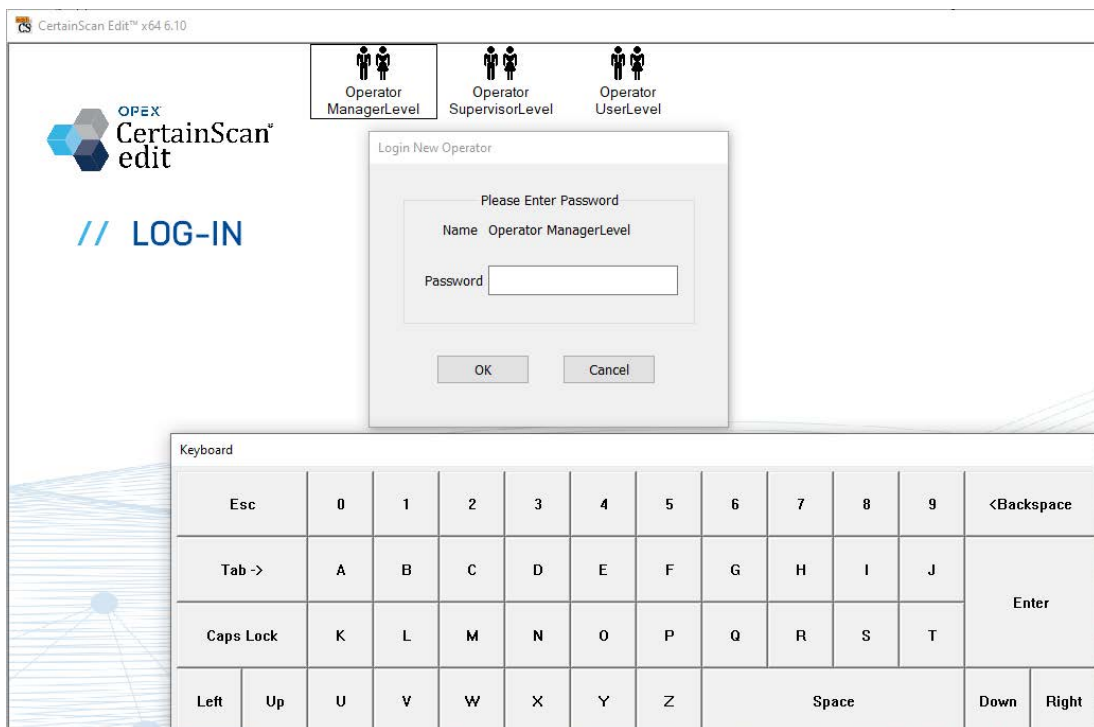


**Figure 2-1: CertainScan Edit icon**

The CertainScan Edit window opens, displaying the login screen.

Select your Operator account and log on. If you don't have an Operator account, see your network administrator to obtain one. There are three Operator accounts, each with a different access level for viewing and modifying settings (Figure 2-2):

- User (least access)
- Supervisor (limited access)
- Manager (full access)



**Figure 2-2: Operator login**

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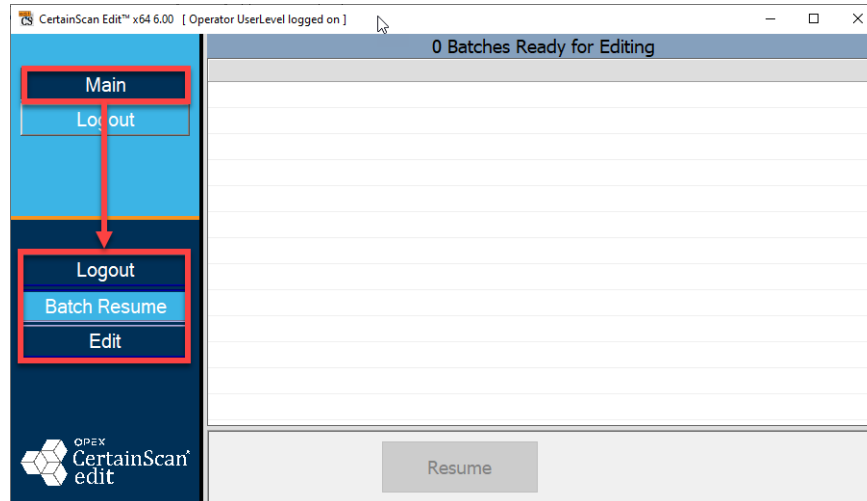
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## 2.2. Edit Menu Select Functions

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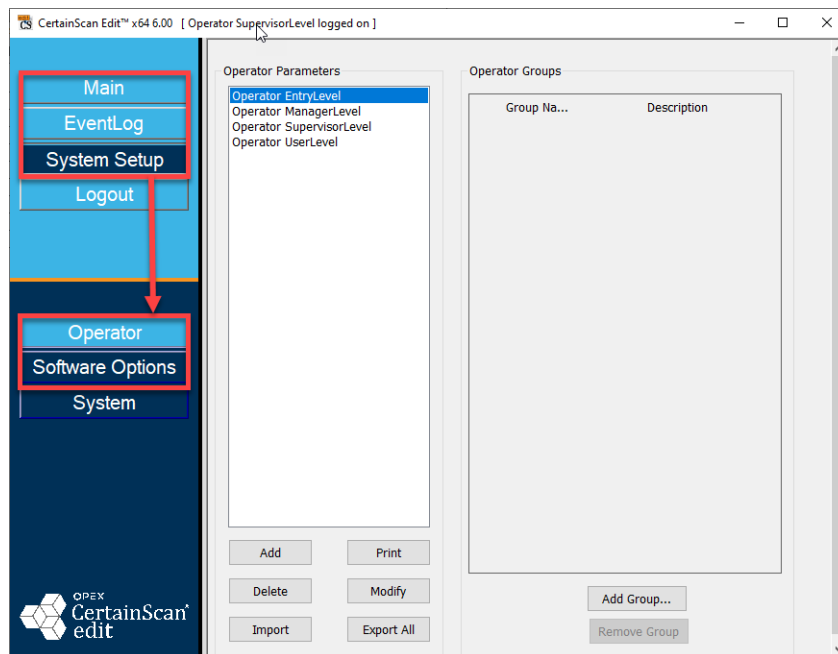
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**Operator User Level** - Access to Batch Resume and Edit functions (Figure 2-3).



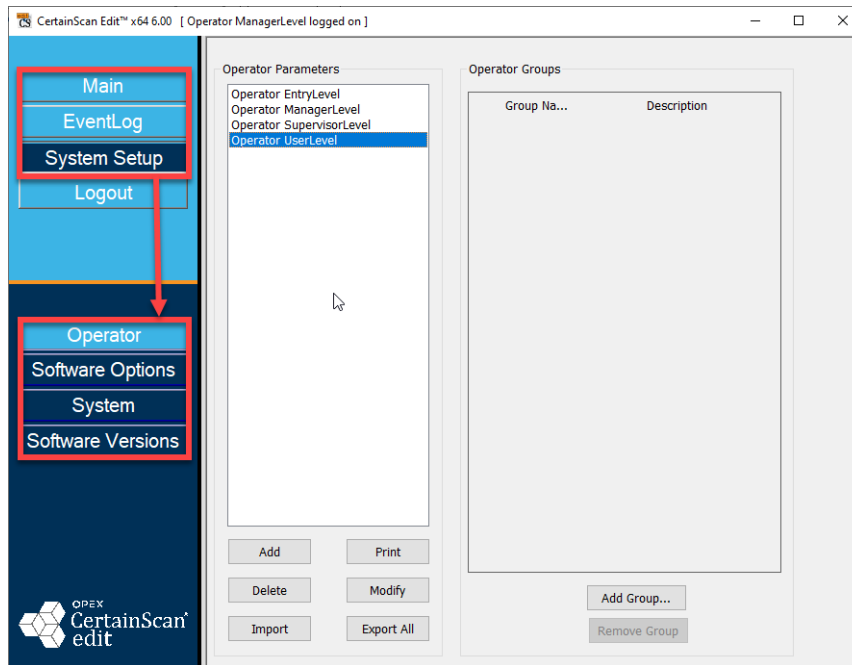
**Figure 2-3: User menu select functions**

**Operator Supervisor Level** - All User level privileges, plus additional access to Event Log and System setup to manage Operators, and activate Software Options (Figure 2-4).



**Figure 2-4: Supervisor menu select functions**

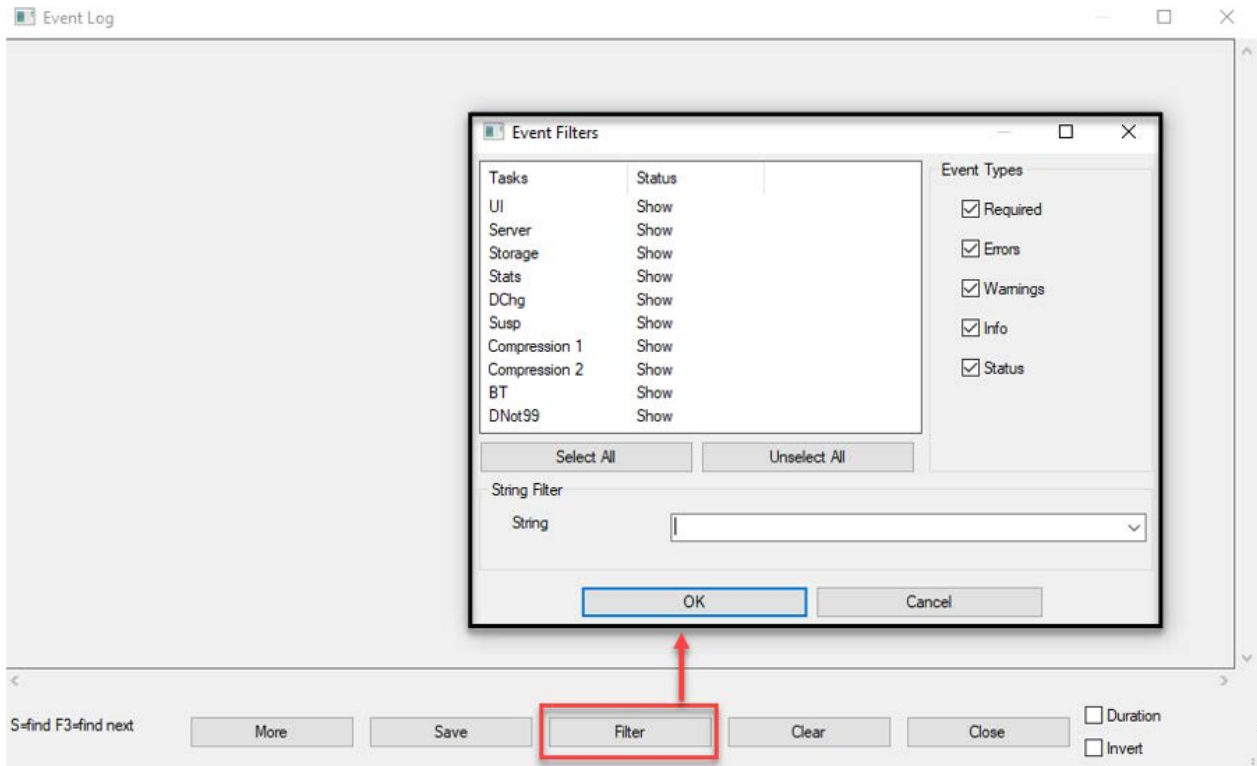
**Operator Manager Level** - Full access to all features including access to System Configuration Parameters (Figure 2-5).



**Figure 2-5: Manager menu select functions**

## 2.3. Event Log

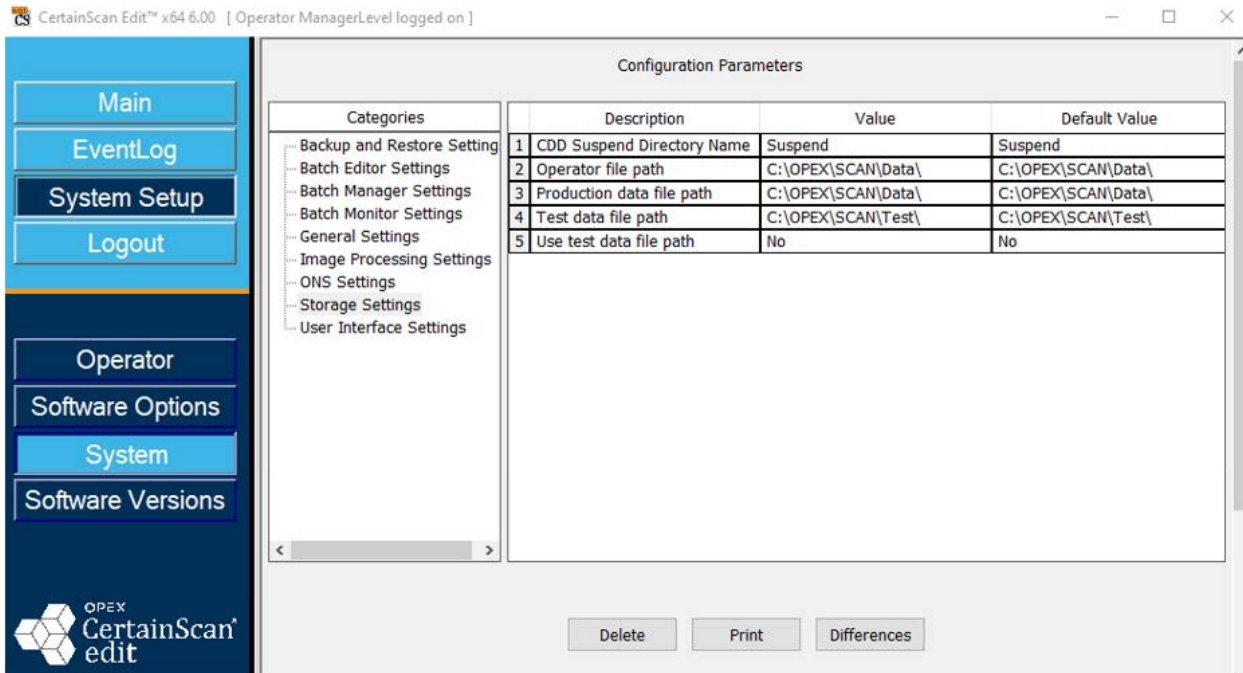
The EventLog provides a popup display of all scanning activity for OPEX support troubleshooting. Click on the **Filter** button to select Event Types to display (Figure 2-6).



**Figure 2-6: EventLog**

## 2.4. System Setup

**System Setup > System:** The System configuration parameters include settings to match up to the CertainScan settings on the scanner PC. For example, defining network paths and setting User Type (Remittance or Service Bureau). Typically, settings are not changed from default and are for configures with OPEX support assistance (Figure 2-7).



**Figure 2-7: System Configuration Parameters**

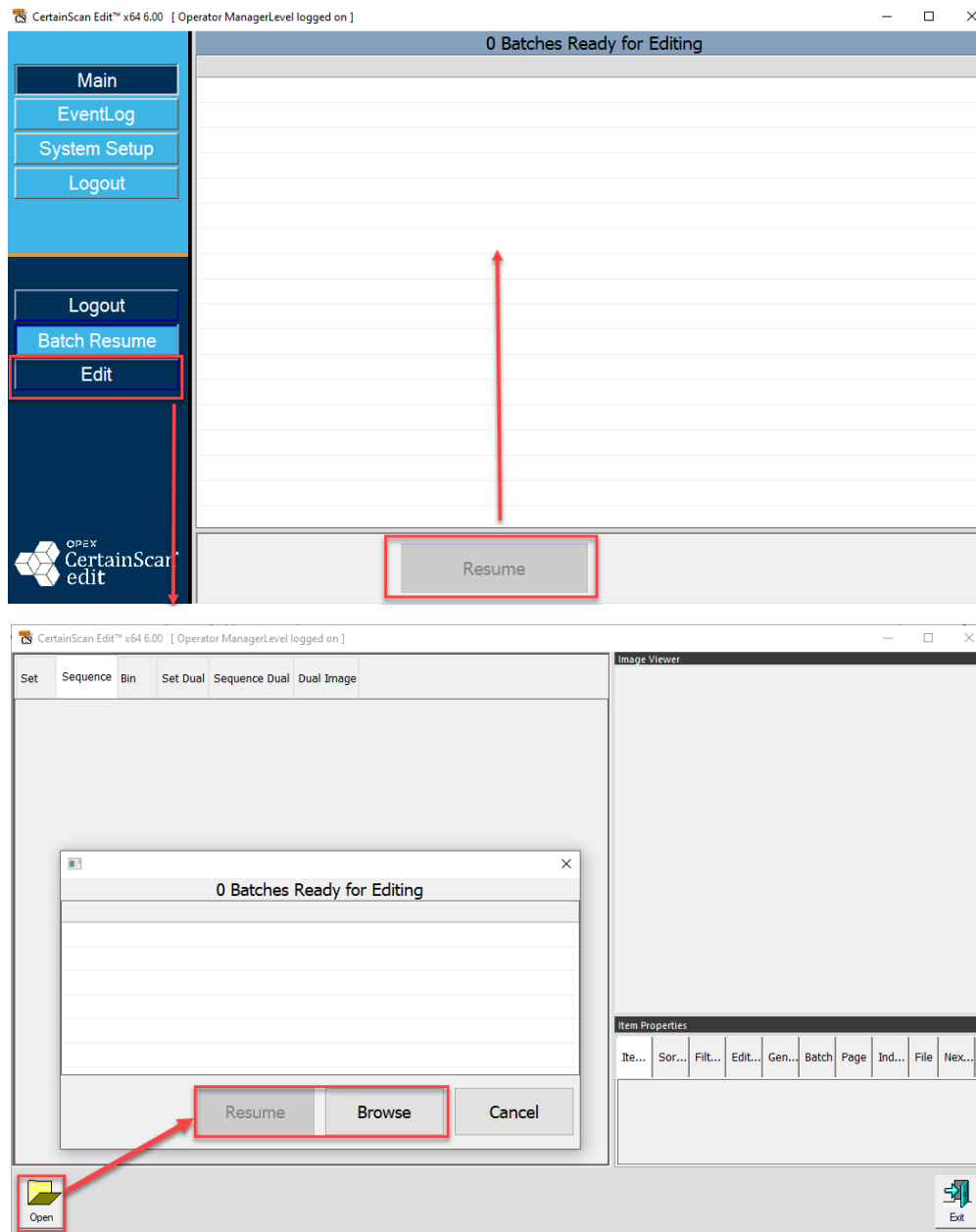
**System Setup > Software Versions:** Display of current running Software Versions for OPEX support reference.



## 2.5. Edit Batch Selection

When launching CertainScan Edit for all Operator levels (see Figure 2-8):

- A non-active (grayed out) **Resume** button indicates there are no batches pending Edit.
- With no batches pending, click on the **Edit** button to **Open** and **Browse** to a known location for batches pending Edit.



**Figure 2-8: Edit Batch Selection**

- With batches ready for Editing, a list will show with information headers for:
  - Batch - Data File Path – Job – Operator – Time - Errors
- Click on the batch to Edit and the **Resume** button becomes active.

**Note:** When a batch is in an error state, it is displayed in red with an error description and the **Batch Resume** button includes an attention icon (Figure 2-9).

The screenshot shows the 'CertainScan Edit' application window. The title bar indicates 'CertainScan Edit™ x64 6.00 [ Operator ManagerLevel logged on ]'. The main window is titled '3 Batches Ready for Editing'. On the left is a sidebar with buttons for 'Main', 'EventLog', 'System Setup', 'Logout', 'Batch Resume' (with a warning icon), and 'Edit'. At the bottom of the sidebar is the OPEX CertainScan edit logo. The main area contains a table with the following data:

Batch	Data File Path	Job	Operator	Time	Errors
00000393.oii_edit	C:\batches\00000393	virtua	Operator ManagerLevel	11/02/22 12:11:53 PM	
00000394.oii_edit	C:\batches\00000394	virtua	Operator ManagerLevel	11/02/22 12:12:44 PM	
00000395.oii_edit	C:\batches\00000395	virtua	Operator ManagerLevel	11/02/22 12:17:00 PM	General Erro

At the bottom of the window, there is a 'Resume' button.

**Figure 2-9: Batches ready for Editing - error state**

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## 2.6. Edit functionality on computer

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Beginning with CertainScan 4.0, editing batches is permitted while scanning. Batches can still be suspended and edited with CertainScan Edit installed on independent computers. However, ScanLink plugins are not used to help sort, and none of the post scan image processing actions can be performed on inserted or pasted images.

There are three levels of Edit options when scanning, which are configured in CertainScan at the Job level. Edit functions are limited to the chosen Job level setting. This applies for editing on scanner computer as well as editing on independent computers.

The editing level can be selected by going to **Job Setup > Job > Batch parameters > Editing Option While Scanning** (Figure 2-10)

- **Cleanup editing only** - Allows only the editing needed to recover an interrupted batch.
- **Metadata only** - Only the metadata about a page may be edited, example: correct the Page Name/Page Type.
- **Full advanced editing** - Metadata about a page may be edited and pages may be inserted, deleted, moved or rotated.

7	Editing Option While Scanning	Full advanced editing
8	CertainScan ProcessLink Plug-in 1	Cleanup editing only
9	CertainScan ProcessLink Plug-in 2	Metadata only
10	CertainScan ProcessLink Plug-in 3	Full advanced editing

**Figure 2-10: Editing Options while scanning - parameter settings**

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# 3. Managing Operators

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## 3.1. Create and Manage Operators

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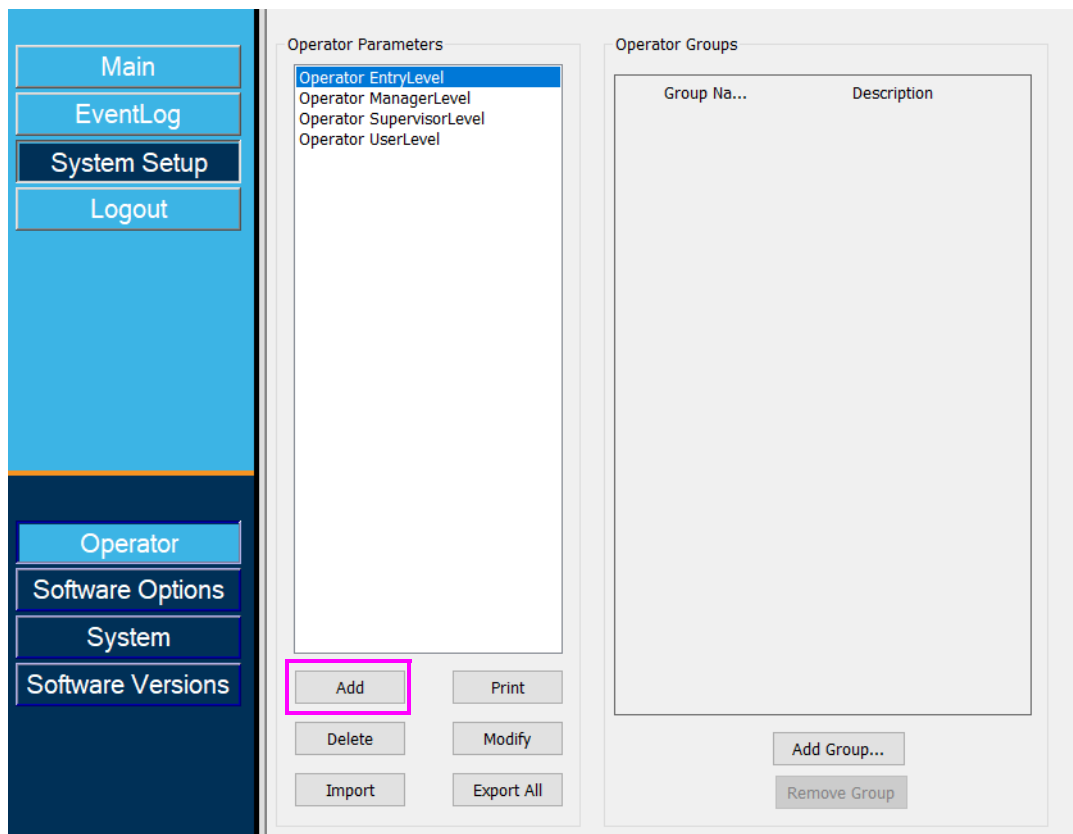
When logged on as a Supervisor or Manager, CertainScan Edit provides the ability to create and manage new operators, or modify existing ones.

### 3.1.1. Operator Levels

- **User Level** - Access to Batch Resume and Edit functions.
- **Supervisor level** - User level access plus access to Event Log and System Setup. A Supervisor can manage User level operators but is not able to manage Manger level operators.
- **Manager Level** - Complete access, can manage Manager level operators. Able to launch Transform and ProcessLink (if activated).

#### Add a new operator

1. Go to **System Setup > Operator** and click the **Add** button (Figure 3-1).



**Figure 3-1: Add Operator**

The Operator pop-up screen is displayed (Figure 3-2).

Operator

First Name

Last Name

Description

Password

Language

REDLink Name

Level

Entry

User

Supervisor

Manager

Shift

First

Second

Third

Misc.

Group Memberships

Available Groups

<< Add

Remove >>

Apply Filter

Save

Cancel

**Figure 3-2: Operator Screen**

2. Enter the information fields provided: **First Name**, **Last Name**, **Level**, **Shift**, **Description** and **Password** if necessary.
3. Click **Save** or **Cancel** to exit.

**Note:** A Supervisor is not able to add a Manager level operator. Operator Groups were introduced with CertainScan 5.50. OPEX defaults do not have passwords, but can be modified to require passwords.

## Modify

1. Click on an existing operator and click **Modify**. The Operator information pop-up screen will appear allowing you to modify Operator information.
2. Click **Save** after modifying.

## Print

1. Select an Operator; select singles or multiples.
2. Click on **Print** to select printer and print.

## Delete

1. Click on an existing Operator.
2. Click **Delete**. A confirmation prompt will appear.
3. Select **Yes** to delete.

## Export all operator accounts

1. Click the **Export All** button.
2. Choose a location to save the named export file “operator.SCAN”.
3. Click **Save**.

## Import operator accounts

1. Click the **Import** button.
2. Navigate to the location of the “operator.SCAN” to import, and click **Open**.

The imported Operators will now appear in the list.

**Note:** *If importing Operators which already exist, a pop-up window will appear asking if you want to replace each of the existing Operators.*



## 3.1.2. Operator Icon Size

Operator icons can now be displayed on the run screen in four different sizes:

- Small
- Medium
- Large
- Extra Large

### To set the Operator icon size

1. Log on with Manager Level access, and navigate to: **System Setup > System > User Interface Settings.**
2. Click the **Operator/Job Icon Size** drop-down to select the size, and click **Apply** button (Figure 3-3).

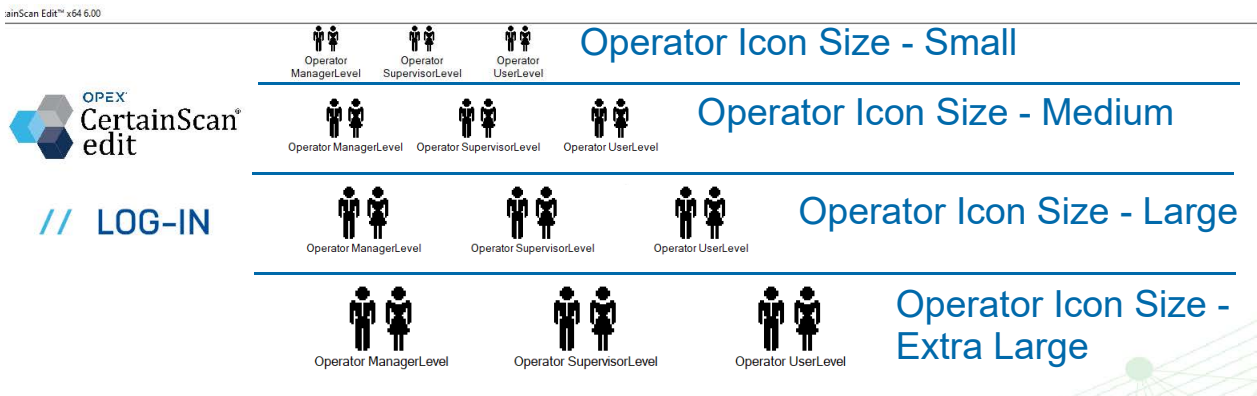
The screenshot shows the 'Configuration Parameters' window. The 'Operator/Job Icon Size' parameter is highlighted in pink. Its dropdown menu is open, showing the following options:

Parameter ID	Parameter Name	Value
16	Operator/Job Icon Size	Medium
17	Run Screen Update Interval in MS	0
18	Run/Edit Screen Font Size	12
19	Run/Edit Screen Horizontal Image Count	8
20	Run/Edit Screen Vertical Image Count	8

**Figure 3-3: Operator/Job Icon Size parameter**

**Note:** Job icons are not used in CertainScan Edit. Adjusting this parameter will only affect the Operator icons.

3. The Operator icons will display based on the size selected (Figure 3-4).



**Figure 3-4: Operator icon size examples**

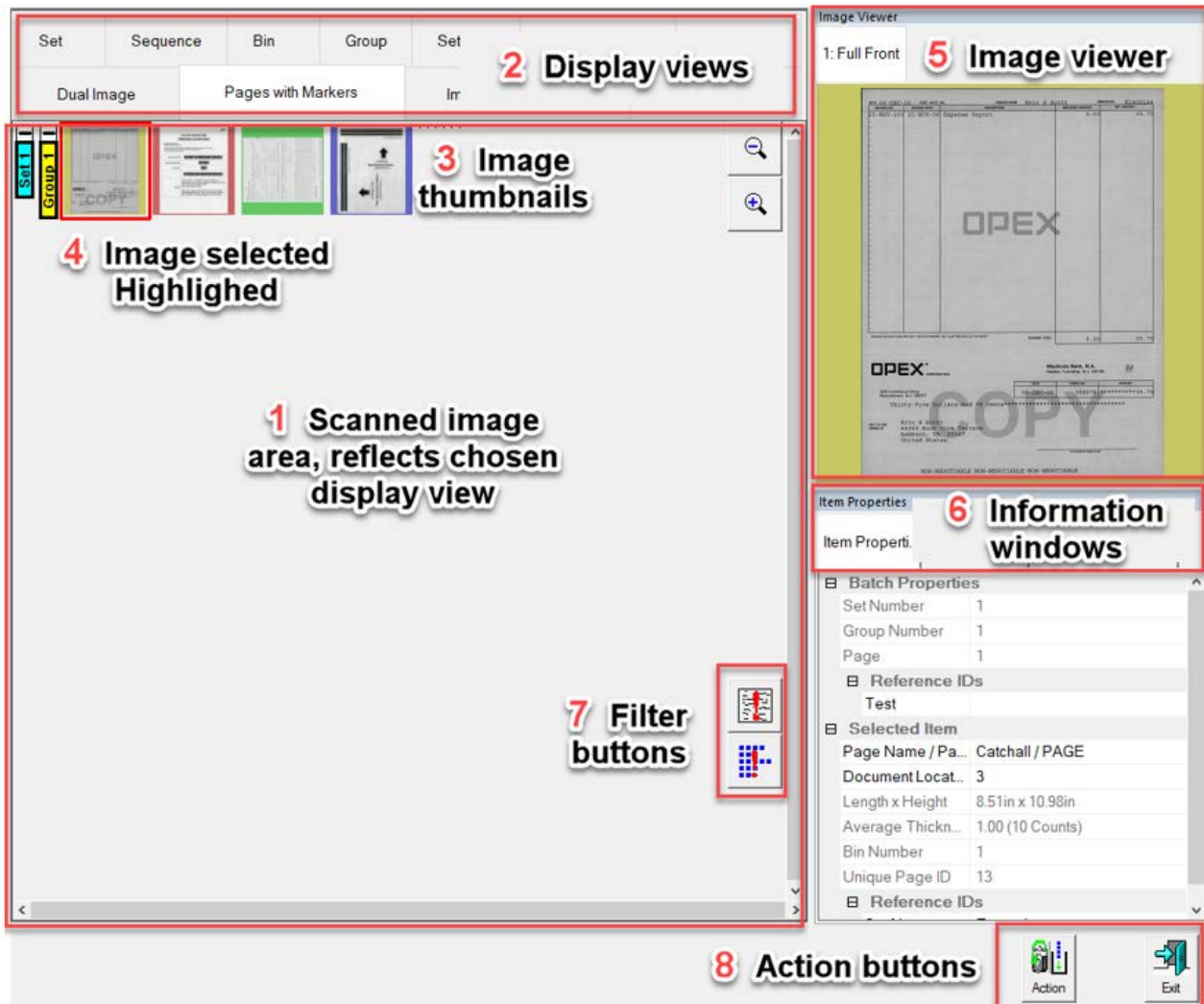
# 4. Edit Screen

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## 4.1. Edit screen overview

When a batch is resumed with CertainScan Edit, the scanned batch is shown with selected display views, information windows, and functions buttons.

Features of the Edit screen are identified in Figure 4-1 and described below.

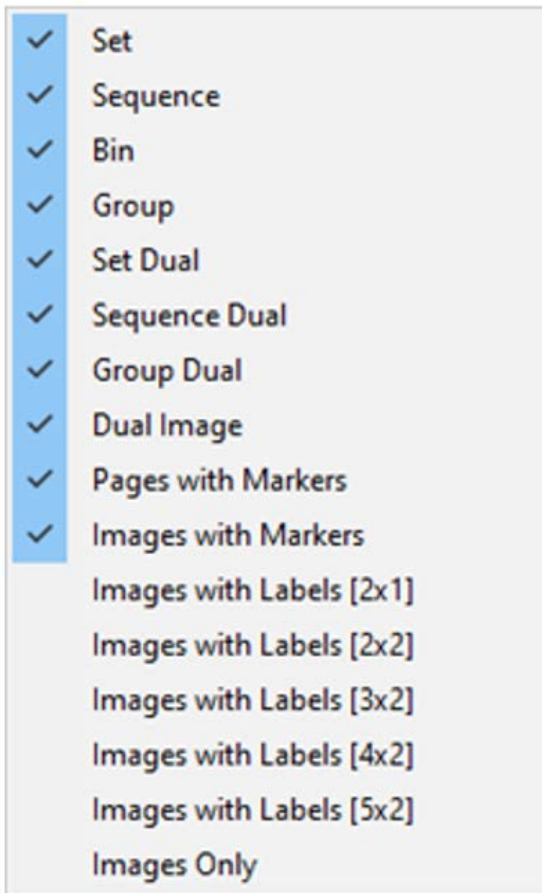


**Figure 4-1: Edit Screen Overview**

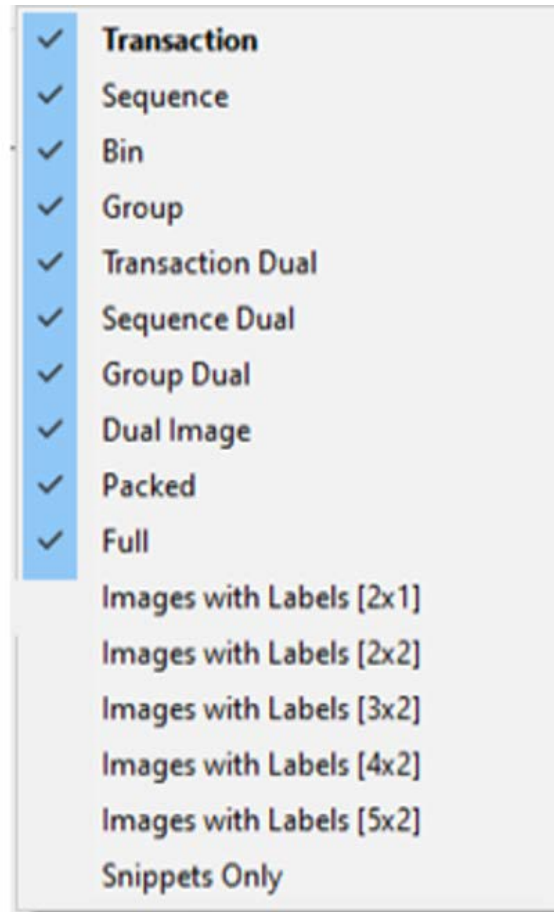
- 1. Scanned image area:** This area shows the scanned batch and allows for Edit functions. The display view reflects the view type selected in area two.
- 2. Display View types:** Right click in the header area. Check or uncheck display view types and once complete the area will reflect each display view

type as a Tab for selection. However, only a Manager level can save defined selections when prompted upon exiting Edit screen.

**Note:** Based on configured customer type, Service Bureau or Remittance, some display view names change based on selection. The following names change respectively: Set or Transaction - Set Dual or Transaction Dual - Pages with Markers or Packed - Images with Markers or Full - Images Only or Snippets Only (Figure 4-2).



Service Bureau



Remittance

**Figure 4-2: Configuration differences**

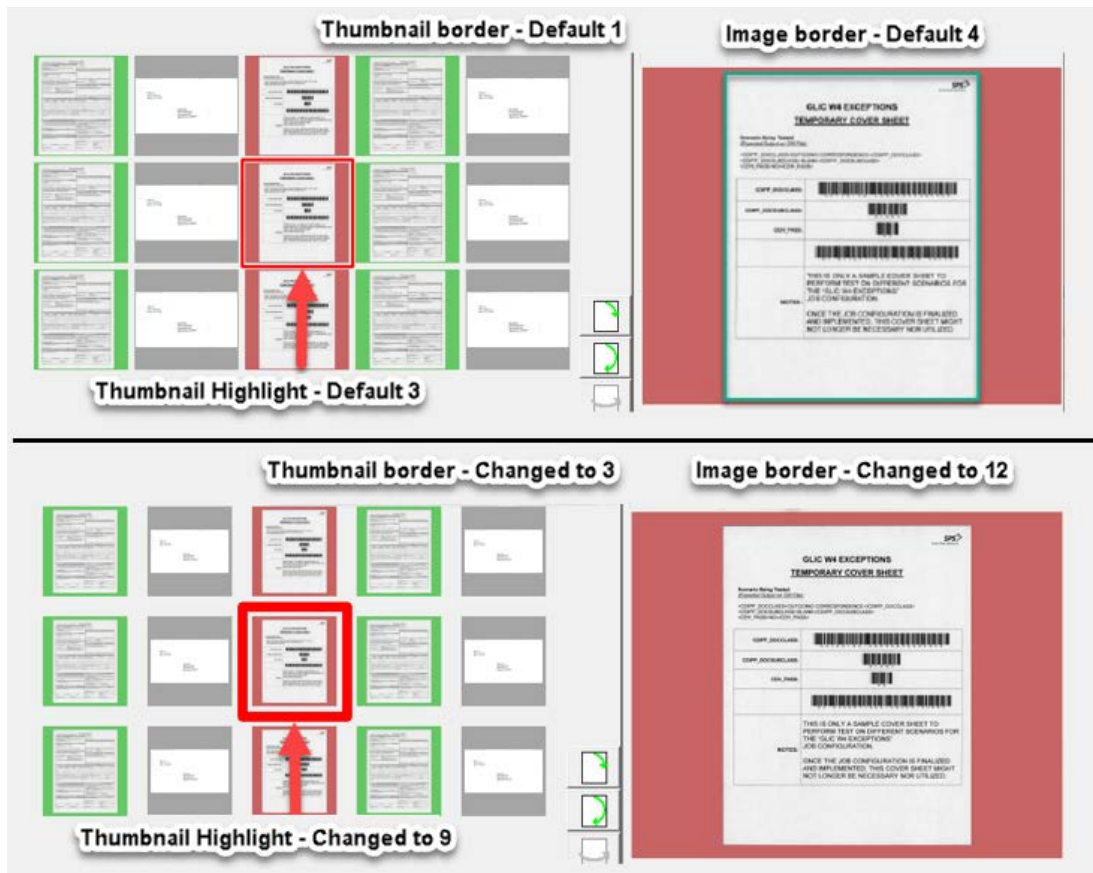
3. **Image thumbnails:** Each page and image within the batch is shown as a thumbnail.
4. **Image selected Highlighted:** When a thumbnail page is selected, the boarder is highlighted in red, and is selected for edit function. A larger view is also shown in the Image Viewer.

5. **Image Viewer:** Also referred to as preview window, displays larger view of thumbnail page selected. The viewer displays image selected and you can choose Back page when available. Clicking on the displayed page in the Image view window will open a pop-up screen providing Image Enhancement tools.
6. **Information Windows:** Right-click on the shown item header. Check or uncheck information windows. Once complete, the area will reflect each selected item as a Tab for selection.
7. **Filter buttons:** These are displayed based on Job as defined. Button icons can be clicked on to apply filter or turn filter off.
8. **Action buttons:** These are displayed based on Job as defined. Examples: **Mark Voids**, **Validate Batch**, **Exit**. Click on the **Action** button to display actions defined.

## 4.2. Edit display view thumbnail borders

When logged on as a Manager, the thumbnail and image borders, and thumbnail highlight are individual settings that can be changed. When using a touch screen monitor, increasing the setting for the thumbnail border and/or the thumbnail highlight may make selecting images easier for inserting new boundaries or new images. In Figure 4-3, one screen capture reflects all default settings with the second screen capture reflecting all settings increased.

- **Thumbnail borders:** defines the space around the thumbnail pages displayed in the image area. This is a pixel value which can be increased or decreased. Default is 1.
- **Image borders:** defines the space around the page displayed in the Image Viewer. This is a pixel value which can be increased or decreased. Default is 4.
- **Thumbnail highlight:** Is the thickness of the highlighted thumbnail. This is a pixel value which can be increased or decreased. Default is 3.



**Figure 4-3: Display view thumbnail borders**

## To change these settings

**Note:** Manager level operator only.

1. Go to **System Setup > System > User Interface Settings**.
2. Adjust the highlighted parameters shown in Figure 4-4:
  - Image display border in pixels
  - Thumbnail border in pixels
  - Thumbnail highlight thickness in pixels

Categories	Description	Value
Backup and Restore Settings	1 Batch Image Viewer Can Show Full Res	No updates while system busy;
Batch Editor Settings	2 Customer Type	Service Bureau
Batch Manager Settings	3 Default color for image display	0x00e07070
Batch Monitor Settings	4 Delay showing thumbnail and preview in	No Delay - show preliminary th
General Settings	5 Display restart warning on system confi	No
Image Processing Settings	6 Downsample bitonal images to screen r	Yes
ONS Settings	7 DownSampler pixel stride	2
Storage Settings	8 Enable rotation button	Runscreen and Edit
User Interface Settings	9 Enable Virtual Keyboard	Yes
	10 Font size for operator and job selection	10
	11 Image display border in pixels	4
	12 Indicate virtual items in demo mode	1
	13 KeyAssist Scheme	2
	14 Logout Button Behavior	Quit if password specified on c
	15 Native Language	English
	16 Operator/Job Icon Size	Extra Large
	17 Run Screen Update Interval in MS	0
	18 Run/Edit Screen Font Size	12
	19 Run/Edit Screen Horizontal Image Coun	8
	20 Run/Edit Screen Vertical Image Count	8
	21 ScanLink Custom Data Button Name Ove	
	22 Set Page ReferenceIDs to Default when	No
	23 Show Throttle Notification UI	1
	24 Sort jobs by run count checked by defa	0
	25 Thumbnail border in pixels	1
	26 Thumbnail highlight thickness in pixels	3
	27 UI Date Format	American date

**Figure 4-4: User Interface Settings**



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## 4.3. Keyboard Shortcuts for Navigation of Batch Content

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**Table 4-1: Keyboard Shortcuts**

<b>Key</b>	<b>Action</b>
Home	Selects the first page in the batch.
End	Selects the last page in the batch.
Page Up	Scrolls the display view up without changing the selected page.
Page Down	Scrolls the display view down without changing the selected page.
Left Arrow	Moves to the left of page selected and changes selected page.
Right Arrow	Moves to the right of page selected and changes selected page.
Up Arrow	Moves up from the page selected and changes selected page.
Down Arrow	Moves down from the page selected and changes selected page.

(This page is intentionally blank)

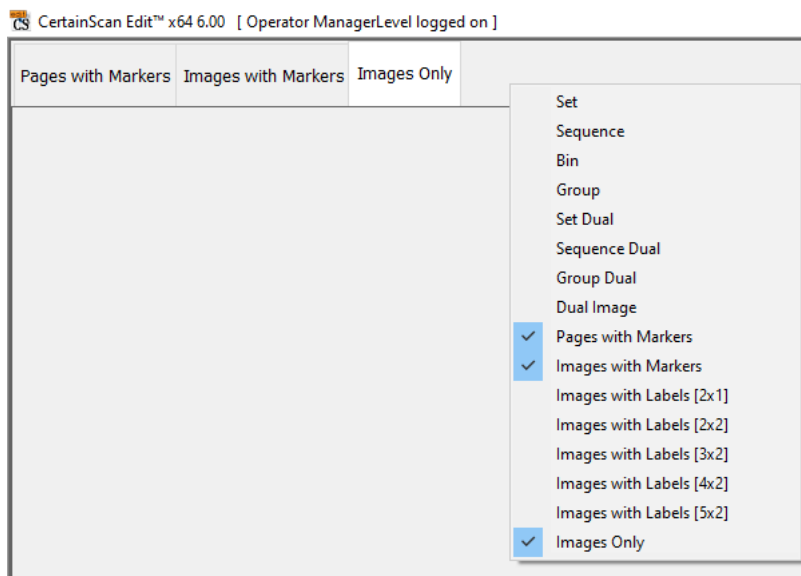
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## 5.1. Selecting Display Views

1. Right-click in the Display view header at the top of the Edit screen.
2. Check or uncheck display view types as desired. Once complete, a tab will appear for each view type selected (Figure 5-1).

**Note:** Based on customer type Service Bureau or Remittance, the following names change respectively: Set or Transaction - Set Dual or Transaction Dual - Pages with Markers or Packed - Images with Markers or Full - Images Only or Snippets Only



**Figure 5-1: Selecting views**

Each display view is described on the pages shown in Table 5-1.

**Table 5-1: List of Views**

Set/Transaction ( <a href="#">page 37</a> )	Group Dual ( <a href="#">page 43</a> )
Sequence ( <a href="#">page 38</a> )	Dual Image ( <a href="#">page 44</a> )
Bin ( <a href="#">page 39</a> )	Pages with Markers/Packed ( <a href="#">page 45</a> )
Group ( <a href="#">page 40</a> )	Images with Markers/Full ( <a href="#">page 47</a> )
Set/Transaction Dual ( <a href="#">page 41</a> )	Images with Labels ( <a href="#">page 51</a> )
Sequence Dual ( <a href="#">page 42</a> )	Images/Snippets Only ( <a href="#">page 52</a> )

## 5.2. Set / Transaction (Remittance customer type)

All scanned pages displayed in a single row from left to right in scan order followed by the next Set. One thumbnail is displayed for each page. Scroll buttons appear on the left of the first shown thumbnail page when the number of thumbnails across exceeds five (Figure 5-2).



**Figure 5-2: Set / Transaction view**

## 5.3. Sequence

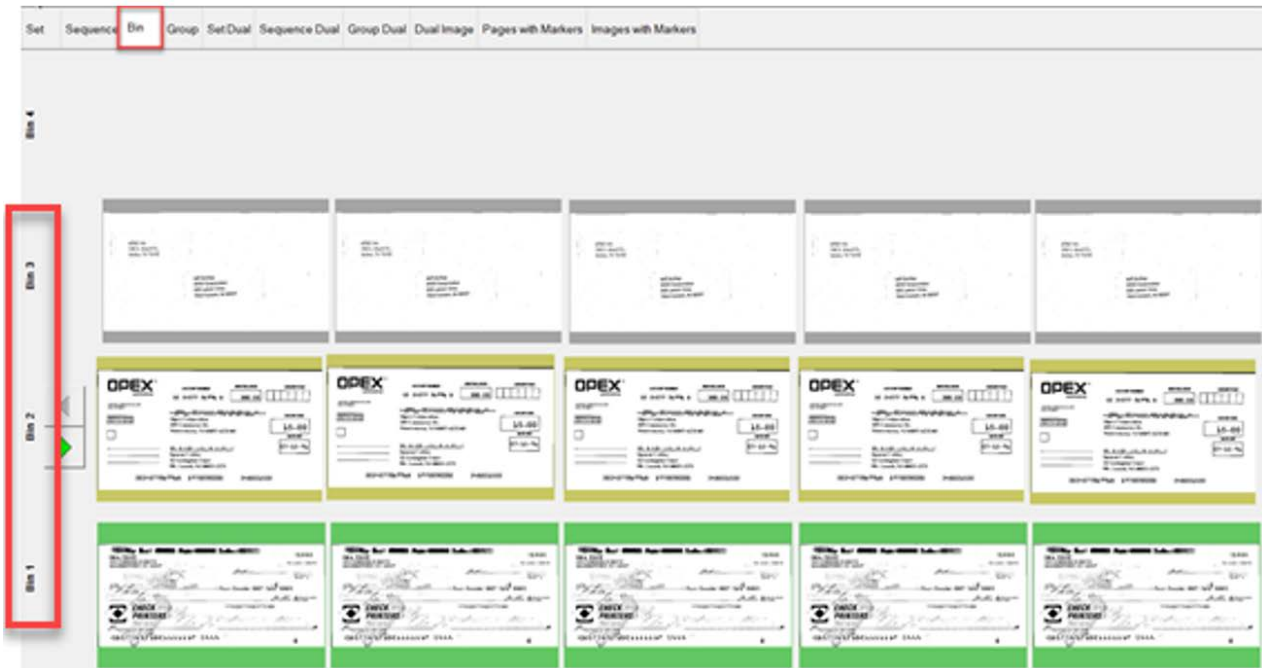
All scanned pages displayed in a single row from left to right in scan order, row header shows respective sequence number. A new row begins after the fifth image (Figure 5-3).



**Figure 5-3: Sequence view**

## 5.4. Bin

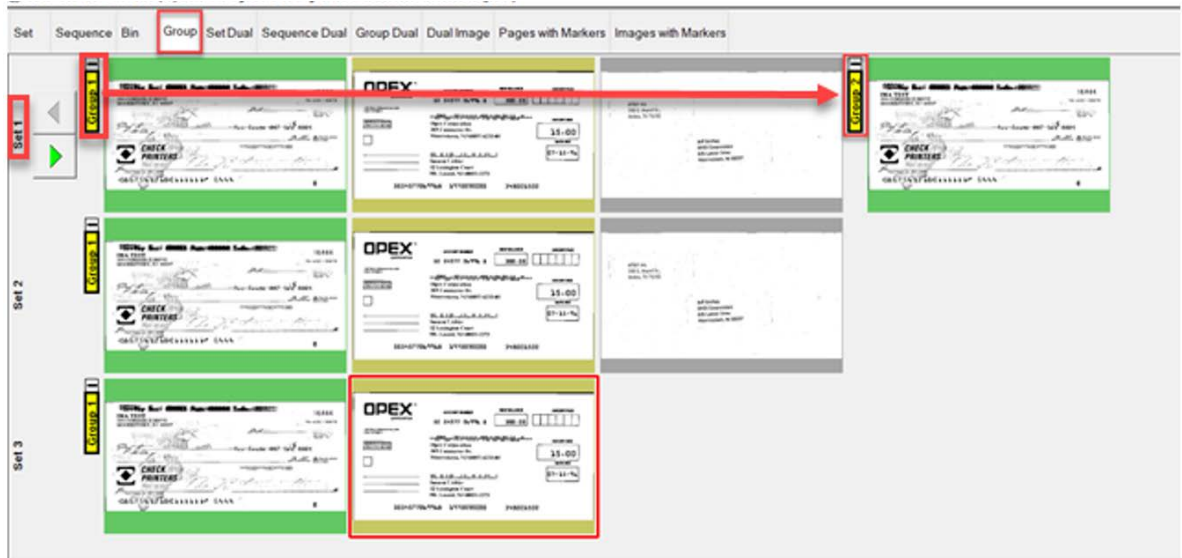
Each row represents the output bin which was assigned for respective Page Type in the Job. Example (Figure 5-4): Bin 1 = Page type Check / Bin2 = Page type Stub / Bin 3 = Page type Envelope.



**Figure 5-4: Bin view**

## 5.5. Group

All scanned pages displayed in a single row from left to right in scan order with additional Groups in the Set when they exist. Scroll buttons appear on the left to scroll between Groups (Figure 5-5).

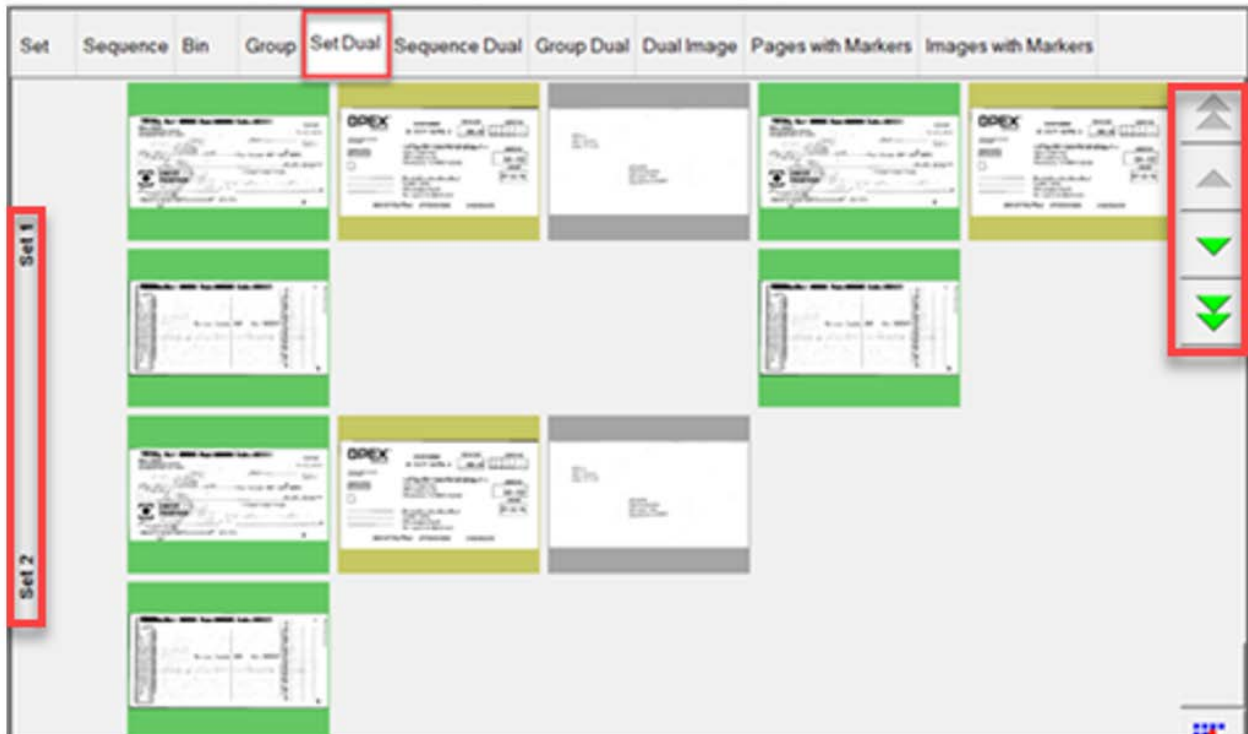


**Figure 5-5: Group view**



## 5.6. Set Dual / Transaction Dual (Remittance customer type)

When a Page Type is set up for Front & Back or secondary image, display view will show two thumbnails. The first row will show front page and directly below is the back page or secondary image. All scanned pages are displayed in scan order left to right and row header shows Set number. Scroll buttons provided on right to scroll between Sets (Figure 5-6).



**Figure 5-6: Set Dual / Transaction Dual view**

## 5.7. Sequence Dual

When a Page Type is set up for Front & Back or secondary image, display view will show two thumbnails. The first row will show front page and directly below is the back page or secondary image. All scanned pages are displayed in scan order left to right and row header shows sequence number. A new row begins after the fifth image across. Scroll buttons provided on right to scroll between sequence numbers (Figure 5-7).



**Figure 5-7: Sequence Dual view**

---

## 5.8. Group Dual

---

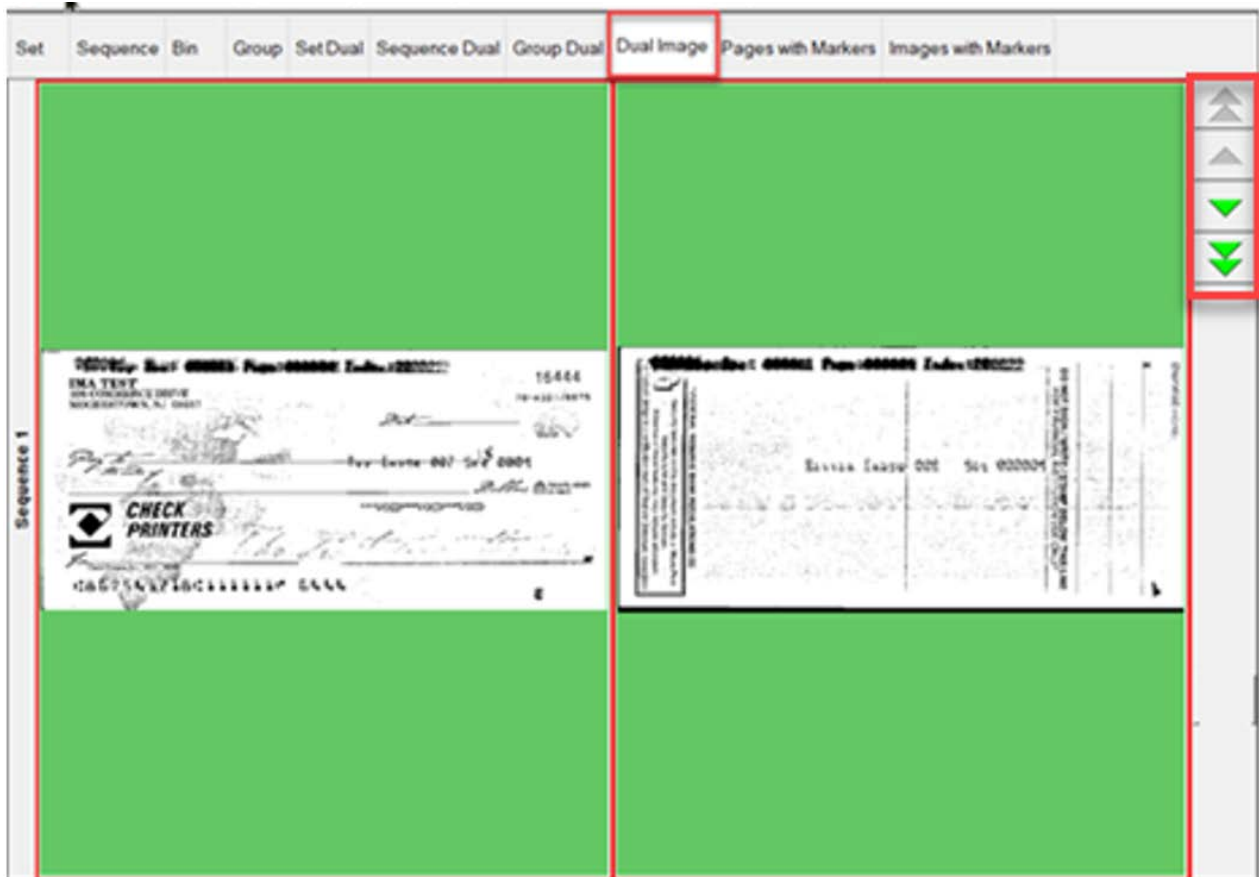
When a Page Type is set up for Front & Back or secondary image, display view will show two thumbnails. The first row will show front page and directly below is the back page or secondary image. All scanned pages are displayed in a single row from left to right in scan order along with additional Groups within a Set when they exist. Scroll functions provided to scroll within a Set or between Sets (Figure 5-8).



**Figure 5-8: Group Dual view**

## 5.9. Dual Image

Displays selected front and back or secondary image per Job setup. Scroll function provided to scroll through pages (Figure 5-9).



**Figure 5-9: Dual Image view**

---

---

## 5.10. Pages with Markers / Packed (Remittance customer type)

---

---

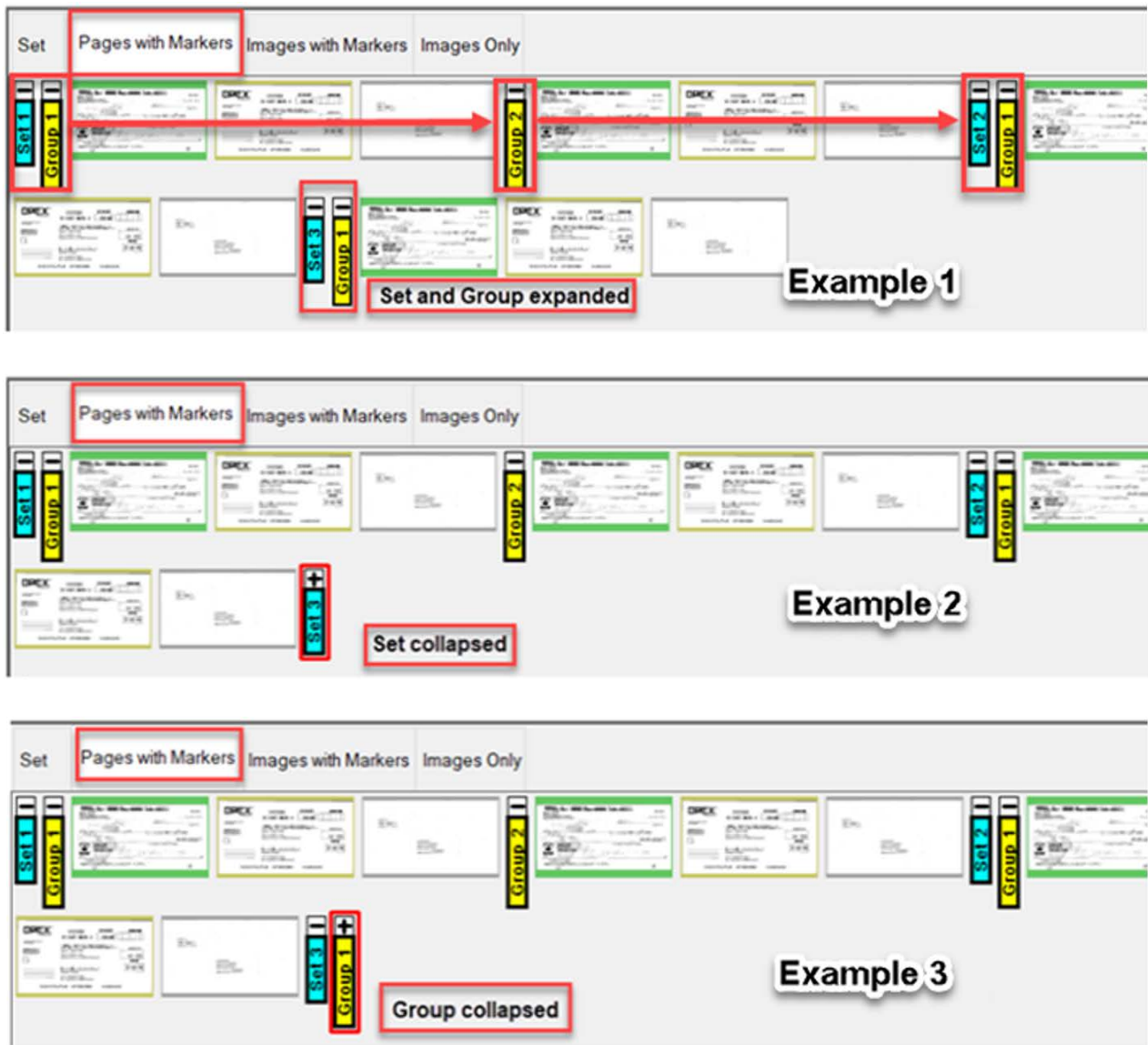
### **This is a commonly used view**

Scanned pages are displayed in a single row from left to right in scan order. Sequentially numbered Set and Group color markers identify scanned order of the batch. Sets and Groups can be expanded or collapsed by clicking on Minus/Plus icon above marker.

Referencing Figure 5-10:

- Example 1 - Set and Group expanded, minus icon shows above each marker. Group pages in Set displayed.
- Example 2 - Set collapsed, plus icon shows above Set marker. Groups and pages are not displayed.

- Example 3 - Group collapsed, plus icon shows above Group marker. No pages are displayed.



**Figure 5-10: Pages with Markers (Packed) examples**

---

---

## 5.11. Images with Markers / Full (Remittance customer type)

---

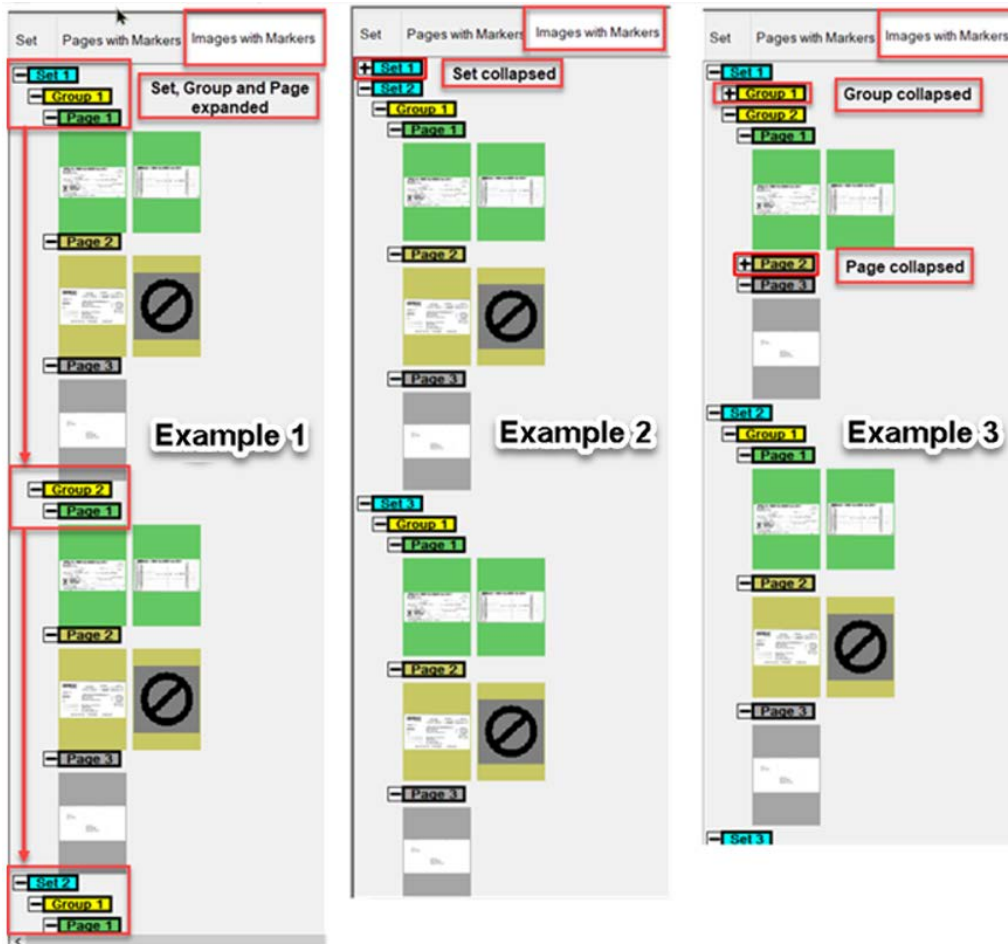
---

### **This is a commonly used view**

All pages displayed vertically in scan order. Sequentially numbered Set, Group and Page color markers identify scanned order of the batch. Sets, Groups and Pages can be expanded or collapsed by clicking on the Minus/Plus icon next to marker. Reference Figure 5-11:

- Example 1 - Set, Group and Pages expanded, minus icon shows left of each marker. All displayed.
- Example 2 - Set collapsed, plus icon shows left of Set marker, Groups and pages are not displayed.

- Example 3 - Group is collapsed, plus icon shows left of Group marker. No pages are displayed. Page is collapsed, plus icon shows left of Page marker. No pages are displayed.



**Figure 5-11: Images with Markers / Full view - examples**

**Note:** When Blank Page Detect is chosen in the scan Job, the **Blank Page Detection** filter button is available, lower right in display view. When filter is

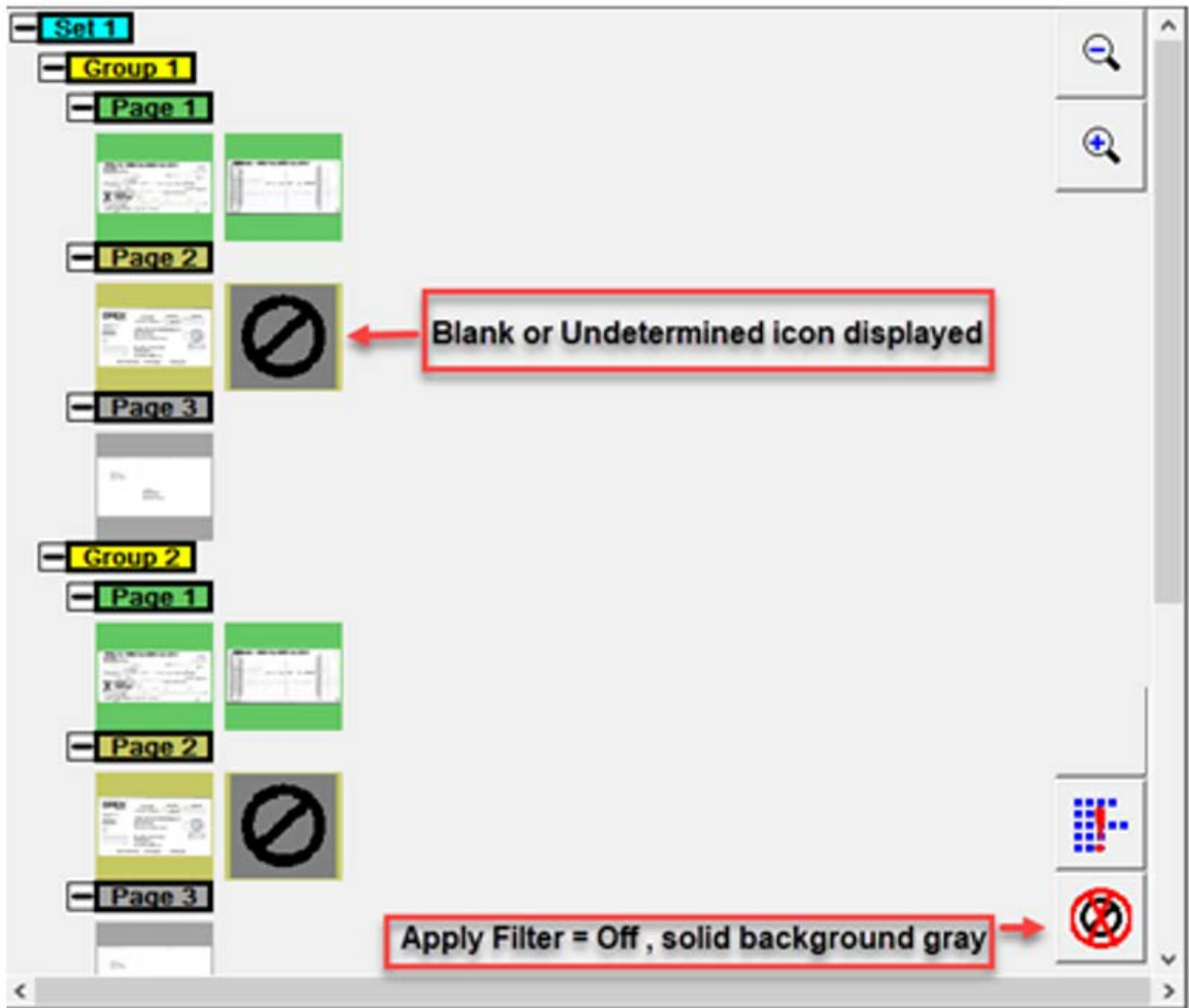


active, pages that are blank or undetermined will not be shown, and display view header also shows “Filtered” (Figure 5-12).



**Figure 5-12: Blank Page Detection - filter example 1**

When filter is non-active, pages that are blank or undetermined will be displayed as an icon symbol (Figure 5-13).

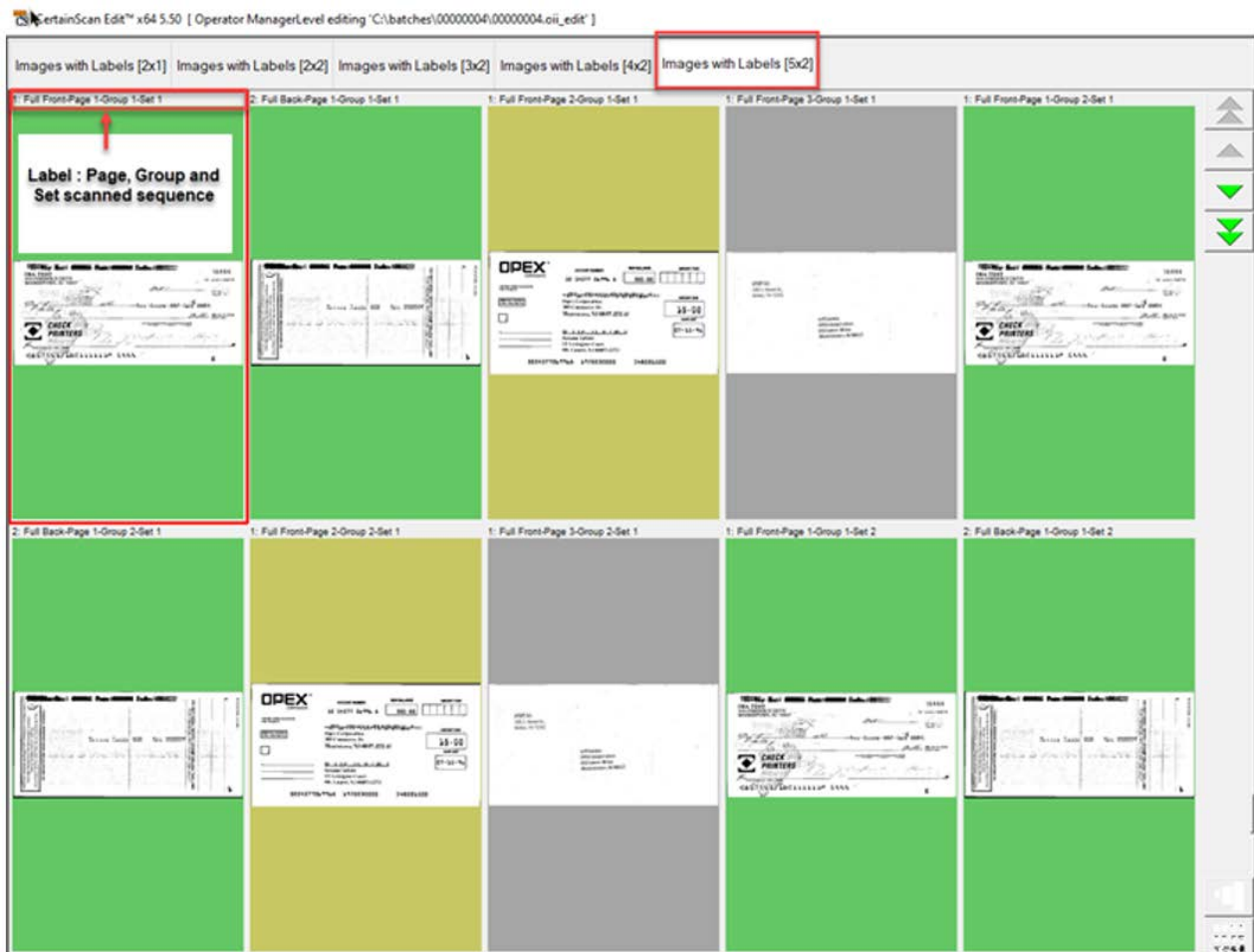


**Figure 5-13: Blank Page Detection - filter example 2**

## 5.12. Images with Labels views

These display views show pages arranged by column and row. At the top of each page is a header Label providing: Page, Group and Set scanned sequence number.

- Images with Labels [2x1] - pages are arranged in 2 columns and 1 row
- Images with Labels [2x2] - pages are arranged in 2 columns and 2 rows
- Images with Labels [3x2] - pages are arranged in 3 columns and 2 rows
- Images with Labels [4x2] - pages are arranged in 4 columns and 2 rows
- Images with Labels [5x2] - pages are arranged in 5 columns and 2 rows (Figure 5-14)



**Figure 5-14: Images with Labels - 5x2 example**

---

---

## 5.13. Images Only / Snippets Only (Remittance customer type)

---

---

### This is a commonly used view

All pages displayed in a single row from left to right in scan order. No Set, Group or Page color markers. A filter button to “Sort by page file size” is available. This filter sorts blank pages to the beginning of the batch, where you can then select all at once to delete (Figure 5-15).



**Figure 5-15: Images Only / Snippets Only view**

When a batch is sorted, the word “Sorted” is added to the display view tab (Figure 5-16).



**Figure 5-16: Images Only - Sorted**

Filter buttons (shown in Figure 5-17): **Pages needing attention**, **Sort by page file size** and **Sort by percent** are default in this display view. When a batch is filtered or sorted, the display mode tab will also show Filtered or Sorted.

When Blank Page Detect is chosen in the scan Job, the **Blank Page Detection** filter button is also available, lower right in display view. When the filter is active, pages that are Blank or Undetermined will not be shown, and display view header also shows Filtered. When filter is non-active, pages that are Blank or Undetermined will be displayed as an icon symbol.



**Figure 5-17: Images Only - Filtered**

# 6. Information Windows

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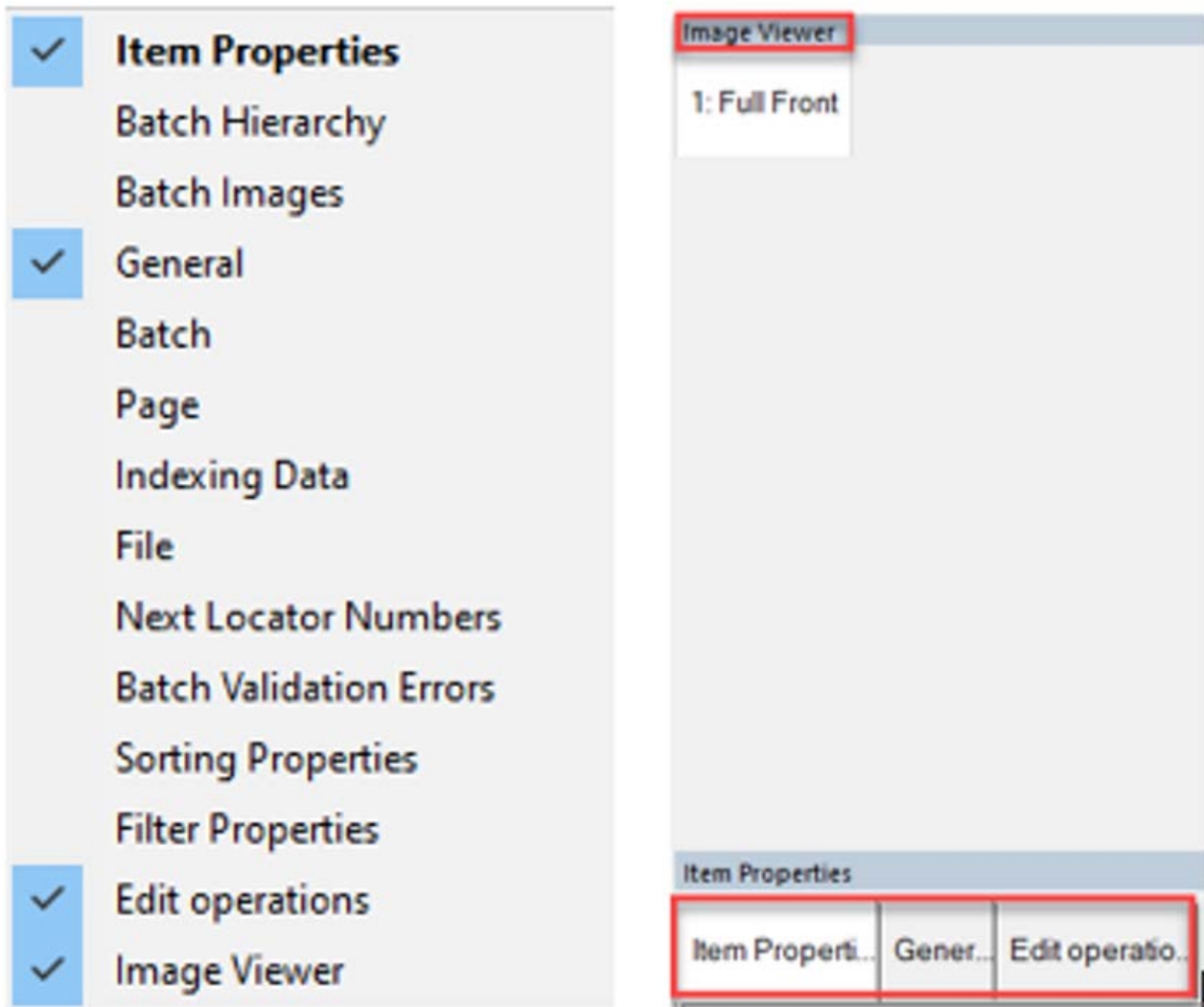
## 6.1. Overview

---

---

Display the Information Windows by right-clicking on the shown item header. Check or uncheck information windows. Once complete, the area will reflect each selected item as a Tab for selection. Tabs in this view can be arranged by left-clicking on them and dragging to left or right (Figure 6-1).

**Note:** Based on customer type Service Bureau or Remittance, Page or Piece name difference.



**Figure 6-1: Display Information Windows**



Each Information window is described on the pages shown in Table 6-1.

**Table 6-1: Information Windows**

Item Properties ( <a href="#">page 58</a> )	File ( <a href="#">page 71</a> )
Batch Hierarchy ( <a href="#">page 66</a> )	Next Locator Numbers ( <a href="#">page 71</a> )
Batch Images ( <a href="#">page 67</a> )	Batch Validation Errors ( <a href="#">page 61</a> )
General ( <a href="#">page 68</a> )	Sorting Properties ( <a href="#">page 62</a> )
Batch ( <a href="#">page 69</a> )	Filter Properties ( <a href="#">page 63</a> )
Page ( <a href="#">page 70</a> )	Edit operations ( <a href="#">page 65</a> )
Index Data ( <a href="#">page 60</a> )	Image Viewer ( <a href="#">page 72</a> )

---

---

## 6.2. Item Properties

---

---

Based on Job and Page setup, respective information is provided for selected page or marker. Information headers can be collapsed or expanded by clicking on the minus/plus icon next to the header name.

For example (Figure 6-2):

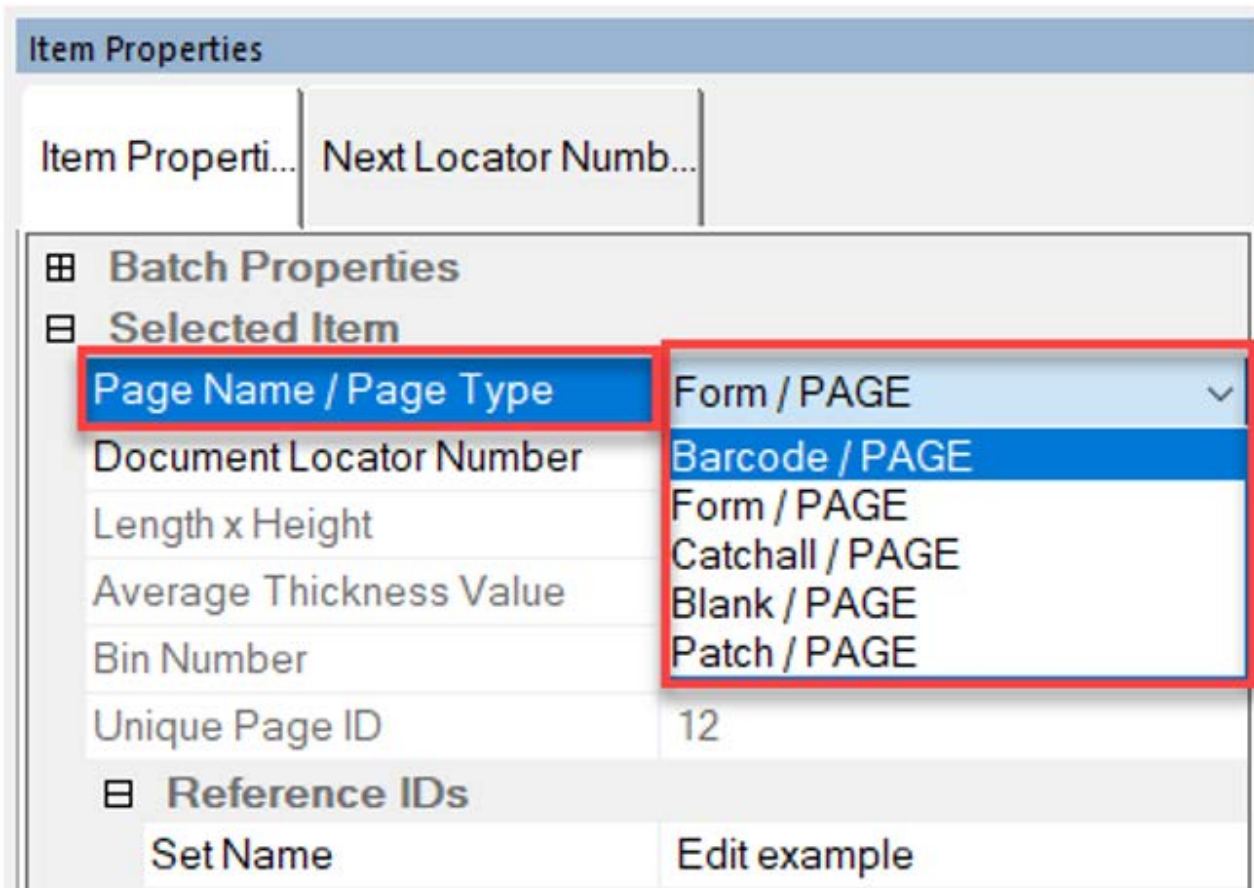
- Batch Properties includes: Set Number, Group Number, Page, Reference IDs
- Selected Item includes: Page Name / Page Type, Document Locator Number, Length x Height, Average Thickness Value, Bin Number, Unique Page ID

Item Properties	
Item Properti...	Next Locator Numb...
<input type="checkbox"/> Batch Properties	
Set Number	1
Group Number	1
Page	2
<input type="checkbox"/> Reference IDs	
Test	
<input type="checkbox"/> Selected Item	
Page Name / Page Type	Form / PAGE
Document Locator Number	2
Length x Height	10.98in x 8.53in
Average Thickness Value	1.00 (10 Counts)
Bin Number	1
Unique Page ID	12
<input type="checkbox"/> Reference IDs	

**Figure 6-2: Item Properties window**

Some items in this view can be edited by the operator, by clicking on the item to edit. For example: Page Name (Figure 6-3).

- Click on **Page Name / Page Type** - Drop down, selections available per Page types in Job.



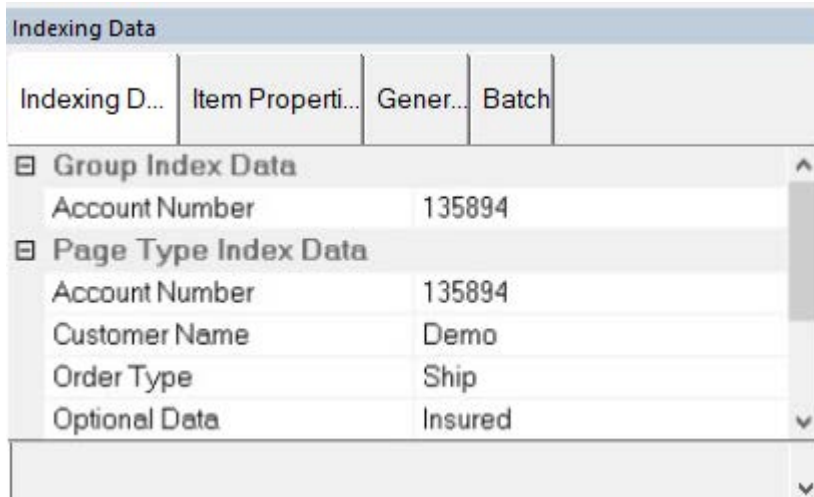
**Figure 6-3: Editing items - example**

---

## 6.3. Indexing Data

---

This Tab provides the editable index fields defined for the selected Page, along with Batch, Set and Group fields applied (Figure 6-4). Indexing is only available with Transform OII batch output.



Indexing D...	Item Properti...	Gener...	Batch
<b>Group Index Data</b>			
Account Number		135894	
<b>Page Type Index Data</b>			
Account Number		135894	
Customer Name		Demo	
Order Type		Ship	
Optional Data		Insured	

**Figure 6-4: Indexing Data window**

The value of an index can be taken from:

- A barcode
- An OCR
- A MICR
- A physical audit trail
- An electronic audit trail
- Operator-entered text
- A Reference ID
- A Custom Tag (specific text configured into a Job)

Each Page Type can have up to twenty index fields.

The index from one Page Type can be configured to be assigned to all pages within a group, set, or batch. As a result, an indexed Page Type does not need to be the first item scanned in its group, set, or batch.

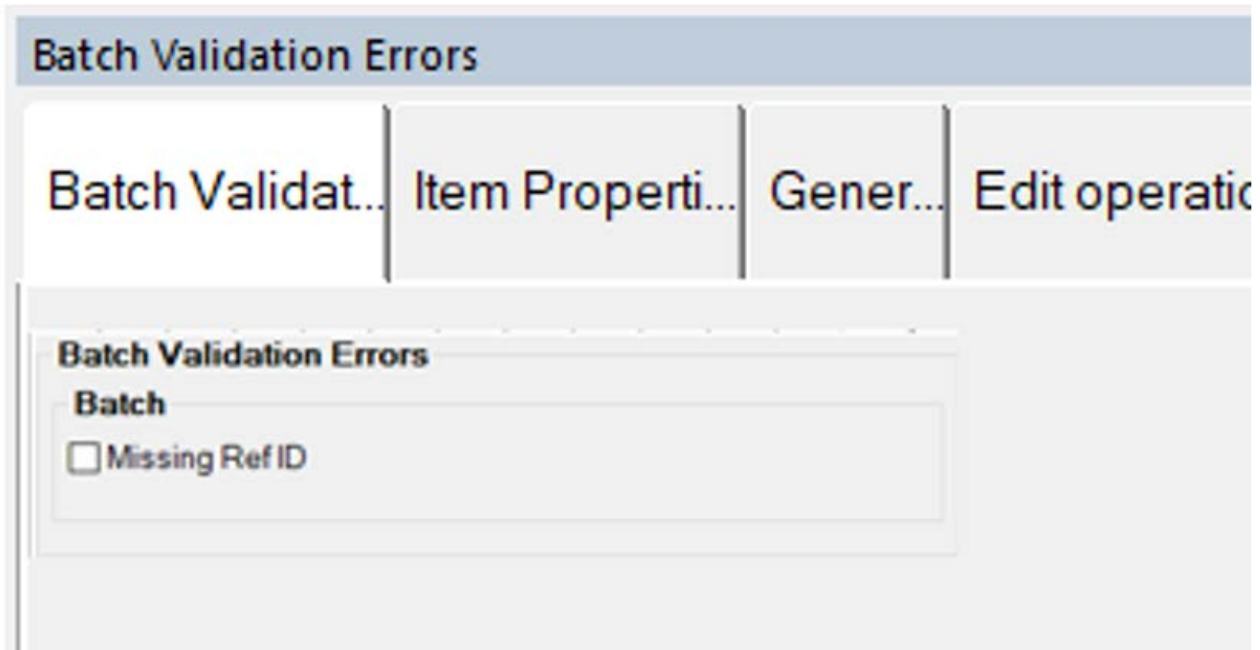
---

## 6.4. Batch Validation Errors

---

Provides a list of errors based on Transform profile applied when running batch validation. Once the error is corrected, check the box next to the error to clear it from the list.

For example: Batch validation executed, Batch is Missing RefID (Figure 6-5)



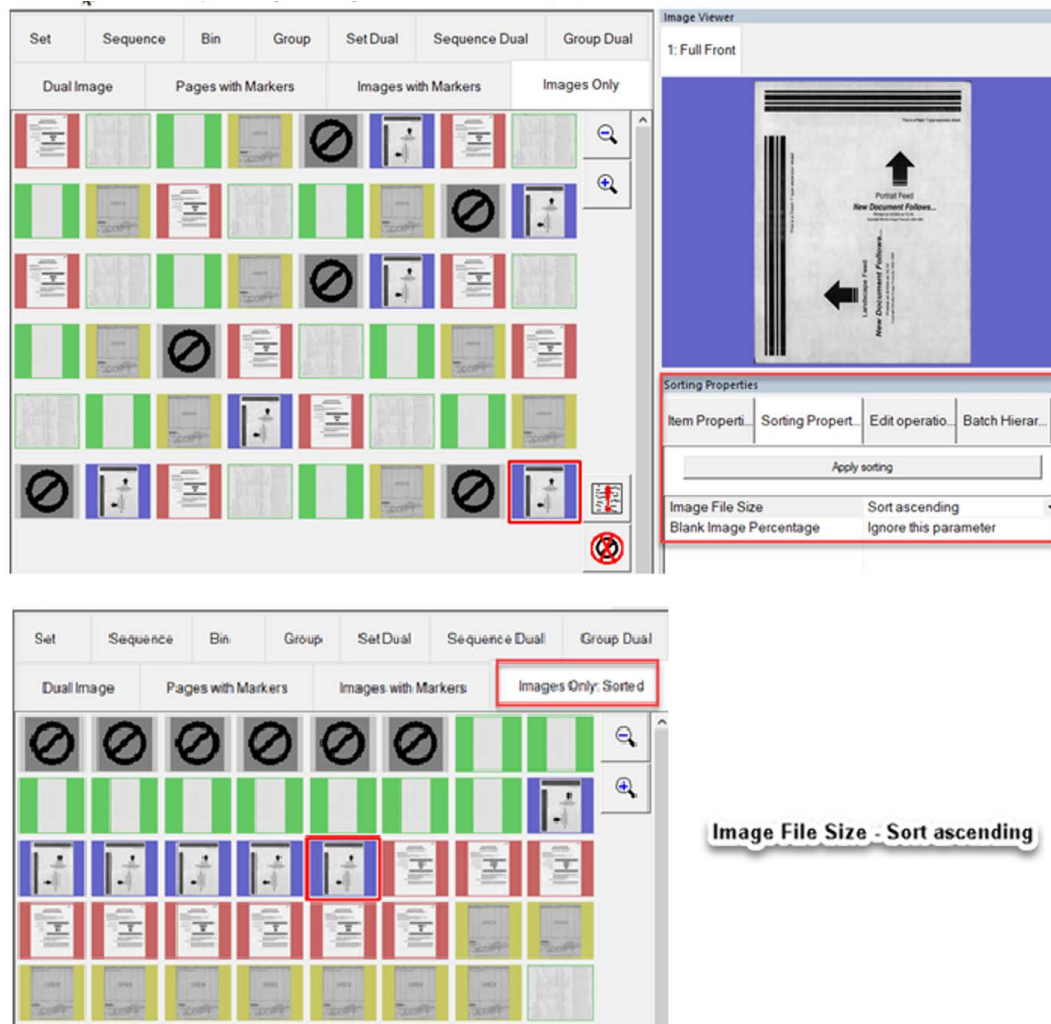
*Figure 6-5: Batch Validation Errors window*

## 6.5. Sorting Properties

Display view > Images Only (Figure 6-6).

**Note:** For Remittance, display view > Snippets Only.

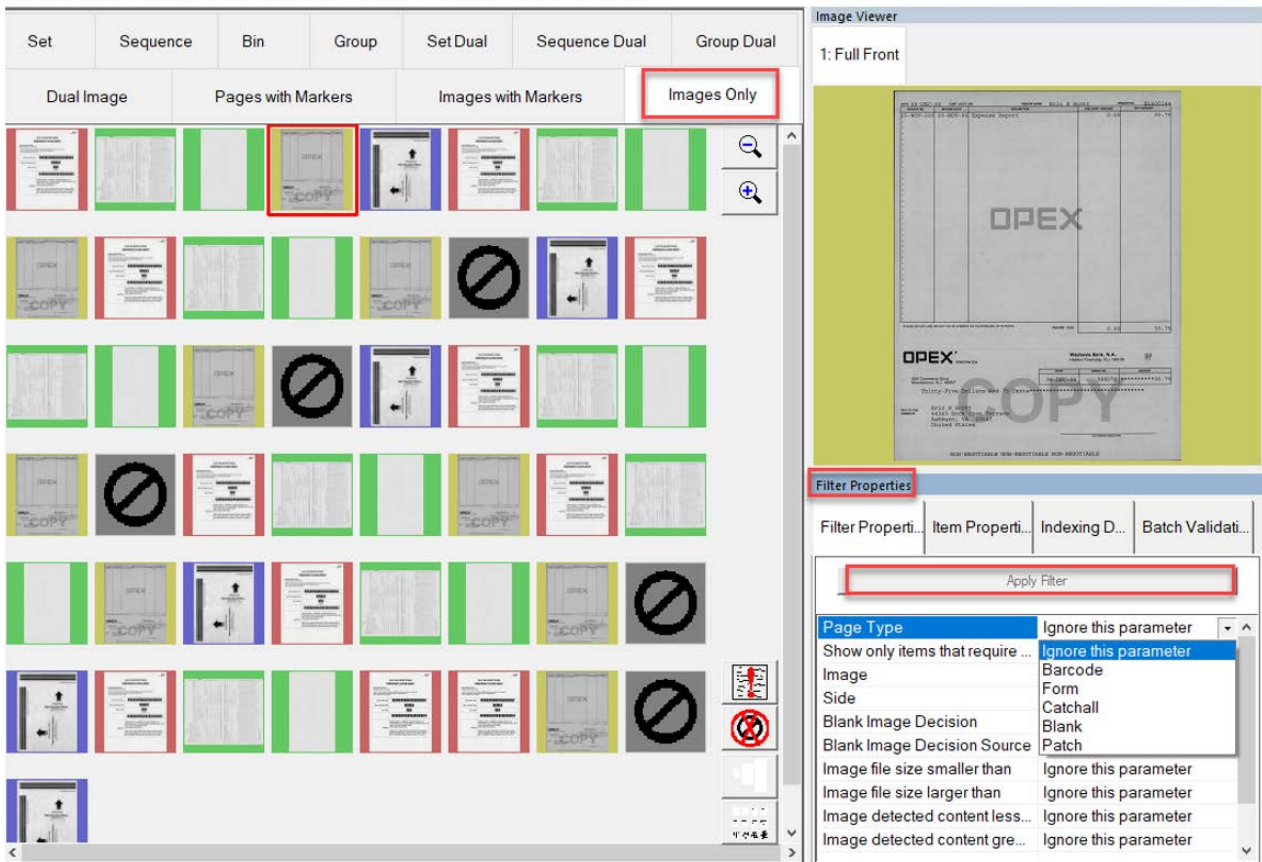
1. Click on **Image File Size** or **Blank Image Percentage** and choose setting.
2. Select either **Ignore this parameter**, **Sort ascending** or **Sort descending**.
3. The **Apply sorting** button directly above will become active, click on to apply sorting.
4. When Sorted or Filtered, it will display accordingly in the **Images Only** tab.



**Figure 6-6: Sorting Properties window**

## 6.6. Filter Properties

The Filter Properties window is available for all display view types (Figure 6-7). However, filter types are automatically limited for the display view type selected. Images Only display view used for screen capture reference. Click on the filter type and drop-down for available selections. “Ignore this parameter” is the default for each filter type. Once filters are defined, the **Apply Filter** button directly above becomes active to apply. The respective view tab will also show **Filtered** when applied.



**Figure 6-7: Filter Properties window**

## Filter examples:

- Page Type: Selections will reflect the pages names used in the Job.
- Show only items that require editing: Yes or No
- Show only sets that require editing: Yes or No
- Image: Selections 1 -10
- Side: Front or Back
- Blank Image Decision: Not Blank, Blank, Undetermined, Blank or Not Blank, Not Blank or Undetermined
- Blank Image Decision Source: Not Performed, Job, Page Type, Image, Image Tools
- Image file size smaller than: Enter a value
- Image file size larger than: Enter a value
- Image detected content less than: Enter a value
- Image detected content greater than: Enter a value

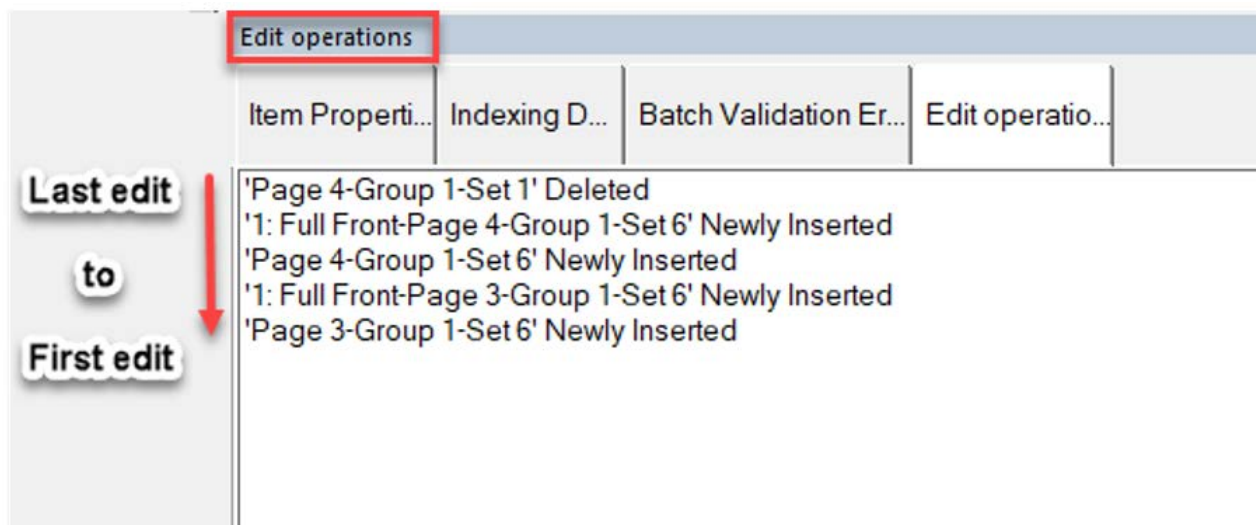


---

## 6.7. Edit Operations

---

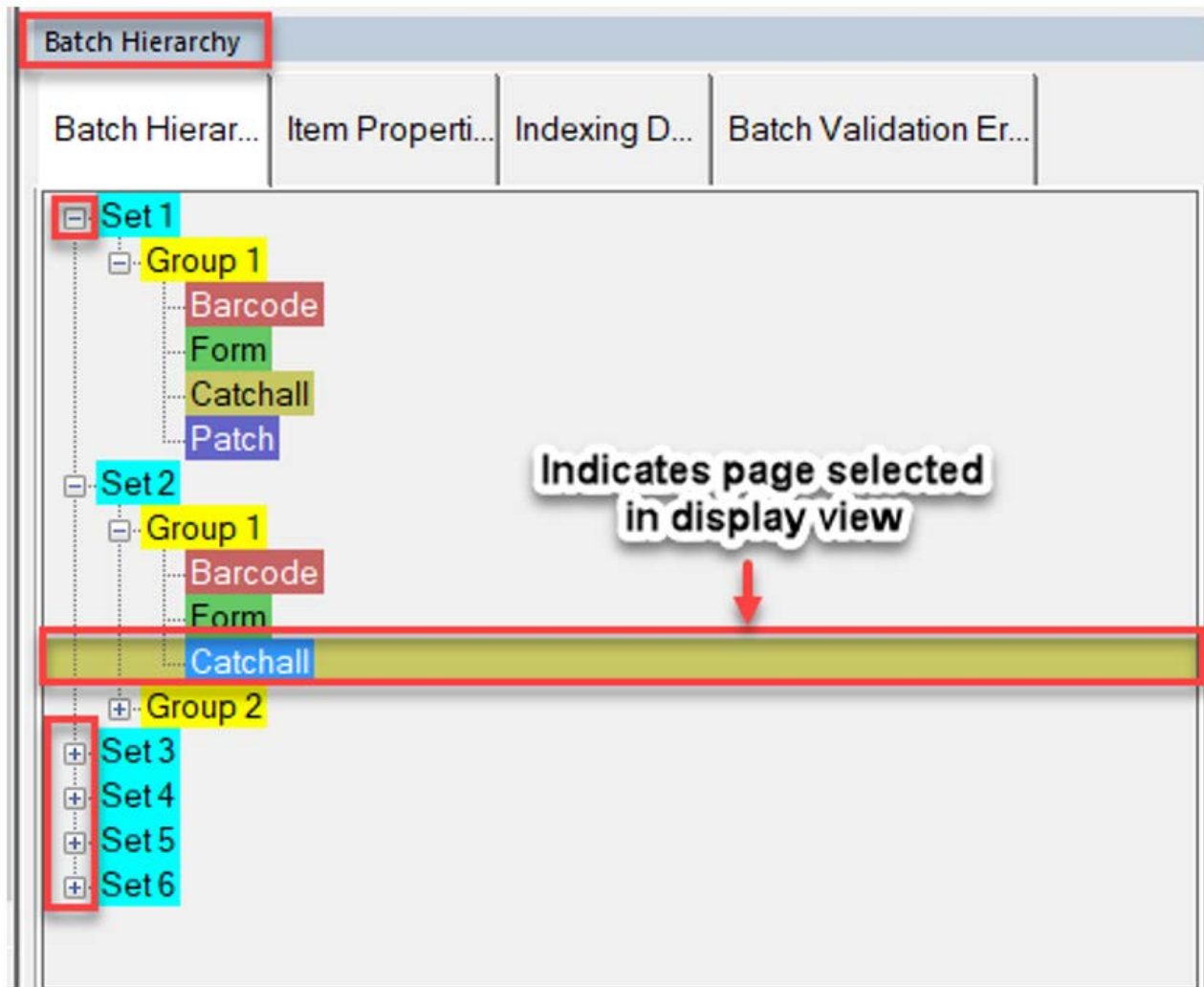
A view of all edit actions made. When editing a batch, all edit actions (insert, delete, rotate, etc.) are tracked by the Batch Editor library and show populated last to first. Edit actions can be undone. To undo an edit action, click on the respective action and press the “Ctrl” and “Z” keys at the same time. When an action is undone, it is removed from the edit list. The list of edit actions is cleared when the edited batch is saved. A new list of edit actions begins with the next batch (Figure 6-8).



**Figure 6-8: Edit Operations**

## 6.8. Batch Hierarchy

View of batch structure: Set, Group and Page Types. Boundary headers can be collapsed or expanded by clicking on the minus or plus icon next to the header name. Click on any item in the view to correspond and show same item in display view. The selected item highlights in respective color (Figure 6-9).



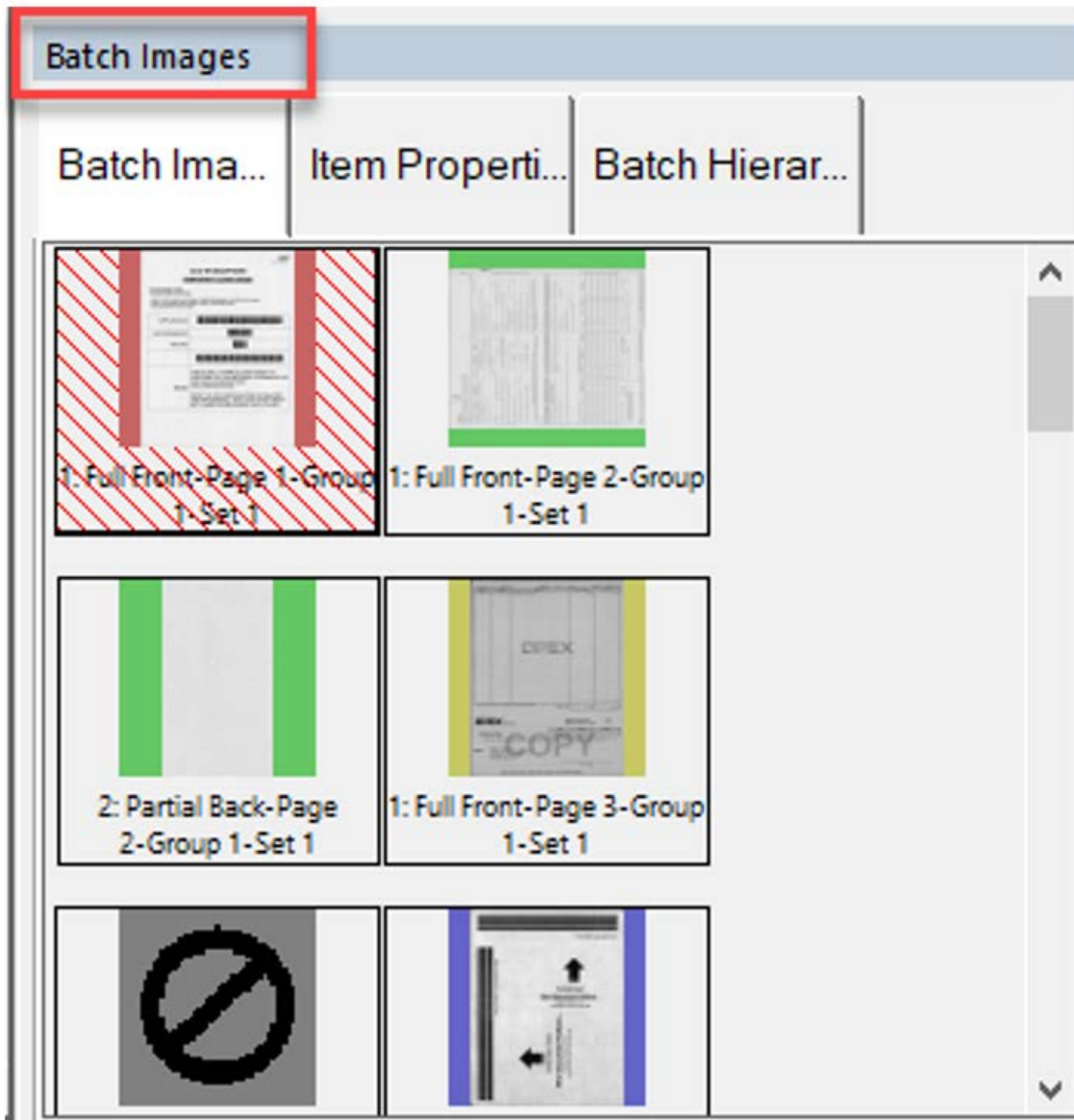
**Figure 6-9: Batch Hierarchy window**

---

## 6.9. Batch Images

---

View of all pages and images in the batch. Clicking on a page will move to that page in display view and display in Image Viewer if selected (Figure 6-10).



**Figure 6-10: Batch Images window**

---

---

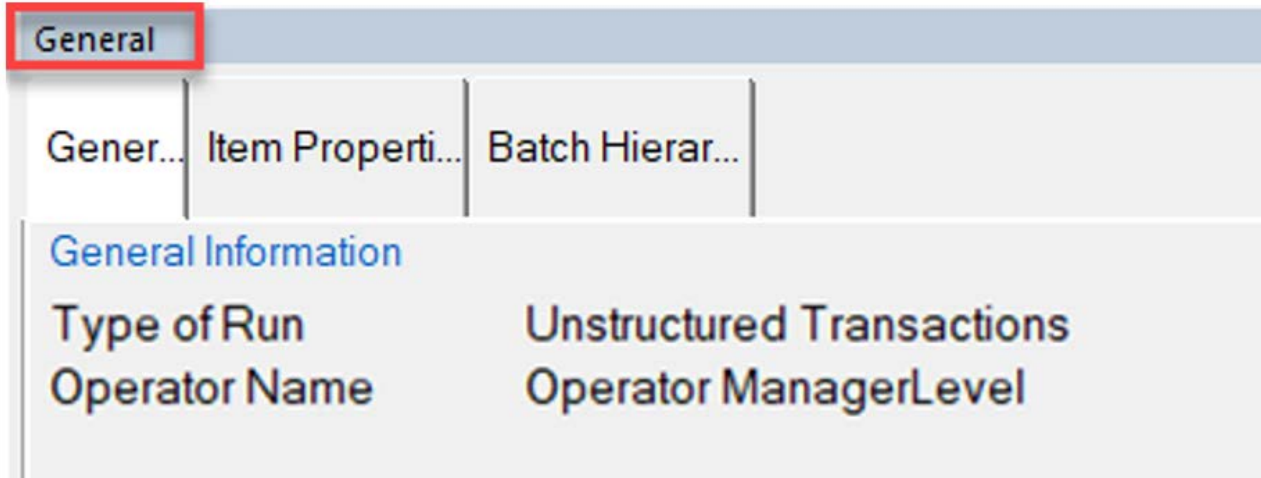
## 6.10. General

---

---

Provides information: Example Type of Run and Operator Name (Figure 6-11)

- Left click in screen area for larger pop-up screen.

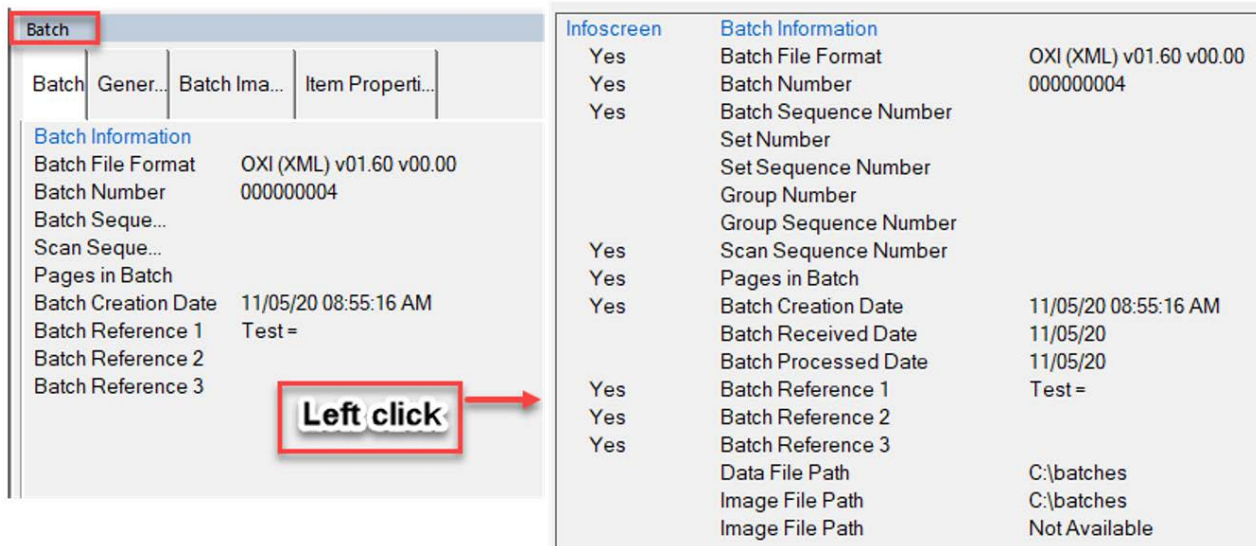


*Figure 6-11: General window*

## 6.11. Batch

Provides information: Batch File Format, Batch Number, Batch Sequence Number, Set Number, Set Sequence Number, Group Number, etc. (Figure 6-12).

- Left-click in screen area for larger pop-up screen.



The screenshot shows a software interface with a 'Batch' window. A red box highlights the 'Batch' title bar. Below it, a 'Batch Information' section lists various fields. A red box labeled 'Left click' with an arrow points to the 'Batch Reference 3' field. To the right, a larger 'Infoscreen' window is open, displaying a detailed list of batch information.

Infoscreen	Batch Information	
Yes	Batch File Format	OXI (XML) v01.60 v00.00
Yes	Batch Number	000000004
Yes	Batch Sequence Number	
	Set Number	
	Set Sequence Number	
	Group Number	
	Group Sequence Number	
Yes	Scan Sequence Number	
Yes	Pages in Batch	
Yes	Batch Creation Date	11/05/20 08:55:16 AM
	Batch Received Date	11/05/20
	Batch Processed Date	11/05/20
Yes	Batch Reference 1	Test =
Yes	Batch Reference 2	
Yes	Batch Reference 3	
	Data File Path	C:\batches
	Image File Path	C:\batches
	Image File Path	Not Available

**Figure 6-12: Batch window**

---

---

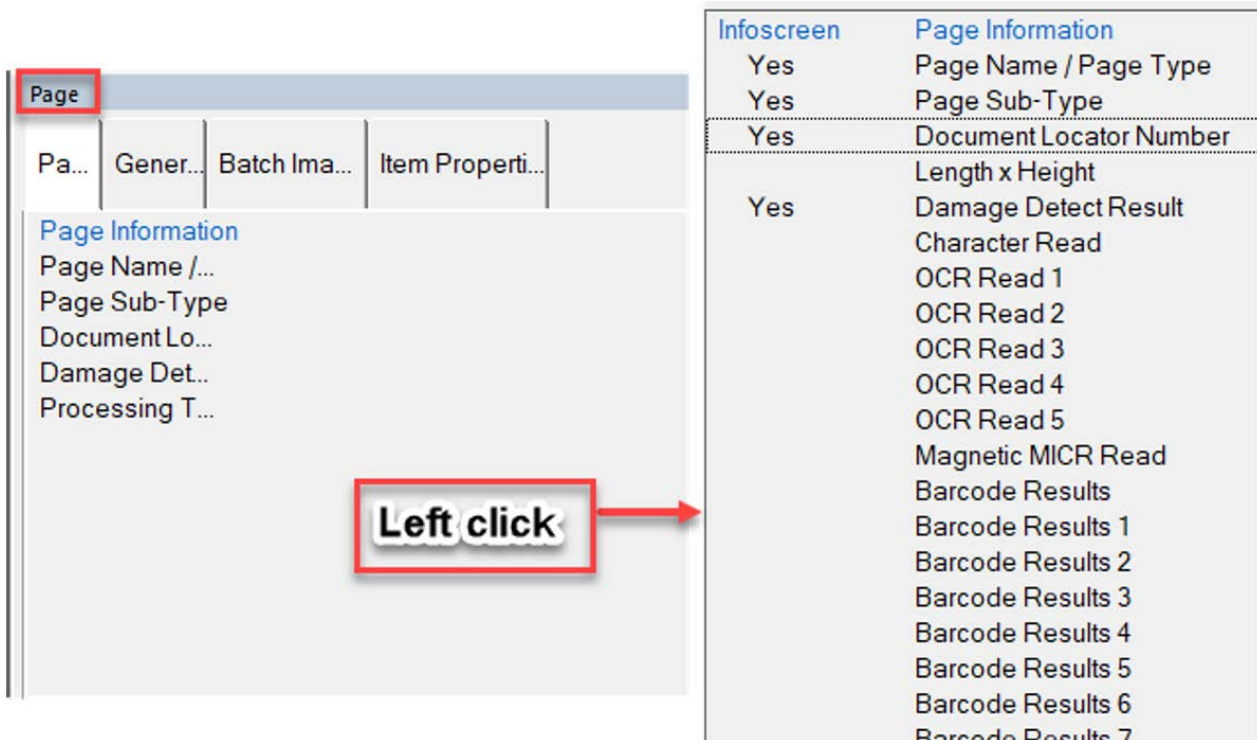
## 6.12. Page / Piece (Remittance customer type)

---

---

Provides information for page selected in display view (Figure 6-13).

- Left-click in screen area for larger pop-up screen.



**Figure 6-13: Page/Piece view**

---

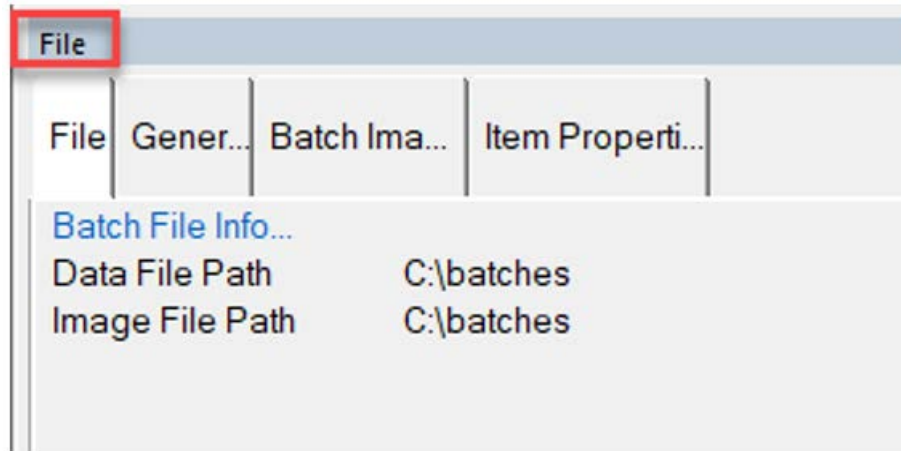
---

## 6.13. File

---

---

Provides information: Data File Path and Image File Path (Figure 6-14).



**Figure 6-14: File window**

---

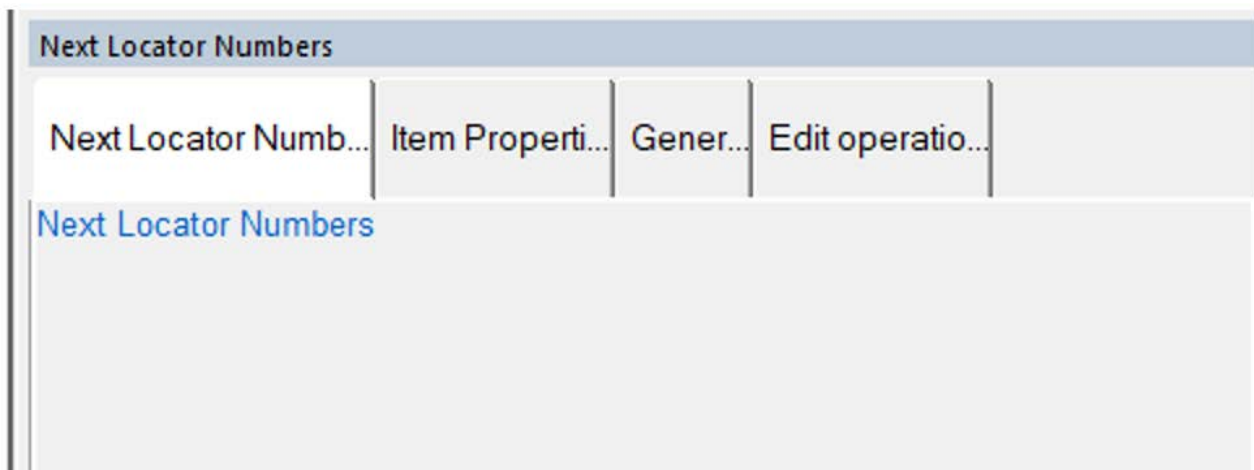
---

## 6.14. Next Locator Number

---

---

Provides the Locator number when set up at a Job level, and used with Transform (Figure 6-15).



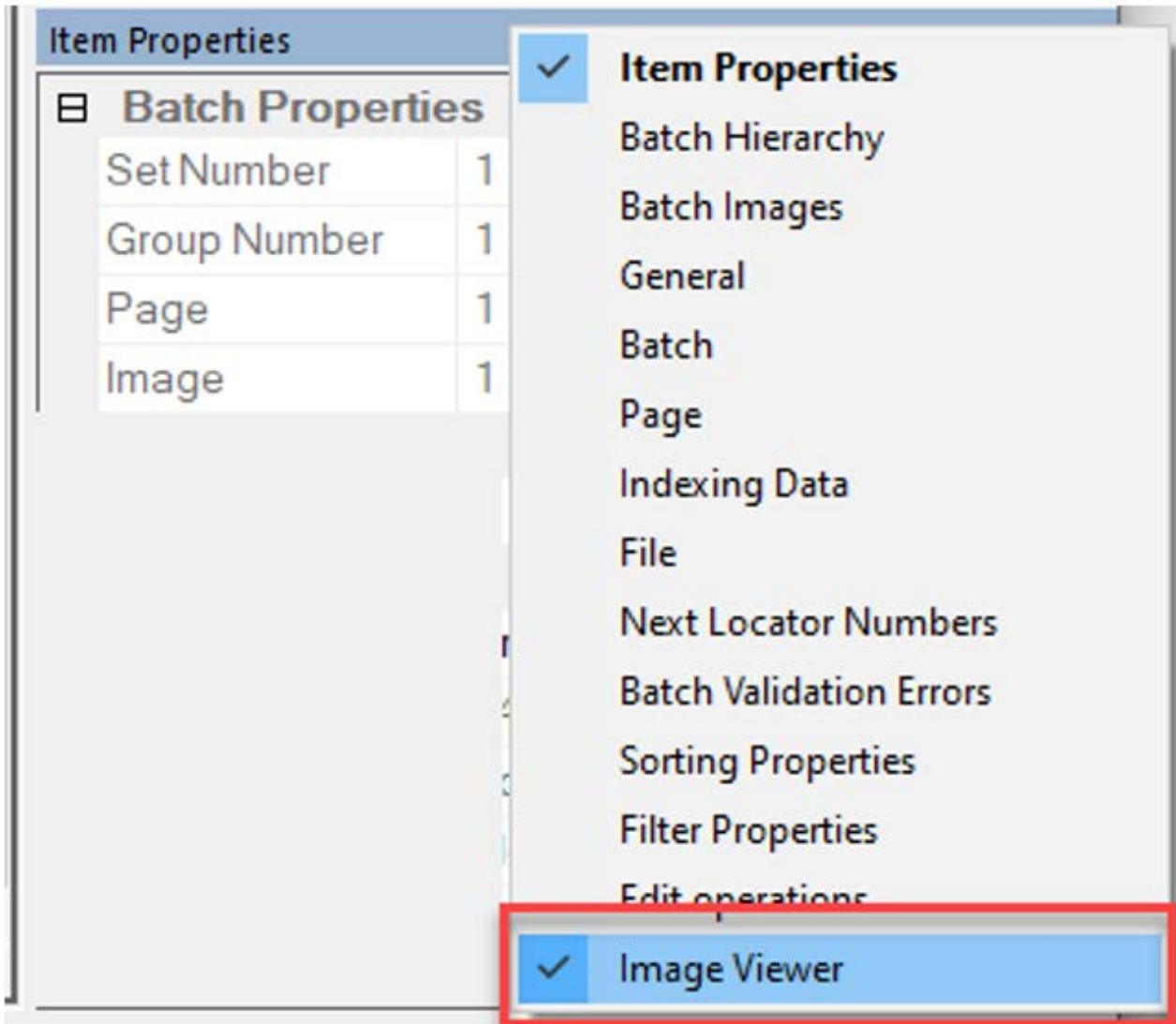
**Figure 6-15: Next Locator Number window**

---

## 6.15. Image Viewer

---

Enable or Disable to display larger thumbnail view (Figure 6-16).



**Figure 6-16: Image Viewer window**



# 7. Batch Editing

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## 7.1. Overview

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---

This chapter describes edit actions that can be performed with CertainScan Edit™.

---

---

## 7.2. Identify editable page and edit actions

---

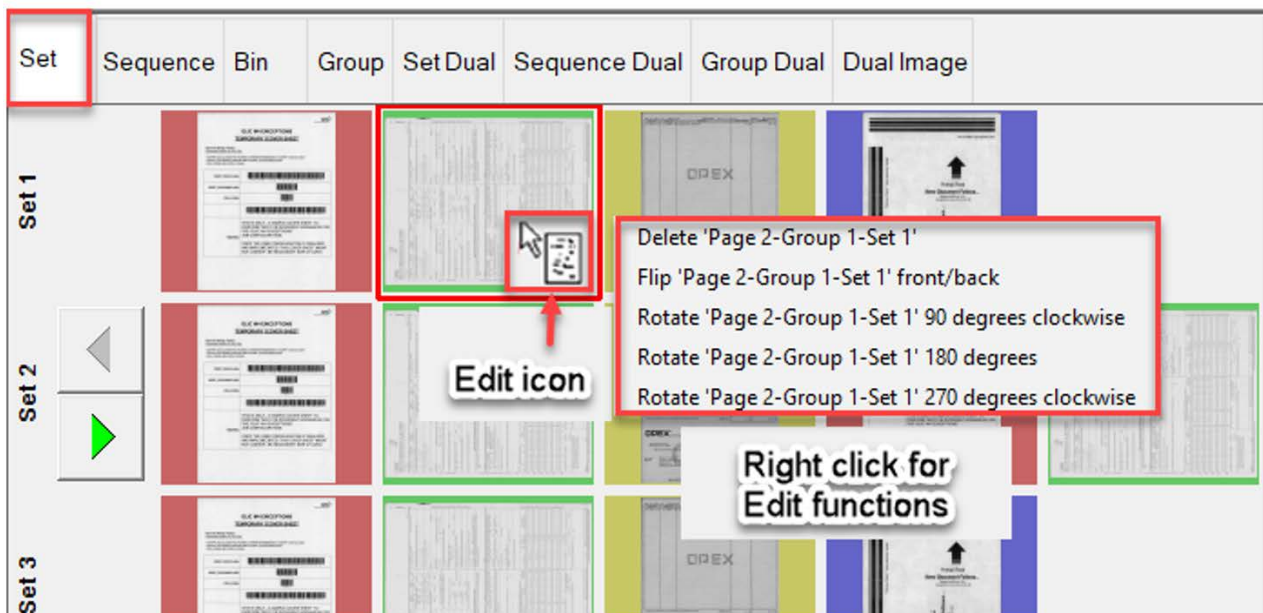
---

In any display view, when moving the cursor position over a page, an Edit icon will appear. Right-click on page to select and to bring up pop-up menu of edit actions. Figure 7-1 shows display view > Set.

Edit action examples:

- Delete Page
- Flip Page Front/Back
- Rotate Page 90-180-270 degrees clockwise.

**Note:** Edit actions provided are related to display view.



**Figure 7-1: Edit action examples**

---

## 7.3. Sort and delete blank pages

---

Figure 7-2 shows display view > Images Only.

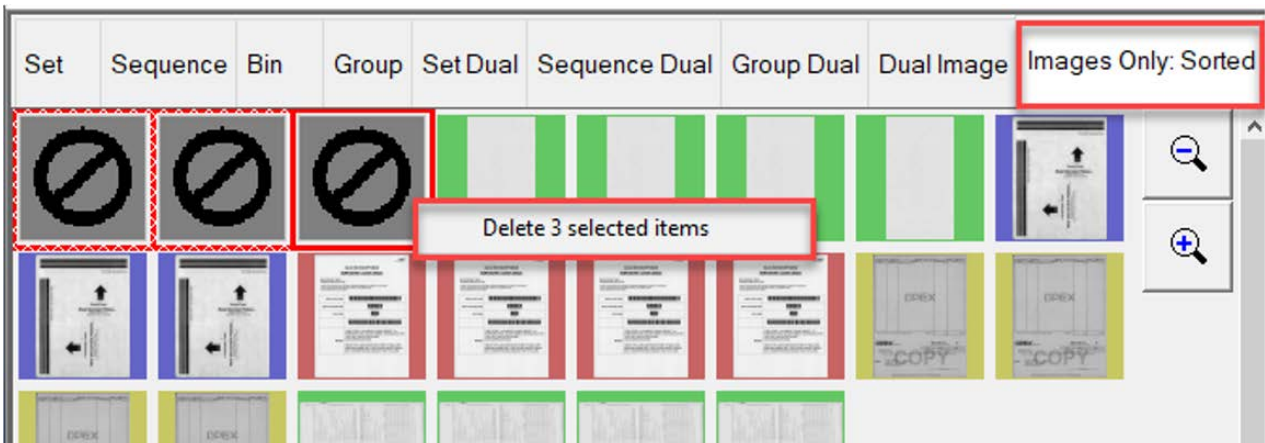
**Note:** For Remittance, display view > Snippets Only.

1. Click on filter button **Sort by file size**. This will place all blank pages at the beginning of the batch.



**Figure 7-2: Sort by file size example**

2. Select individual blank images or select an image, and hold the shift key to select multiple (Figure 7-3).



**Figure 7-3: Select blank images**

3. Once selected, right-click to select **Delete**.

---

---

## 7.4. Insert new Page

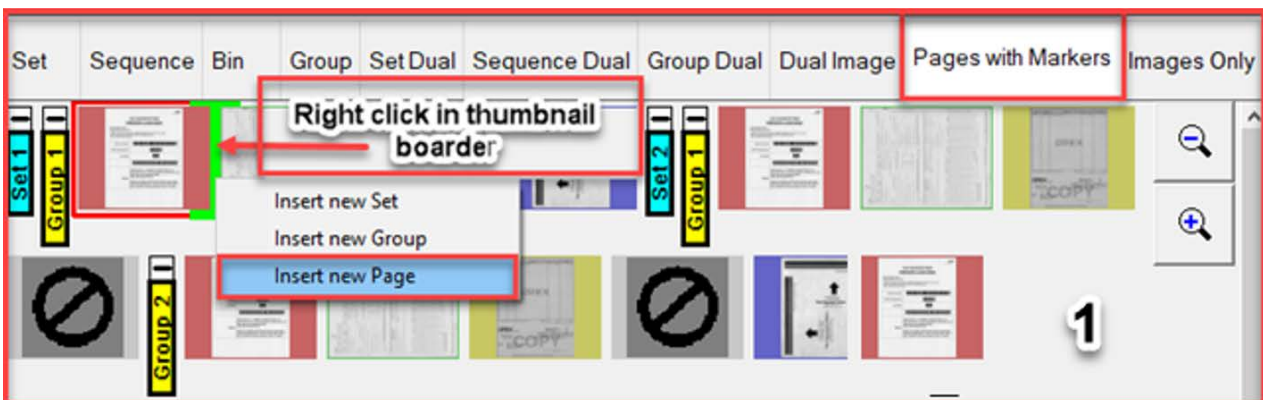
---

---

Display view > Pages with Markers. Ensure filter button **Pieces needing Attention** is not active. If active, display view tab would also show “Filtered.”

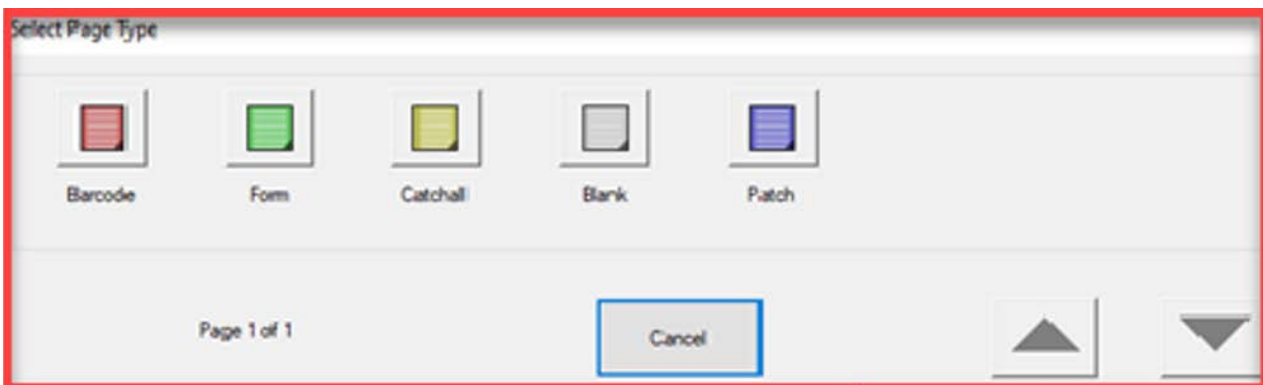
**Note:** For Remittance, display view > Packed.

1. Right-click in thumbnail boarder to insert new page and select **Insert new Page**. Green bracket indicates valid location (Figure 7-4).



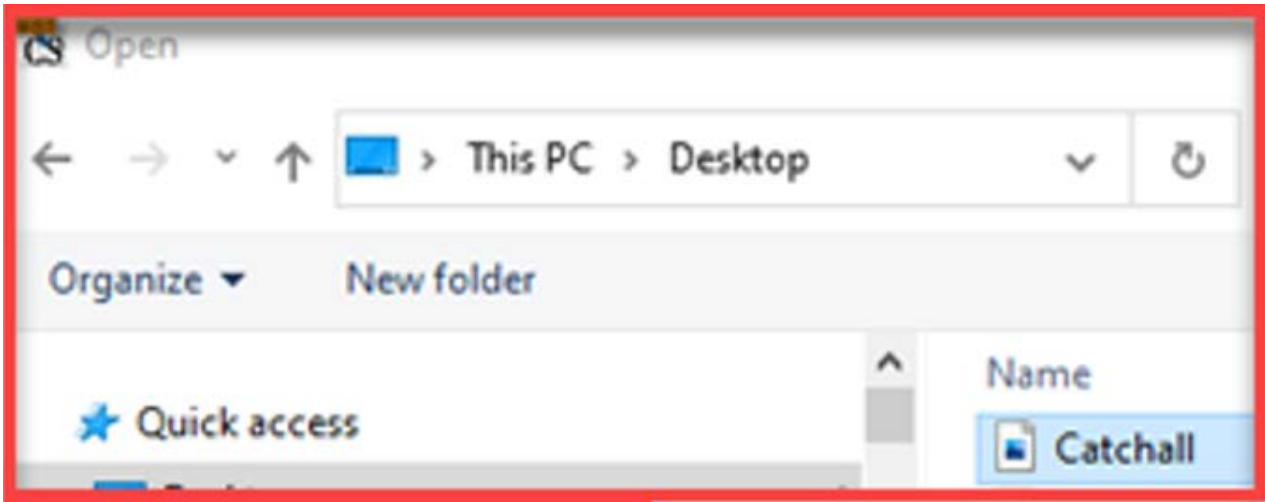
**Figure 7-4: Insert new page**

2. A **Select Page Type** pop-up will appear. Select a Page Type. Choices are Job page types defined (Figure 7-5).



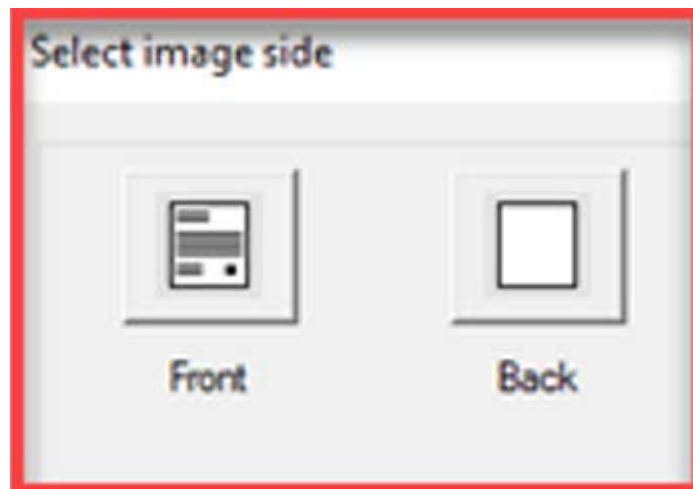
**Figure 7-5: Select Page Type pop-up example**

3. After chosen, a Windows open dialog box will appear, browse to location and select a page file (jpg. or tiff.) to insert, and then click **Open** (Figure 7-6).



**Figure 7-6: Choose the page file location**

4. A **Select image side** pop-up will appear to choose side **Front** or **Back** (Figure 7-7).



**Figure 7-7: Select image side**

---

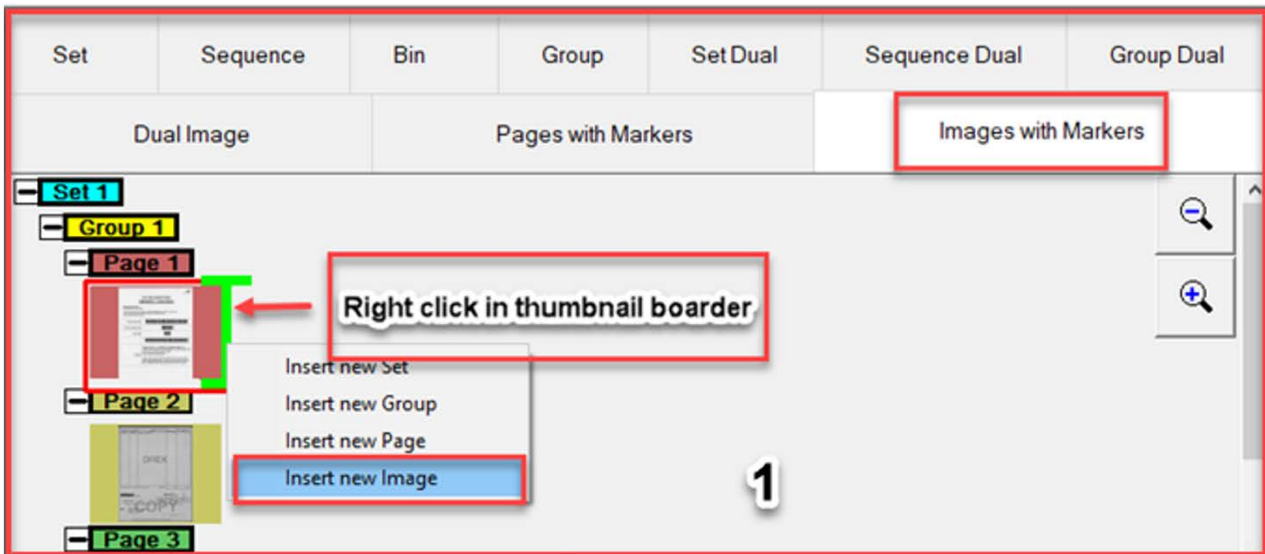
## 7.5. Insert new Image

---

Display view > Images with Markers. Ensure filter button **Pieces needing Attention** is not active. If active, view display tab would also show “Filtered.”

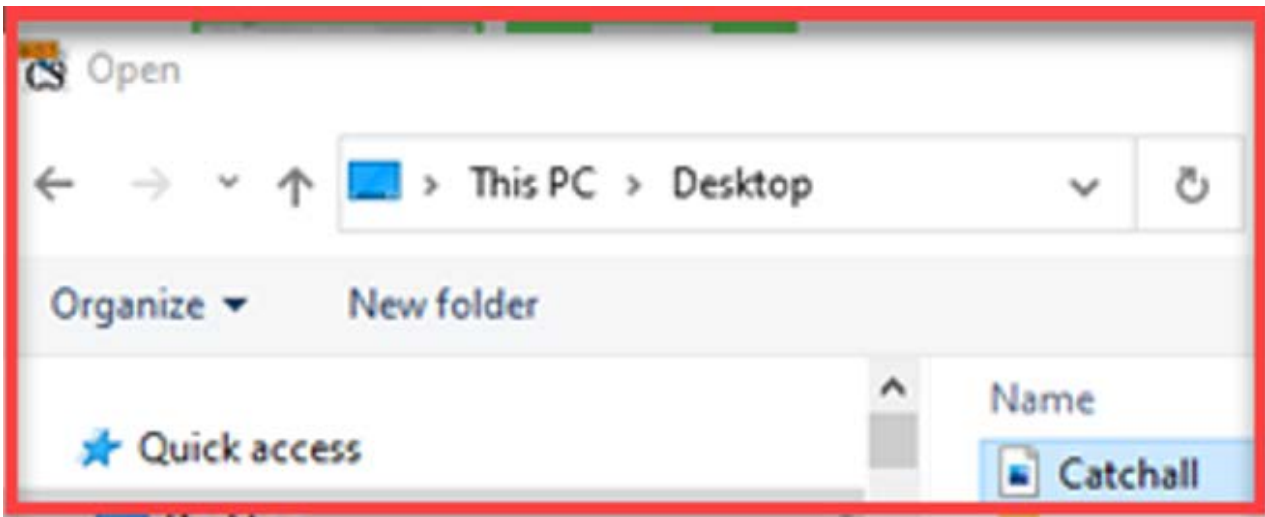
**Note:** Remittance, display view > Full.

1. Right-click in thumbnail boarder to insert image, and select **Insert new Image**. Green bracket indicates valid location (Figure 7-8).



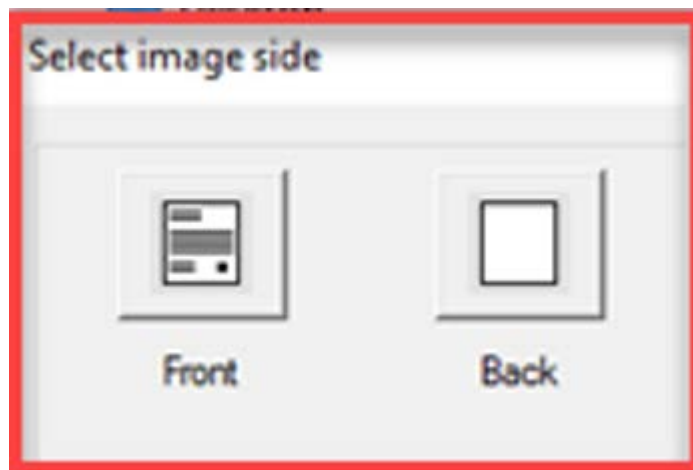
**Figure 7-8: Insert New Image**

2. A Windows open dialog box will appear, browse to image location and select image file (jpg. or tiff.) to insert, and then click **Open** (Figure 7-9).



*Figure 7-9: Select image to insert*

3. A **Select image side** pop-up will appear to choose side **Front** or **Back** (Figure 7-10).



*Figure 7-10: Select image side*

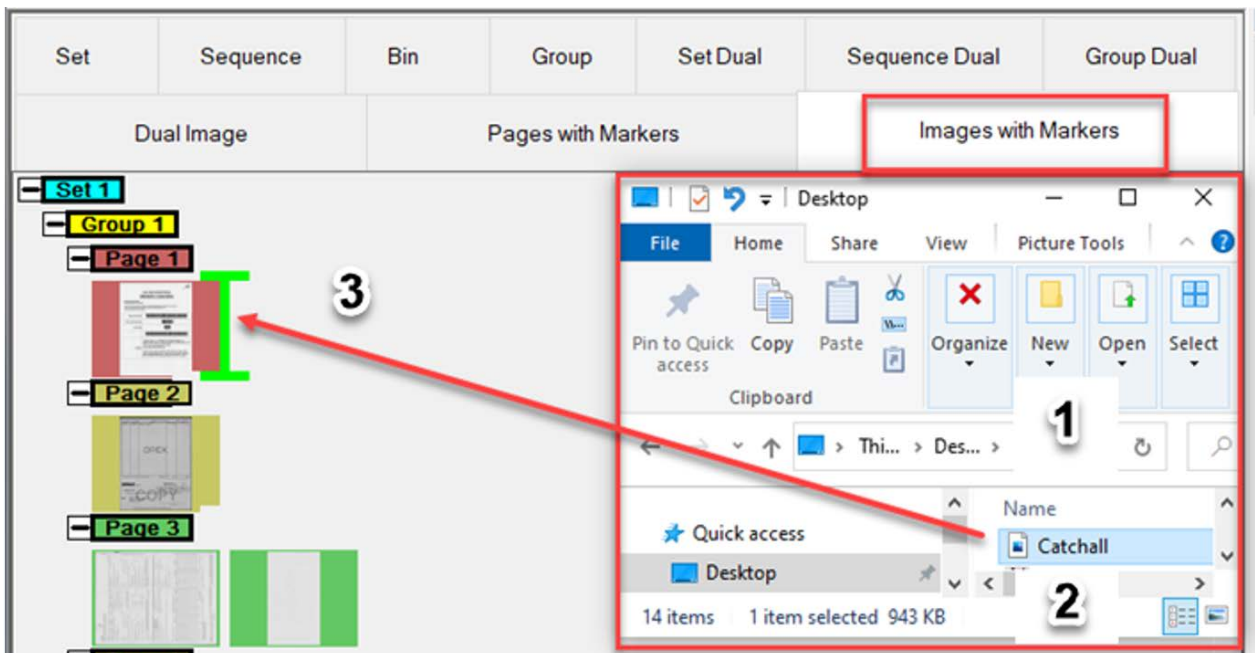


## 7.6. Insert new Image by drag and drop

Display view > Images with Markers. Ensure filter button **Pieces needing Attention** is not active. If it is active, view display tab would show “Filtered.”

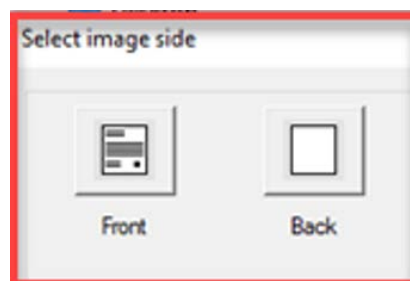
**Note:** For Remittance, display view > Full.

1. Using Windows File Explorer, browse to the image file (jpg. or tiff.) to be inserted (“1” in Figure 7-11).
2. Click on file and drag to insert location. Green bracket indicates valid location (“2” in Figure 7-11).
3. Release mouse button to drop new image (“3” in Figure 7-11).



**Figure 7-11: Insert new image - drag and drop**

4. A **Select image side** pop-up will appear to choose side **Front** or **Back** (Figure 7-12).



**Figure 7-12: Select image side**

---

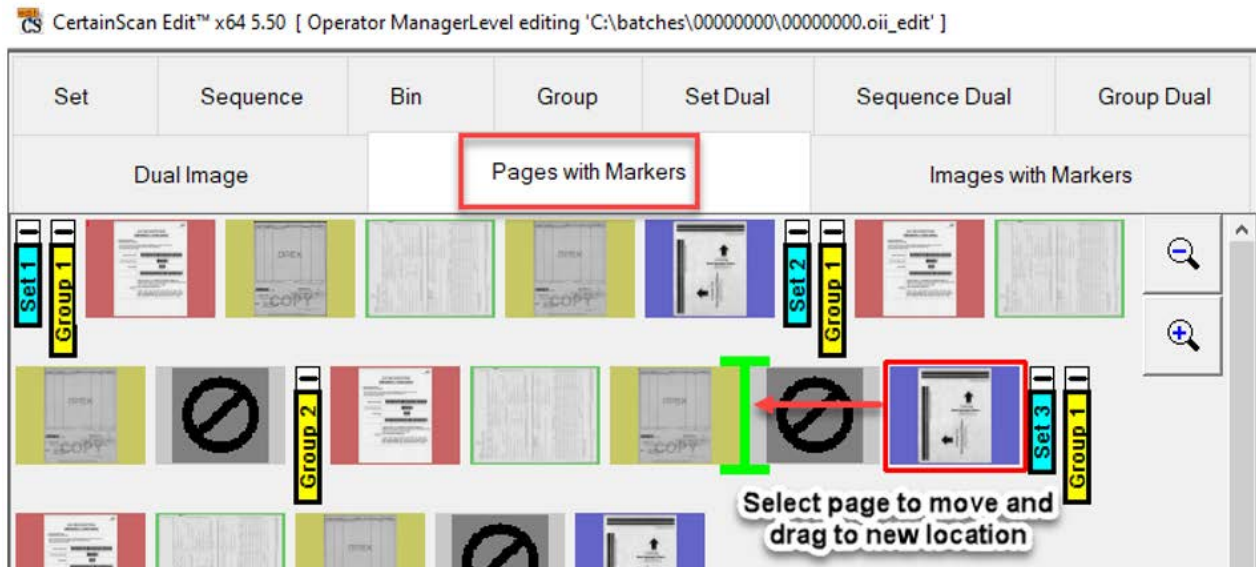
## 7.7. Move a Page by drag and drop

---

Display view > Pages with Markers (Figure 7-13).

**Note:** For Remittance, display view > Packed.

1. Select the page to move, left-click on it and hold.
2. Drag the page to the new location. Green bracket indicates valid location.
3. Drop the page by releasing mouse button.



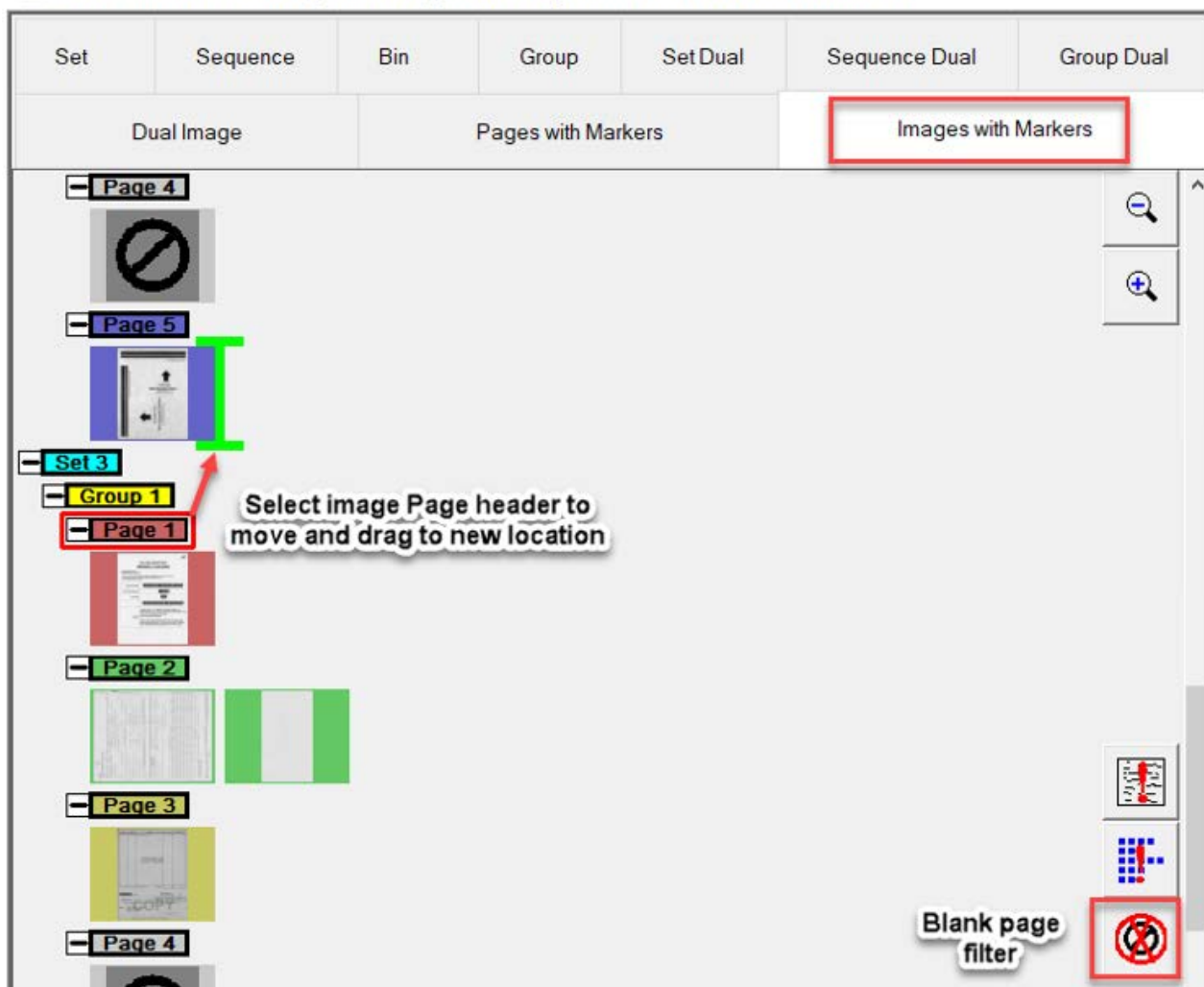
**Figure 7-13: Move page by drag and drop**

## 7.8. Move an Image by drag and drop

Display view > Images with Markers (Figure 7-14). Ensure filter button Blank pages is not active. If active display view tab would also show “Filtered”.

**Note:** For Remittance, display view > Full

1. Select image Page header to move, left-click on it and hold.
2. Drag the image to the new location. Green bracket indicates valid location.
3. Drop the image by releasing mouse button.



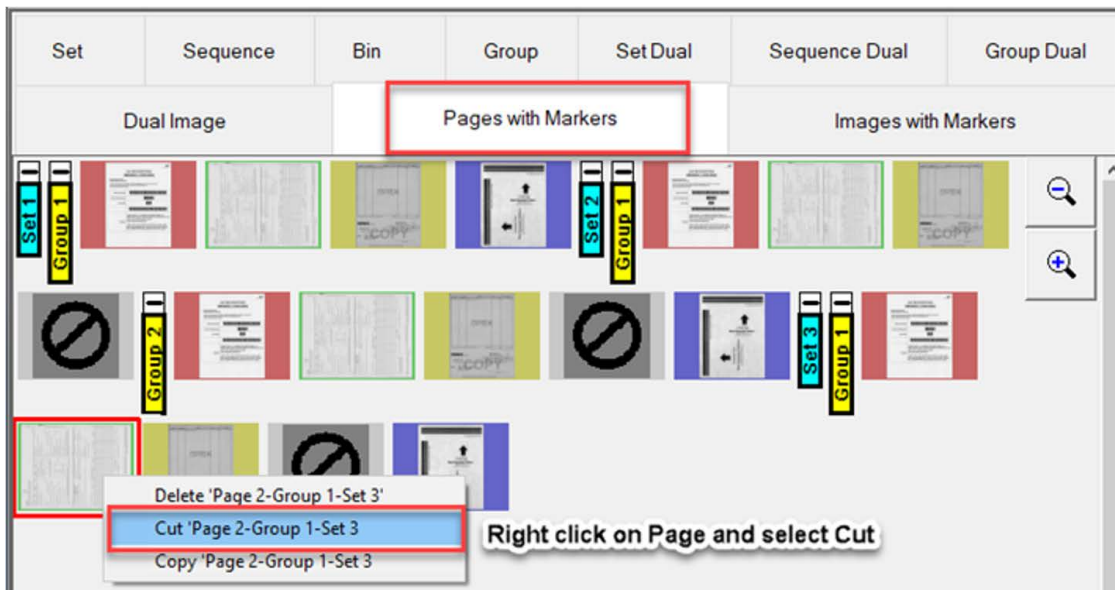
**Figure 7-14: Move an Image by drag and drop**

## 7.9. Move a Page by Cut & Move

Provides the ability to move a page when unable to drag and drop. Display view > Pages with Markers.

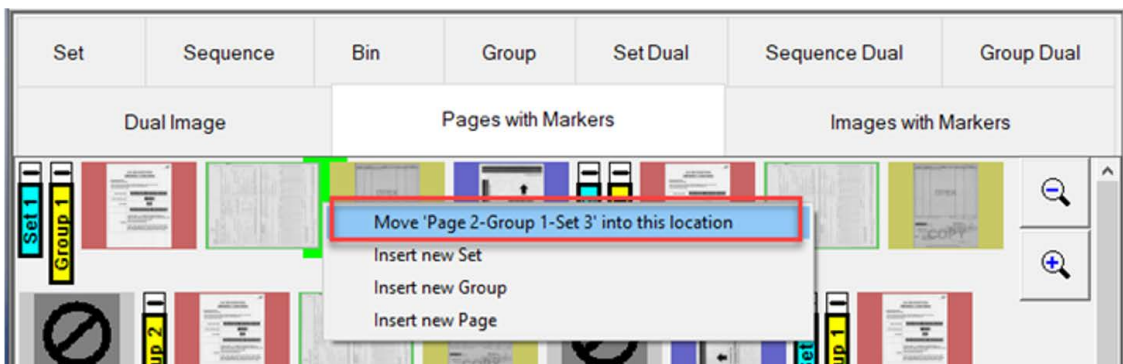
**Note:** For Remittance, display view > Packed

1. Right-click on the page to move and select **Cut Page** in pop-up Edit actions (Figure 7-15).



**Figure 7-15: Select Cut**

2. Scroll to thumbnail boarder of the Set-Group-Page to move page cut, and right-click. Green bracket indicates valid location.
3. Select **Move Page** (Figure 7-16).



**Figure 7-16: Move Page**

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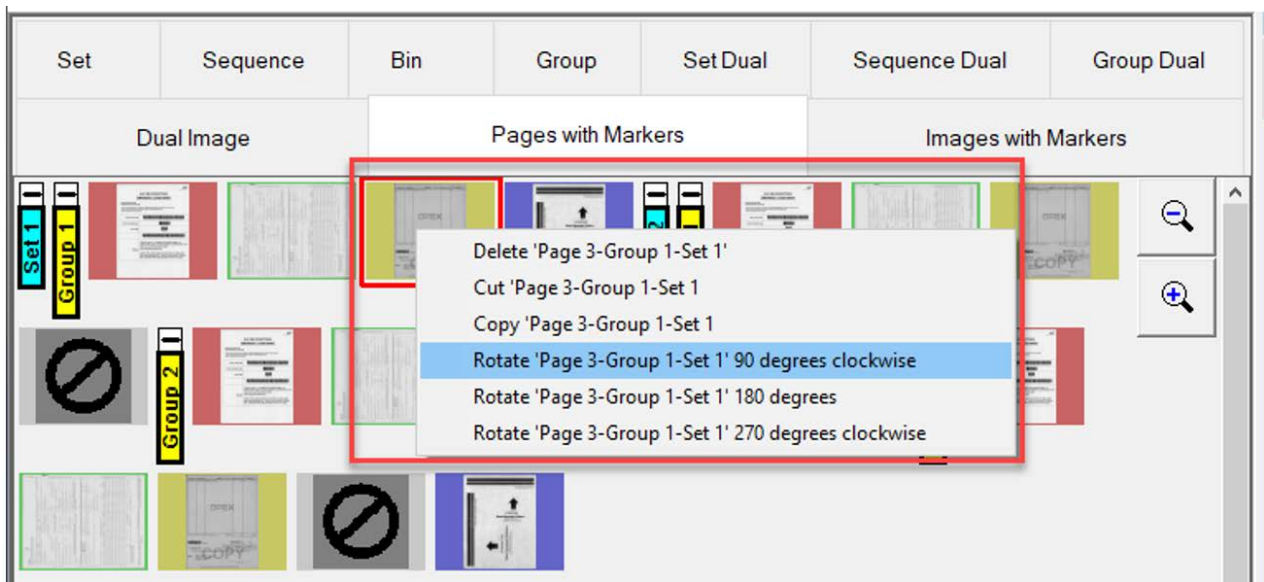
## 7.10. Rotating Images

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In any display view, select page to rotate and right-click to bring up pop-up menu of edit actions (Figure 7-17).

1. Right-click on the page to rotate.
2. A pop-up window with the following rotation options are provided:
  - Rotate 90 degrees clockwise
  - Rotate 180 degrees clockwise
  - Rotate 270 degrees counterclockwise.
3. Select as desired.



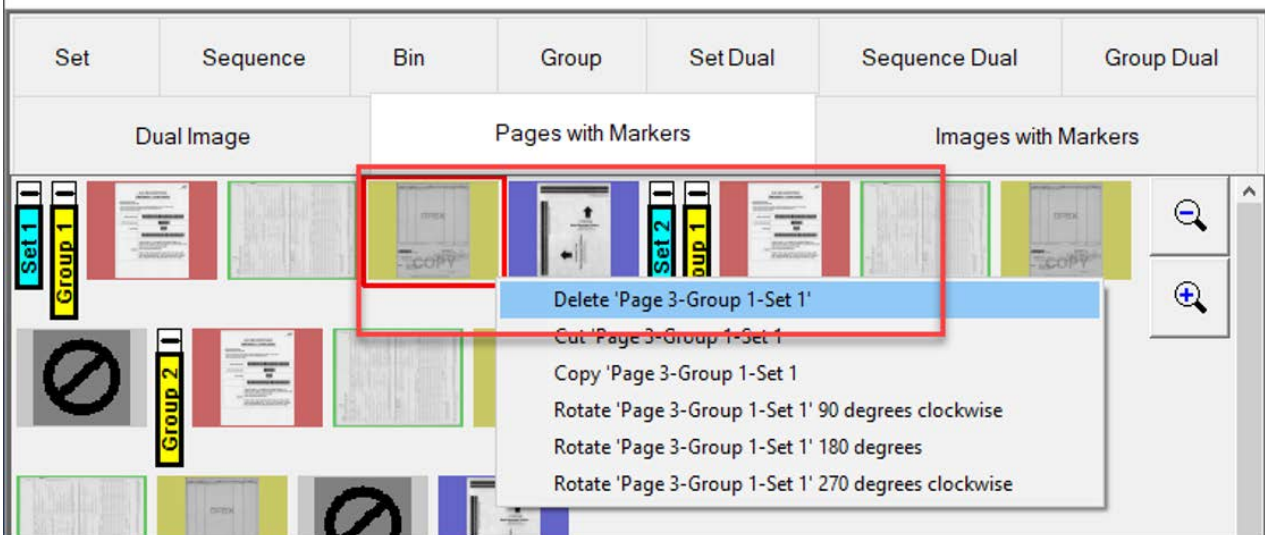
**Figure 7-17: Rotate Image**

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## 7.11. Delete a Page or image

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In any display view, select page to delete and right-click to bring up pop-up menu edit actions, select **Delete** (Figure 7-18).



**Figure 7-18: Delete page or image**

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## 7.12. Copy and Paste a Page

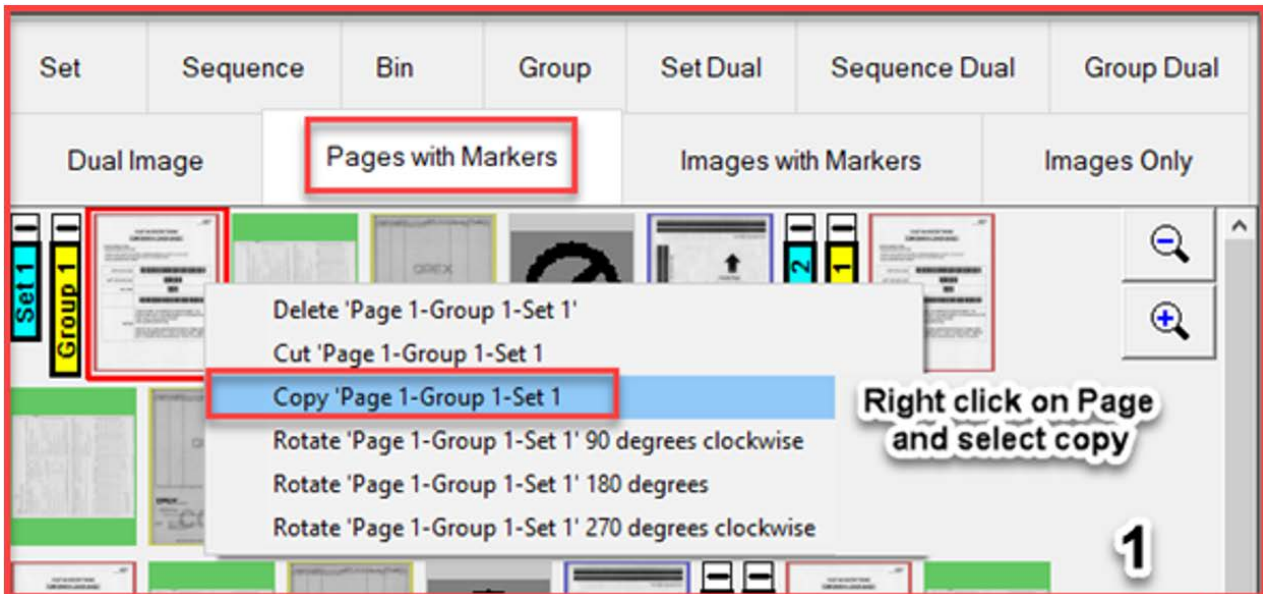
---

---

Provides the ability to copy a page from a Set/Group and paste into another Set/Group. Display view > Pages with Markers.

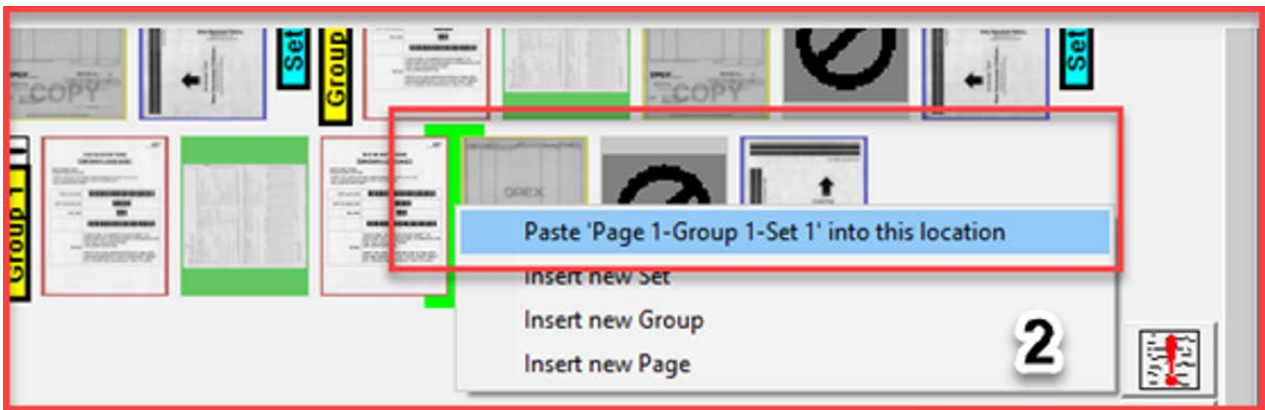
**Note:** For Remittance, display view > Packed.

1. Right-click on the page to Copy and select **Copy Page** in pop-up Edit actions (Figure 7-19).



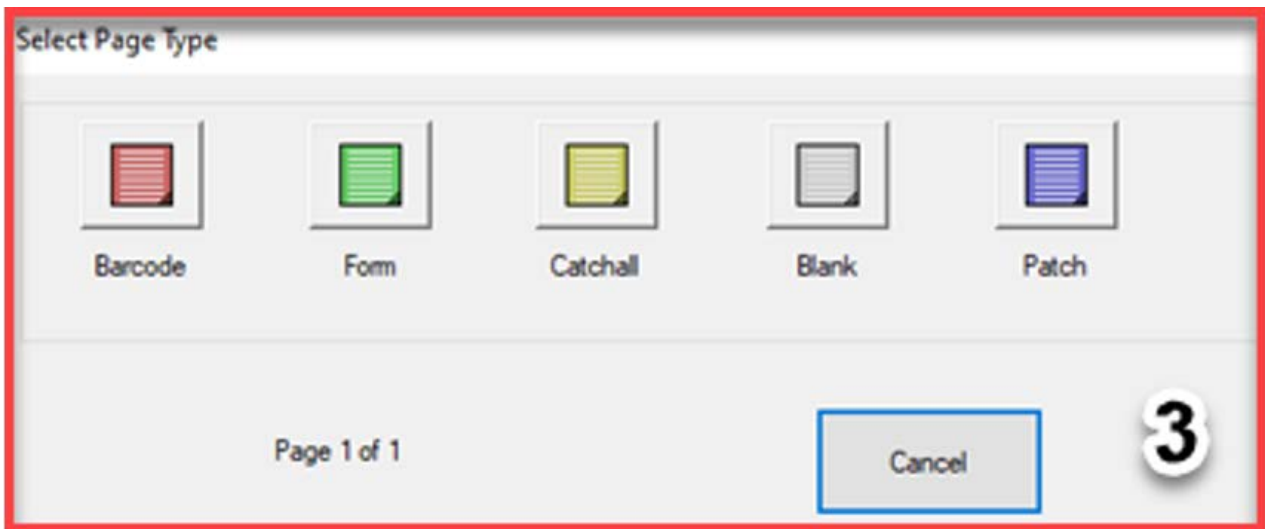
**Figure 7-19: Select Copy**

2. Scroll to thumbnail boarder of the Set-Group-Page to paste page copied, right-click. Green bracket indicates valid location. Select **Paste Page** (Figure 7-20).



**Figure 7-20: Select Paste Page**

3. A **Select Page Type** pop-up will appear, select a Page Type. Choices are Job page types defined (Figure 7-21).



**Figure 7-21: Select Page Type**



## 7.13. Delete an existing Group marker

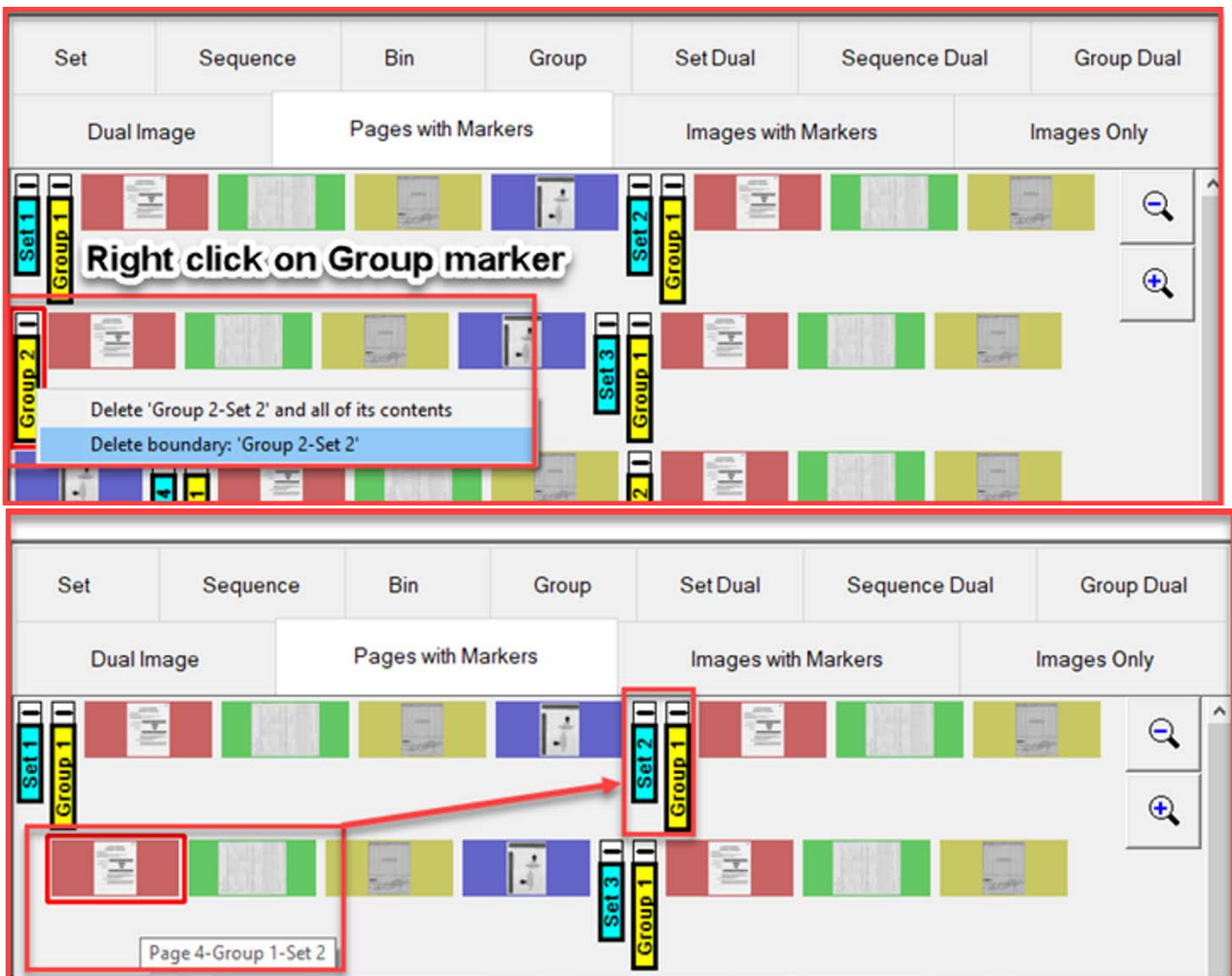
Display views > Group, Group Dual, Pages with Markers and Images with Markers. When there are multiple Groups in a Set, they are defined with markers and are boundaries within a batch.

When the Group boundary is deleted, the pages will remain and become part of the Group before the Group that was deleted (Figure 7-22).

Display view > Pages with Markers for example.

**Note:** For Remittance, display view > Packed or Full

1. Right-click on the Group marker to delete and select **Delete boundary**.



**Figure 7-22: Delete a group marker**

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## 7.14. Delete an existing Group marker and all contents

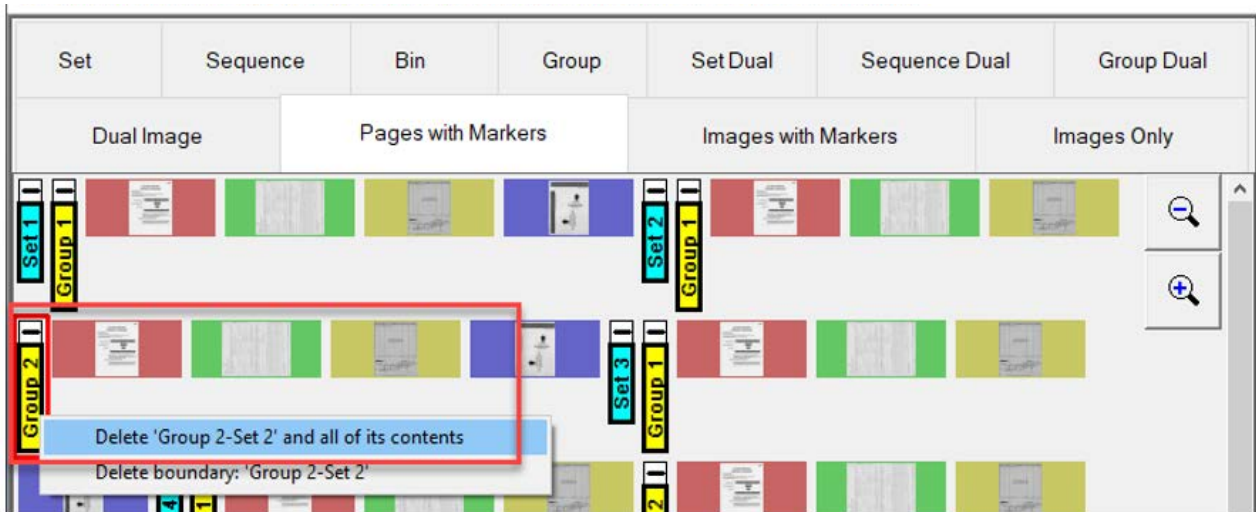
---

---

Display views > Group, Group Dual, Pages with Markers and Images with Markers.

**Note:** For Remittance, display view > Packed or Full.

1. Right-click on the Group marker to delete, and select **Delete Group and all of its contents** (Figure 7-23).



**Figure 7-23: Delete group and all contents**

---

## 7.15. Insert a new Group

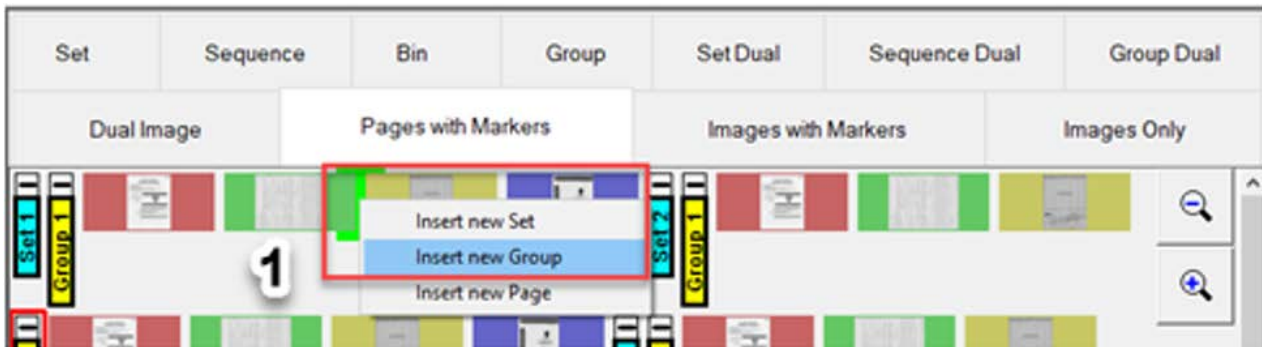
---

Display views > Pages with Markers or Images with Markers.

**Note:** For Remittance, display view > Packed or Full.

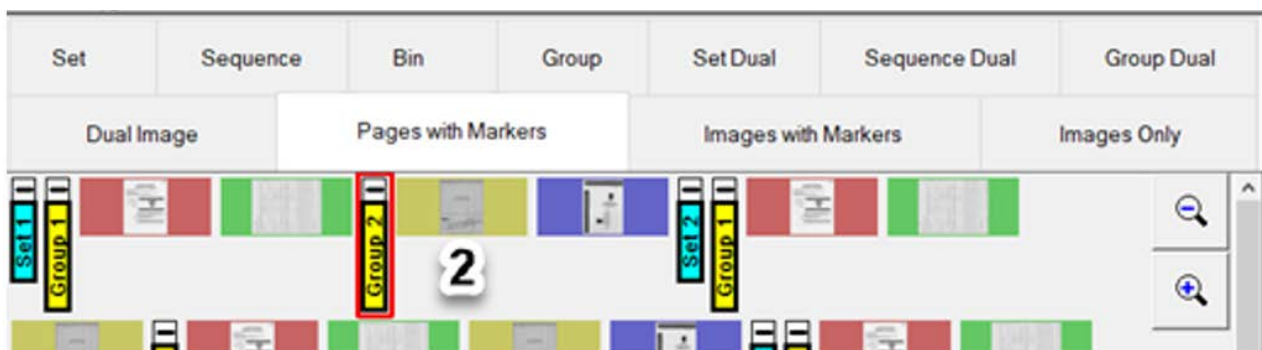
In display view Images with Markers, ensure filter button **Blank Image** is not active. If active, display view tab would also show “Filtered.”

1. Right-click in the thumbnail boarder to insert new Group. Green bracket indicates valid location.
2. Select **Insert new Group** to place new Group (Figure 7-24).



**Figure 7-24: Insert new group**

3. The proceeding pages remain and are now part of the new Group (Figure 7-25).



**Figure 7-25: New group example**

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## 7.16. Delete an existing Set marker

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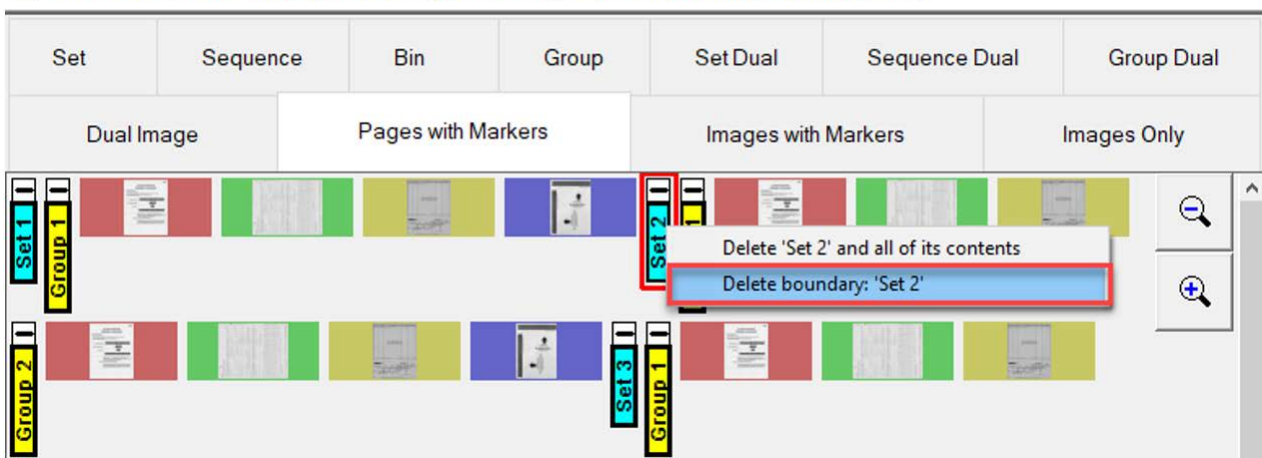
---

Display views > Pages with Markers and Images with Markers.

**Note:** For Remittance, display view > Packed or Full

When a Set boundary marker is deleted, all its pages remain and append accordingly to the previous Set (Figure 7-26).

1. Right-click on the Set Marker to delete.
2. Click on **Delete boundary**.



**Figure 7-26: Delete Set Boundary Marker**

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## 7.17. Delete an existing Set marker and all contents

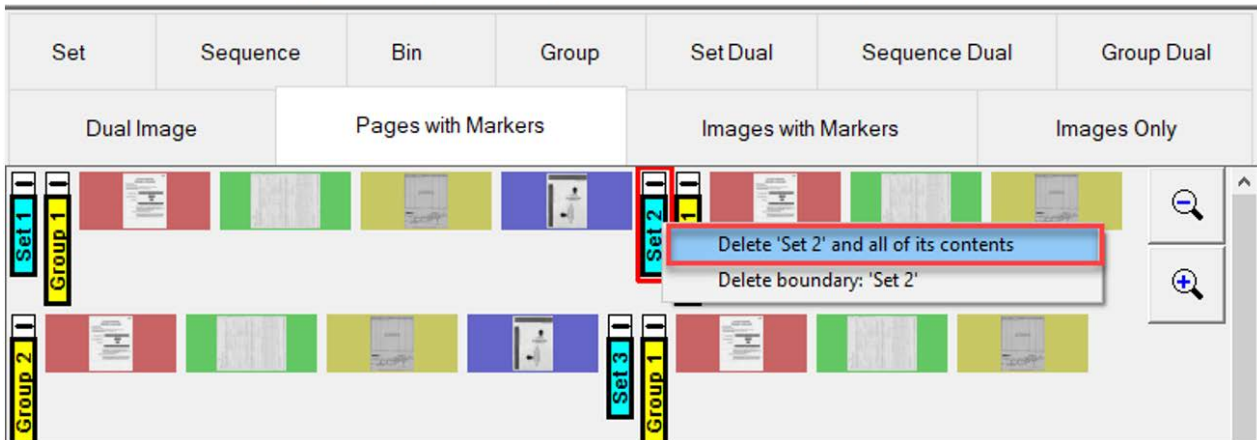
---

---

Display view > Pages with Markers or Images with Markers.

**Note:** For Remittance, display view > Packed or Full.

1. Right-click on the Set marker and select **Delete Set and all of its contents**.
2. The proceeding Sets and Groups move up respectively.



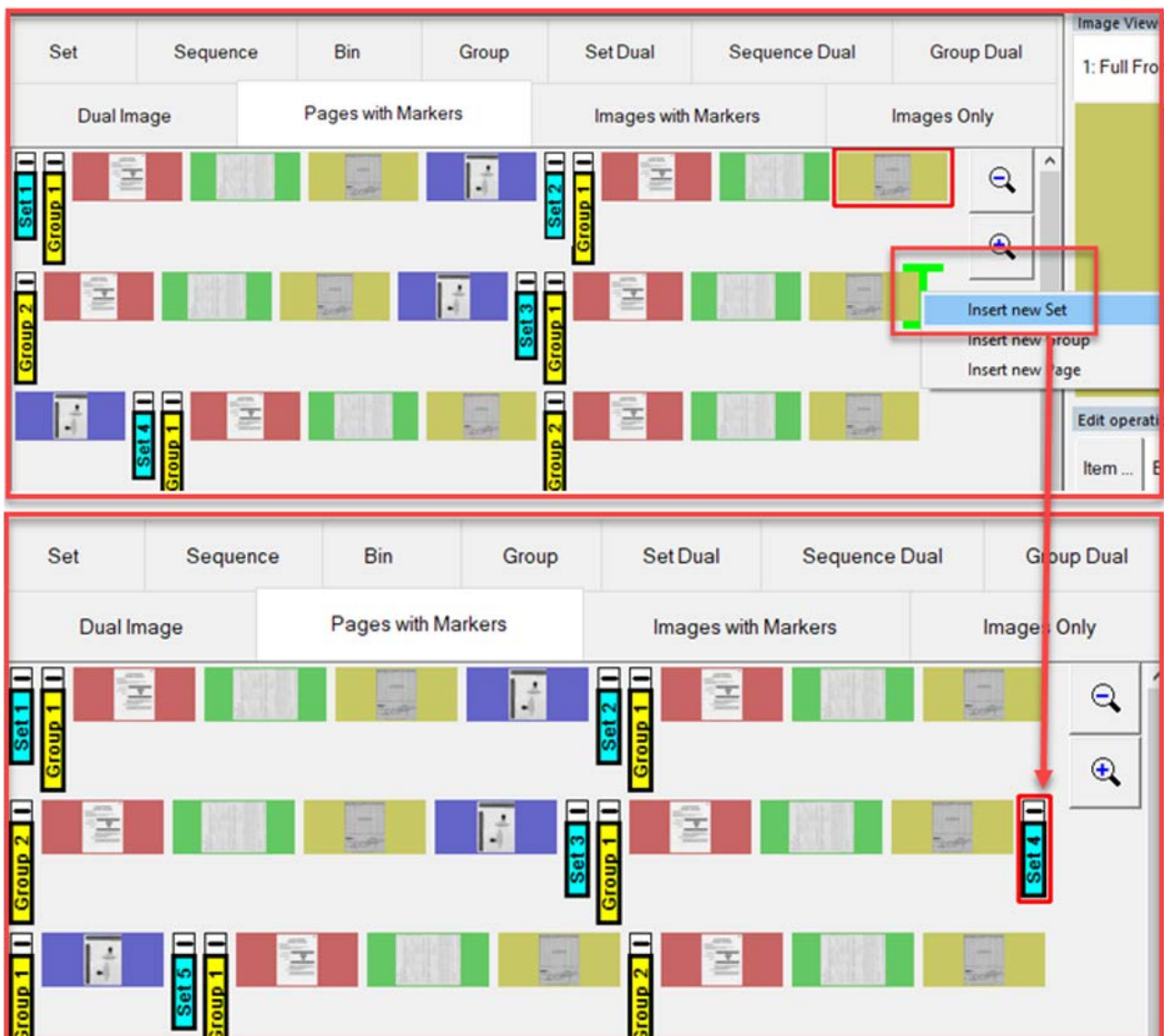
**Figure 7-27: Delete set boundary marker**

## 7.18. Insert a new Set

Display view > Pages with Markers or Images with Markers.

**Note:** For Remittance, display view > Packed or Full.

1. Right-click in the thumbnail boarder to insert new Set. Green bracket indicates valid location.
2. Select **Insert new Set**. The new Set marker will be inserted sequentially.
3. The new Set marker will appear after the existing Set marker and subsequent sets renumbered.

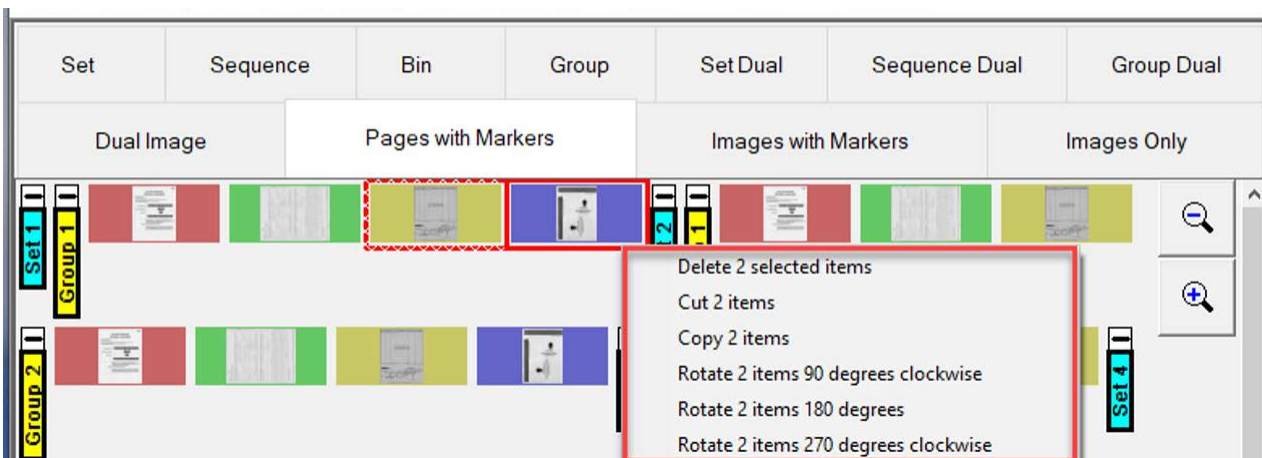


**Figure 7-28: Insert new Set**

## 7.19. Methods to select multiple pages for edit

In all display modes, multiple pages can be selected by four different methods. Based on display view selected or selected item differences, only allowable edit functions will be displayed. After selecting multiple pages, right-click for edit functions.

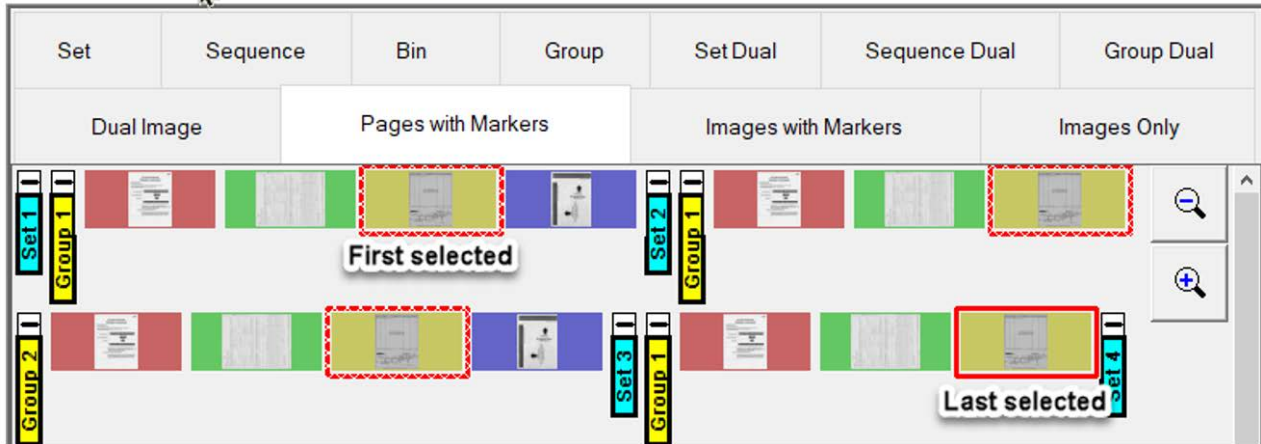
- Delete multiple pages - All items selected must be able to be deleted.
- Cut/Move multiple pages - All items selected must be able to be cut and moved.
- Copy/Paste
- Multiple pages - All items selected must be able to be copied and pasted.
- Drag and drop multiple pages - All items selected must be able to be moved.
- Rotating multiple pages - All items selected must be able to be rotated.



**Figure 7-29: Select multiple pages**

## Method 1

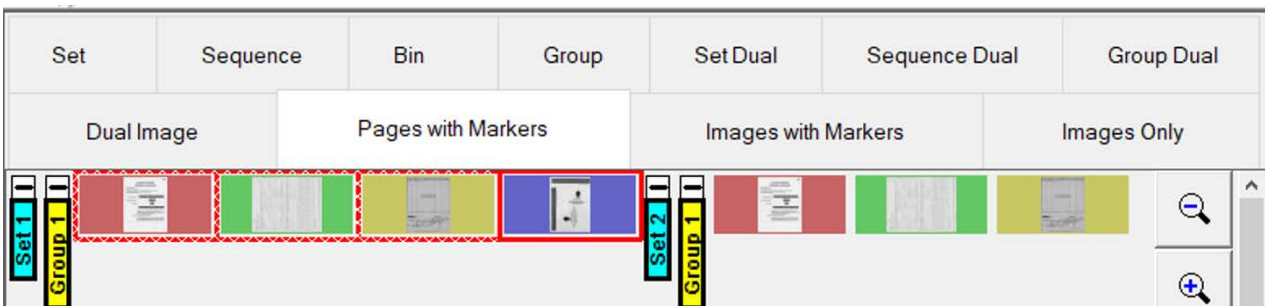
Select first page, press and hold CTRL key, left-click mouse button to select pages. The last page selected will be highlighted with a red solid highlight, prior pages are highlighted in red with a white cross hatch pattern (Figure 7-30).



**Figure 7-30: Select multiples - method 1**

## Method 2

Select a page and press the SHIFT key, while holding down left mouse click on the last page for edit. All pages between the first and last page selected will automatically be selected (Figure 7-31).

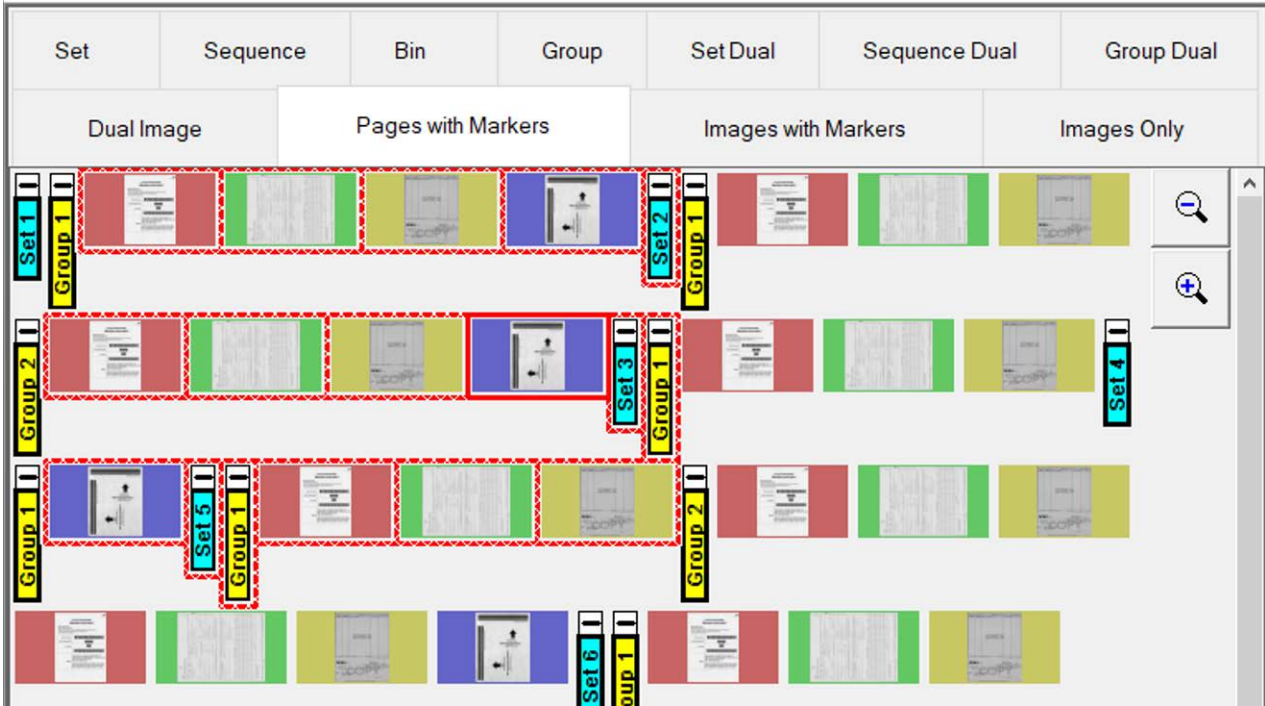


**Figure 7-31: Select multiples - method 2**



### Method 3

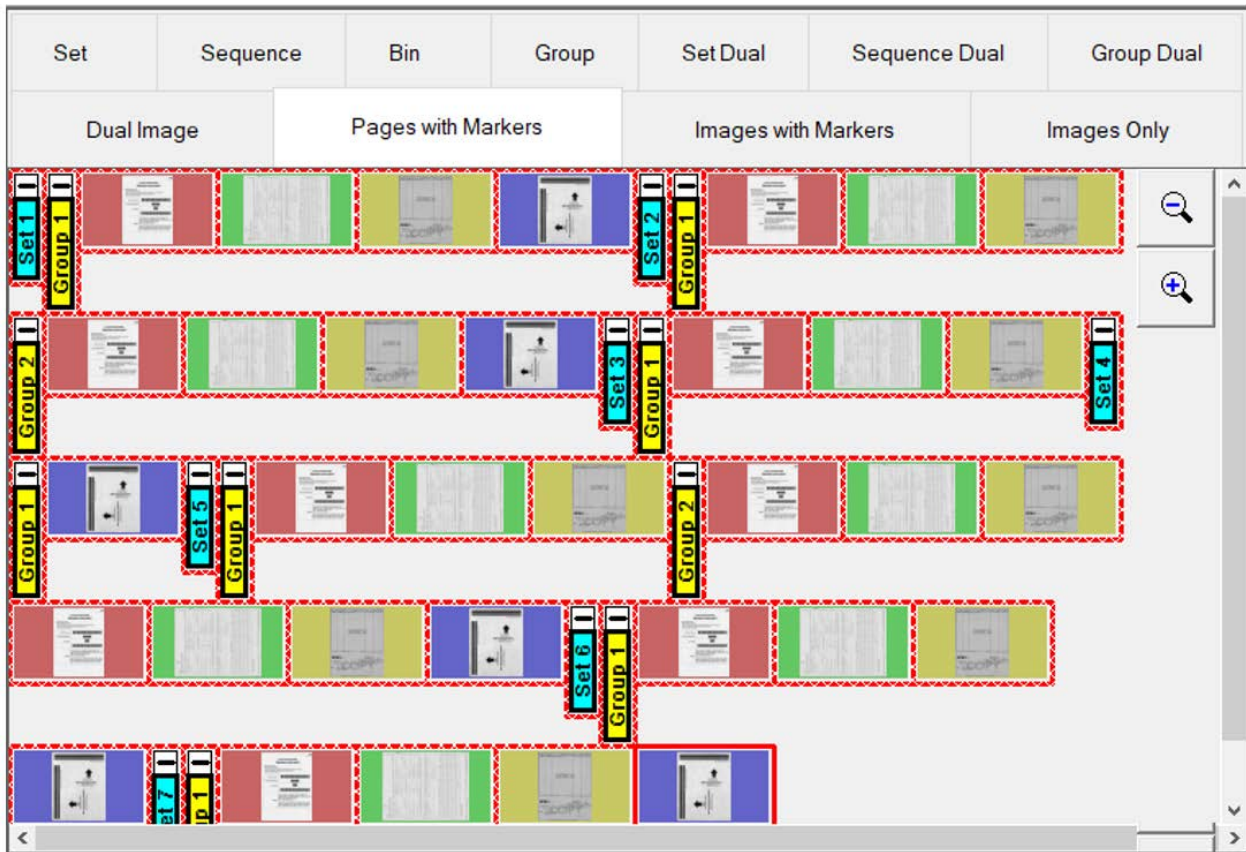
Place the cursor in thumbnail boarder of a page, left click and hold mouse button. Move the mouse to draw a rectangle, all pages in the region drawn will become selected (Figure 7-32).



**Figure 7-32: Select multiples - method 3**

## Method 4

Select all pages. Press CTRL and “A” key. This will select all items, but will not select filtered out pages (Figure 7-33).



**Figure 7-33: Select multiples - method 4**

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## 7.20. Image icons

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When images are available in CertainScan Edit cache, images will display as expected. Under certain conditions when images are not immediately available, CertainScan Edit will display one of the icons where the image would have been (reference Table 7-1).

**Table 7-1: Image icons**

	Image Blank: Image is blank according to batch image data.
	No Image Metadata: Image information was not saved in the batch. This is configured in the page type.
	Image Not Saved: This image has metadata but has no image file. The page type was configured to not save this image to disk.
	Image Out Of Bounds: This image was set up to not be the entire piece. However, when trying to extract the image for batch output, the specified region was found to lie completely outside the boundaries of the item's edges. No disk image was written for this reason.
	Image Unavailable: Attempted to load the image from disk but failed. The request did not time out, so the disk to which the image is stored may be down or disconnected.
	Image Timeout: Attempted to load the image from disk but the request timed out. Network might be busy, or the host might be busy writing other active items to disk.

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# 8. Image Editing

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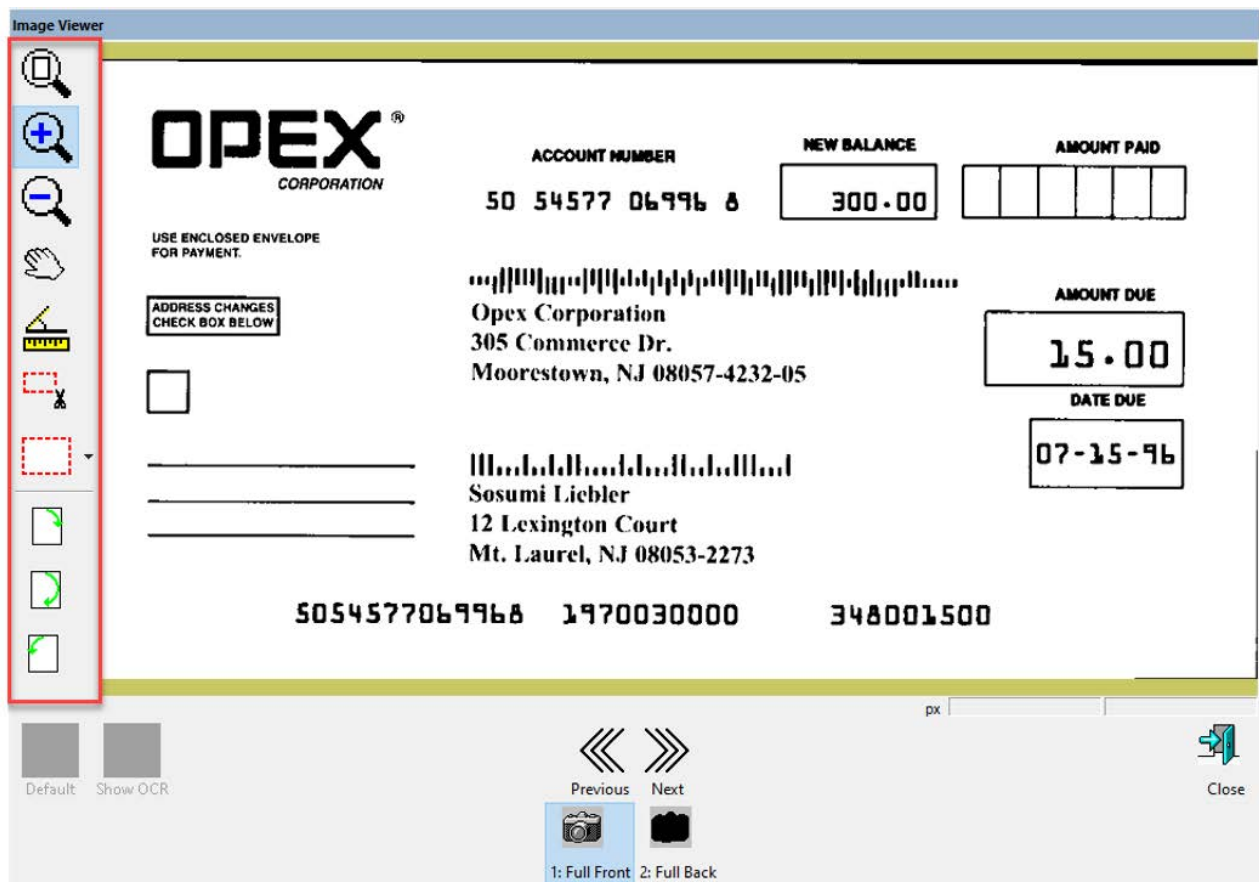
## 8.1. Image Viewer

CertainScan Edit™ provides all operators with Image enhancement tools to clean up and fix images. Edit can fix holes, repair torn corners, clean up edges, crop information, and redact personal information such as account numbers or routing numbers.

In any display view, select a page. The page will appear in Image Viewer.

1. Click on the image in Image Viewer display.

The Image Viewer screen will expand the selected page with Image Enhancement tools bar to the left (Figure 8-1).



**Figure 8-1: Image Viewer**

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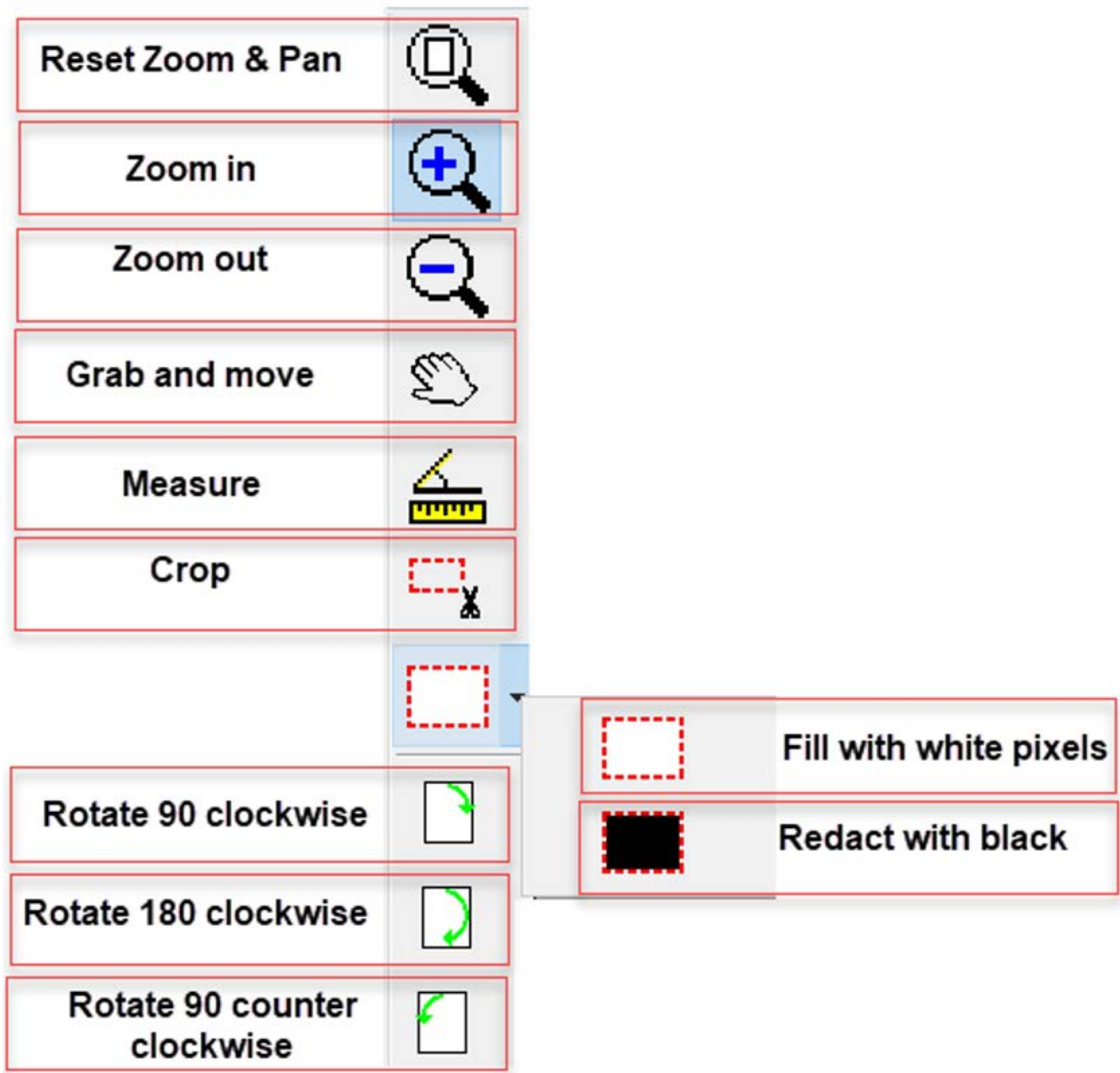
## 8.2. Image Enhancement Tools

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Referencing [Figure 8-2 on page 104](#):

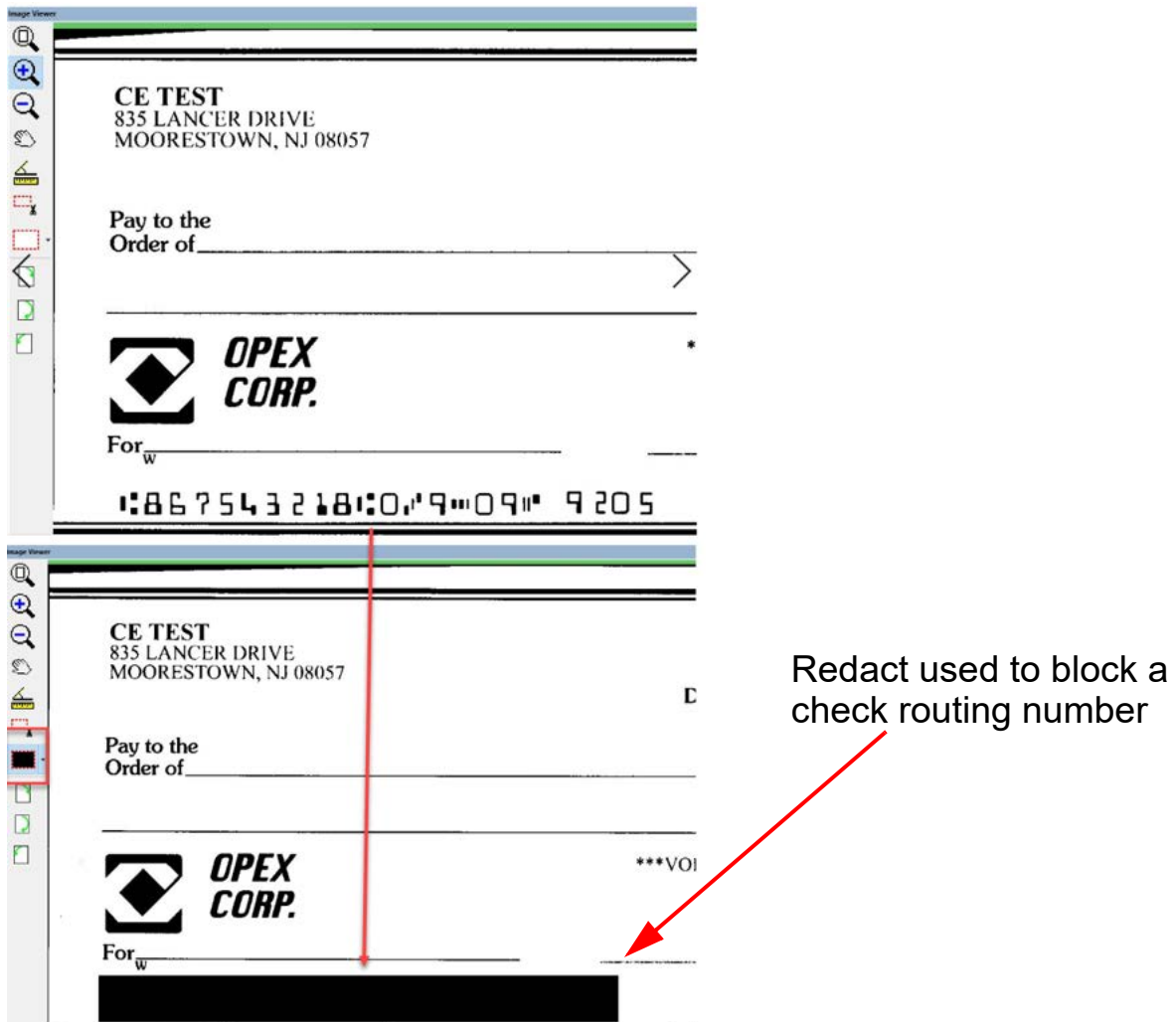
- **Reset Zoom & Pan:** Click on to return to default after using Zoom in or Zoom out.
- **Zoom in:** Click on to magnify.
- **Zoom out:** Click on to reduce magnify after Zoom In used.
- **Grab and move:** If image magnified, can grab and move to view other areas magnified.
- **Measure:** Provides length and angle degrees.
- **Crop:** If only a piece of the image is needed, select just that portion of the image. Only the portion selected will save and will disregard the remainder of the image.
- **Fill:** The Fill button fills in a mouse drawn rectangle with white pixels to repair torn hole punches, torn or skewed edges.
- **Redact:** The Redact button fills a mouse drawn rectangle with black pixels to blackout portions of the image. For example, redact personal information such as account numbers or routing numbers ([Figure 8-3 on page 105](#)).
- **Rotate:** Rotate 90 or 180 degrees clockwise or rotate 90 degrees counter-clockwise



**Figure 8-2: Image Enhancement Tools**



Example: Use the **Redact with Black** icon to block a check routing number (Figure 8-3).



**Figure 8-3: Redact Example**

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## 8.3. Navigation Buttons

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- **Previous** button browses to previous item in Batch Viewer.
- **Next** button browses forward to next item in Batch Viewer.
- View **Full Front** or **Full Back**, if there are two views.
- **Close** button to exit Image Viewer.



*Figure 8-4: Navigation buttons*

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## About OPEX Corporation

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OPEX Corporation is more than a manufacturer of machines. We continuously reimagine technology to power the future for our customers.

With an innovative approach, we engineer unique automated solutions that support our customers so they can solve the most pressing business challenges for both today and tomorrow. Our scalable Warehouse, Document, and Mail Automation solutions improve workflow, accelerate change, and drive efficiencies in infrastructure.

We are a family-owned and operated organization with more than 1600 committed employees who innovate, manufacture, install, and service products that are helping transform industry every day. We listen to our customers, respect each other, and work together to help reimagine the future through automated solutions.

At OPEX, we are Next Generation Automation.



**OPEX**  
**CertainScan**<sup>®</sup>  
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