



CertainScan Edit™ User Manual

9306900CE-EN

Revision 20-01

Original Instructions



CertainScan Edit™



Read this manual thoroughly before attempting to operate or service this equipment. Keep a current copy for your reference.

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0.2. EC Declaration of Conformity

Declaration of Conformity

	ctive(s): <u>2014/35/EU (Low Voltage); 2014</u> ity); 2011/65/EU (RoHS); EC No. 1907/20	
(Electromagnetic Compation	uy), 2011/05/EO (R0H3), EC No. 190//20	00 (KEACH)
Standard(s) to which confo	ormity is declared IEC 62368-1:2014 (Sec	ond Edition);
CISPR32:2015 Edition 2.0; (CISPR24 Issue:2010/08/24 Ed:2; EN IEC 6:	3000:2018
Manufacture's Name:	OPEX Corporation	
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Importer's Name:		1
importer's Address.	29/32 Queensbrook, Bolton Technology E Spa Road	xchange
	Bolton BL1 4AY United Kingdom	
	Botton BET 4AT Clifted Kingdom	
Type of Equipment:	Document Scanner	
Model Nos. :	Falcon+, FalconV+	
Serial No. :		
Voor of Manufactura		
real of Manufacture.		
I, the undersigned, hereby de above Directive(s) and Stand	clare that the equipment specified above coard(s).	nforms to the
Place: <u>Moorestown, New Je</u>	rsey USA (Signature)	
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Document History

Doc Rev	Date	Changes (click blue text to go to that page)
20-01	Dec 22, 2020	Initial release of CertainScan Edit 5.5™

Translation History

Table 1: Revision history for translated manuals

Source (English version)	Date	Details (click blue text to go to that page)

Language codes:

DE	German
EN	English

ES	Spanish
FR	French

IT	Italian
JA	Japanese

PL	Polish

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CertainScan Edit™

1.1. About CertainScan Edit™

1.1.1. Edit overview

OPEX CertainScan Edit 5.5™ is an independent software option, license activated, for editing scanned batches and pages. Operators can insert, delete, move, manage blank pages and rescan pages to insert back into a batch for completion. CertainScan Edit also includes Image enhancement tools to clean up scanned pages.

1.1.2. Edit functionality

CertainScan Edit can be installed based on your scan workflow. Install on the OPEX scanner computer or install separately on independent edit computers. With CertainScan Edit being licensed per computer, it can be installed on multiple computers. OPEX also offers a purchasable computer with CertainScan Edit and OPEX Transform already installed. Transform integrates with CertainScan and Edit to provide customized batch output files.

1.2. About the Manual

This manual provides instructions for the operation of CertainScan Edit 5.5™, a user interface software designed for use with the following OPEX scanners:

- FalconPlus[™] and FalconVPlus[™]
- 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 4). 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.

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 <u>"Table of Contents"</u> 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

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.

<u></u> **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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CertainScan Edit™

2.1. Installing CertainScan Edit™

This chapter describes the installation and configuration required to operate the CertainScan Edit™ software. CertainScan Edit is installed using the OPEX Scanner Software Install utility.

- **1.** Double-click on the executable file to open the OPEX Scanner Software Install window (Figure 2-1).
- 2. Select the CertainScan Edit radio button on the install screen.
- 3. Click Next and select Remittance or Service Bureau customer type.
- **4.** Step through the install process.

Note: When installing, you can also install CertainScan Monitor.



Figure 2-1: OPEX Scanner Software Install utility

2.2. CertainScan and CertainScan Edit install

CertainScan and CertainScan Edit are installed with the OPEX Scanner Software Install utility (Figure 2-2).

- 1. Select your scanner's radio button on the install screen.
- 2. Click Next and select Remittance or Service Bureau customer type.
- 3. Click Next and select CertainScan Edit check box.

Note: You can also install CertainScan Monitor.

4. Step through the install process.

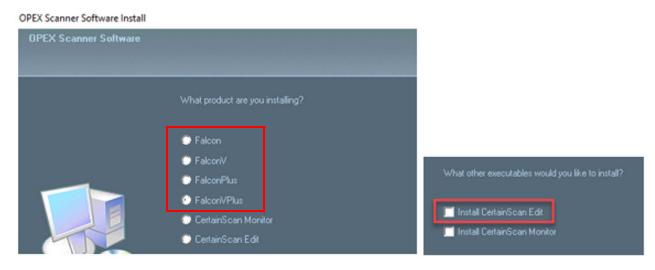


Figure 2-2: CertainScan and CertainScan Edit Install

2.3. SOLS Setup

After install, the license will need to be activated.

1. Click on the CertainScan Edit icon installed on desktop (Figure 2-3).



Figure 2-3: CertainScan Edit icon

- 2. Select the Manager Operator level to login to CertainScan Edit.
- Click System Setup, then Software Options.
 The Unique Machine Identifier (UMI) window opens (Figure 2-4).

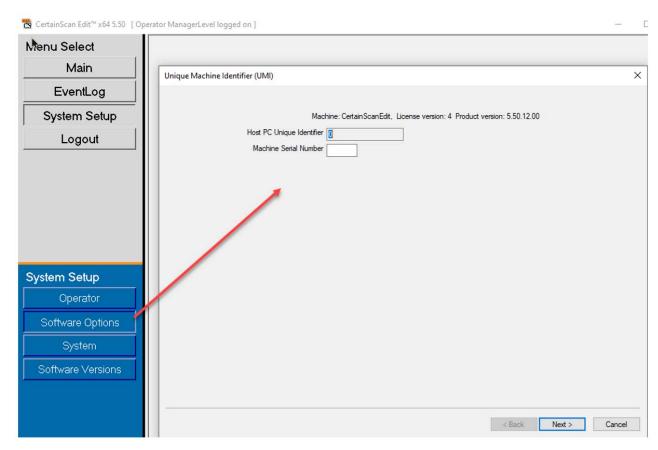


Figure 2-4: Unique Machine Identifier (UMI)

- **4.** Contact OPEX Technical Support to provide this information and receive license.
- 5. Click Next.
- **6.** Click the drop-down arrow, select **Enabled**, and enter the date the license expires (Figure 2-5).

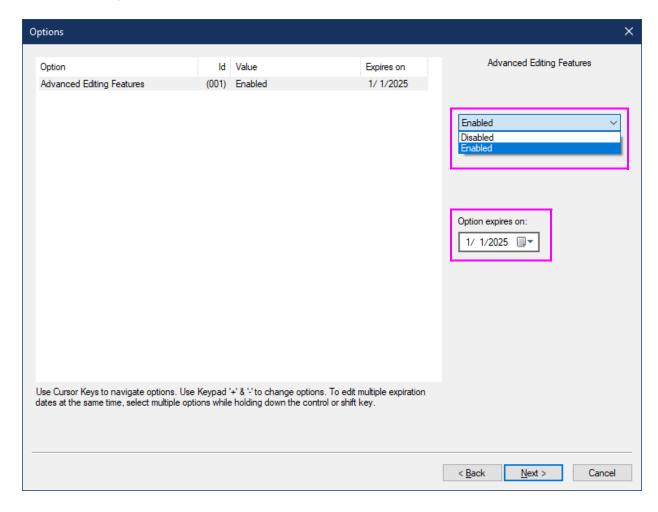


Figure 2-5: License detail

- 7. Click Next.
- 8. Enter the Option Activation Key (OAK) provided by OPEX Tech Support.
- 9. Click Next.
- 10. Click Finish.
- **11.** Restart the computer.

2.4. CertainScan Customer Types

CertainScan and CertainScanEdit are configured based on two different Customer Types: Remittance and Service Bureau. There is no performance difference based on chosen customer type. However, there are different reference names used with these customer types. This document and screen captures reflect customer type set to "Service Bureau." Scanned items are referred to as "Pages" and/or as "Images."

Note: Customer type can be changed after installation, if necessary.

Path to set customer type (Figure 2-6):

System Setup > System > User Interface Settings > Customer Type

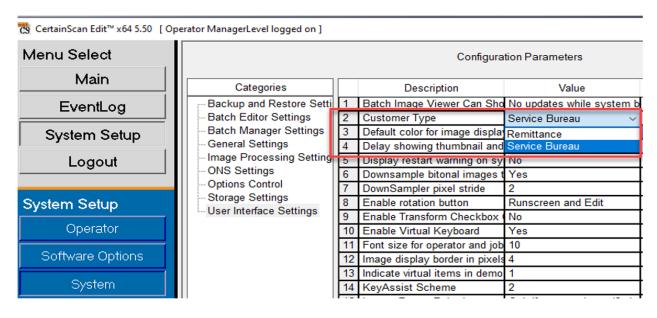


Figure 2-6: Customer Type parameter

2.5. CertainScan Job network path

By default, when using an OPEX scanner computer for Scanning, Editing and Transform (if activated), all scanning information is stored on the computer. CertainScan saves Job information in C:\OPEX\SCAN\Data, including the paths for data and image files as defined in batch parameters. This path is typically changed to the customer's specified network path (Figure 2-7).

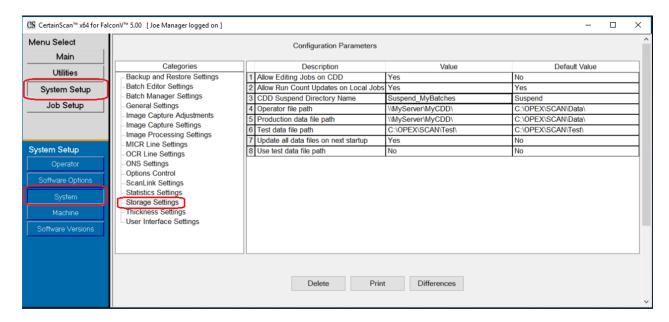


Figure 2-7: Storage Settings

2.6. Configure network path on independent computer

After login for first time use, the network path must be configured in CertainScan Edit to match the scanner computer.

- 1. Identify network path on the OPEX scanner computer. This can be confirmed by going to **System Setup > System > Storage Settings**:
 - Operator file path [OperatorDataPath]
 - Production data file path [ProductionPath]
- 2. On the CertainScan Edit computer, update with the same network path. Manually enter or click the box to browse to the same path (Figure 2-8).

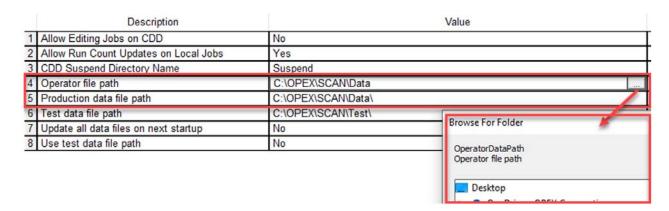


Figure 2-8: Network Path setup

2.7. Edit functionality on computer

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. ScanLink plugins are not utilized 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 2-9)

- **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.

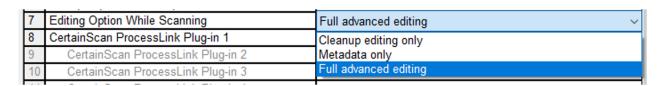


Figure 2-9: Editing Options while scanning - parameter settings

2.8. Manage Operators

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

2.8.1. 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 2-10).

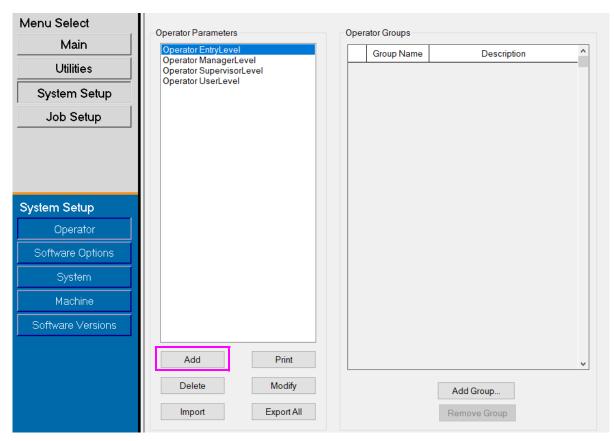


Figure 2-10: Add Operator

Operator Shift Level First Name EntryLevel Last Name Entry First Description OUser Second Password O Third O Supervisor Language Manager O Misc. REDLink Name <DOES NOT USE RE[~ **Group Memberships** Available Groups Remove > Apply Filter:

The Operator pop-up screen is displayed (Figure 2-11).

Figure 2-11: Operator Screen

Cancel

Save

- 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.

2.9. Edit display view thumbnail borders

When logged on as a Manager, the thumbnail and image viewer 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 2-12, 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.

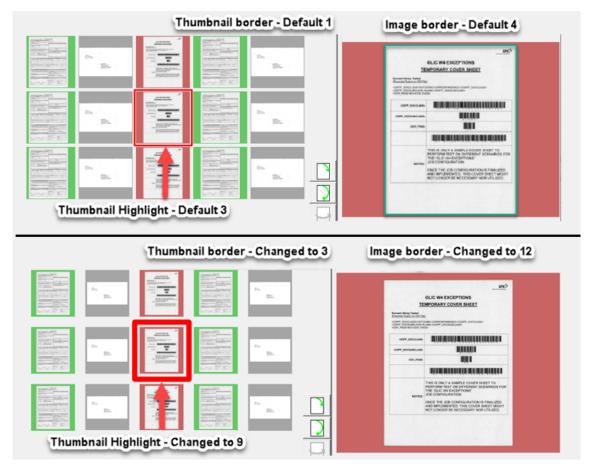


Figure 2-12: Display view thumbnail borders

To change these settings

1. Go to System Setup > System > User Interface Settings (referencing Figure 2-13).

Note: Manager level operator only.

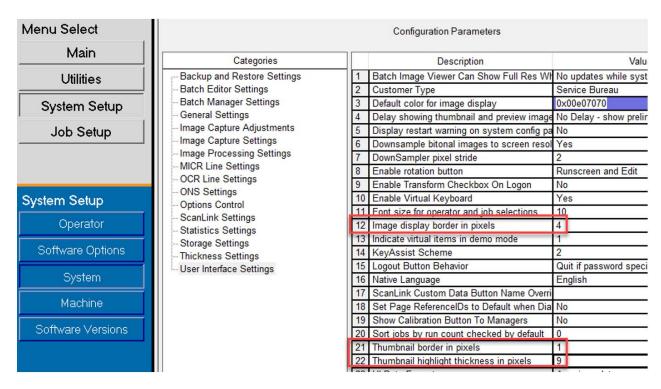


Figure 2-13: User Interface Settings

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CertainScan Edit™

3.1. Overview

This chapter describes the user interface for the CertainScan Edit $^{\text{TM}}$ software.

3.2. CertainScan Edit login

1. Double-click on the CertainScan Edit icon on the desktop.



Figure 3-1: CertainScan Edit icon

The CertainScan Edit window opens, displaying the login screen.

2. 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 with different level access (Figure 3-2).

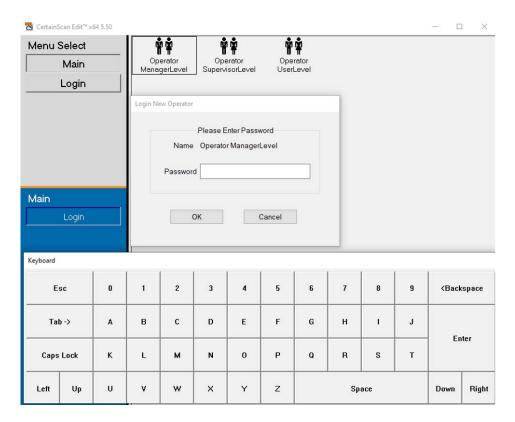


Figure 3-2: Operator login

3.2.1. Edit Menu Select functions

Operator Level - Access to Batch Resume, Edit functions and Logout (Figure 3-3).



Figure 3-3: Operator menu select functions

Supervisor Level - Event Log and System Setup access to manage Operators, activate Software Options and access to limited System configuration parameters.

Manager Level - Full access to all features including Software Version information (Figure 3-4).

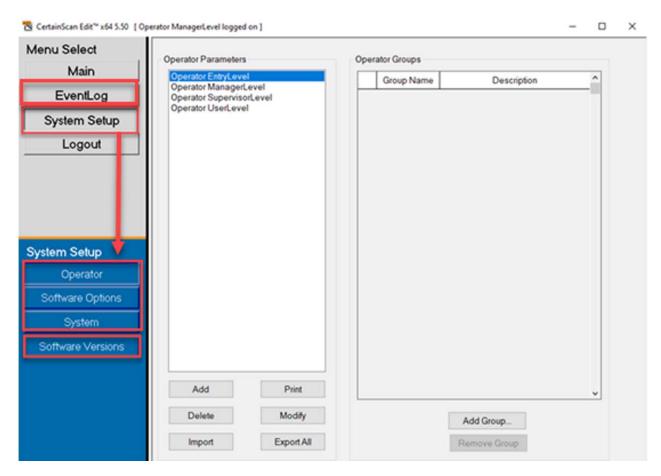


Figure 3-4: Manager menu select functions

3.3. Edit Batch Selection

All Operator levels (see Figure 3-5):

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

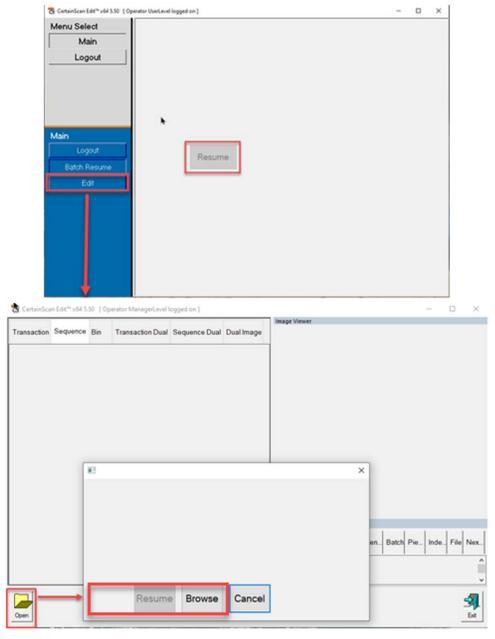


Figure 3-5: Edit Batch Selection

- 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 3-6).

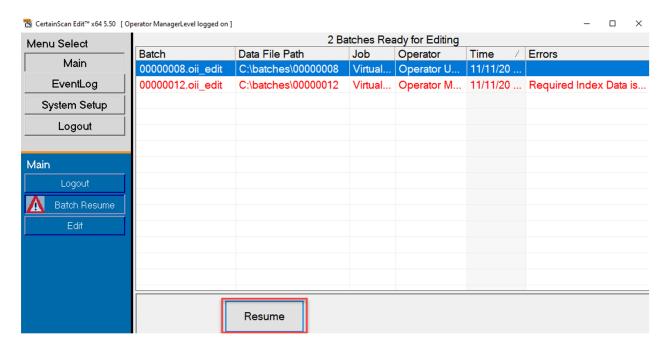


Figure 3-6: Batches ready for Editing - error state

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4. Edit Screen

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CertainScan Edit™

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4.1. Edit screen overview

When a batch is resumed with 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 in the list below.

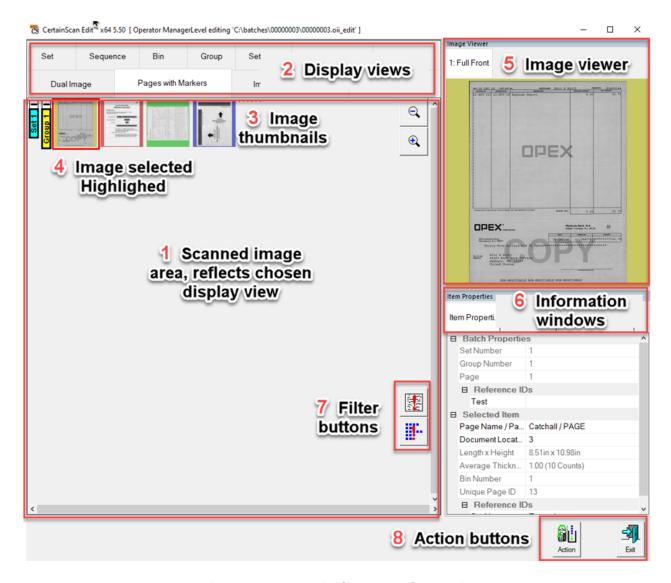
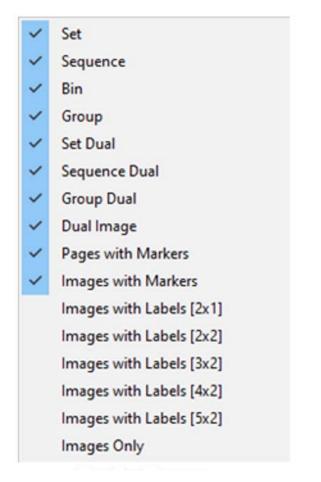
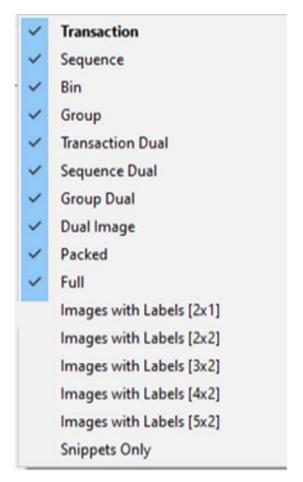


Figure 4-1: Edit Screen Overview

 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. Keyboard Shortcuts for Navigation of Batch Content

Table 4-1: Keyboard Shortcuts

Key	Action
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.

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5. Display Views

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5.3. Sequence
5.4. Bin
5.5. Group
5.6. Set Dual / Transaction Dual (Remittance customer type) 49
5.7. Sequence Dual 50
5.8. Group Dual 51
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5.10. Pages with Markers / Packed (Remittance customer type) 53
5.11. Images with Markers / Full (Remittance customer type) 55
5.12. Images with Labels views 59
5.13. Images Only / Snippets Only (Remittance customer type) 60

CertainScan Edit™

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

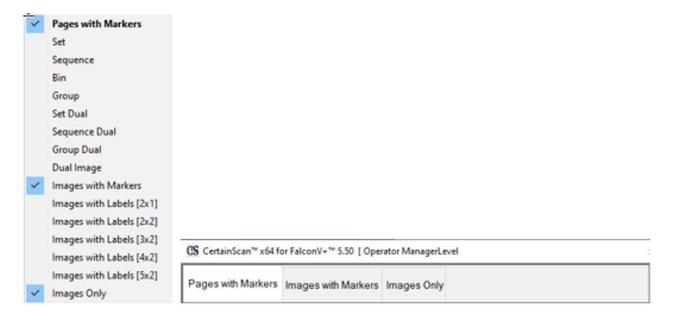


Figure 5-1: Selecting views

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

Table 5-1: List of Views

Set/Transaction (page 45)	Group Dual (page 51)
Sequence (page 46)	Dual Image (page 52)
Bin (<u>page 47</u>)	Pages with Markers/Packed (page 53)
Group (page 48)	Images with Markers/Full (page 55)
Set/Transaction Dual (page 49)	Images with Labels (page 59)
Sequence Dual (page 50)	Images/Snippets Only (page 60)

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).

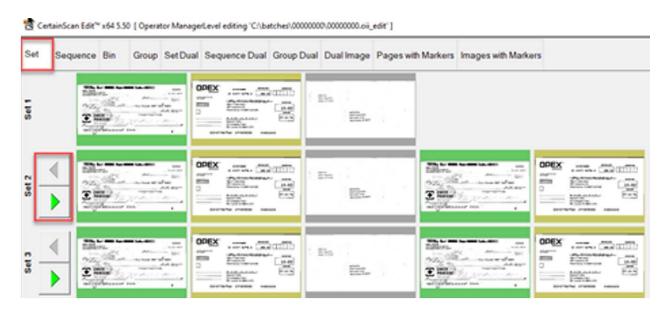


Figure 5-2: Set / Transaction view

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).

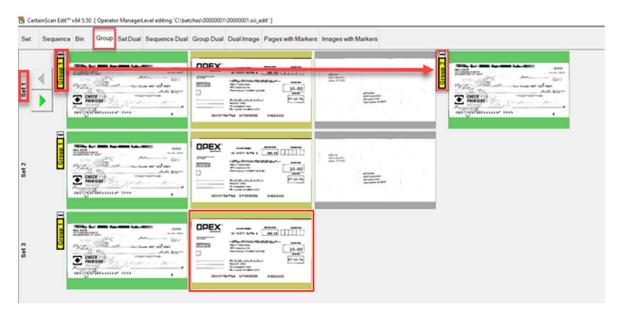


Figure 5-5: Group view

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).

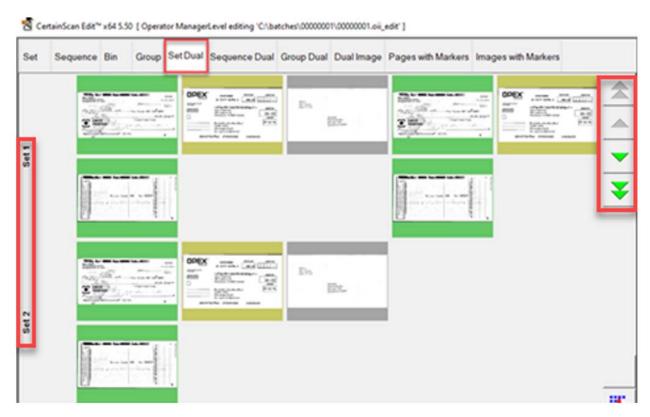


Figure 5-6: Set Dual / Transaction Dual view

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).

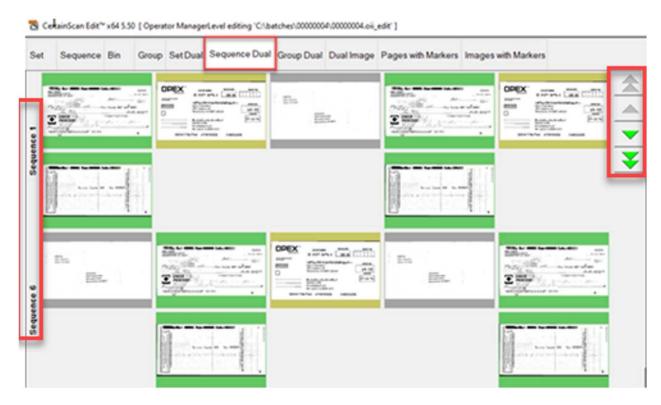


Figure 5-7: Sequence Dual view

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).

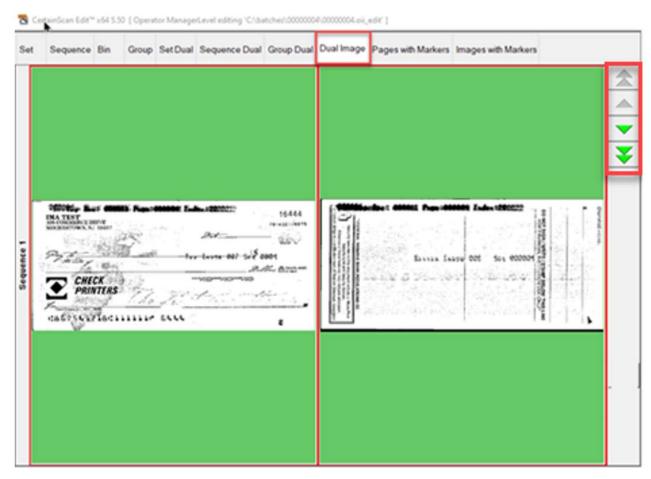


Figure 5-9: Dual Image view

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.

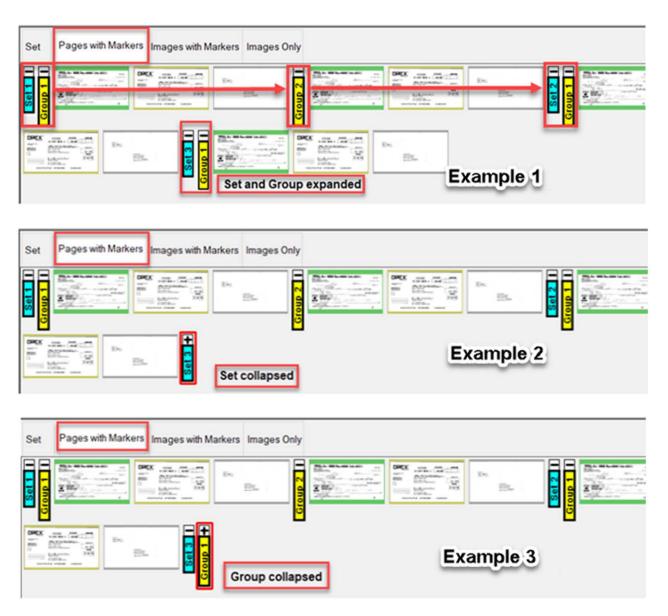


Figure 5-10: Pages with Markers (Packed) examples

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.

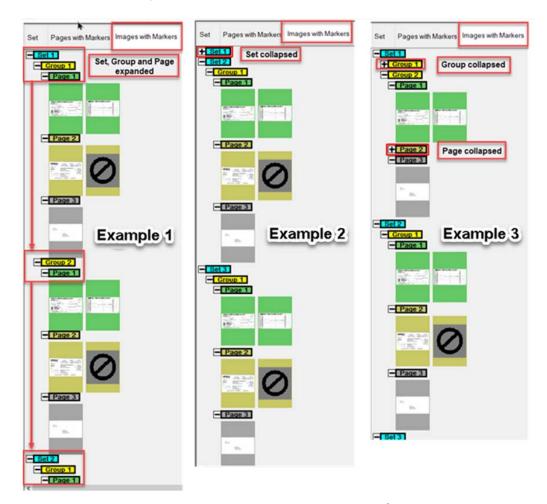


Figure 5-11: Images with Markers / Full view - examples

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).

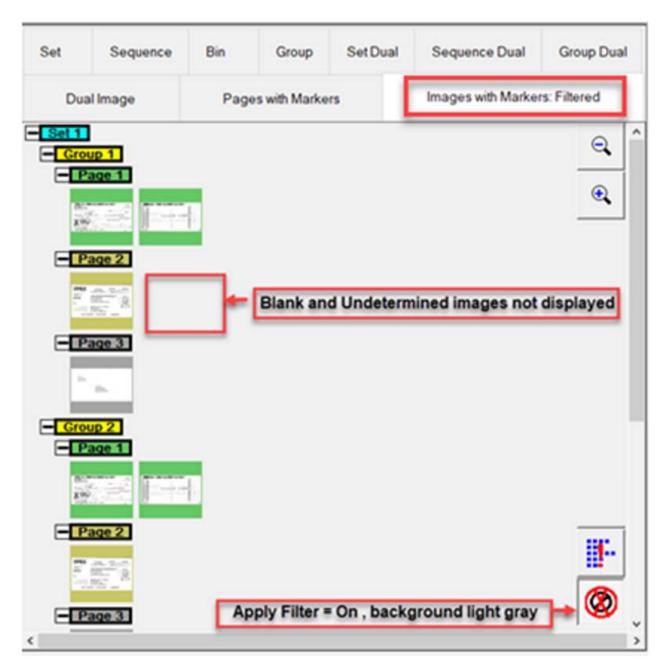


Figure 5-12: Blank Page Detection - filter example 1

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

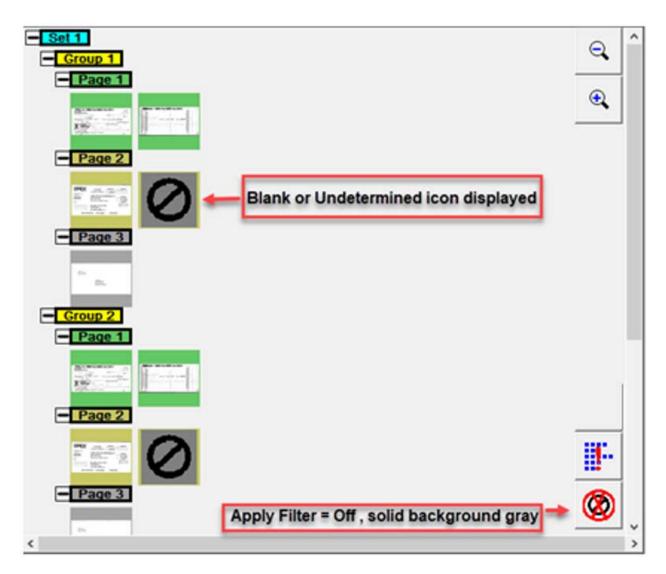


Figure 5-13: Blank Page Detection - filter example 2

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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CertainScan Edit™

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.

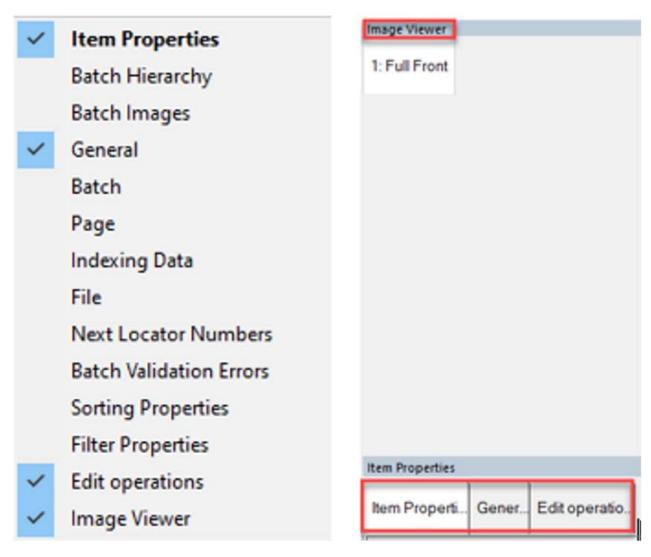


Figure 6-1: Display Information Windows

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

Table 6-1: Information Windows

Item Properties (page 66)	File (page 79)
Batch Hierarchy (page 74)	Next Locator Numbers (page 79)
Batch Images (page 75)	Batch Validation Errors (page 69)
General (page 76)	Sorting Properties (page 70)
Batch (page 77)	Filter Properties (page 71)
Page (page 78)	Edit operations (page 73)
Index Data (page 68)	Image Viewer (page 80)

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

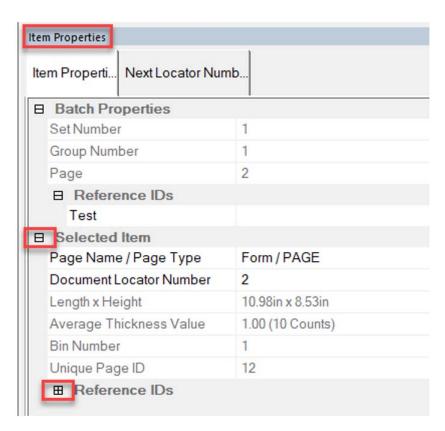


Figure 6-2: Item Properties window

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.

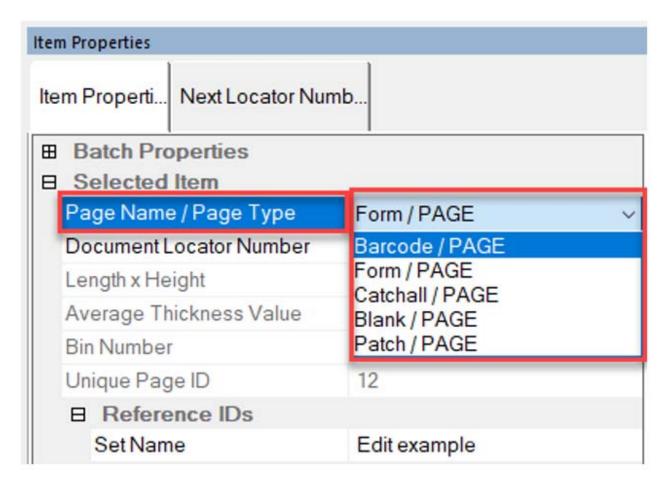


Figure 6-3: Editing items - example

6.3. Indexing Data

Provides the index fields defined for the selected Page, along with Batch, Set and Group fields applied. Only available with Transform OII batch output. This window can also be used to edit the data shown. Reference "CertainScan - Advanced Features" manual for more information on Indexing.

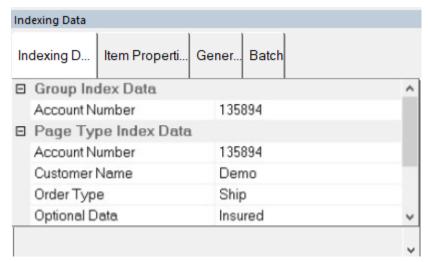


Figure 6-4: Indexing Data window

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)

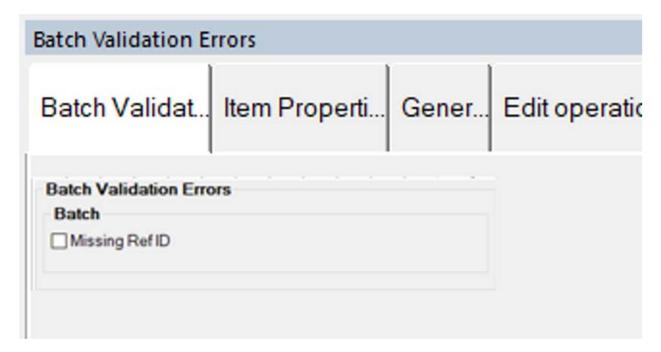


Figure 6-5: Batch Validation Errors window

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.

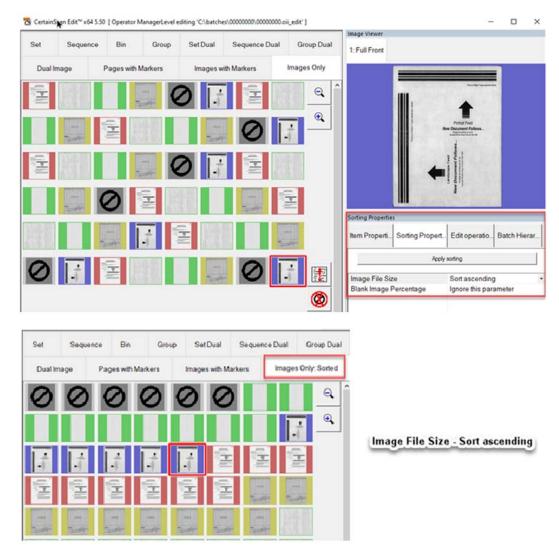


Figure 6-6: Sorting Properties window

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.

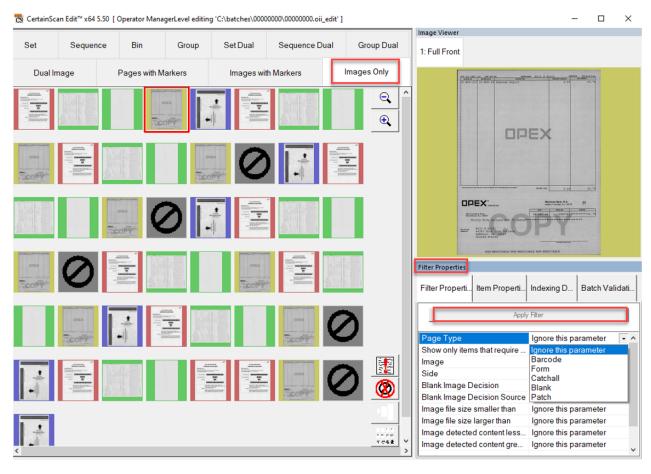


Figure 6-7: Filter Properties window

6.6.1. 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).

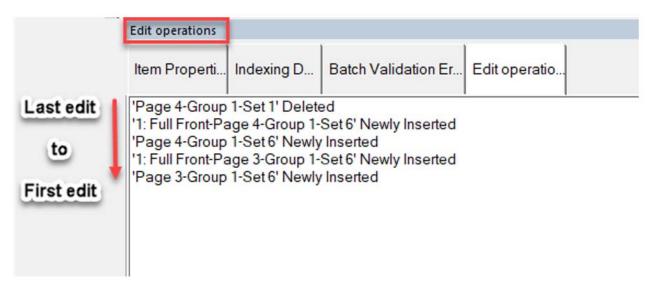


Figure 6-8: Edit Operations

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).

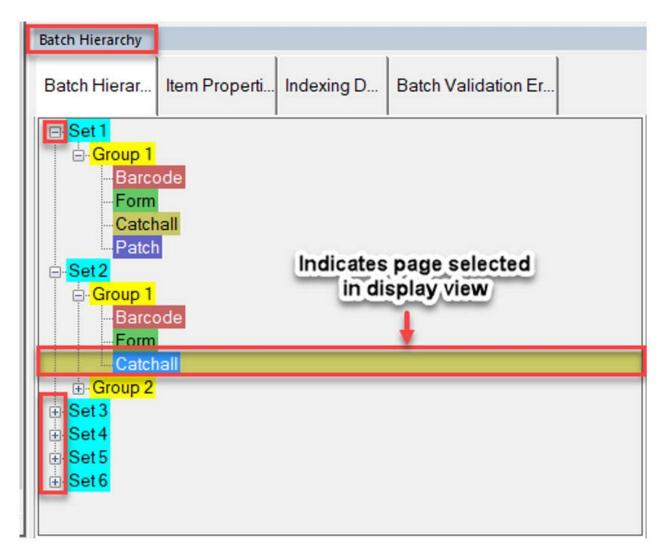


Figure 6-9: Batch Hierarchy window

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).

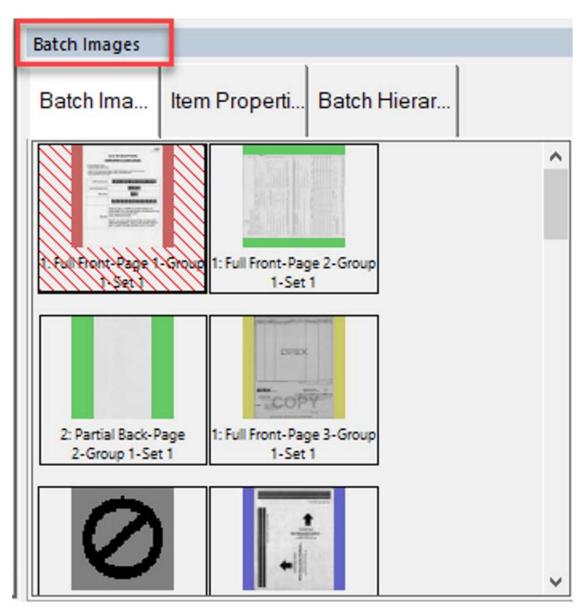


Figure 6-10: Batch Images window

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.

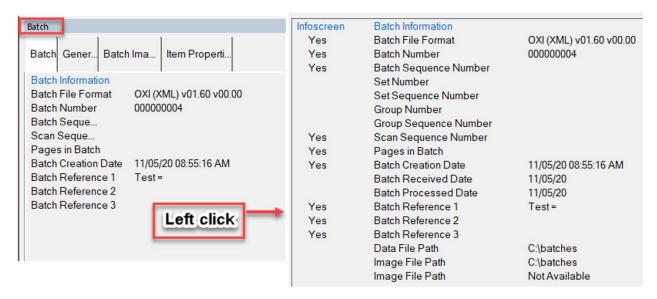


Figure 6-12: Batch window

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.

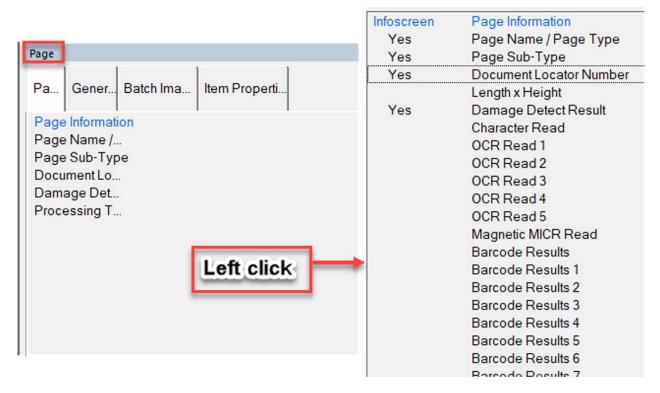


Figure 6-13: Page/Piece view

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).

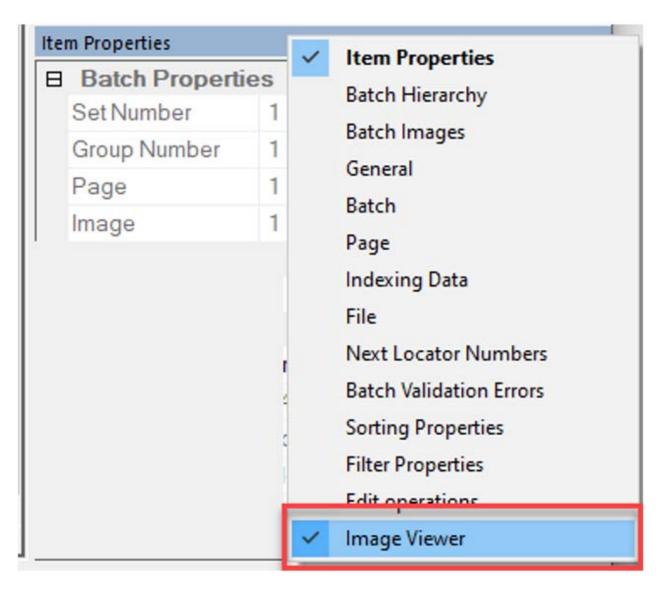


Figure 6-16: Image Viewer window

7. Batch Editing

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CertainScan Edit™

User Manual

7.1. Overview

This chapter describes some of the operations 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.

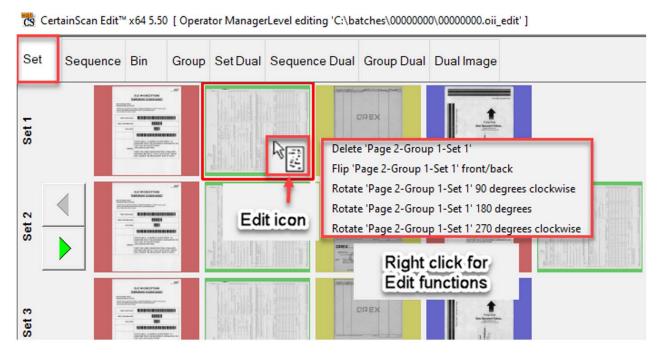


Figure 7-1: Edit action examples

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).

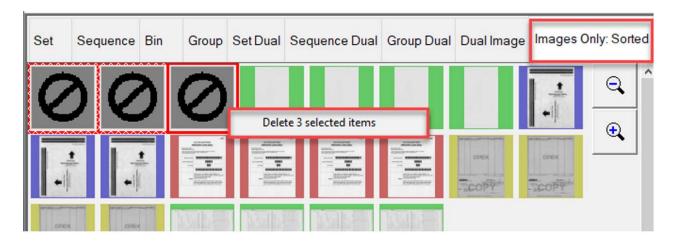


Figure 7-3: Select blank images

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).

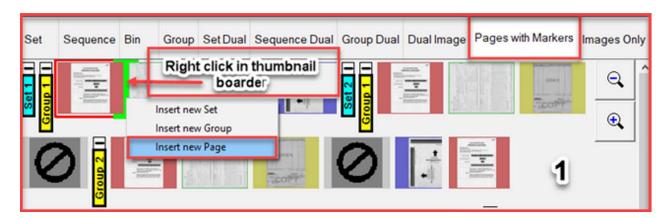


Figure 7-4: Insert new page

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

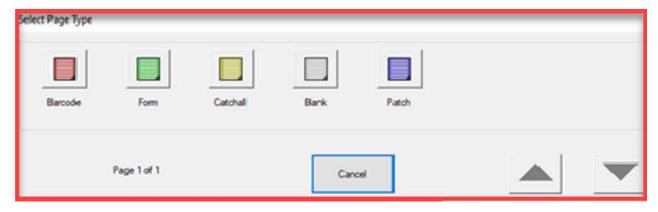


Figure 7-5: Select Page Type pop-up example

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).

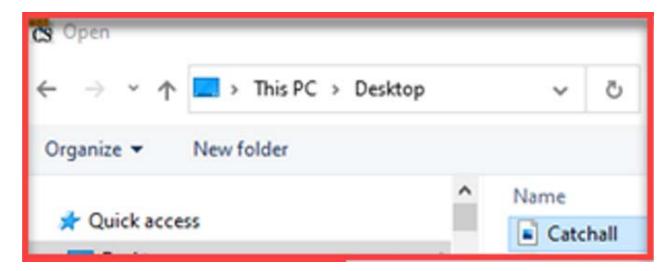


Figure 7-6: Choose the page file location

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

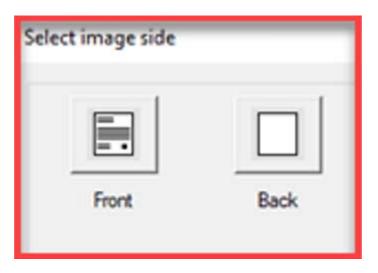


Figure 7-7: Select image side

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).

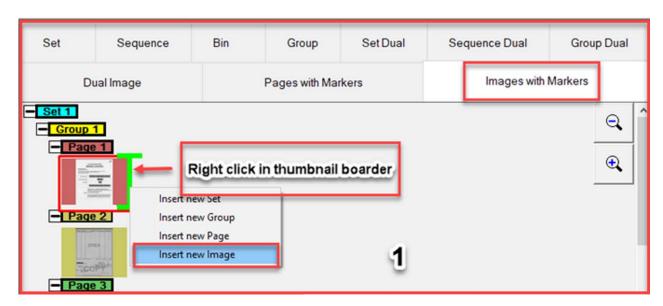


Figure 7-8: Insert New Image

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).

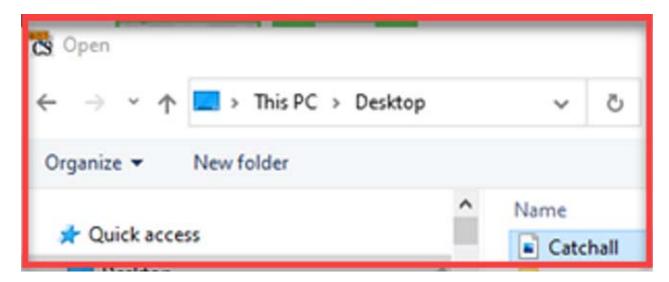


Figure 7-9: Select image to insert

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

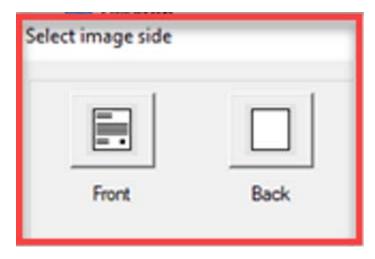


Figure 7-10: Select image side

OPEX Corporation

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).

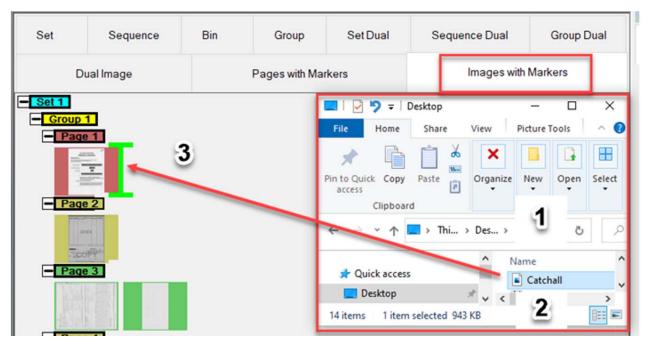


Figure 7-11: Insert new image - drag and drop

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

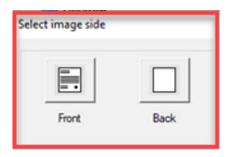


Figure 7-12: Select image side

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.

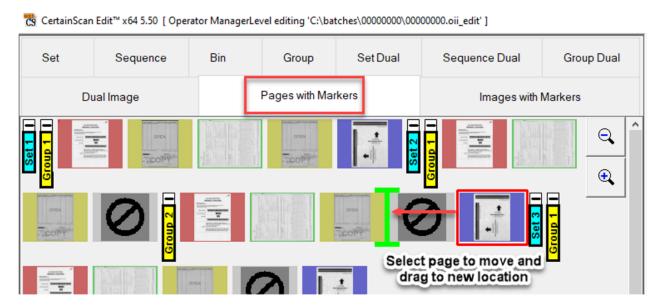


Figure 7-13: Move page by drag and drop

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.

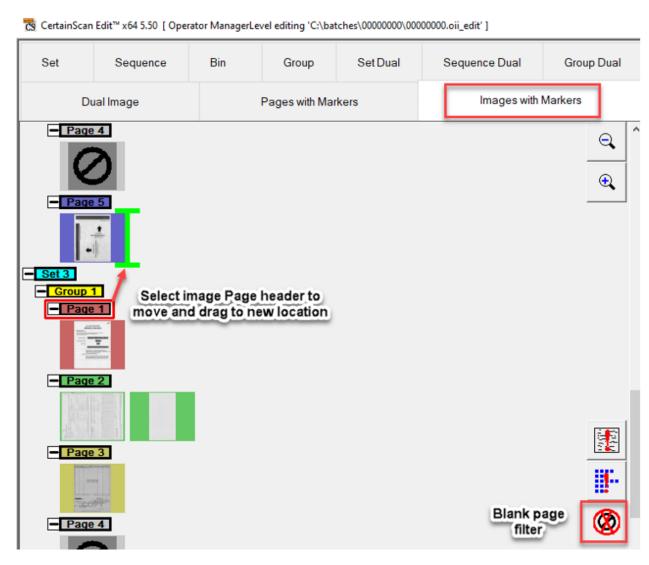


Figure 7-14: Move an Image by drag and drop

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).

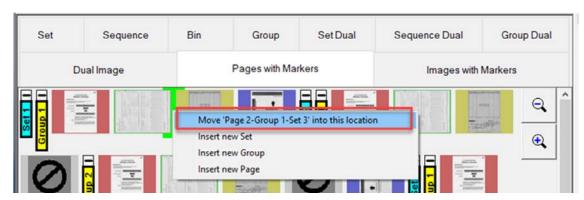


Figure 7-16: Move Page

7.10. Rotating Images

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.

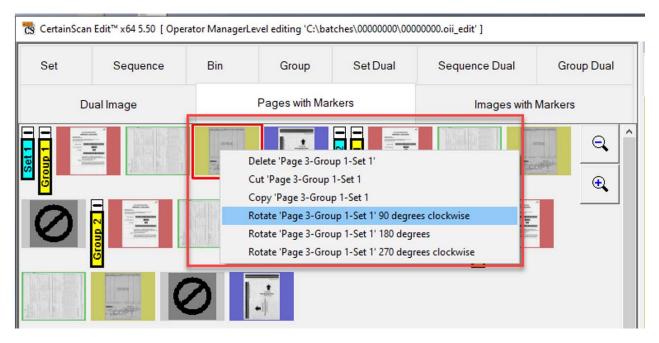


Figure 7-17: Rotate Image

7.11. Delete a Page or image

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

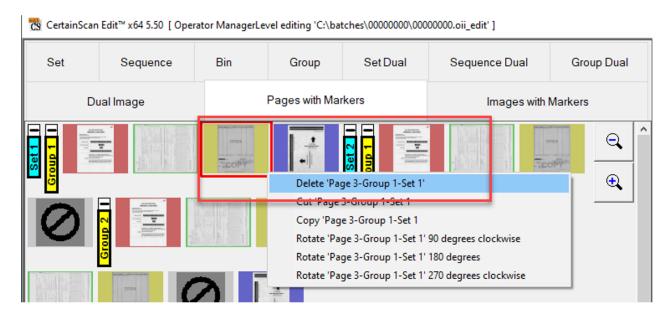


Figure 7-18: Delete page or image

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).

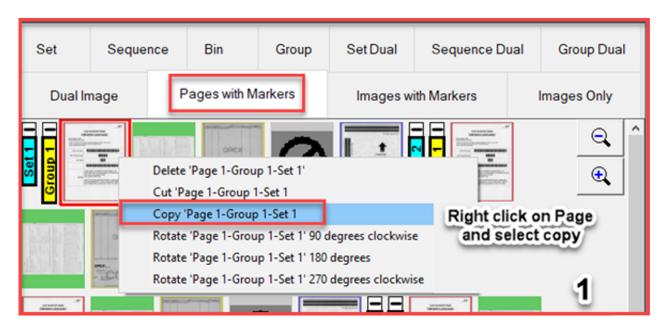


Figure 7-19: Select Copy

 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).

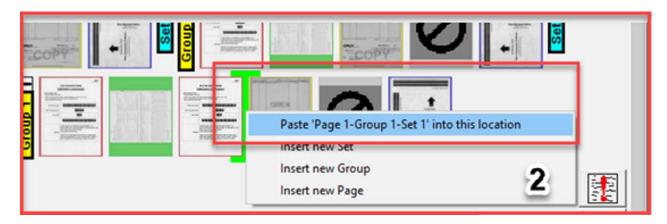


Figure 7-20: Select Paste Page

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

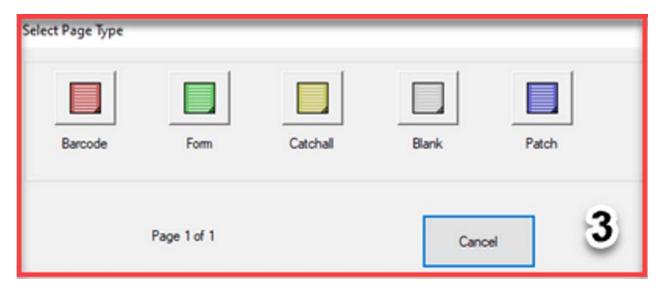


Figure 7-21: Select Page Type

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

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).

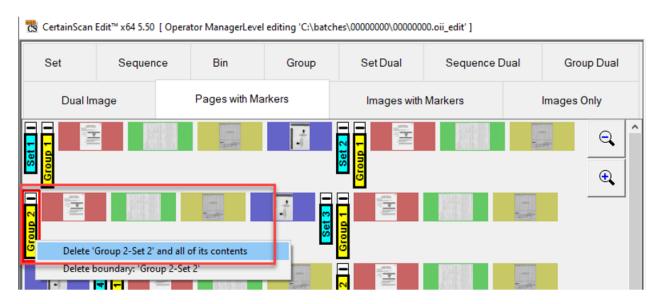


Figure 7-23: Delete group and all contents

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).

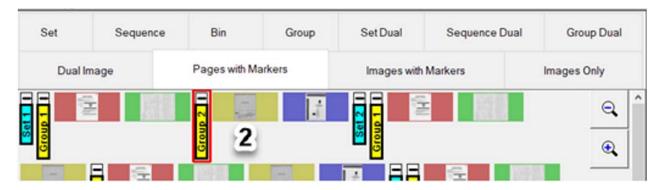


Figure 7-25: New group example

7.16. Delete an existing Set marker

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.

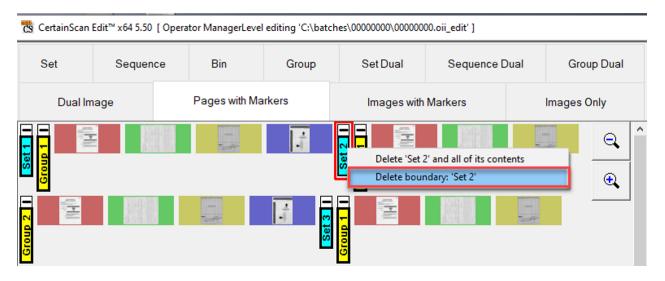


Figure 7-26: Delete Set Boundary Marker

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.

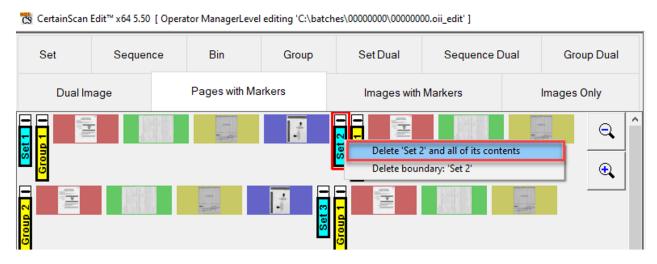


Figure 7-27: Delete set boundary marker

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.

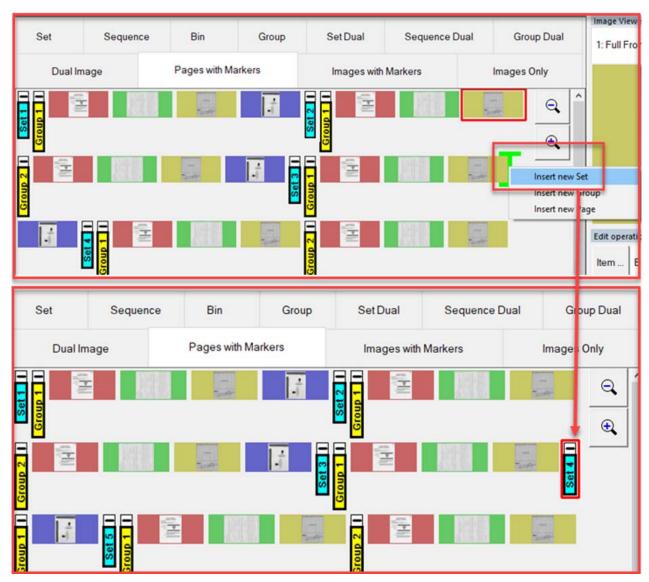


Figure 7-28: Insert new Set

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.

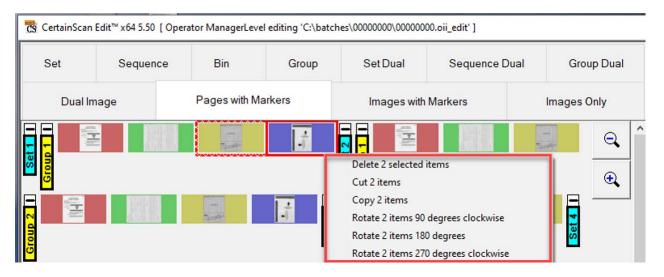


Figure 7-29: Select multiple pages

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).

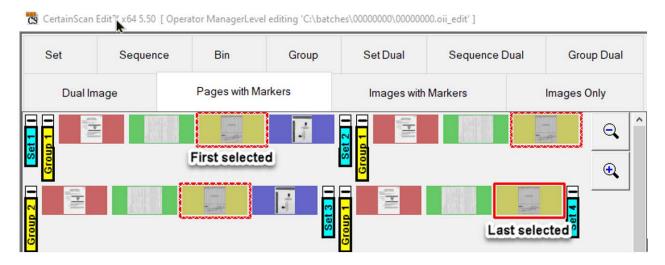


Figure 7-30: Select multiples - method 1

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).

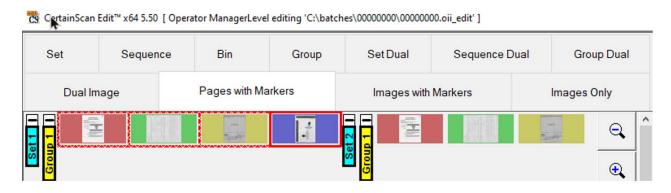


Figure 7-31: Select multiples - method 2

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).

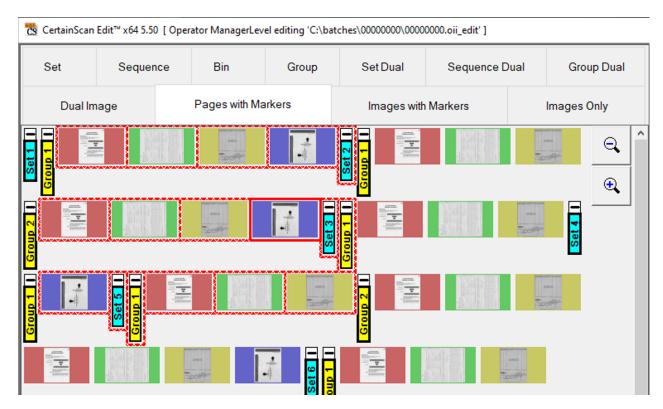


Figure 7-32: Select multiples - method 3

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).

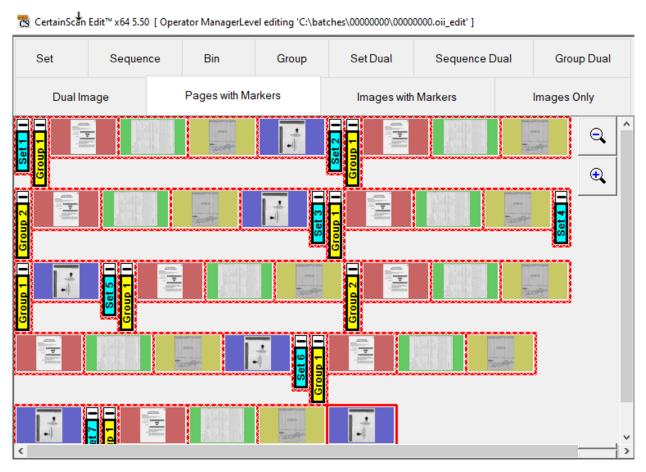


Figure 7-33: Select multiples - method 4

7.20. Image icons

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

0	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.
θ	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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CertainScan Edit™

User Manual

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).

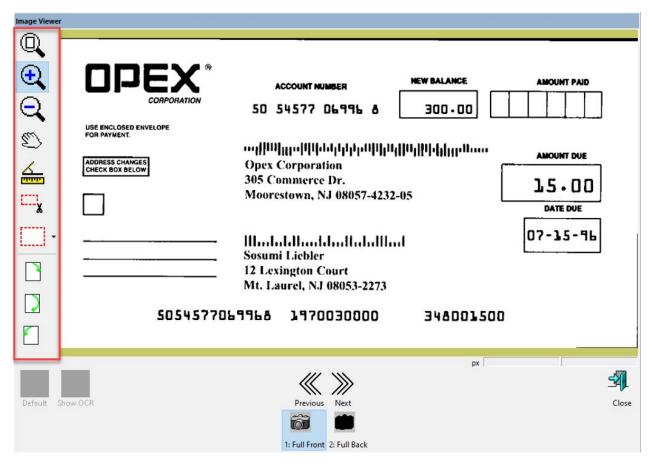


Figure 8-1: Image Viewer

8.2. Image Enhancement Tools

Referencing Figure 8-2 on page 112:

- 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 (<u>Figure 8-3 on page 113</u>).
- Rotate: Rotate 90 or 180 degrees clockwise or rotate 90 degrees counterclockwise

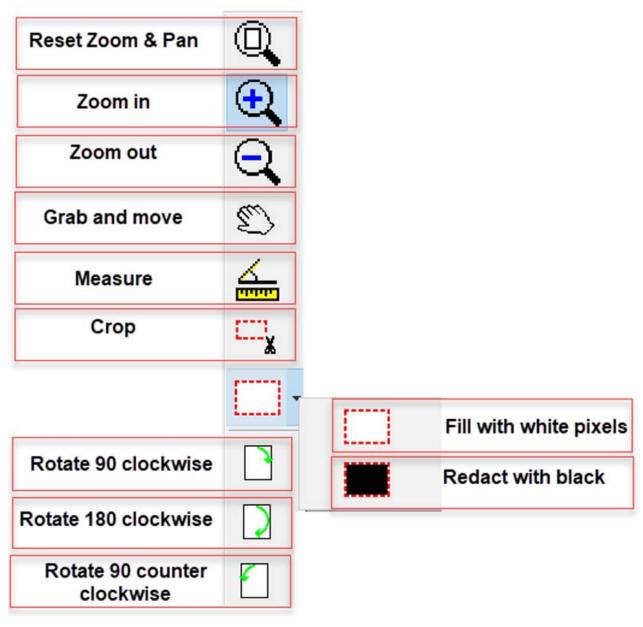


Figure 8-2: Image Enhancement Tools

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

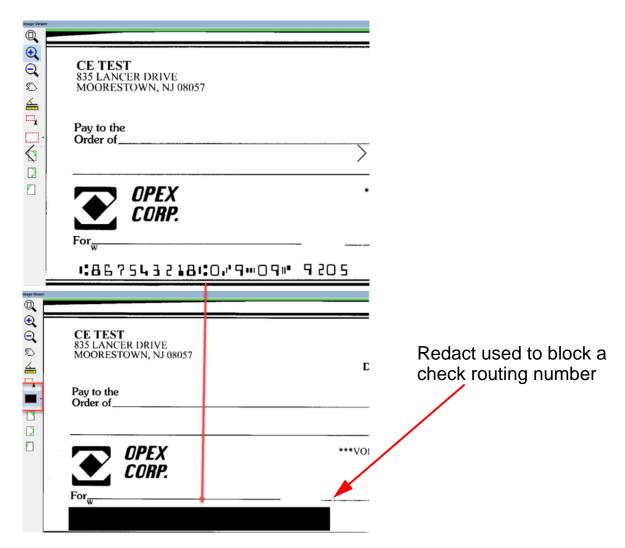


Figure 8-3: Redact Example

8.3. Navigation Buttons

- 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

About OPEX Corporation

For over four decades, OPEX has delivered forward-focused solutions for customers ranging from businesses aspiring to e-commerce success, to organizations striving for agility and profitability in a world that values speed and rewards service.

Throughout these 40+ years of leadership by the Stevens family, OPEX has forged a reputation for steadfast values: high quality, exceptional customer service, stability, stewardship and unwavering independence.

Utilizing a vast global workforce of direct employees, OPEX serves a variety of industries including financial services, insurance, healthcare, government, retail, non-profits, utilities, telecommunication, service bureaus, educational institutions and fulfillment operations.

To maintain our commitment to the highest standards of quality, we control all aspects of product design. Our combined Moorestown, NJ World Headquarters and Pennsauken, NJ production facilities feature 475,000 square feet of solar-powered engineering, manufacturing, warehouse, product assembly and office space.



