

June 2023

**OPEX<sup>®</sup>**



## **CertainScan<sup>®</sup> Monitor 6.10 User Manual**

**9306900CM6.10-EN**

**Revision 23-01**

**Original Instructions**



**OPEX<sup>®</sup>**

# **CertainScan<sup>®</sup> Monitor**

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# Document History

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Doc Rev	Date	Changes (click blue text to go to that page)
23-01	June 9, 2023	Initial release for CertainScan Monitor version 6.10.

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# 1. Introduction

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## 1.1. About CertainScan® Monitor

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OPEX CertainScan® Monitor 6.10 is an independent software application, and is used to view and manage the status of batches being scanned, edited, and transformed (if activated). It includes ProcessLink™, a new feature option with CertainScan 6.10 release. It is designed to work seamlessly with CertainScan versions 4.0, 5.0, 5.5, 6.10 and CertainScan Transform versions 3.0, 3.5, and 4.0. CertainScan Monitor and ProcessLink version 6.10 will require license activation.

CertainScan Monitor can be installed on Windows 11 64-bit, Windows 10 64-bit, or Windows 7 32 or 64-bit operating system computers.

CertainScan Monitor functionality includes the following:

- View and manage batches currently scanning or currently being edited.
- View and manage batches ready to resume scanning or ready for edit.
- View and manage batches needing clean-up from a scanning, editing or ProcessLink state.
- View and manage batches based on Transform and ProcessLink state (if activated).
- Browse to a batch ready to Transform and place in the queue (file must have an .oii transform extension).
- Includes a Machines view to provide status of additional OPEX scanners (if available) and installed instances of CertainScan Monitor and CertainScan Edit, if configured on same network.

**Note:** *CertainScan Monitor has been referred to as “Batch Monitor” or “CertainScan Batch Monitor.” In this document, it is referred to as “CertainScan Monitor.”*



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## 1.2. About the Manual

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This manual provides instructions for the operation of CertainScan Monitor 6.10, a user interface 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 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).

# 2. User Interface

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## 2.1. Overview

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This chapter describes the CertainScan® Monitor operator interface.

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## 2.2. CertainScan Monitor Login

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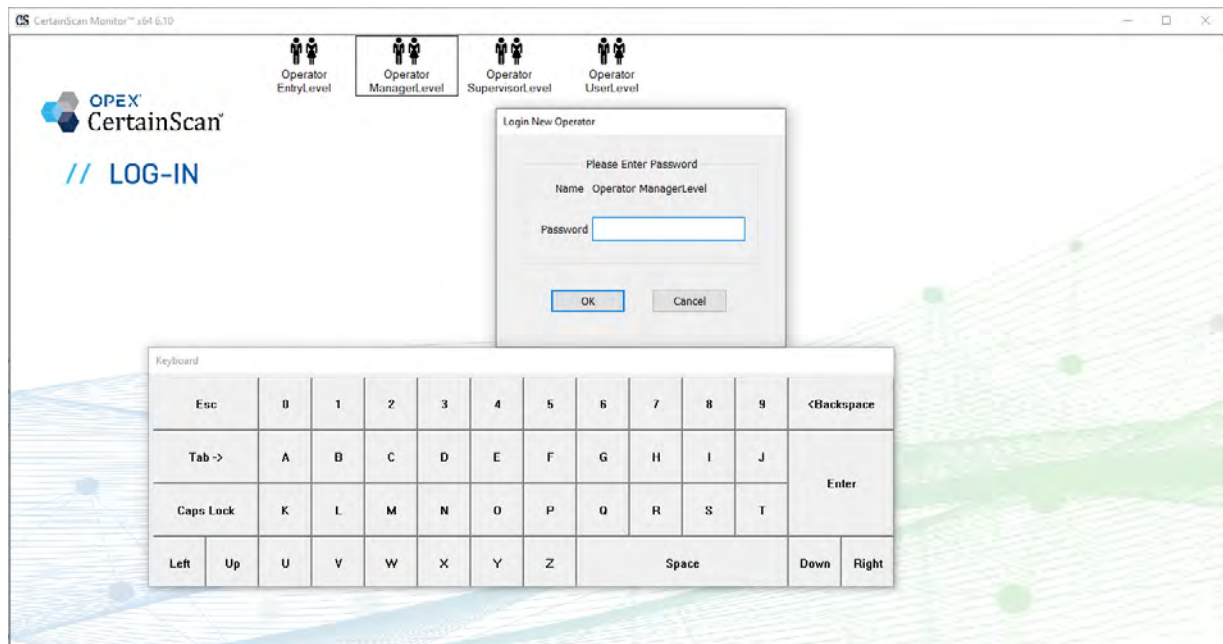
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1. Click on the **CertainScan Monitor** icon on the desktop.



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

The CertainScan Monitor window opens, displaying the login screen (Figure 2-2).



**Figure 2-2: Operator login**

## 2.2.1. Operator Levels

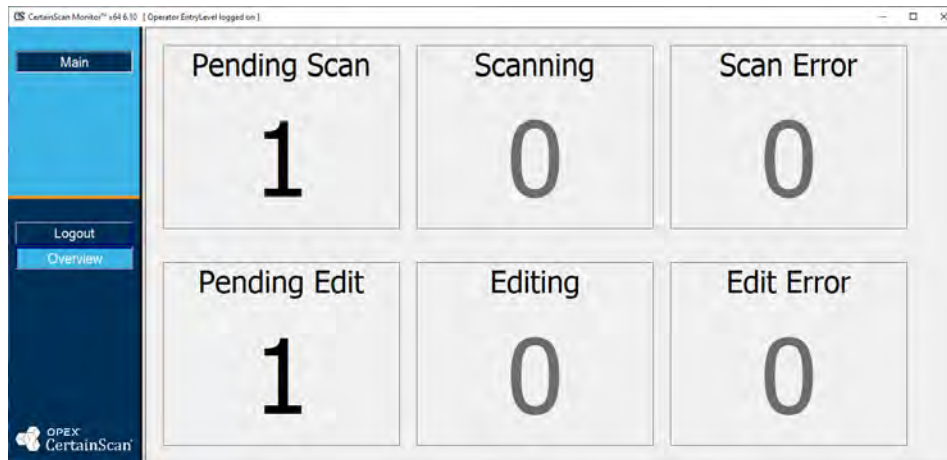
- Entry Level: Access to Overview display and Logout function.
- User Level: Access to Overview, Batch Queues, Machines and Logout functions.
- Supervisor Level: User level access plus access to EventLog and System Setup. A Supervisor can manage User level operators, but is not able to manage Manager level operators.
- Manager Level: Complete access, can manage Manager level operators. Able to launch Transform and ProcessLink (if activated).

**Note:** *Default Operator levels do not require passwords, and have access per Operator level selected.*

## 2.3. Main Screen

What appears on the Main screen is based on the logged-in operator level:

- **Entry Level:** The Batch Overview is displayed (Figure 2-3). See [“Enable/Disable CertainScan Transform and ProcessLink” on page 29](#) for more information on this window.



**Figure 2-3: Entry Level Main screen**

- **User/Supervisor/Manager Level:** Batch Queues are displayed (User level shown in Figure 2-4). See [“Batch Queues” on page 18](#) for more information on this window.



**Figure 2-4: User/Supervisor/Manager Level Main Screen**

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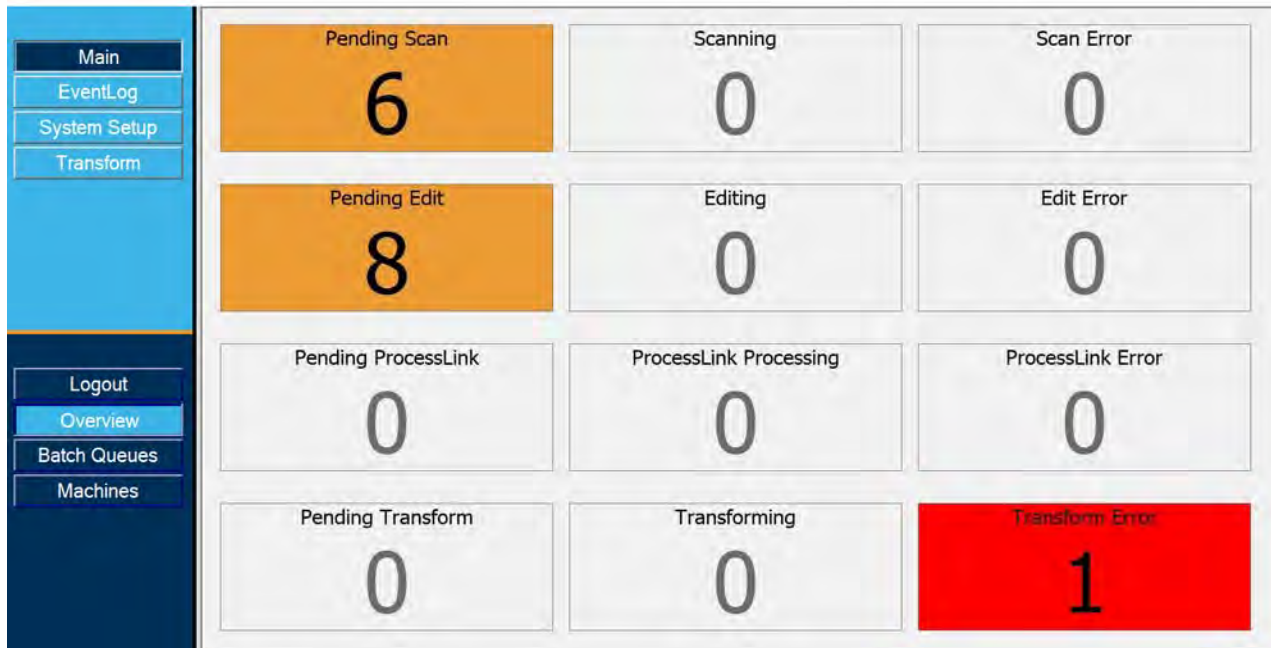
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## 2.4. Overview

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The Overview button is provided to all operators. Click the **Overview** button on the Main menu for a quick overview of the counts in each of the queues (Figure 2-5).

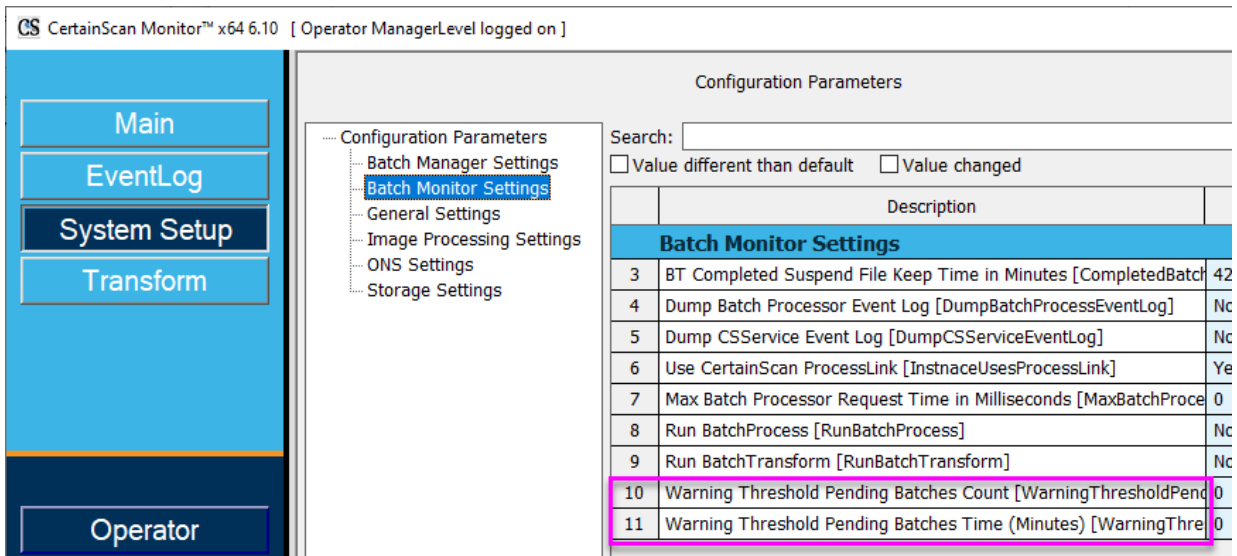


**Figure 2-5: Overview**

- This overview shows the number of batches in the system and what process they are in. The background color of each count changes based on the condition:
  - Error displays show a red background when any count is above zero.
  - Pending displays show an orange background when any count is above either threshold.

Threshold parameters have been added, and the respective queue will highlight when a threshold has been exceeded. These queue highlights will

display based on the **System Setup >System > Batch Monitor Settings** threshold parameter settings (Figure 2-6).



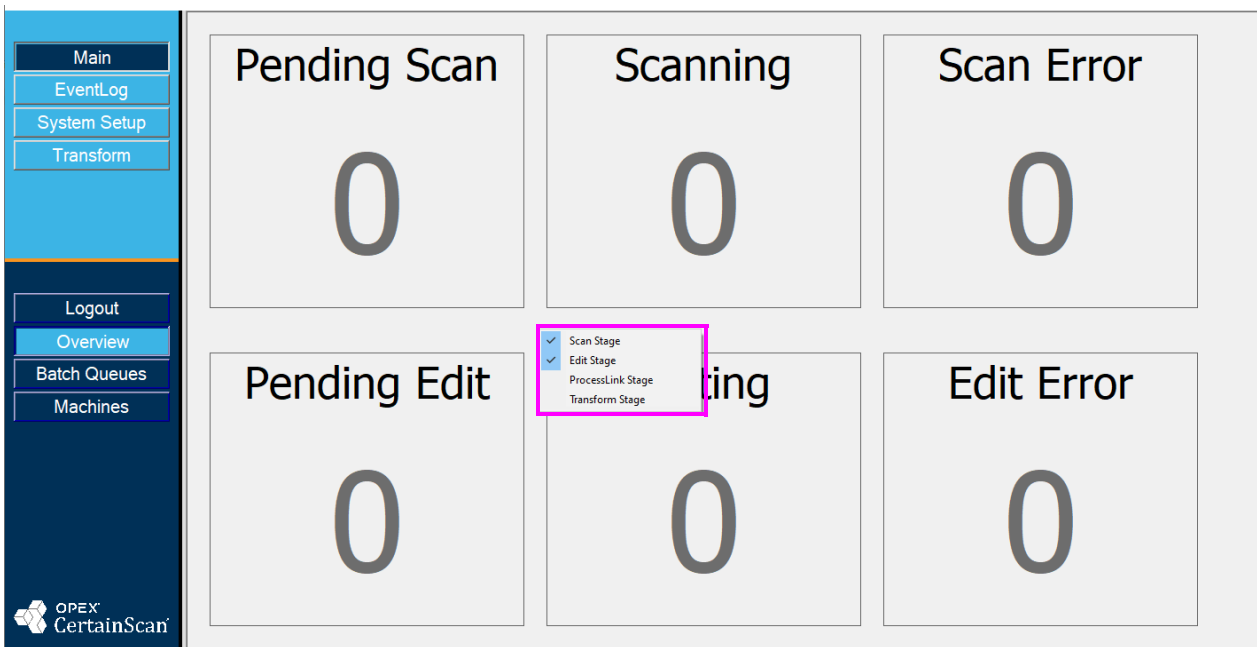
**Figure 2-6: Batch Monitor Settings**

- **Warning Threshold Pending Batches Count** - if the count of pending batches exceeds the threshold, the pending count for that state in the Overview will turn orange.
- **Warning Threshold Pending Batches Time (Minutes)** - if the batch has been waiting longer than the specified amount of time, the batch will have an orange background, and the reason will be displayed in the status.

**Note:** Each Monitor computer will poll the batches on its own timer. A batch that has been waiting longer than the threshold may show up on one computer up to a minute before it shows up on others. This is normal.



Right-clicking anywhere on this screen will display a popup window allowing you to select/unselect which of the four stages you want to view in Overview - Scan Stage, Edit Stage, ProcessLink Stage, and Transform Stage. In the example in Figure 2-7, only the Scan and Edit stages are shown.



**Figure 2-7: Scan and Edit Stages**

## 2.5. Batch Queues

Batch Queues access is provided to all operators, except Entry level operators (Figure 2-8):

- **Scanning:** Batches Needing Cleanup from Scanning, Batches Currently Scanning, Batches Ready to Resume Scanning
- **Editing:** Batches Needing Cleanup from Editing, Batches Currently Being Edited, Batches Ready for Editing
- **CertainScan ProcessLink:** Batches Needing Cleanup from CertainScan ProcessLink, Batches Being Processed by CertainScan ProcessLink, Batches Waiting for CertainScan ProcessLink
- **CertainScan Transform:** Batches Waiting for CertainScan Transform, Batches Being Transformed, Batches Transformed, Batches Needing Cleanup from CertainScan Transform



**Figure 2-8: Batch Queues window**

**Note:** Each panel heading will show the quantity of batches within that stage.

Based on a batch and the stage it is in, additional information is provided respectively in columns, as shown in Figure 2-9. In this example, for Batches Ready to Resume Scanning: **Batch**, **Data File Path**, **Job**, **Operator**, **Time**, and **Errors** columns are displayed.

[ Operator ManagerLevel logged on ]

1 Batches Ready to Resume Scanning					
Batch	Data File Path	Job	Operator	Time	Errors
00000003.oii_scan	C:\batches\00000003	test	Operator ManagerLevel	05/01/23 08:01:31 AM	

**Figure 2-9: Batch monitor - additional information**

## 2.5.1. Output File Extensions

An internal batch file format called OII (OPEX Interchange Interface) is used to pass batches between OPEX applications (CertainScan, CertainScan Edit, and OPEX Transform), allowing changes to be applied along the way, and then produce the final output (OXI, ODI, Custom) that is made available to the back-end user. OII batch files use the extension “.oii”. Your CertainScan Batch Parameter settings can affect how and when a batch is processed using the OII file.

### Extensions:

The state of a batch is indicated by its file extension. ODI, OXI and OII support the following states (Figure 2-10):

- **Final:** \*.odi, \*.oxi, \*.oii
- **Suspended Scanning:** \*.odi\_scan, \*.oxi\_scan, \*.oii\_scan

These extensions appear based on the following Batch Parameter settings:

- Require Image and Batch Editing = No
- Prompt Operator to Suspend Batch = Yes

- **Suspended Editing:** \*.odi\_edit, \*.oxi\_edit, \*.oii\_edit

This extension appears when a batch is closed for editing.

- **Suspended Transform:** \*.odi\_transform, \*.oxi\_transform, \*.oii\_transform

This extension appears when a batch is closed for transform.

- **Temp Scanning:** \*.odi\_scan\_temp, \*.oxi\_scan\_temp, \*.oii\_scan\_temp

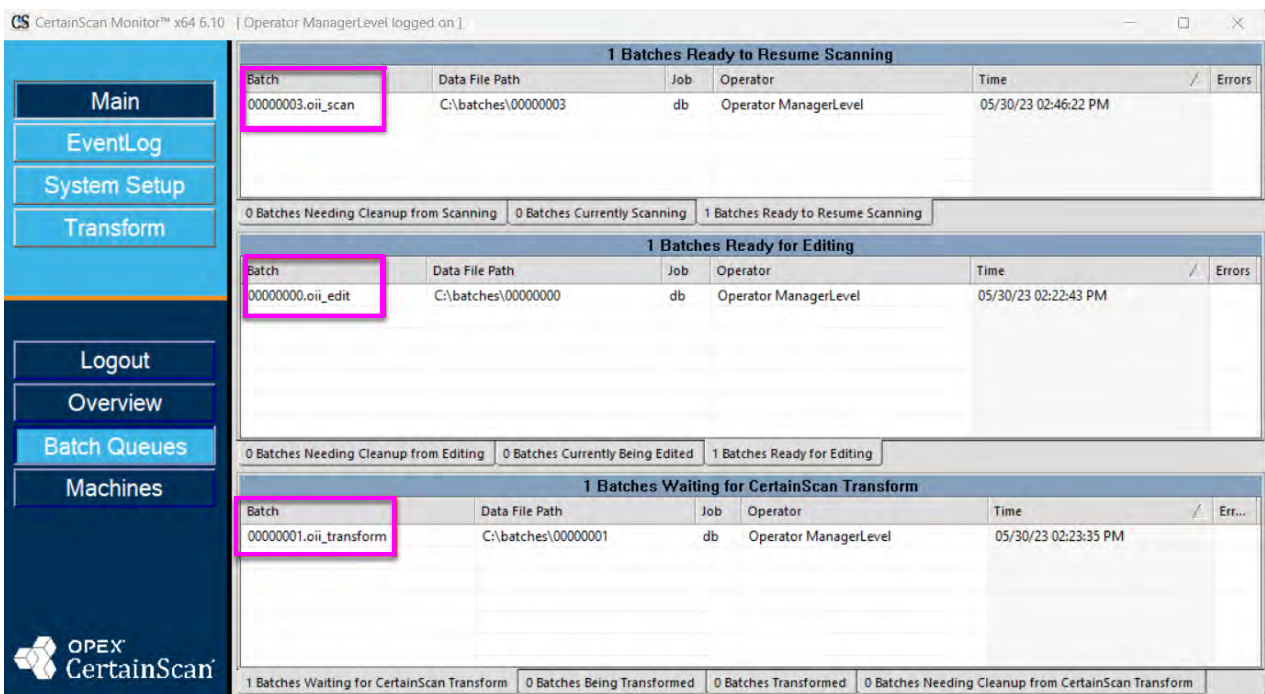
This extension is seen momentarily when a batch first appears.

- **Temp Editing:** \*.odi\_edit\_temp, \*.oxi\_edit\_temp, \*.oii\_edit\_temp

This extension appears when a batch is open in CertainScan Edit.

- **Corrupt:** \*.odx, \*.oxx, \*.oix

**Note:** This is a list of all supported states, though you may not see all states being used.



**Figure 2-10: Output file extensions**

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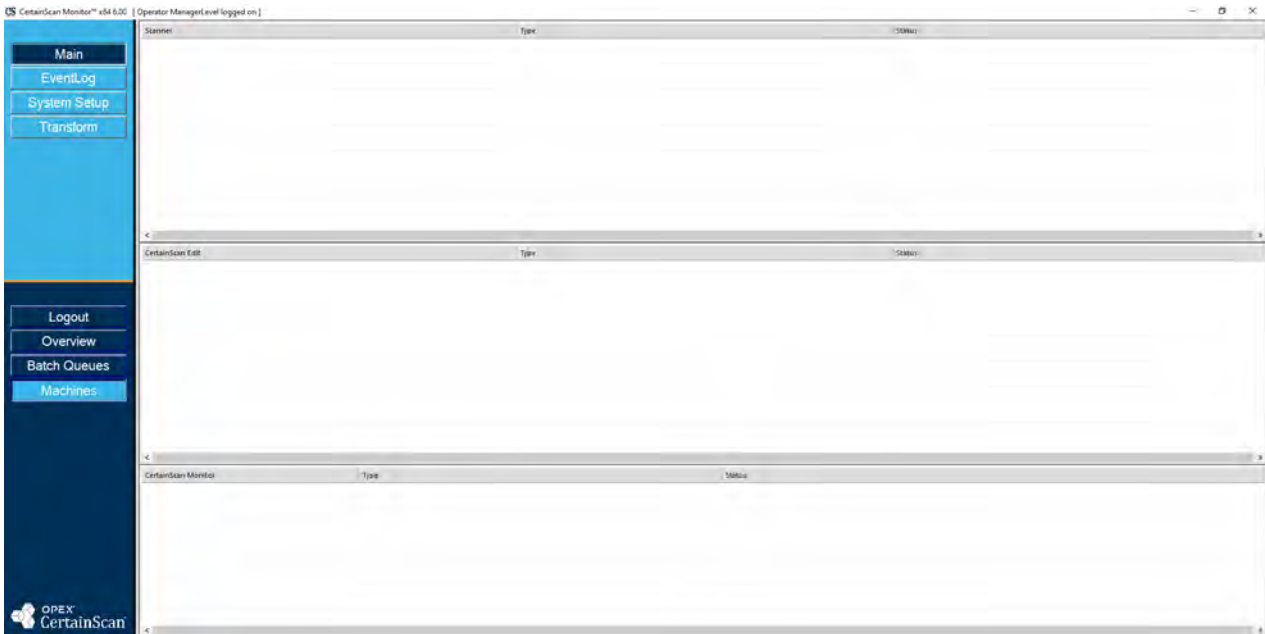
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## 2.6. Machines

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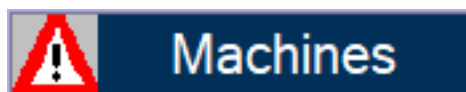
Machines access is provided to all operators, except Entry level operators (Figure 2-11).



**Figure 2-11: Machines**

Machines provides a display view of additional Scanners, CertainScan Edit and CertainScan Monitor status (if available), and setup on the same network. If not on a network, the display view will only reflect the state of the OPEX scanner computer.

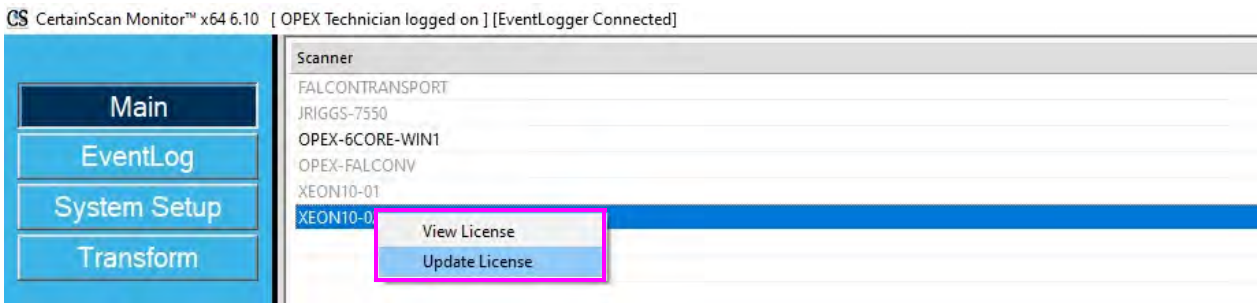
- Status Messages: Idle, Scanning, Editing, Transforming, Process no longer running and License either contains unexpected values, is close to expiring or is expired.
- The **Machines** button will include an error icon when another scanner is in an error state. This is useful when not in Machines Monitor view (Figure 2-12).



**Figure 2-12: Machines error**

## 2.6.1. Viewing and Updating Licenses

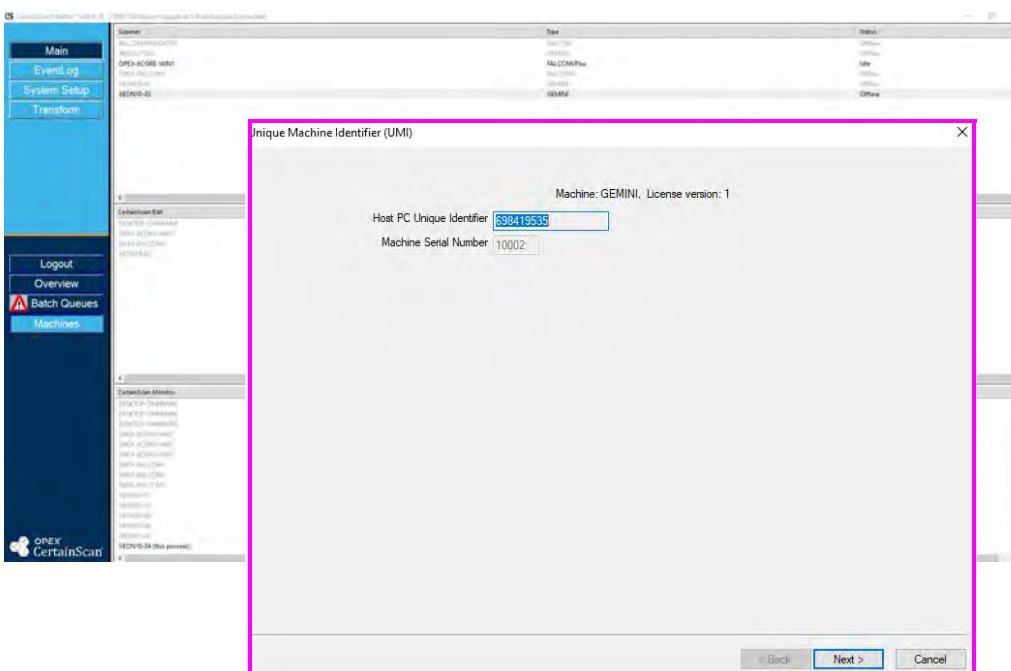
If you right-click on any of the machines in the list, you get two options: View License and Update License (Figure 2-13).



**Figure 2-13: View License/Update License**

View License allows you to see all the options, so you know which are enabled and what their expiration dates are.

Update License brings up the license window to update the license for that machine selected (Figure 2-14).



**Figure 2-14: License Window**

Once you update the machine from CertainScan Monitor, the license will get updated next time software is started on that machine.

The computer names under Scanner will update the CertainScan license, names under CertainScan Edit will update the CertainScan Edit license, and names under CertainScan Monitor will allow you to update the Monitor, ProcessLink and Transform licenses.

In the CertainScan Monitor section, be sure to select the correct **Type** from the list. For example: in Figure 2-15, if you wanted to update Transform on Xeon10-02, select the line that says CertainScan Monitor / CertainScan Transform. This will bring up the Transform license for that machine.

CertainScan Monitor	Type
DESKTOP-QM6NM98	CertainScan Monitor
DESKTOP-QM6NM98	CertainScan Monitor / CertainScan ProcessLink
DESKTOP-QM6NM98	CertainScan Monitor / CertainScan Transform
OPEX-6CORE-WIN1	CertainScan Monitor
OPEX-6CORE-WIN1	CertainScan Monitor / CertainScan ProcessLink
OPEX-6CORE-WIN1	CertainScan Monitor / CertainScan Transform
OPEX-FALCONV	CertainScan Monitor
OPEX-FALCONV	CertainScan Monitor / CertainScan ProcessLink
OPEX-FALCONV	CertainScan Monitor / CertainScan Transform
XEON10-01	CertainScan Monitor
XEON10-01	CertainScan Monitor / CertainScan Transform
XEON10-02	CertainScan Monitor
XEON10-02	CertainScan Monitor / CertainScan ProcessLink
XEON10-02	CertainScan Monitor / CertainScan Transform

**Figure 2-15: Update example**

## 2.7. EventLog

Available to Supervisor and Manager levels.

Click on the **EventLog** button to view the Event Log. The EventLog shows everything that the software has done since the current session has been started (Figure 2-16).

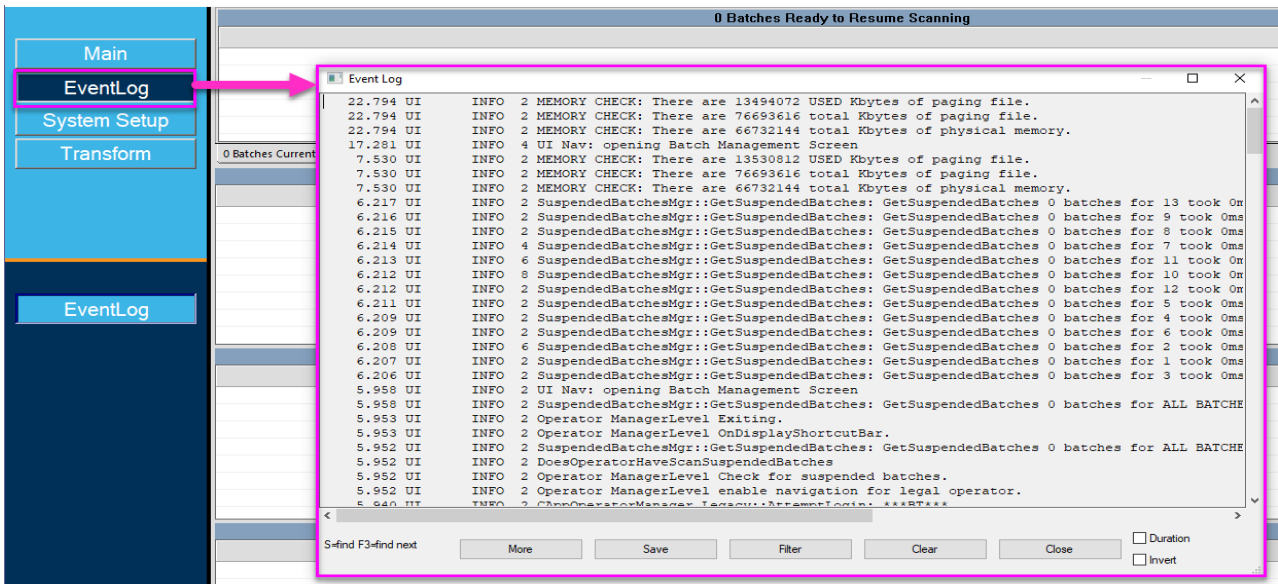


Figure 2-16: Accessing the Event Log



## 2.8. System Setup

The System Setup page offers the following (Figure 2-17):

CS CertainScan Monitor™ x64 6.10 [ Operator ManagerLevel logged on ]

Main  
EventLog  
**System Setup**  
Transform

Operator  
Software Options  
System  
Software Versions  
Email Notifications

OPEX  
CertainScan

Operator Parameters

- Operator EntryLevel
- Operator ManagerLevel
- Operator SupervisorLevel
- Operator UserLevel

Operator Groups

	Group Na...	Description
1	Banking	Enter group description
2	Hospitals	Medical Accounts

Add Print  
Delete Modify  
Import Export All  
Add Group...  
Remove Group

**Figure 2-17: System Setup**

1. **Operator:** Create and manage operators (see [page 30](#))
2. **Software Options:** License activation
3. **System:** Configuration Parameters for Monitor
4. **Software Versions:** For technical reference of software versions running
5. **Email Notifications:** Configure Email Server and configure Email Receivers

## 2.8.1. Configuration Parameters

The Configuration parameters are structured to allow easier grouping and filtering of parameters (Figure 2-18).

CS CertainScan Monitor™ x64 6.10 [ Operator ManagerLevel logged on ]

Configuration Parameters

Search:

Value different than default  Value changed

	Description	Value	Defa
<b>Batch Manager Settings</b>			
1	Encrypt Non-IEM Batches [EncryptNon-IEMBatches]		
2	Extension to Append to Encrypted Batch Data and Image Files [Ext...	.encrypted	.encry
<b>Batch Monitor Settings</b>			
3	BT Completed Suspend File Keep Time in Minutes [CompletedBatch	4294967295	429496
4	Dump Batch Processor Event Log [DumpBatchProcessEventLog]	No	No
5	Dump CSService Event Log [DumpCSServiceEventLog]	No	No
6	Use CertainScan ProcessLink [InstnaceUsesProcessLink]	Yes	No
7	Max Batch Processor Request Time in Milliseconds [MaxBatchProce	0	0
8	Run BatchProcess [RunBatchProcess]	No	No
9	Run BatchTransform [RunBatchTransform]	No	No
10	Warning Threshold Pending Batches Count [WarningThresholdPend	0	0
11	Warning Threshold Pending Batches Time (Minutes) [WarningThre	0	0
<b>General Settings</b>			
12	Active Directory Configuration File [ActiveDirectoryConfigFile]		
13	Folder Permissions Configuration File [FolderPermissionsConfigFile	C:\OPEX\SCAN...	
14	Operator Management [OperatorManagement]	Legacy	Legacy
15	Active Directory Username Option [OperatorManagementAD_Userm	First Name + L...	First N
16	Shared Settings File Path [SharedSettingsFilePath]		
<b>Image Processing Settings</b>			
17	Image Buffer Size for Monitor (Uncompressed Image Manager) in f	1000	1
<b>ONS Settings</b>			
18	ONS Live State [Live State]	Machine state	Machic

Related parameters are listed under sub headings

**Figure 2-18: Grouping Parameters**

Selecting a sub-level heading on the left will display only those parameters in that section (Figure 2-19).

Configuration Parameters

Search:

Value different than default  Value changed

	Description	Value	Default Value
<b>Batch Monitor Settings</b>			
3	BT Completed Suspend File Keep Time in Minutes [C	4294967295	4294967295
4	Dump Batch Processor Event Log [DumpBatchProcess	No	No
5	Dump CSService Event Log [DumpCSServiceEventLog	No	No
6	Use CertainScan ProcessLink [InstnaceUsesProcessLi	Yes	No
7	Max Batch Processor Request Time in Milliseconds [N	0	0
8	Run BatchProcess [RunBatchProcess]	No	No
9	Run BatchTransform [RunBatchTransform]	No	No
10	Warning Threshold Pending Batches Count [Warning	0	0
11	Warning Threshold Pending Batches Time (Minutes)	0	0

**Figure 2-19: Sub-Level parameters**

The search bar allows filtering the list of parameters to only those that contain the entered text (Figure 2-20).

Configuration Parameters

Search:

Value different than default  Value changed

	Description	Value	Default Value
<b>Batch Manager Settings</b>			
<b>Batch Monitor Settings</b>			
<b>General Settings</b>			
16	Shared Settings File Path [SharedSettingsFilePath]		
<b>Image Processing Settings</b>			
<b>ONS Settings</b>			
19	Network Batch Log Path [Network Batch Log Path]		
20	Network Batch Stats Path [Network Batch Stats Path]		
21	ONS Network Path [Network Path]	O:\	O:\
<b>Storage Settings</b>			
22	Suspend directory path [CDDSSuspendDirectoryName]	Suspend	Suspend
23	Centralized license path [CentralizedLicensePath]		
24	Operator file path [OperatorDataPath]	C:\OPEX\SCAN\Data\	C:\OPEX\SC...
25	Production data file path [ProductionPath]	C:\OPEX\SCAN\Data\	C:\OPEX\SC...
26	Test data file path [TestPath]	C:\OPEX\SCAN\Test\	C:\OPEX\SC...

**Figure 2-20: Filtering parameters**

Check boxes allow you to search for values that are different than the default settings, as well as values changed.

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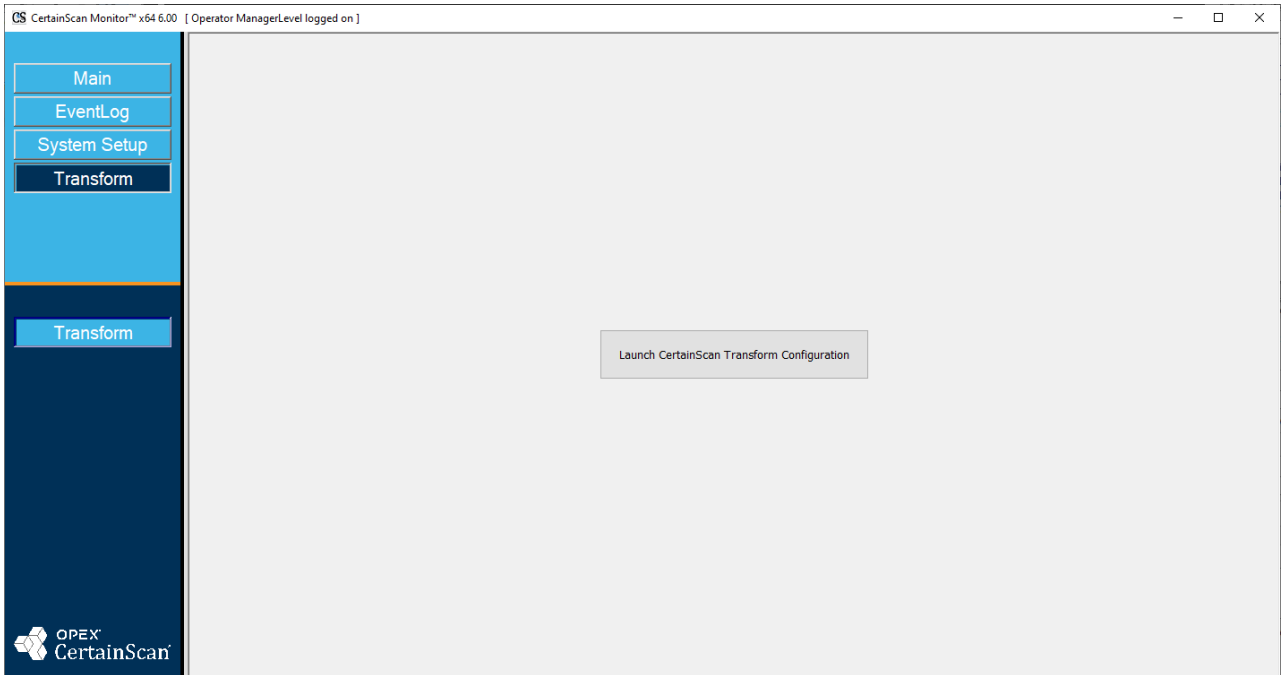
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## 2.9. Transform

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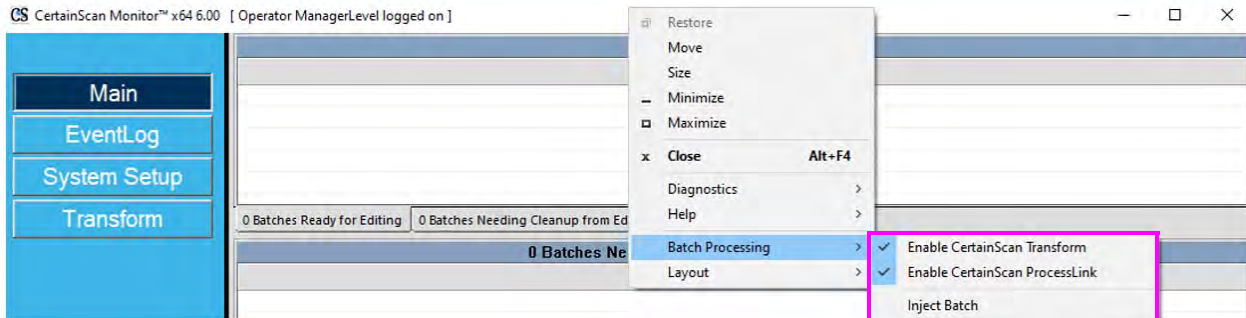
Available to Manager levels (if Transform is activated). This will launch the Transform utility (Figure 2-21).



**Figure 2-21: Launch CertainScan Transform**

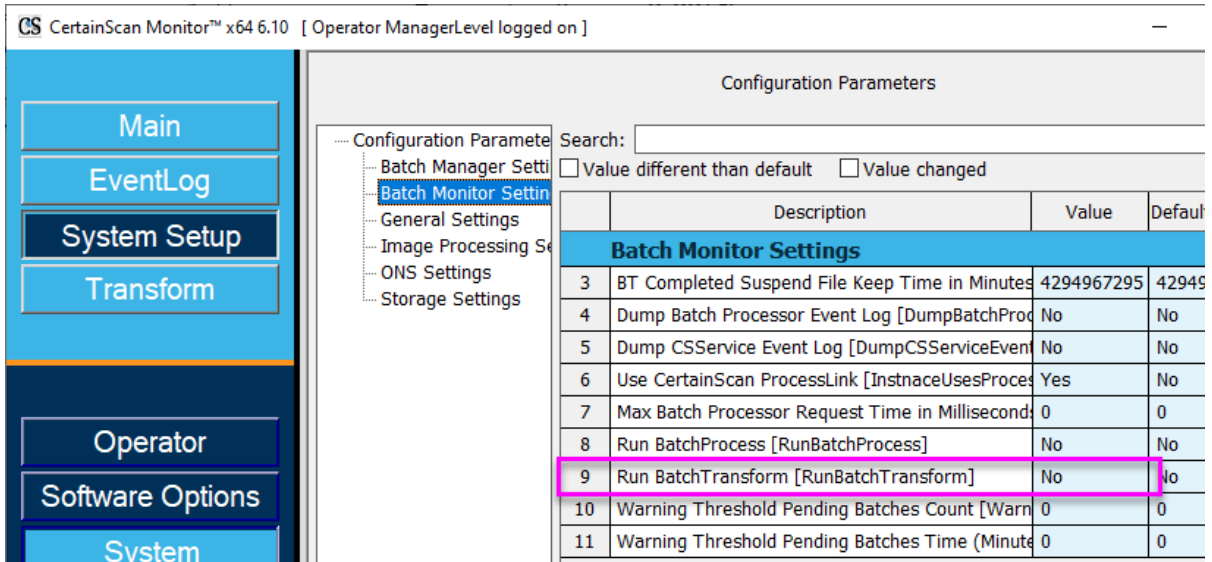
## 2.9.1. Enable/Disable CertainScan Transform and ProcessLink

- Enable/Disable CertainScan Transform and ProcessLink, along with being able to Inject Batch. Right-click in the header and select under **Batch Processing** (Figure 2-22).



**Figure 2-22: Batch Processing access**

Or configure as default. Go to **System Setup > System > Batch Monitor Settings > Run Batch Transform** (Figure 2-23).



**Figure 2-23: Run Batch Transform**

## 2.10. Manage Operators

When logged on as a Supervisor or Manager, CertainScan Monitor provides the ability to create and manage new operators, or modify existing ones (Figure 2-24).

CS CertainScan Monitor™ x64 6.10 [ Operator ManagerLevel logged on ]

Main  
EventLog  
System Setup  
Transform

Operator  
Software Options  
System  
Software Versions  
Email Notifications

OPEX  
CertainScan

Operator Parameters

- Operator EntryLevel
- Operator ManagerLevel
- Operator SupervisorLevel
- Operator UserLevel

Operator Groups

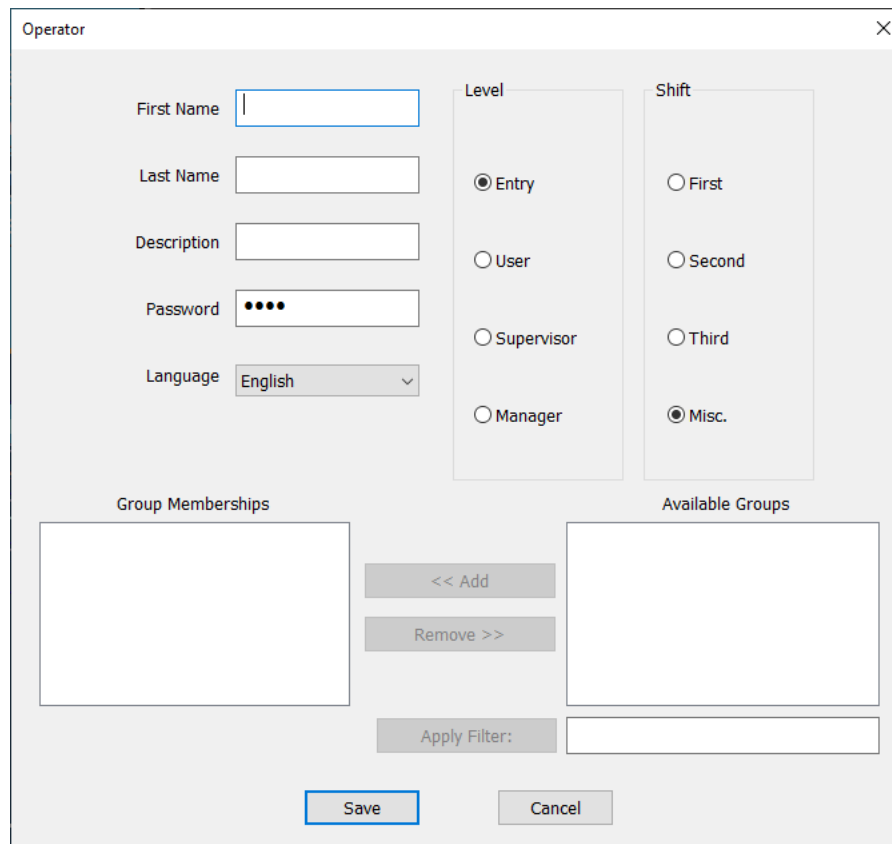
	Group Na...	Description
1	Banking	Enter group description
2	Hospitals	Medical Accounts

Add Add Group...  
Print Remove Group  
Delete Modify  
Import Export All

**Figure 2-24: Managing Operators**

## Add a New Operator: System Setup - Operator

1. Click on the **Add** button to open the Operator pop-up screen (Figure 2-25).



**Figure 2-25: Operator Screen**

2. In the Operator pop-up screen, enter the information fields provided: **First Name**, **Last Name**, **Level**, **Shift**, **Description**, **Language** and **Password** if necessary.
3. Click **Save** or **Cancel** to exit.

**Note:** A Supervisor is not able to add a Manager level operator.

### 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.*

## 2.10.1. Add Group

This is not required to configure in Monitor. The Add Group feature is configured in CertainScan when Job Access by Group is configured to limit job access by operator.



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## 2.11. Customizing the Layout

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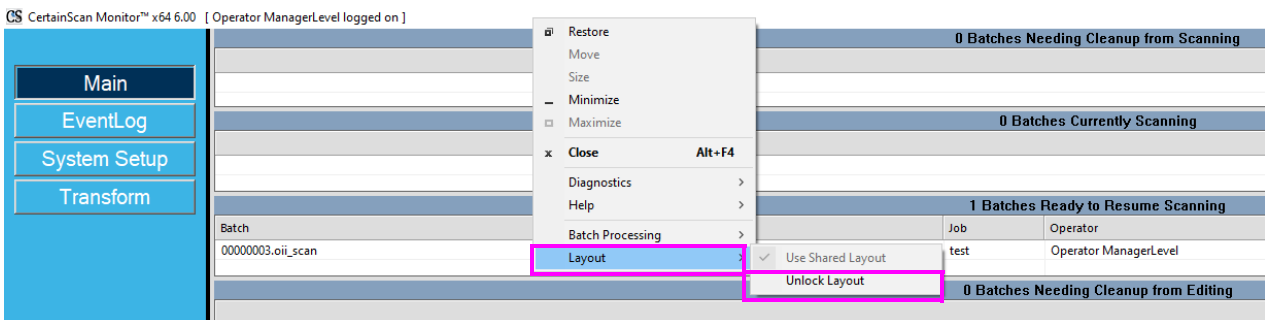
---

CertainScan Monitor allows all operator levels (except Entry Level) to customize the display view. Once the layout is unlocked, use the Click/Drag/Drop function or position icons to: Expand views, group status levels into single group with tab access, arrange screen view, or change displayed order. Many arrangements are possible, as shown in the following examples.

### 2.11.1. Unlock Layout

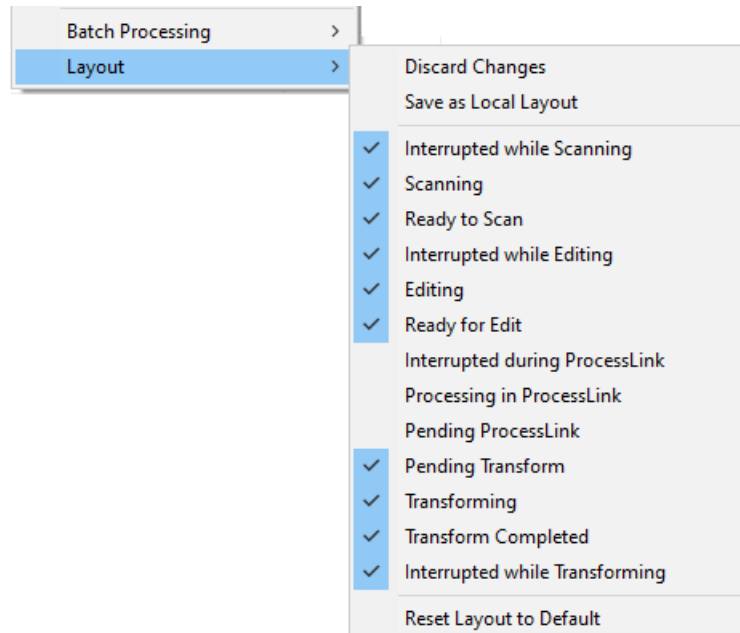
Monitor layout configuration is locked by default when launching, and can be unlocked by selecting within the **Layout** menu.

1. Click **Main > Batch Queues**.
2. Right-click in the Header.
3. Click **Layout** and select **Unlock Layout** (Figure 2-26).



**Figure 2-26: Unlock Layout**

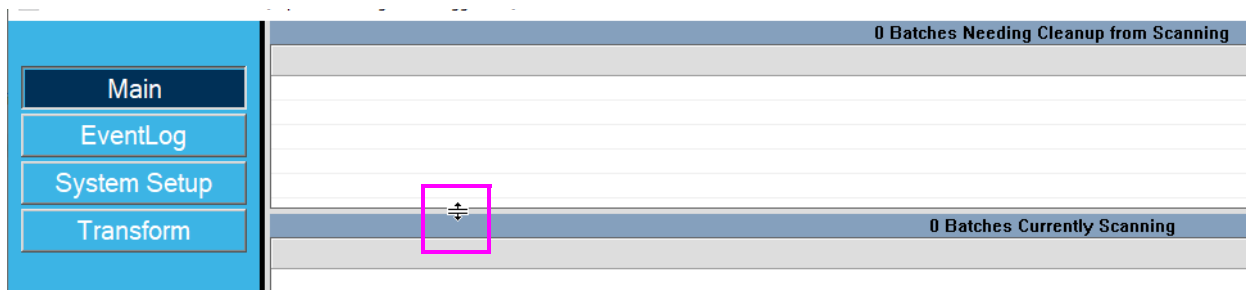
4. Once unlocked, customize the Batch Queues Layout as preferred. In addition, check or uncheck the queues you want to display (Figure 2-27).



**Figure 2-27: Layout Options**

## 2.11.2. Expand Views

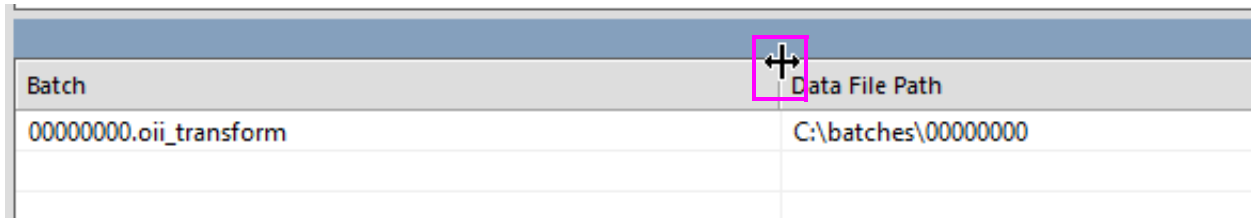
1. Scroll cursor above panel heading till icon appears (Figure 2-28).
2. Left-click and hold, drag up or down to expand.
3. This can be done for each panel heading. Example: Expanded each Scanning stage.



**Figure 2-28: Expanding views**

## 2.11.3. Resize Columns

Columns can be sized. Place cursor left of header name till highlighted icon shows, click and drag to desired width (Figure 2-29).



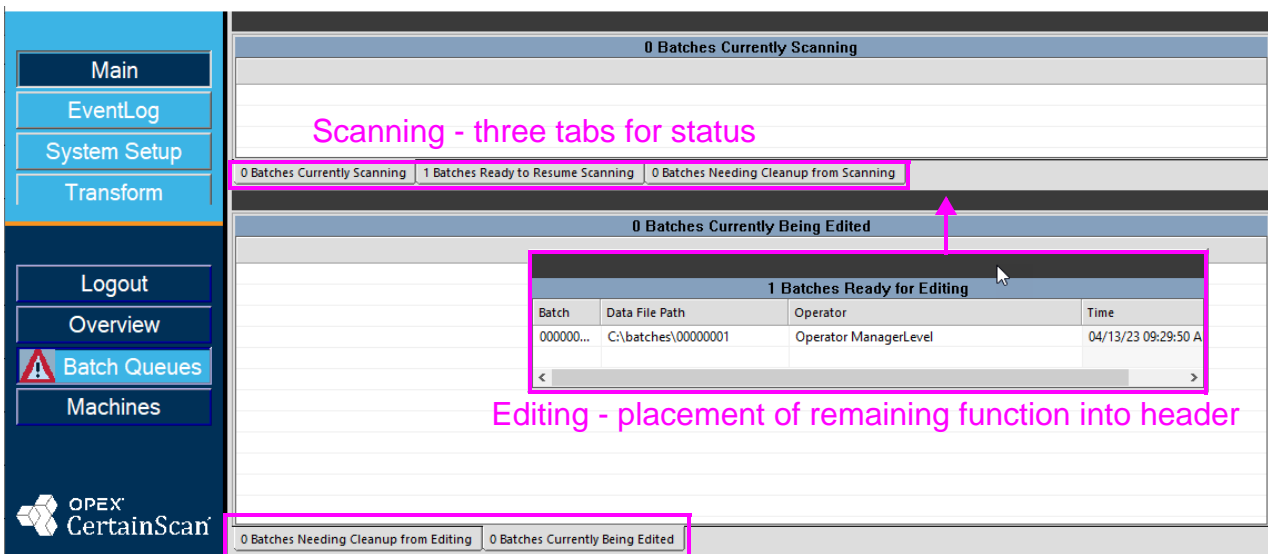
Batch	Data File Path
00000000.oii_transform	C:\batches\00000000

**Figure 2-29: Resize column icon**

## 2.11.4. Grouping Panel Levels with Tab Access

1. Place cursor in dark panel level heading, left-click and hold.
2. Drag and place into desired group panel header.

Reference, three tabs in Scanning, Figure 2-30 shows placement of third editing function (Batches Ready for Editing), as prior two were already placed. Tabs can also be arranged by dragging left or right within level panel for desired order.



Scanning - three tabs for status

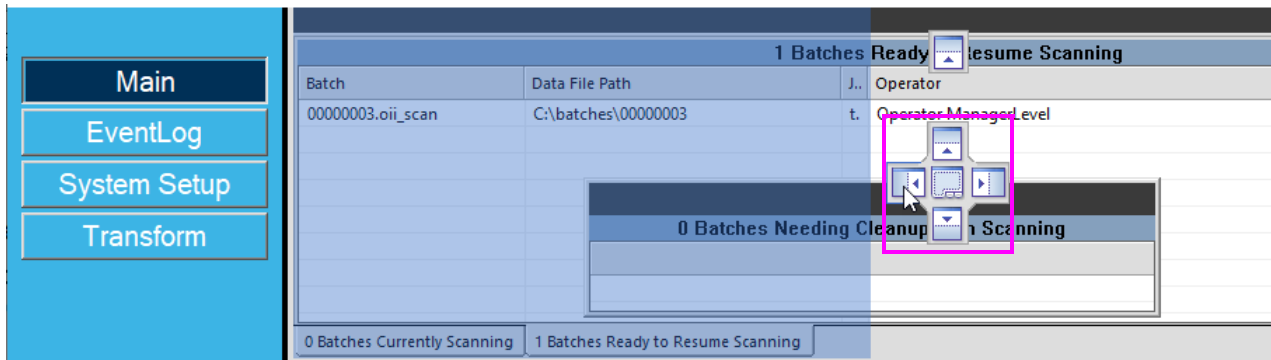
Batch	Data File Path	Operator	Time
000000...	C:\batches\00000001	Operator ManagerLevel	04/13/23 09:29:50 A

Editing - placement of remaining function into header

**Figure 2-30: Grouping panel levels**

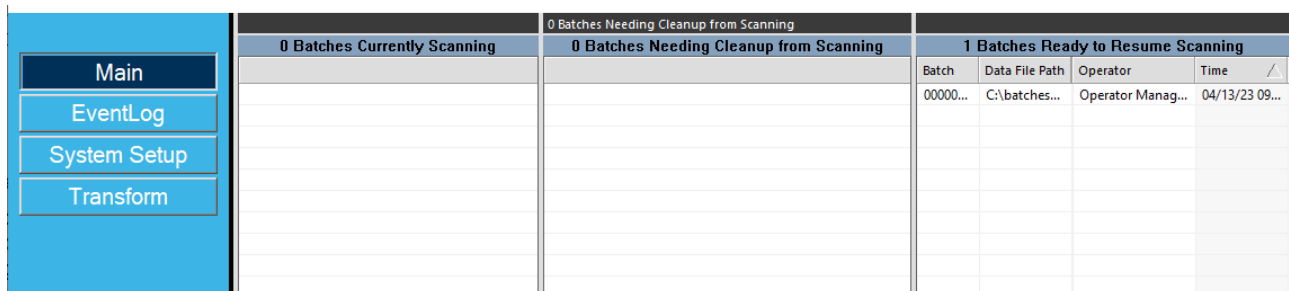
## 2.11.5. Arrange Screen View

1. Place cursor in panel level heading, left-click and hold.
2. Upon moving the cursor, a position tool appears, enabling you to select a location for the panel. Moving the cursor to one of the positions (Top, Bottom, Left, or Right) will highlight the area showing where the panel will be placed (Figure 2-31).



**Figure 2-31: Arranging screen views - position icon**

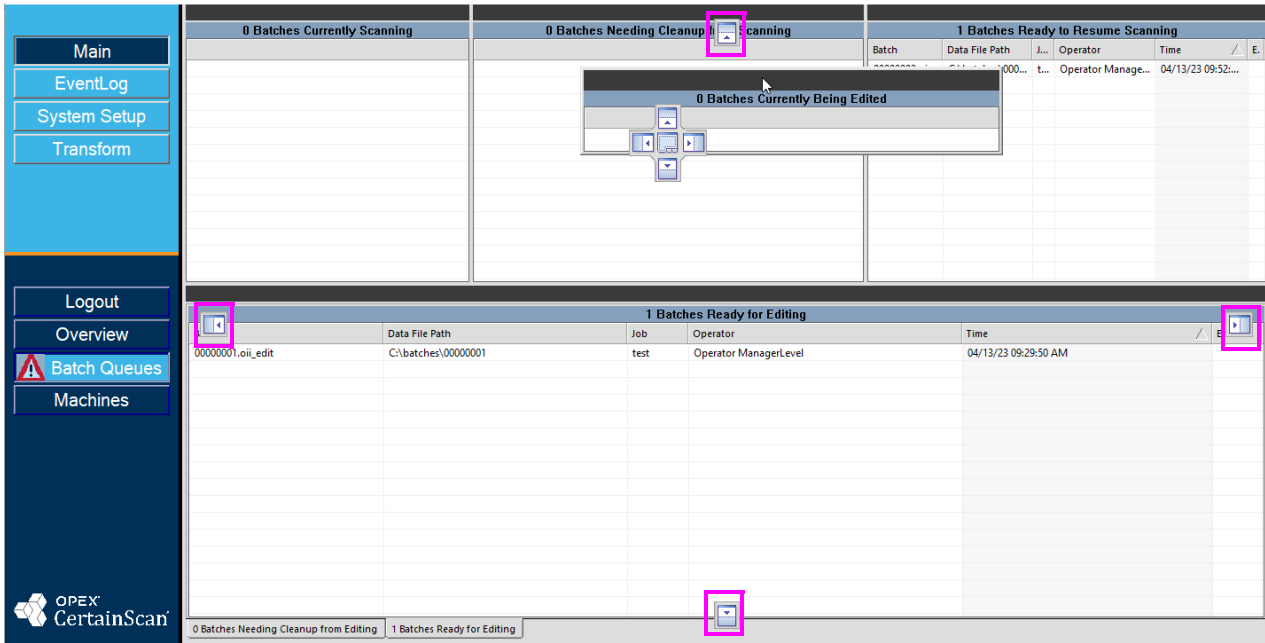
The example screen in Figure 2-31 shows the prior placement of **Batches Currently Scanning** to left, and **Batches Ready to Resume Scanning** to right. Figure 2-32 shows the placement of **Batches Needing Cleanup from Scanning** now in the middle.



**Figure 2-32: Arranging screen views - example**

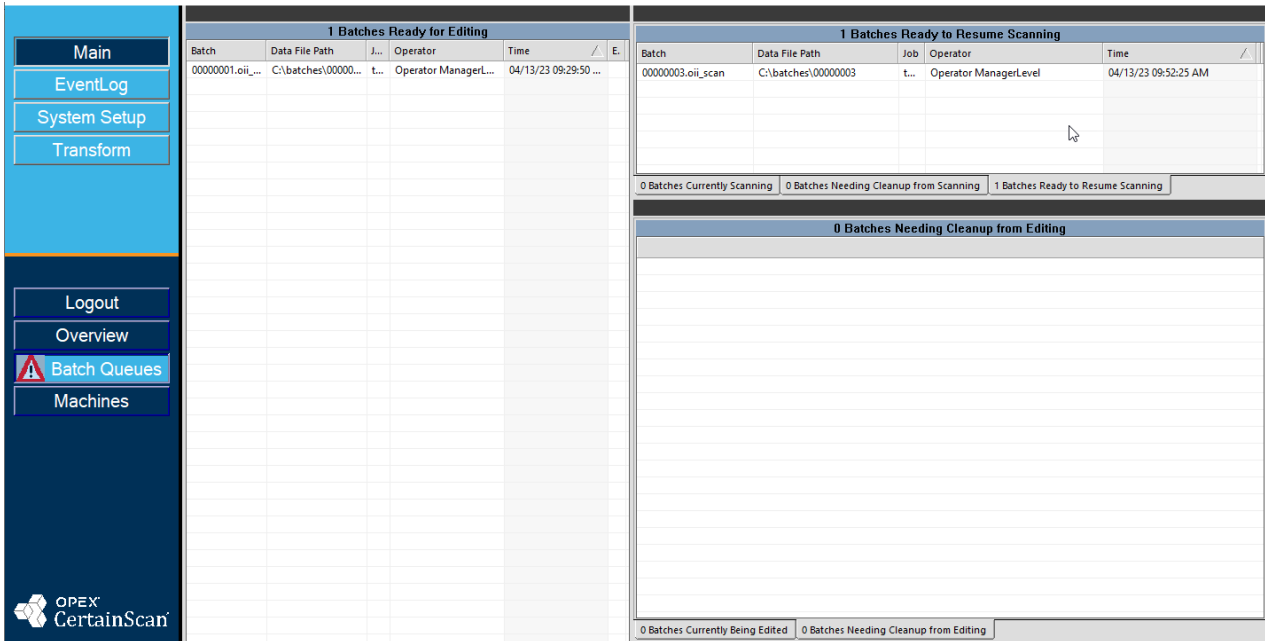
## 2.11.6. Change Displayed Order

1. Place cursor in panel level heading, left-click and hold.
2. Upon moving the cursor, individual position tools appear (Figure 2-33).



**Figure 2-33: Individual position tools**

3. Drag and drop the desired group level header and place at the Top, Bottom, Left or Right. The example in Figure 2-34 shows panel **Batches Ready for Editing** repositioned to the left.

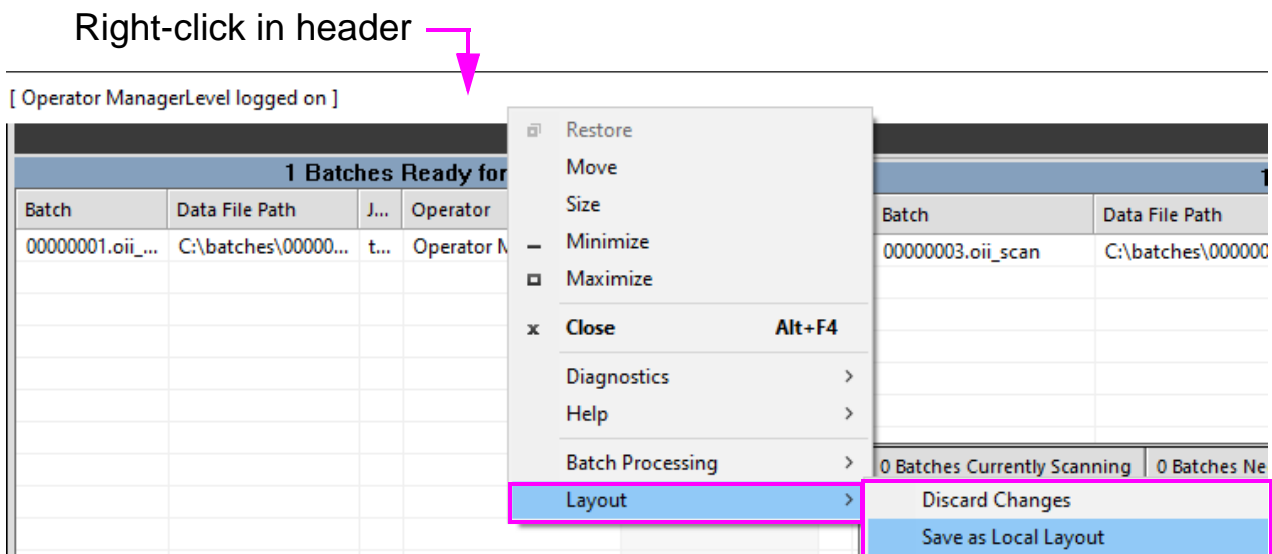


**Figure 2-34: Changed order example**

## 2.11.7. Saving a Layout

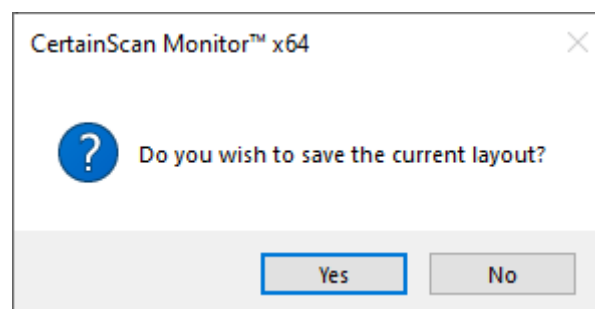
Changes made to your screen layout will not be saved automatically. However you can save them using one of two ways:

1. Save changes immediately by:
  - a. Right-clicking in the header (Figure 2-35).
  - b. Select **Layout > Save as Local Layout** or **Discard Changes** to return to the previous layout.



**Figure 2-35: Save as Local Layout**

2. Or when closing or logging out of Monitor, select **Yes** at the prompt to save changes (Figure 2-36).



**Figure 2-36: Save layout prompt**

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# 3. Operation

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## 3.1. CertainScan Monitor Batches

This section describes some of the operations that can be performed in CertainScan Monitor regarding batches:

- CertainScan Monitor Batches needing Cleanup
- CertainScan Monitor Batches Ready to Resume Scanning or Ready for Editing

### 3.1.1. Batches Needing Cleanup

When a batch error occurs, the **Batch Queues** button on the left will display an error icon (Figure 3-1). This alerts the operator of a batch in an error state.

1 Batches Needing Cleanup from Scanning						
Batch	Data File Path	Job	Operator	Time	Running on...	Errors
00000002.oil_scan_temp	C:\batches\00000002	test	Operator ManagerLevel	04/13/23 09:30:47 AM	-7750	Requires cleanup after exception

**Figure 3-1: Batch Error example**

- When an operator could not close a batch because of a computer issue, the interrupted batch becomes a temporary batch. CertainScan Monitor will list the batch in the **Batches Needing Cleanup from Scanning** panel. The batch will be shown in red. The error will be “Requires cleanup after exception”. When CertainScan is restarted and that temporary batch is resumed, the batch will be listed again in the **Batches Currently Scanning** panel.
- When a batch is being edited and CertainScan Edit closed because of a computer issue, the interrupted batch will become a temporary batch. CertainScan Monitor will list it in **Batches Needing Cleanup for Editing** panel. The batch will be shown in red. The error will be “Requires cleanup after exception”.

- When an operator could not close a ProcessLink batch due to a computer issue, the interrupted batch becomes a temporary batch. CertainScan Monitor will list the batch in the **Batches Needing Cleanup from CertainScan ProcessLink** panel. The batch will be shown in red. When CertainScan is restarted and that temporary batch is resumed and saved for ProcessLink, the batch will move to “Waiting for CertainScan ProcessLink” state.

### 3.1.2. Batches Ready for Editing/Ready to Resume Scanning

When Batch parameters “Require Image and Batch Editing” and/or “Prompt Operator to Suspend Batch” are configured in CertainScan, the operator will be prompted to choose an action when exiting the batch. Based on the selection, CertainScan Monitor will show as **Batches Ready for Editing** or **Batches Ready to Resume Scanning** (Figure 3-2).

1 Batches Ready for Editing				
Batch	Data File Path	Job	Operator	Time
00000001.oij_edit	C:\batches\00000001	test	Operator ManagerLevel	04/13/23 09:29:50 AM

1 Batches Ready to Resume Scanning				
Batch	Data File Path	Job	Operator	Time
00000003.oij_scan	C:\batches\00000003	test	Operator ManagerLevel	04/13/23 09:52:25 AM

**Figure 3-2: Batches Ready for Editing / Ready to Resume Scanning**

- “Batches Currently Scanning” and “Batches Currently Being Edited” are live, based on OPEX scanner activity.

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## 3.2. Transform Batch Menu Functions

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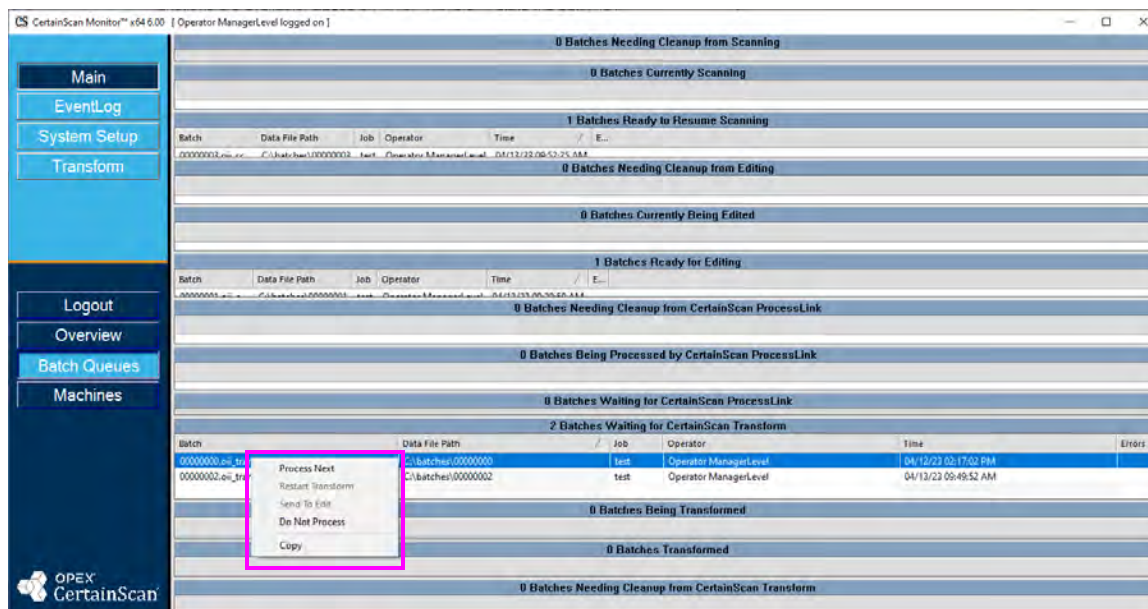
When batches are in a Transform state (if Transform is activated), a number of right-click functions are available, based on which Transform state the batch is in. Functions that are not active will be grayed out.

After a batch is transformed, Monitor will rename the oii data file if it was not deleted by Transform. This prevents the batch from being reprocessed by the same Transform computer or any additional Transform computers used, depending on the network environment.

### 3.2.1. Batches Waiting for Transform Functions:

- **Process Next:** The batch will be the next batch to be Transformed (with **Transform Batches** box checked)
- **Restart Transform:** When batch in an error condition (red font), convert back to state “Waiting for Transform.”
- **Send to Edit:** Convert back to editable and return batch to “Batches Ready for Edit” state.
- **Do Not Process:** Batch will not be transformed and displayed in red font. Text message will show canceled by the user operator (Figure 3-3).

- Copy: Copy the batch text to paste in another software application (ex. Notepad, Word, Excel, etc.)



**Figure 3-3: Batches Waiting for Transform functions**

### 3.2.2. Batch Being Transformed Functions:

- Stop Transforming: Batch will be transferred to “Batches Waiting for Batch Transform” and displayed in red. Text message will show canceled by user and computer name.
- Copy: Copy the batch text to paste in another software application (ex. Notepad, Word, Excel, etc.)

### 3.2.3. Batches Transformed Functions:

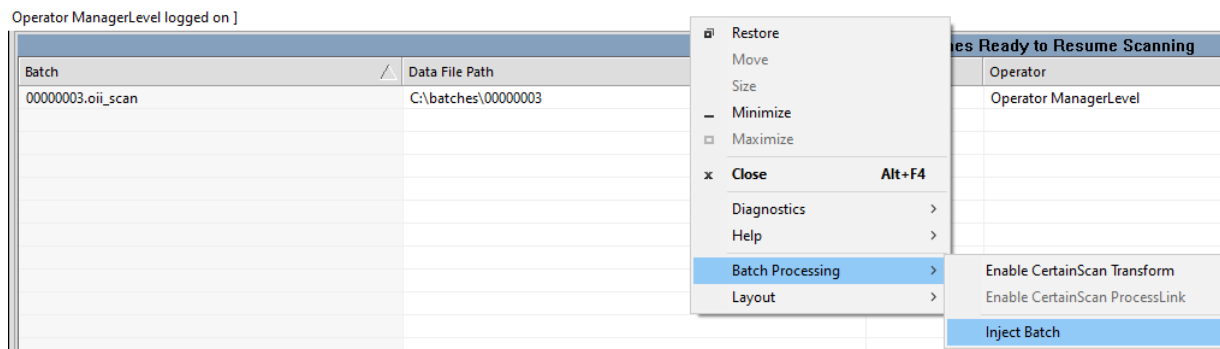
- Delete: Remove the batch from Transformed status panel
- Copy: Copy the batch text to paste in another software application (ex. Notepad, Word, Excel, etc.)

## 3.2.4. Batches Needing Cleanup from CertainScan Transform

- Restart Transform: When batch in an error condition (red font), convert back to state “Waiting for Transform.”
- Send to Edit: Convert back to editable and return batch to “Batches Ready for Edit” state.
- Delete: Remove the batch from “Batches Needing Cleanup from CertainScan Transform”
- Copy: Copy the batch text to paste in another software application (ex. Notepad, Word, Excel, etc.)

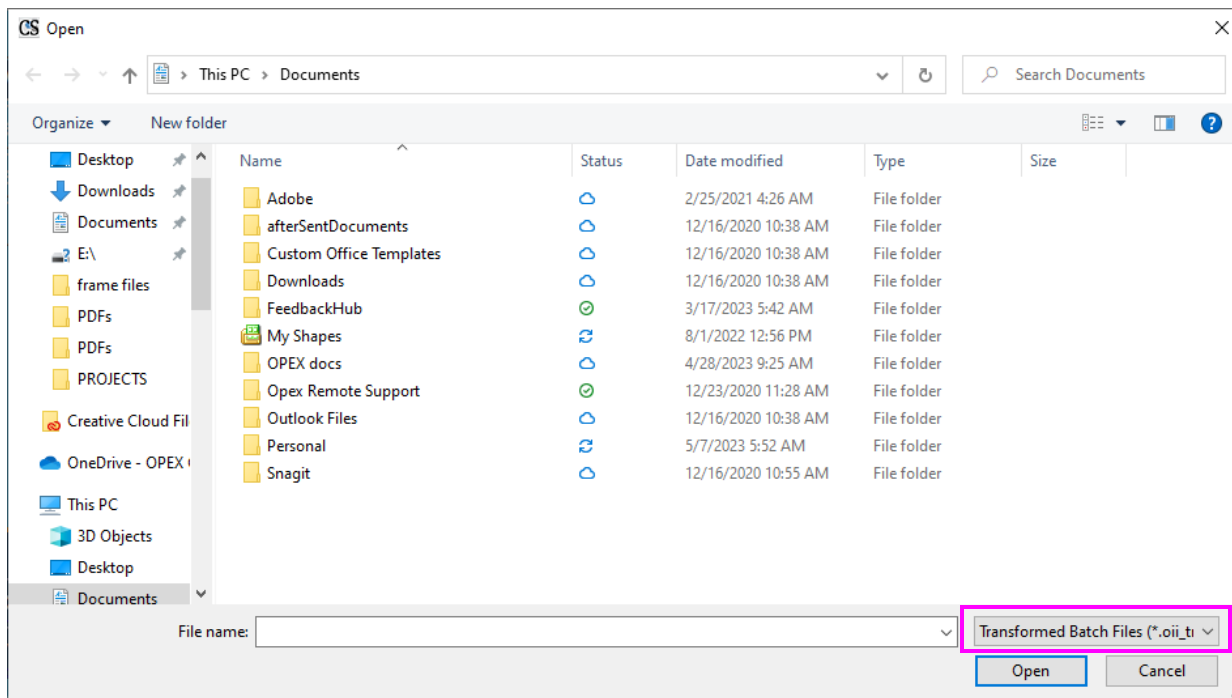
## 3.2.5. Requeue a Transformed Batch

1. To requeue a Transformed batch, right-click in the Monitor header, select **Batch Processing > Inject Batch** (Figure 3-4).



**Figure 3-4: Inject Batch**

2. When the dialog window opens, select **Transformed Batch Files** in the drop-down selection box above the **Open/Cancel** buttons to display completed batches (Figure 3-5).

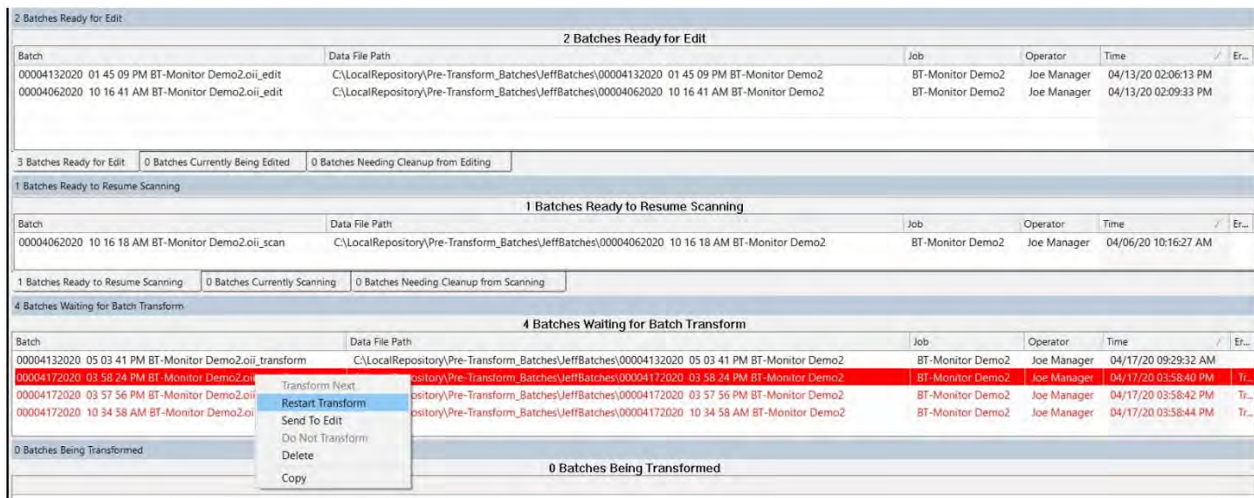


**Figure 3-5: Select Transformed Batch Files**

## 3.3. Selecting Multiple Batches

In panels **Batches Waiting for Batch Transform**, **Batches Being Transformed** and **Batches Transformed**, the operator can select multiple batches to apply menu functions. However, all selected batches must meet the criteria for a menu selection to be available.

An example: For “Restart Transform” to be available, all selected batches must be in an error state (Figure 3-6).



**Figure 3-6: Selecting multiple batches**

**Note:** Transform Next menu function is not available if multiple batches are selected.



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## 3.4. ProcessLink Batch Menu Functions

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When Jobs are saved for ProcessLink (if ProcessLink is activated), the Jobs will be placed in “Waiting for CertainScan ProcessLink” state (Figure 3-7).

0 Batches Needing Cleanup from CertainScan ProcessLink
0 Batches Being Processed by CertainScan ProcessLink
0 Batches Waiting for CertainScan ProcessLink

**Figure 3-7: ProcessLink functions**

When Jobs are processed by ProcessLink, they will proceed through the CertainScan process to resume scanning, to edit or save the batch (Figure 3-8).

0 Batches Needing Cleanup from CertainScan ProcessLink
0 Batches Being Processed by CertainScan ProcessLink
0 Batches Waiting for CertainScan ProcessLink

**Figure 3-8: ProcessLink - resume scanning**

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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.



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Monitor