June 2023





CertainScan® Monitor 6.10 User Manual

9306900CM6.10-EN

Revision 23-01

Original Instructions



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Document History

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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CertainScan® Monitor 6.10

User Manual

1.1. About CertainScan® Monitor

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 64bit, 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."

1.2. About the Manual

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 <u>page 3</u>). Be sure to retain the latest electronic release of the manual for your reference. The latest release can be downloaded in PDF format at <u>www.opexservice.com</u>.

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.



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



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

NOTICE

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

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2.1. Overview

This chapter describes the CertainScan® Monitor operator interface.

2.2. CertainScan Monitor Login

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).

PEX'	Opera EntryLe	tor evel	Operat Managert	or	Operate Supervisor	10	Operato UserLevi	r el				
ertainScan LOG-IN					Logi	n New Oper Nam Passwo	Please Er	nter Passw r Manager				
							OK	c	ancel			
Keyboard	1 1		1 1				ОК	C	ancel			4
Keyboard Esc	0	1	2	3	4	5	б	7	ancel 8	9	<back< td=""><td>kspace</td></back<>	kspace
	D A	1 B	z C	3 D	4 E					a		
Esc						5	6	7	8			kspace

Figure 2-2: Operator login

User Interface

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 <u>"Enable/Disable CertainScan Transform and ProcessLink" on page 29</u> for more information on this window.

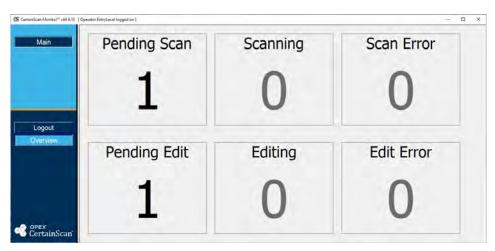


Figure 2-3: Entry Level Main screen

• User/Supervisor/Manager Level: Batch Queues are displayed (User level shown in Figure 2-4).

See <u>"Batch Queues" on page 18</u> for more information on this window.

CertainScan Monitor** at	64.6.10 [Operator UserLevel logged on	1				- 0 >
	OTHER DRIVEN		1 Batches	Ready to Resume Scanning		
	Batch	Data File Path	Job	Operator	Time	Enors
Main	0000003.oii_scan	C/\batcher\0000003	lest	Operator ManagerLevel	05/01/23 08:01:31 AM	
	D Rabines Corrently Sciencing	© Batches Needing Cleanup from Scanning 1 B		Scanning		
Logout						
Overview			10-	tches Ready for Editing		
Batch Queu	es Batch	Data File Path	Job	Operator	Time	Enor
Machines	00000001.oii.edt	Cribationes/00000001	tet	Operator ManagerLevel	05/01/23 08/01/20 AM	
			B Basch	es Currently Being Edited		_

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

2.4. Overview

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).

CS CertainScan Monitor™ x64 6.10 [Operator ManagerLevel logged on]	
Main EventLog System Setup Transform	Configuration Parameters Batch Manager Settings Batch Monitor Settings General Settings Image Processing Settings ONS Settings Storage Settings	Configuration Parameters Search: Value different than default Value changed Batch Monitor Settings 3 BT Completed Suspend File Keep Time in Minutes [CompletedBatcf 4 4 Dump Batch Processor Event Log [DumpBatchProcessEventLog] 5 Dump CSService Event Log [DumpCSServiceEventLog] 6 Use CertainScan ProcessLink [InstnaceUsesProcessLink] 7 Max Batch Processor Request Time in Milliseconds [MaxBatchProce 0 8 Run BatchProcess [RunBatchProcess] 9 Run BatchTransform [RunBatchTransform] 10 Warning Threshold Pending Batches Count [WarningThresholdPend 11 Warning Threshold Pending Batches Time (Minutes) [WarningThre

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 with 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.

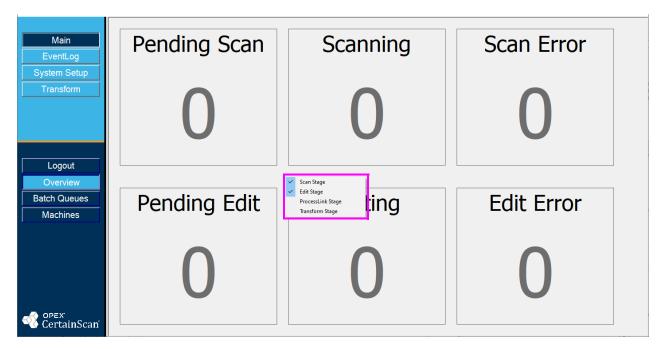


Figure 2-7: Scan and Edit Stages

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.

			1 Batches Ready to	Resume Scanning	
Batch	Data File Path	Job	Operator	Time	Errors
00000003.oii_scan	C:\batches\0000003	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 backend 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.

		1 Batches Re	eady to Resume Scanning			
Batch	Data File Path	Job	Operator	Time	1	Erro
Main 00000003.oii_scan	C:\batches\0000003	db	Operator ManagerLevel	05/30/23 02:46:22 PM		
EventLog						
System Setup						-
Transform 0 Batches Needing	Cleanup from Scanning 0 Batches Curr	ently Scanning	1 Batches Ready to Resume Scanni	ng		
manatorini		1 Batch	es Ready for Editing			
Batch	Data File Path	Job	Operator	Time	1	Error
0000000,oii_edit	C:\batches\0000000	db	Operator ManagerLevel	05/30/23 02:22:43 PM		
Logout						
Logout Overview						
Overview	Cleanup from Editing 0 Batches Curren	tly Being Edited	1 Batches Ready for Editing			
Overview	,		1 Batches Ready for Editing	m	_	
Overview Batch Queues O Batches Needing	,	Batches Waiti		m Time	4	Err.,
Overview Batch Queues Machines	1 I Data File Path	Batches Waiti	ng for CertainScan Transfor		1.	Err.

Figure 2-10: Output file extensions

2.6. Machines

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

	Stannet		Type		Stenar	
	Contraction of the second seco		194		- States	
Main						
EventLog						
ystem Setup						
Transform						
manaioni						
	1					
	¢					
	CertainScan Edit		Tglar		Statur	
Logout						
Logout						
Overview						
and the second						
atch Queues						
Machines						
Wachines.						
	é	and the second				
	CertainScan Monitol	7/20		Millio		
		122				
	1					
opex GertainScan						

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).

	Scanner	
Main	FALCONTRANSPORT JRIGGS-7550	
EventLog	OPEX-6CORE-WIN1 OPEX-FALCONV	
System Setup	XEON10-01 XEON10-0 View License	
Transform	Update License	

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).

Contraction and the later					
	Sectornet		Trae	Detro	
Main	Sec. 24 Min. Colline		Test (Mr.	264	
Main	OPD-SCORE WINT		Hai, CONVPtue	100	
Eventing	OPEN-BCORE WHAT		HALCONVEN	late	
	An owned and				
stem Setup	NON-12		GLOV .	Office	
ranstorm	and a set				
(auzioni)	_				
	J.	nique Machine Identifier (UMI)			×
		and the second se			
			Machine: GEMINI, License version:	1	
	4				
	Certaintum Bar	Host PC Unique Identifier	410525		
	SO/OF OWNER				
-	tathin ACONT soluti tarbit des (Chin	Machine Serial Number 100	00		
	adjusting.	machine Sonal Multiper 10(102		
Logout					
Overview					
atch Queues					
Northines.					
	-				
	4				
	Zamandrian Mendles				
	Trace breaking				
	(K)greps (Addenie)				
	http://cite-instanchi.				
	Dath at One-and				
	and a strength of the strength				
	hards and Others				
	hallow man (Chino				
	famm-min (CMA)				
	Martine and				
	Anna and				
	Lamanian .				
and the second se	Minerus				
ertainScan	180APG-04 (this percent)				
creamscan					
				< Back Next >	Cancel

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	Туре	
DESKTOP-OM6NIM98	CertainScan Monitor	
DESKTOP-QM6NM98	CertainScan Monitor / CertainScan ProcessLink	
DESKTOP-OM6NM98	CertainScan Monitor / CertainScan Transform	
OPEX-6CORE-WIN1	CertainScan Monitor	
OPEX-6CORE-WIN1	CertainScan Monitor / CertainScan ProcessLink	
OPEX-5CORE-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).

		0 Batches Ready to Resume Scanning
Main		
EventLog	Event Log	— 🗆 X
LVCINEOg	22.794 UI	INFO 2 MEMORY CHECK: There are 13494072 USED Kbytes of paging file.
System Setup	22.794 UI	INFO 2 MEMORY CHECK: There are 76693616 total Kbytes of paging file.
System Setup	22.794 UI	INFO 2 MEMORY CHECK: There are 66732144 total Kbytes of physical memory.
	17.281 UI	INFO 4 UI Nav: opening Batch Management Screen
Transform	0 Batches Current 7.530 UI	INFO 2 MEMORY CHECK: There are 13530812 USED Kbytes of paging file.
	7.530 UI	INFO 2 MEMORY CHECK: There are 76693616 total Kbytes of paging file.
	7.530 UI	INFO 2 MEMORY CHECK: There are 66732144 total Kbytes of physical memory.
	6.217 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 13 took 0m
	6.216 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 9 took 0ms
	6.215 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 8 took 0ms
	6.214 UI	INFO 4 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 7 took 0ms
	6.213 UI	INFO 6 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 11 took 0m
	6.212 UI	INFO 8 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 10 took 0m
	6.212 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 12 took Om
EventLog	6.211 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 5 took 0ms
LveniLog	6.209 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 4 took 0ms
	6.209 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 6 took 0ms
	6.208 UI	INFO 6 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 2 took 0ms
	6.207 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 1 took 0ms
	6.206 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for 3 took 0ms
	5.958 UI	INFO 2 UI Nav: opening Batch Management Screen
	5.958 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for ALL BATCHE
	5.953 UI	INFO 2 Operator ManagerLevel Exiting.
	5.953 UI	INFO 2 Operator ManagerLevel OnDisplayShortcutBar.
	5.952 UI	INFO 2 SuspendedBatchesMgr::GetSuspendedBatches: GetSuspendedBatches 0 batches for ALL BATCHE
	5.952 UI	INFO 2 DoesOperatorHaveScanSuspendedBatches
	5.952 UI	INFO 2 Operator ManagerLevel Check for suspended batches.
	5.952 UI	INFO 2 Operator ManagerLevel enable navigation for legal operator.
	5 940 TIT	TNEO 2 ChnnOnerstorManager TegaguivittemntTogin ****RT****
	S=find F3=find next	More Save Filter Clear Close Invert

Figure 2-16: Accessing the Event Log

2.8. System Setup

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

CertainScan Monitor™ x64 6.10	[Operator ManagerLevel logged on]		
Main EventLog System Setup Transform	Operator Parameters Operator EntryLevel Operator ManagerLevel Operator SupervisorLevel Operator UserLevel	Perator Groups Group Na Banking Hospitals	Description Enter group description Medical Accounts
Operator Software Options System Software Versions Email Notifications			
opex CertainScan	Add Print Delete Modify Import Export All		Add Group Remove Group

Figure 2-17: System Setup

- **1. Operator:** Create and manage operators (see <u>page 30</u>)
- 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).

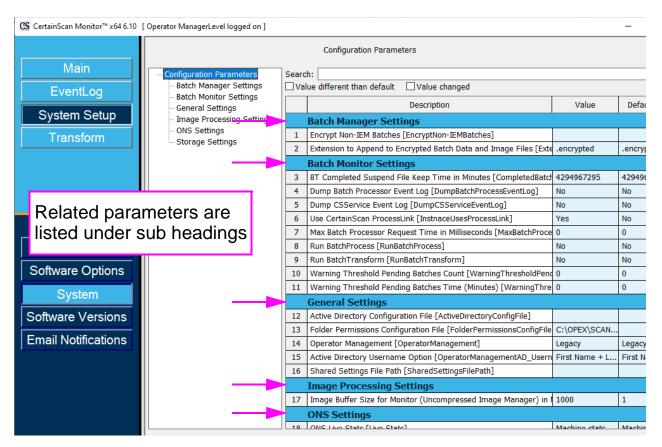


Figure 2-18: Grouping Parameters

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

-	-			
Configuration Parameters Batch Manager Settings	Searc	h: ue different than default Value changed		
Batch Monitor Settings				
General Settings		Description	Value	Default Value
Image Processing Settings		Batch Monitor Settings		
ONS Settings Storage Settings	3	BT Completed Suspend File Keep Time in Minutes [C	4294967295	4294967295
Storage Settings	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).

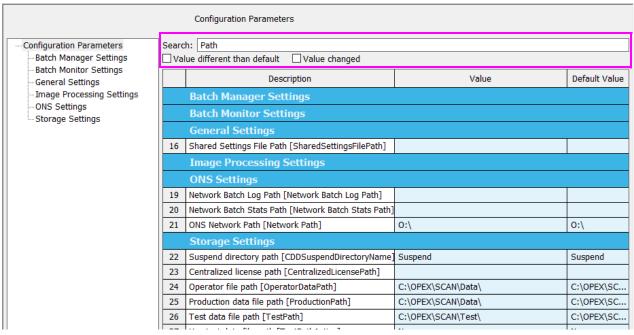


Figure 2-20: Filtering parameters

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

User Interface

2.9. Transform

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

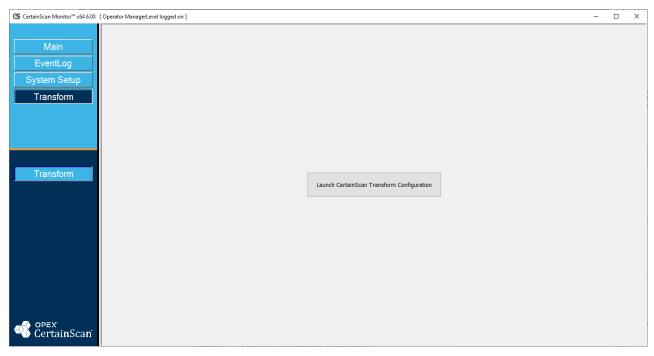


Figure 2-21: Launch CertainScan Transform

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).

CertainScan Monitor™ x64 6.00 Main EventLog System Setup			- 0	Restore Move Size Minimize Maximize Close Alt+F4		
Transform	0 Batches Ready for Editing	0 Batches Needing Cleanup from Ed		Diagnostics Help	>	
	1	0 Batches Ne		Batch Processing	> ~	Enable CertainScan Transform
				Layout	> ~	Enable CertainScan ProcessLink
						Inject Batch

Figure 2-22: Batch Processing access

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

CS CertainScan Monitor™ x64 6.10 [Operator ManagerLevel logged on] -							
	Configuration Parameters						
Main	Configuration Paramete	Searc	h:				
EventLog	Batch Manager Setti		ue different than default 🗌 Value changed				
	Batch Monitor Settin General Settings		Description	Value	Defaul		
System Setup	- Image Processing Se		Batch Monitor Settings				
Transform	ONS Settings	3	BT Completed Suspend File Keep Time in Minutes	4294967295	42949		
	Storage Settings	4	Dump Batch Processor Event Log [DumpBatchProc	No	No		
		5	Dump CSService Event Log [DumpCSServiceEvent	No	No		
		6	Use CertainScan ProcessLink [InstnaceUsesProces	Yes	No		
		7	Max Batch Processor Request Time in Millisecond	0	0		
Operator		8	Run BatchProcess [RunBatchProcess]	No	No		
Cotture Ontions		9	Run BatchTransform [RunBatchTransform]	No	No		
Software Options		10	Warning Threshold Pending Batches Count [Warn	0	0		
System		11	Warning Threshold Pending Batches Time (Minute	0	0		

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).

CertainScan Monitor™ x64 6.10	[Operator ManagerLevel logged on]			
Main EventLog System Setup Transform	Operator Parameters Operator EntryLevel Operator ManagerLevel Operator SupervisorLevel Operator UserLevel	Oper-	ator Groups Group Na Banking Hospitals	Description Enter group description Medical Accounts
Operator Software Options System Software Versions Email Notifications				
opex CertainScan	Add Print Delete Modify Import Export All			Add Group Remove Group

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).

Operator		×						
First Name	Level	Shift						
Last Name	Entry	○ First						
Description	OUser	○ Second						
Password ••••	○ Supervisor	OThird						
Language English ~	⊖ Manager	• Misc.						
Group Memberships		Available Groups						
<< Add Remove >>								
App	Apply Filter:							
Save Cancel								

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.

2.11. Customizing the Layout

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).

CertainScan Monitor™ x64 6.00	[Operator ManagerLevel logged on]						
		đ	Restore			0 Batches	Needing Cleanup from Scanning
			Move				
Main			Size				
		-	Minimize				
EventLog		-	Maximize			0 Ba	atches Currently Scanning
System Setup		×	Close	Alt+F4			
			Diagnostics	>			
Transform			Help	>		1 Batche	s Ready to Resume Scanning
	Batch		Batch Processing	>		Job	Operator
	00000003.oii_scan		Layout	3	✓ Use Shared Layout	test	Operator ManagerLevel
					Unlock Layout	0 Batches	Needing Cleanup from Editing

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).

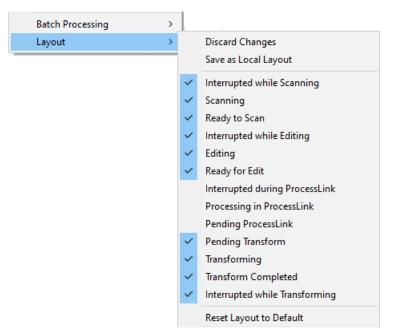


Figure 2-27: Layout Options

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.

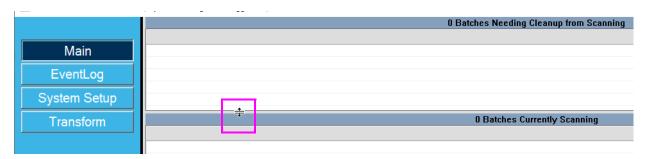


Figure 2-28: Expanding views

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
0000000.oii_transform	C:\batches\0000000

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.

	0. Bateles Consetto Carseira						
Main	0 Batches Currently Scanning						
EventLog	Companying three take for status						
System Setup	Scanning - three tabs for status						
Transform	0 Batches Currently Scanning 1 Batches Ready to Resume Scanning 0 Batches Needing Cleanup from Scanning						
	0 Batches Currently Being Edited						
Logout				1 Batches Ready for Editing			
Overview		Batch	Data File Path	Operator	Time		
Batch Queues		000000	C:\batches\0000001	Operator ManagerLevel	04/13/23 09:29:50 A		
Machines		Editing	- placement	t of remaining fun	ction into header		
,		Lating	placement				
opex CertainScan							
	0 Batches Needing Cleanup from E	diting 0 Batches Currently	Being Edited				

Figure 2-30: Grouping panel levels

2.11.5. Arrange Screen View

- **1.** Place cursor in panel level heading, left-click and hold.
- 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).

		1 Bat	rhes	Ready 📃 lesume Scanning
Main	Batch	Data File Path		Operator
EventLog	00000003.oii_scan	C:\batches\0000003	t.	C perster Manager Level
System Setup				
Transform		0 Batches Need	ng (Cleanup 📩 1 Scanning
	0 Batches Currently Scanning	1 Batches Ready to Resume Scanning		

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.

		0 Batches Needing Cleanup from Scanning					
	0 Batches Currently Scanning	0 Batches Needing Cleanup from Scanning	1 Batches Ready to Resume Scanning				
Main			Batch	Data File Path	Operator	Time	Δ
EventLog			00000	C:\batches	Operator Manag	04/13/23	09
System Setup							
Transform							

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).

		0 Batches Currently Sca	nning	0 Batches Ne	eding Clea	nup <mark>fi 🔤 S</mark> canning	1	Batches R	eady	to Resume Scan	ning	
N	Main										Time	E.
Eve	entLog					0 Batches Currently Being Ed		000	t	Operator Manage	04/13/23 09	:52:
Syste	em Setup						meu					
Tra	nsform											
	ogout				1 Batc	es Ready for Editing						
Ov	erview		Data File Path		Job	Operator		Time			Δ.	E
A Bate	ch Queues	00000001.oii_edit	C:\batches\00000	001	test	Operator ManagerLevel		04/13/23 09:2	9:50 A	M		
Ma	chines											
	ex rtainScan											
Cer	rtainScan	0 Batches Needing Cleanup from Editing	1 Batches Ready f	or Editing								

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.

				Ready for Editing	1	_					idy to Resume Scan	ning		
Main	Batch	Data File Path		Operator		Ε.	Batch		a File Path		Operator		Time	
EventLog	0000001.011	C:\batches\00000	t	Operator ManagerL	04/13/23 09:29:50		00000003.oii_scan	C:\b	patches\0000003	t	Operator ManagerLeve		04/13/23 09:52:25 AM	
System Setup												N		
Transform												B		
							0 Batches Currently Sc	anning	0 Batches Needing 0	leanup fr	om Scanning 1 Batches	Ready to Re	esume Scanning	
									0 Batch	es Need	ling Cleanup from Ec	liting	_	
Logout														
Overview														
Batch Queues														
Machines														
opex CertainScan														
GertailiStali							0 Batches Currently Be	eing Edit	ed 0 Batches Needir	ng Cleanu	p from Editing			

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.

Operator Manag	JerLevel logged on]						1		
				۵	Restore				
	1 Batc	hes	Ready for		Move				
Batch	Data File Path	J	Operator		Size		Batch	Data	File Path
0000001.oii	C:\batches\00000	t	Operator N	-	Minimize		00000003.oii_scan	C:\ba	atches\00000
					Maximize				
				x	Close	Alt+F4			
					Diagnostics	>			
					Help	>			
					Batch Processing	>	0 Batches Currently Sc	anning	0 Batches Ne
					Layout	>	Discard Changes		
							Save as Local Lay	out	

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).

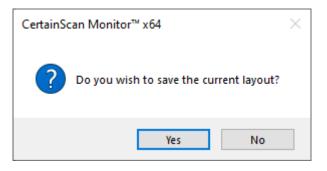


Figure 2-36: Save layout prompt

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3. Operation

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CertainScan® Monitor 6.10

User Manual

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.



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.oii_edit	C:\batches\0000001	test	Operator ManagerLevel	04/13/23 09:29:50 AM								
		1 Batches	Ready to Resume Scanning									
Batch	Data File Path	Job	Operator	Time								
00000003.oii_scan	C:\batches\0000003	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.

3.2. Transform Batch Menu Functions

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.)

CertainScan Monitor** x64 6.	00 [Operator Manage	erLevel logged on]						-		3
	1 and 1 and 1			0 Batches M	eeding	Cleanup from Scanning				
Main	1			D Bat	ches Cu	mently Scanning			_	
EventLog										
System Setup	Batch	Data File Path Jol	b Operator T	ime / E	Ready	to Resume Scanning				
Transform	.0000003.eii.ee	Chikatobar000002 tar	1. Operator Mananarianal D		Needing	Cleanup from Editing				
		_		0 Batc	ies Curr	ently Being Edited		-		
	Batch	Data File Path Job	Operator Te	1 Ba	tches fl	cady for Editing		-	-	
Logout		CASHIC-20000001			Cleanup	from CertainScan ProcessLink			_	i
Overview										
Batch Queues	1			0 Batches Being P	rocesse	d by CertainScan ProcessLink	_			
Machines				0 Batches Wa	iting for	CertainScan ProcessLink				i
	0			2 Batches W	aiting to	r CertainScan Transform				
	Batch		Data File Path	11	ob	Operator	Time		1	Ēh
	0000000.eij_tri 00000002.eij_tri	Process Next Restart Transform	C\\batches\0000000 C\\batches\00000002		est ést	Operator ManagerLevel Operator ManagerLevel	04/12/23 02:17:02 PM 04/13/23 09:49:52 AM			
		Send To Edia Do Not Process		0 Bat	ches Be	ing Transformed			-	
		Сору		Û	Batches	Transformed				
opex CertainScan				0 Batches Needing	Cleanu	p from CertainScan Transform		_	_	

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).

				Restore		es Ready to Resume Scanning
Batch	Δ	Data File Path		Move		Operator
00000003.oii_scan		C:\batches\0000003		Size		Operator ManagerLevel
				Minimize		
				Maximize		
			x	Close	Alt+F4	
				Diagnostics	>	
				Help	>	
				Batch Processing	>	Enable CertainScan Transform
				Layout	>	Enable CertainScan ProcessLink
						Inject Batch

Figure 3-4: Inject Batch

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

→ 、 小 🛗 > Thi	s PC > Documents			v ē	Search Documents
				· U	//
ganize 🔻 🛛 New folde	r				
🔜 Desktop 🛛 🖈 🔦	Name	Status	Date modified	Туре	Size
🖊 Downloads 🖈	Adobe	0	2/25/2021 4:26 AM	File folder	
🚆 Documents 🖈	afterSentDocuments	0	12/16/2020 10:38 AM	File folder	
🚅 E:\ 🛷	Custom Office Templates	0	12/16/2020 10:38 AM	File folder	
frame files		0	12/16/2020 10:38 AM	File folder	
PDFs	FeedbackHub	\odot	3/17/2023 5:42 AM	File folder	
PDFs	🛗 My Shapes	C	8/1/2022 12:56 PM	File folder	
	OPEX docs	0	4/28/2023 9:25 AM	File folder	
PROJECTS	📙 Opex Remote Support	\odot	12/23/2020 11:28 AM	File folder	
S Creative Cloud Fil	Outlook Files	0	12/16/2020 10:38 AM	File folder	
0.01	Personal	C	5/7/2023 5:52 AM	File folder	
OneDrive - OPEX	📙 Snagit	0	12/16/2020 10:55 AM	File folder	
This PC					
🗊 3D Objects					
Desktop					
😫 Documents 🛛 👻					
File na	me				Transformed Batch Files (* oii tu
File na	ime:			~	Transformed Batch Files (*.oi
					Open Cancel

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).

2 Batches Ready for Edit											
						3	Batches Ready for Edit				
Batch			Data	a File Path				Job	Operator	Time	/ Er.
00004132020 01 45 09 00004062020 10 16 41		and the second se					ches\00004132020 01 45 09 PM BT-Monitor Demo2 ches\00004062020 10 16 41 AM BT-Monitor Demo2	BT-Monitor Demo2 BT-Monitor Demo2	Joe Manager Joe Manager	04/13/20 02:06:13 PM 04/13/20 02:09:33 PM	
3 Batches Ready for Edit	0 Batches Currer	ntly Being Edited	0 Batche	es Needing Clear	nup from Editing						-
1 Batches Ready to Resum	e Scanning										
						1 Batch	s Ready to Resume Scanning				
Batch			Data	a File Path				Job	Operator	Time	/ Er.,
00004062020 10 16 18	AM BT-Monitor D	emo2.oii_scan	C/	LocalRepositor	ry\Pre-Transform_Ba	atches\JeffB.	ches\00004062020 10 16 18 AM BT-Monitor Demo2	BT-Monitor Demo2	Joe Manager	04/06/20 10:16:27 AM	
1 Batches Ready to Resum	ne Scanning 0 E	Batches Currently	Scanning	0 Batches Nee	iding Cleanup from S	canning					-
4 Batches Waiting for Batch	n Transform										
69.10			_			4 Batch	s Waiting for Batch Transform	Too	Taxon	Pane	
Batch				Data File Path				dol	Operator	Time	/ Ef.
00004132020 05 03 41 1			m			-	fBatches\00004132020 05 03 41 PM BT-Monitor Demo2	BT-Monitor Demo2	Joe Manager	04/17/20 09:29:32 AM	
00004172020 03 57 56 PM BT-Monitor Demo2.oi 00004172020 10 34 58 AM BT-Monitor Demo2.oi Send		tart Transf d To Edit Not Transf	orm o	sitory\Pre-Transform	n_Batches\J	Batches()00004172020 03 58 24 PM BT-Monitor Demo2 (Batches()00004172020 03 57 56 PM BT-Monitor Demo2 (Batches()00004172020 10 34 58 AM BT-Monitor Demo2	BT-Monitor Demo2 BT-Monitor Demo2 BT-Monitor Demo2	Joe Manager Joe Manager Joe Manager		t Tr	
0 Batches Being Transform	ed	De	lete			0 8	tches Being Transformed				

Figure 3-6: Selecting multiple batches

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

3.4. ProcessLink Batch Menu Functions

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).

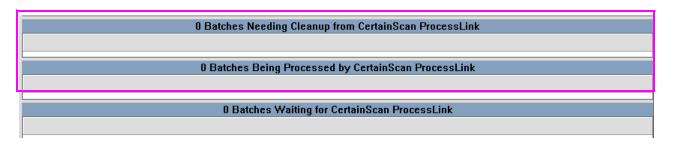


Figure 3-8: ProcessLink - resume scanning

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About OPEX Corporation

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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