

nameXpdf manual ENG ver 2.



The latest version can be downloaded here:

www.x-this.com
www.facebook.com/xthis

CONTENTS

1.0 INTRODUCTION	3
2.0 THE CONCEPT	4
3.0 INSTALLATION.....	5
4.0 REGISTRATION.....	8
5.0 GETTING STARTED	9
5.1. SETTINGS.....	9
5.2. DESKTOP REFERENCE	12
6.0. SCANNING DOCUMENTS.....	14
6.1. TECHNICAL DATA	14
6.2. SCANNING.....	14
7.0. OPERATION	15
7.1. CONCEPT	15
7.2. GETTING STARTED	15
7.3. SETTING UP THE SEARCH AREA.....	15
7.3. AUTOMATIC DOCUMENT PROCESSING	16
7.4. SEARCHING FOR BARCODE WITHIN SELECTED AREA.....	16
7.5. MANAGING UNRECOGNIZED DOCUMENTS.....	17
7.6. RENAME/CREATE DOCUMENTS MANUALLY	18
7.7. JOINING PDF DOCUMENTS.....	18
8. INDEX.....	19
9. TROUBLESHOOTING	20

1.0 INTRODUCTION

nameXpdf is a Windows application that finds barcodes on a scanned image (of a document, form, letter etc.), recognizes it and from that image generates a pdf document with the name defined by the recognized barcode.

nameXpdf reads all standard types of files used for storing scanned documents, i.e. jpg, tif, bmp, wmf etc.

Some of the practical uses of the **nameXpdf** application:

1. Indexing of all outgoing business documents, e.g.:
 - i. Dispatch notes certified by the buyer,
 - ii. Inventory release forms certified by the employee,
 - iii. Petty cash vouchers certified by the employee,
 - iv. Other documents (both internal and external), which must be certified by signature and archived as evidence,
2. Transformation into pdf format and indexing of scanned drawings up to ISO A0 size
3. Transformation into pdf format and indexing of purchase orders, certified by the buyer
4. Transformation into pdf format and indexing of doctor's prescriptions.
... etc.

2.0 THE CONCEPT

The basic principle of **nameXpdf** operation is independence from other systems. Therefore, **nameXpdf** works with the files which are physically stored on a disk within the organisation, and in its basic version does not communicate directly with databases or other systems.

OTHER VERSIONS

Once installed, the application can process several hundreds of documents per hour, if the organisation and the employees are technically and organisationally well prepared.

The **nameXpdf** concept of operation presumes that all the documents on all pages will have unique barcodes, and that such documents, after the physical processing (signing, stamping, any kind of data entry, etc.) will be scanned by some kind of scanner (ranging from cheap scanners to very complex devices).

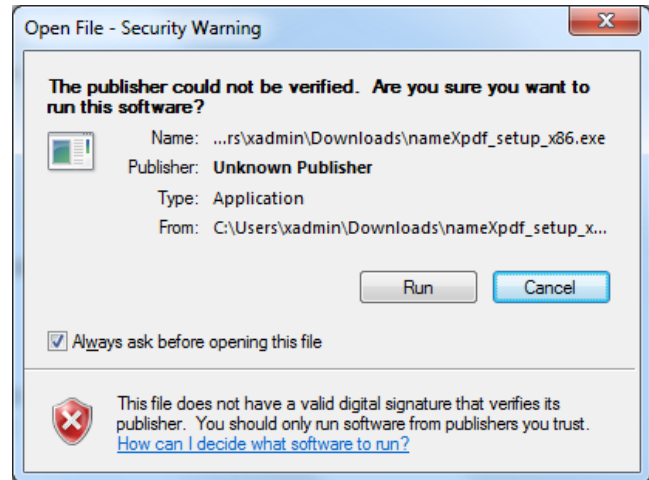
After scanning such document, **nameXpdf** will find a barcode in it and transform such document (scan) into a pdf file.

In case of several documents with the same barcode value or an existing document named after the barcode, **nameXpdf** will join such documents into a single multi-page document. Therefore, if your document consists of several pages, you should place the same generated barcode on each of the pages, and **nameXpdf** will take such scanned document and transform it into a multi-page pdf file, identical to the scanned original.

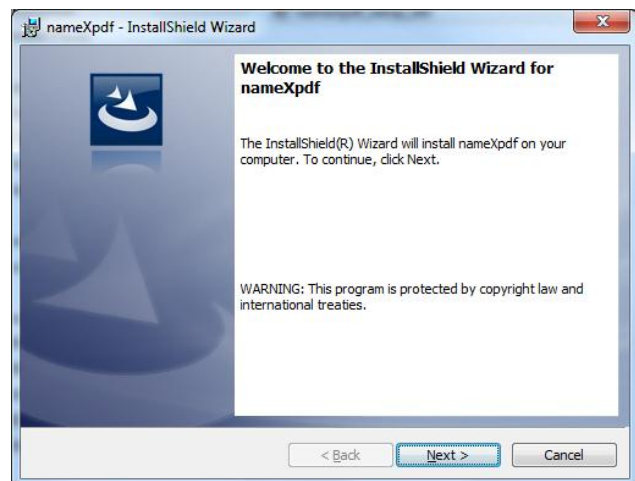
3.0 INSTALLATION

STEPS

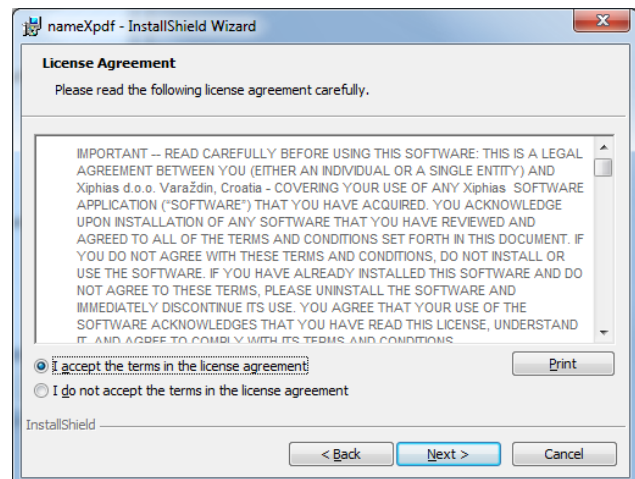
Start **nameXpdf_setup_x86.exe**, and click **Run**,



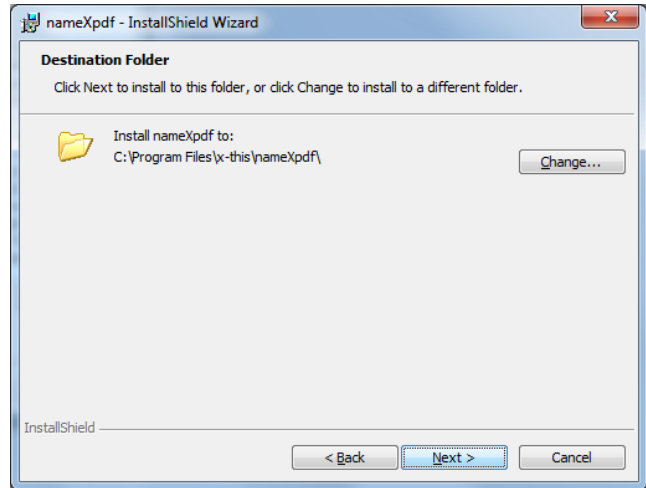
2. Click on **Next**,



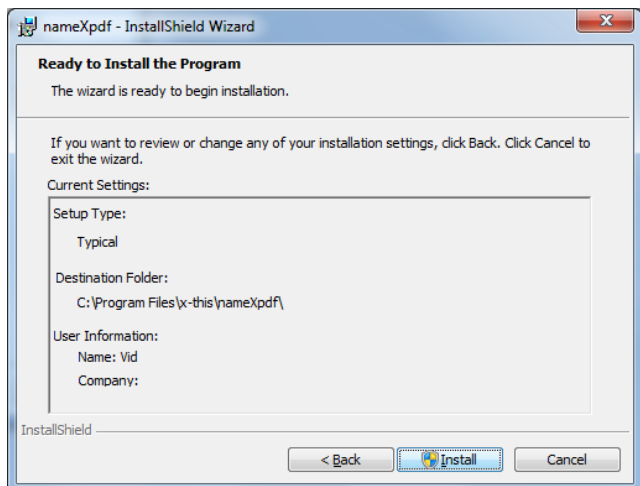
3. Read the **License agreement** and, if you agree to the terms, click on "I accept the terms in the license agreement" and then click **Next**,



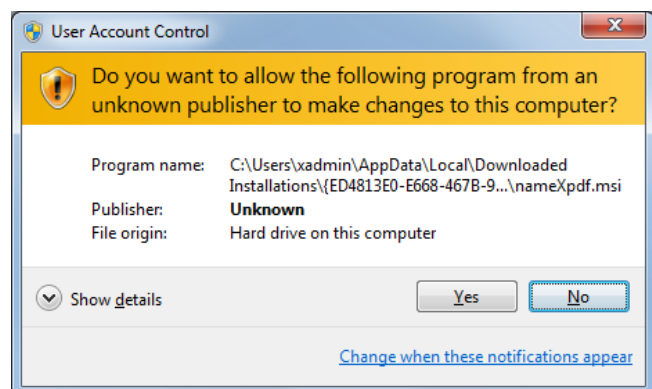
4. You can change the path where **nameXpdf** will be installed by clicking **Change**, or you can use the default path. Then click **Next**.



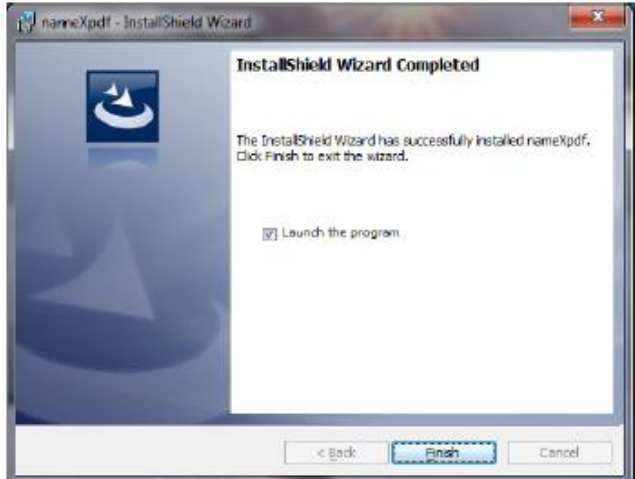
5. Click **Install**,



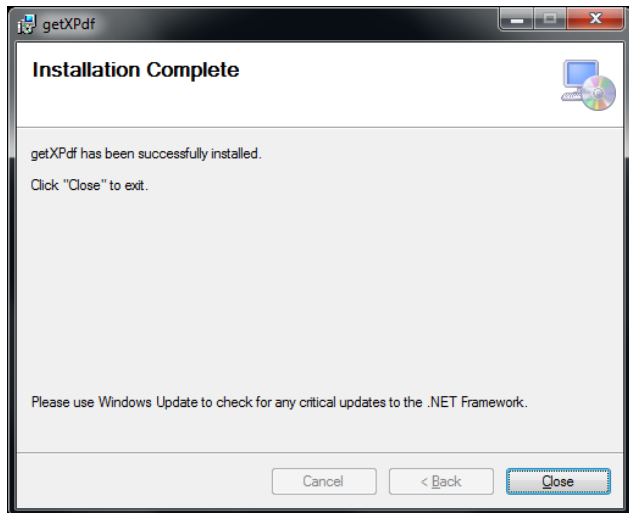
6. Click **Yes** to allow the installation on the computer (this dialog does not always appear, since it depends on the computer security settings).



7. Click **Finish**.



8. Click **Close**.



4.0 REGISTRATION

Enter the required data and the registration code and then click on **Activate**.

Like all **x-this** applications, **nameXpdf** product registration is performed online, so the computer on which the product is installed needs to have an Internet connection..

License

nameXpdf® [Change license version](#)

Licence type: STANDARD licence

First name: Last name: user data

E mail:

Company name: Company data

Enter registration code: Registration

Activation code:

For any problems or questions please visit our online help www.x-this.com Command

In case your computer does not have an Internet connection, the online product activation cannot be done automatically, so you will have to register as follows:

a) By email

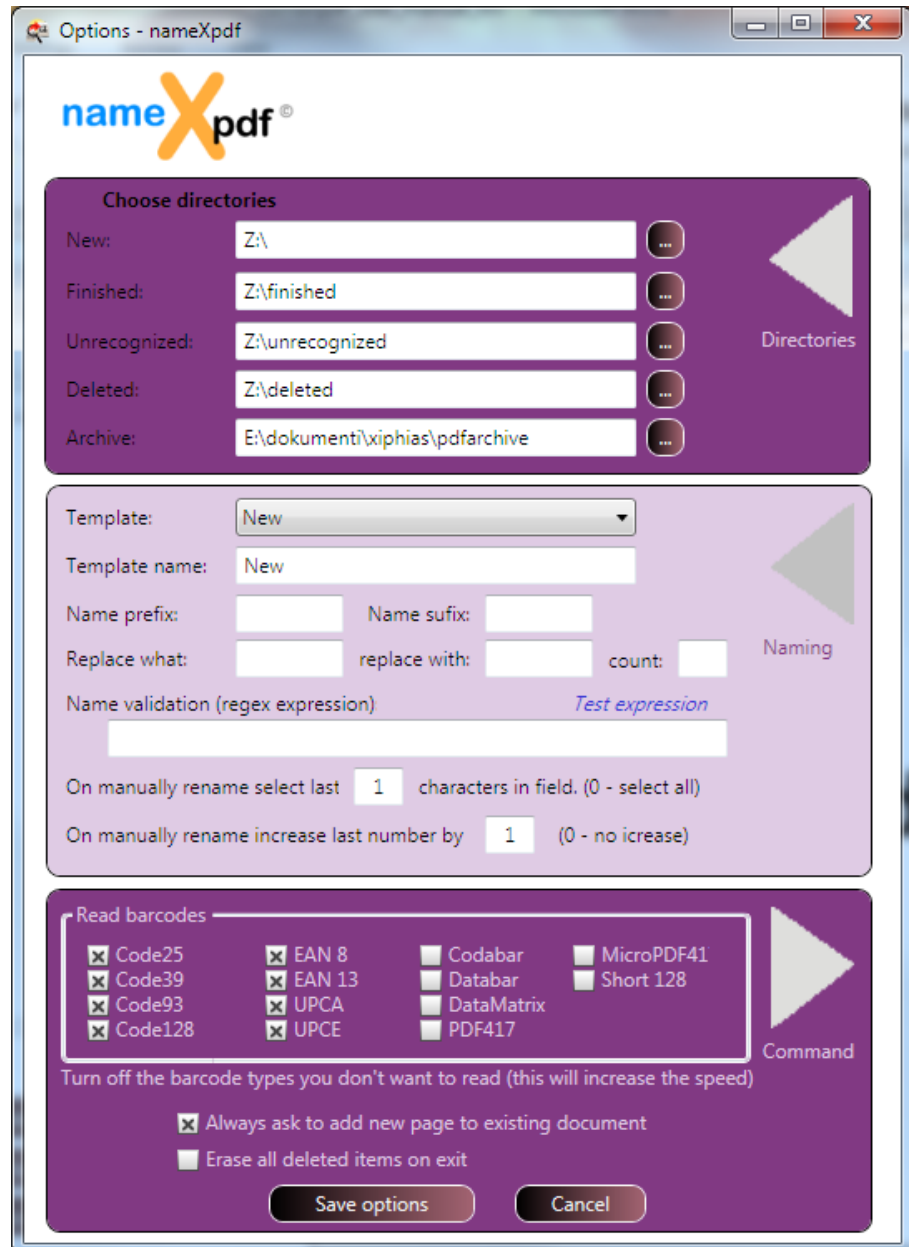
1. Send an email to activation@x-this, containing the registration code and the activation code,
2. Very soon you will receive the code for activation confirmation to the same email address from which you sent the initial email.

a) By sending a text message (SMS) to phone number +385 99 xxx xxx

1. Send an SMS containing the registration and activation codes.
2. Very soon you will receive an SMS message with the code for activation confirmation to the same device from which you sent the initial SMS.

5.0 GETTING STARTED

5.1. SETTINGS



CHOOSE DIRECTORIES:

New: Enter the path where **nameXpdf** should perform the search for the new scanned documents, i.e. the image files (TIFF, JPG etc.). This path is generally the same as the path you have defined as the destination path on the scanner.

Finished: The path where **nameXpdf** will save the pdf documents which were successfully processed and recognized.

Unrecognized: The path where **nameXpdf** will save the documents which were not recognized in the source format (images).

Deleted: The path where **nameXpdf** will save the documents which were deleted (recognized and those manually deleted).

Archive: The path where **nameXpdf** will copy all pdf documents from the folder **Finished** when exiting application or upon request.

TEMPLATES

The templates are used for automatic renaming of pdf documents according to the defined criteria.

Template:	Choose New to create a new template or choose an existing template to change it.
Template name:	Enter/change the name of the template.
Name prefix:	Enter the (alphanumeric) value which you want to add at the beginning of the new file name.
Name suffix:	Enter the (alphanumeric) value which you want to add at the end of the new file name.
Replace what:	Enter the text you want to change.
Replace with:	Enter the text that you want to use as replacement text for the one listed under Replace what ,
Count:	Determines how many times the text defined under Replace what is changed into the text defined under Replace with ,
Name validation:	Enter the expected name structure of the file being recognized by nameXpdf in regex format. For example, the expected filename format is NNN-YYYY-XXXX, where NNN is document type (e.g. 201), YYYY is the year (e.g. 2011), and XXXX is the document number with leading zeros (e.g. 0231). You will receive a warning if nameXpdf reads a value from barcode that does not comply with that format (e.g. 11-2009-00D3).
On manually rename select last N characters in field:	After starting manual rename of documents, nameXpdf will offer a new filename and select the last N characters, where N is the value you entered.
On manually rename increase last number by N:	After starting manual rename of documents, nameXpdf will offer a new filename and increase the number of the last entered value by N , where N is the value you entered.
Read	In order to speed up the search, limit the barcode search to

barcodes: | only those used in your system.

Example (for replacing):

Supplier delivers dispatch notes with his barcode. His barcode has the structure which includes the code for the type of document, by using the letter combination "OTP". In our system, such type of documents is marked by the numerical code "109".

E.g.: OTP-2010-012489

Name prefix: OTP

Name suffix: empty

Replace what: OTP

Replace with: 109

OTHER SETTINGS

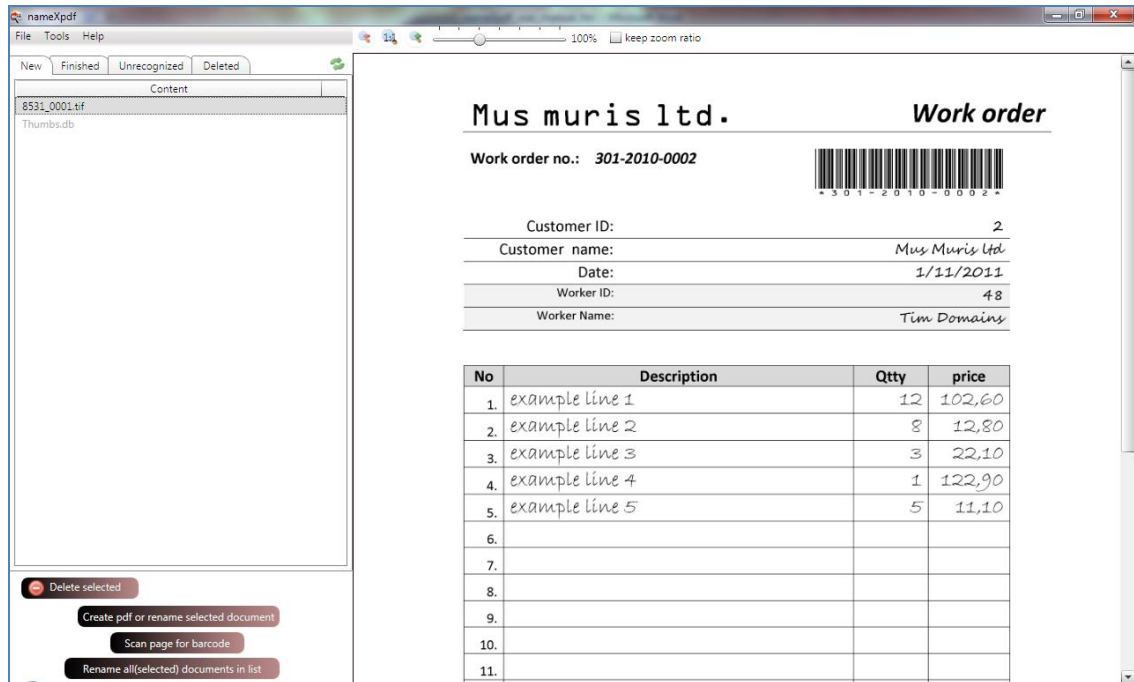
ALWAYS ASK TO ADD NEW PAGE TO EXISTING DOCUMENT – nameXpdf will add a new page automatically (if this option is not activated) to an already existing pdf document if the value of the recognized barcode is equal to the value of an already existing pdf document.

ERASE ALL DELETED ITEMS ON EXIT – if this option is activated, nameXpdf will delete all deleted documents or images (scans) from the path listed under **Deleted** upon exit.

5.2. DESKTOP REFERENCE

nameXpdf window consists of two main parts:


1. The left side, which contains:
 - a. tabs with document type – on the top,
 - b. commands for images,
 - c. document list – in the middle,
 - d. commands – at the bottom.
2. Right side – document preview



1.a.) TABS

- New:** In the document list, shows raw, unprocessed scanned documents*,
- Finished:** In the document list, shows documents in pdf format, for which the recognition and barcode reading were successful,
- Unrecognized:** In the document list, shows the documents for which the recognition was successful, but the barcode recognition failed.
- Deleted:** In the document list, shows the documents which were deleted either manually or automatically.




* nameXpdf will show all file types (all extensions), but will work only with image file types.

** use the **Refresh**  icon to update the document list in case of manual operations on files in the relevant folders.

1.b.) WORKING WITH IMAGES

The commands on the top of the application window are used for working with images, i.e. with the documents in the original scanned form:



-  Zoom out : reduces the detail level,
 -  Zoom in: increases the detail level
 -  Normal view: shows the image in original size
- Keep zoom ratio: the current zoom ratio is used for all documents.

1.c.) DOCUMENT LIST

This part of the application window shows the documents from the selected tab. Depending on the status of a document, the following actions are possible:

Delete selected	•	•	•	•
Create pdf or rename selected document	•	•	•	•
Scan page for barcode	•	•	•	•
Rename all (selected) documents in list	•			
Move all (selected) documents to archive		•		
Move selected to New			•	•

1.d.) COMMANDS

Delete selected:	Deletes all selected documents
Create pdf or rename selected document:	Manual creation and naming of a pdf document
Scan page for barcode	Scans the image in order to find the barcode
Rename all (selected) documents in list	Generates a pdf document and names it according to the recognized barcode value
Move all (selected) documents to archive	Moves all pdf documents to the archive folder
Move selected to New	Moves the documents in source format to the folder with unprocessed documents

Quick command invocation by using hotkeys

Delete selected	DELETE
Create pdf or rename selected document	F2

6.0. SCANNING DOCUMENTS

6.1. TECHNICAL DATA

nameXpdf can process all image types, among them:

- tif,
- jpg,
- bmp,
- png,
- gif,
- wmf,

Recommended minimum system requirements:

- × Recommended minimum scan resolution is 300dpi
- × Minimum colour depth is 8bit, and
- × Either black and white or in colour

x-this.com recommends using the newer generation of scanners, which offer the following functions:

- Automatic document feeder
- Option to save the scanned document directly to the defined path

6.2. SCANNING

Since **nameXpdf** uses the sequential concept of operation, we recommend to set up the following when using a newer generation scanner:

- Automatic (generic) naming of the scanned document, using incremental numbering scheme,
- Setting up of central location and scanning type for saving documents using one click (preset),
- If you use several scanners on different locations, define a prefix for the generic naming scheme according to the document type being scanned on individual locations (e.g. dispatch notes, receipts, inventory documents etc. will all be scanned on the warehouse location),
- Use separate page scanning, since **nameXpdf** will later automatically join the pages with the same barcode,
- Scan once or twice during the office hours and process the documents scanned using **nameXpdf** from single location, thereby avoiding the need to purchase several **nameXpdf** licenses and to educate several members of the staff to work with the software.

7.0. OPERATION

7.1. CONCEPT

Although **nameXpdf** can search the entire area of the scanned document for a barcode, the results obtained by such method of operation largely depend on the quality of print and the scanning, and therefore we do not recommend this kind of use.

Since **nameXpdf** can process a large quantity of scanned documents within a short time, it is assumed that a large number of similar documents will be scanned sequentially. This in practice means that e.g. 100 dispatch notes will be inserted into scanner for scanning, and that they will be numbered sequentially, according to the system used by the scanning device. Subsequently, these documents will also appear in the same order on the document list, and will be processed by **nameXpdf** in the same order.

Therefore the barcode marker should always be in the same place on the following document, which is why you will find the command "**Set selection as default search area**", which tells **nameXpdf** to search for the barcode in the selected area.

7.2. GETTING STARTED

After starting the **nameXpdf** application and after setting the path in the program settings, you are ready to start using **nameXpdf**.

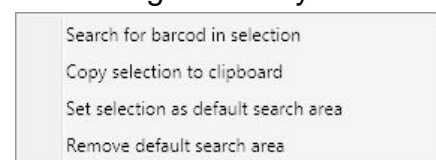
In the top left part of the window you will find tabs with document types:

- New:** Shows new scanned documents which **nameXpdf** has not processed yet.
- Finished:** Shows documents (pdf) which have been recognized and processed (renamed). Upon exiting the application, **nameXpdf** will request confirmation in order to move the processed documents into the archive.
- Unrecognized:** Shows the scanned documents in which **nameXpdf** failed to recognize the barcode.
- Deleted:** Deleted documents.

By clicking the document list on the right side a preview of the selected document opens. Depending on the type of the selected document, the document preview enables you the different operations.

7.3. SETTING UP THE SEARCH AREA

After selecting (using the left mouse button) the part of the image which you want to



designate as the restricted area for barcode search, the following menu is activated using the right mouse button:

Search for barcode in selection	nameXpdf will look for the barcode only in the selected part of the image.
Copy selection to clipboard	nameXpdf will copy the selected part of the image to the clipboard.
Set selection as default search area	nameXpdf sets the selected part of the image as the restricted area where the search for the barcode will be performed, for the current and all subsequent documents, until the command Remove default search area is used.
Remove default search area	Removes the limits of the barcode search area.

7.3. AUTOMATIC DOCUMENT PROCESSING

After marking/limiting the barcode search area as shown in the illustration below, on the left side of the window choose the documents to which this limitation will apply and click on **Rename all (selected) documents in list**.

The documents can be selected using the standard Windows selection methods – by using Shift for selecting the selection range and/or using Ctrl key for selecting non-sequential documents.

If you want to process a single document, use the option **Search for barcode in selection** from the menu above.

After processing the selected/all documents, **nameXpdf** provides a report on the completed operations, as follows:

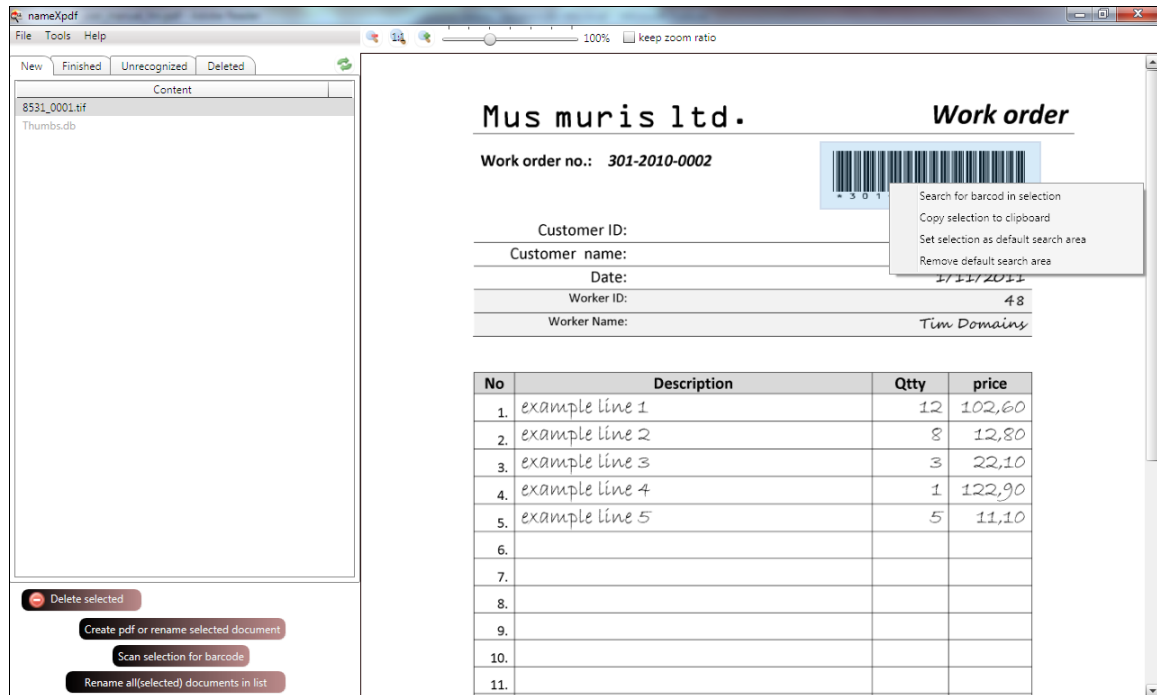
- Number of documents recognized,
- Number of documents not recognized,
- Start time,
- End time,
- Duration.

The documents which were not recognized are moved to **Unrecognized**, while the documents on which the barcode was successfully recognized will be transformed into pdf format, and named according to the recognized barcode value.

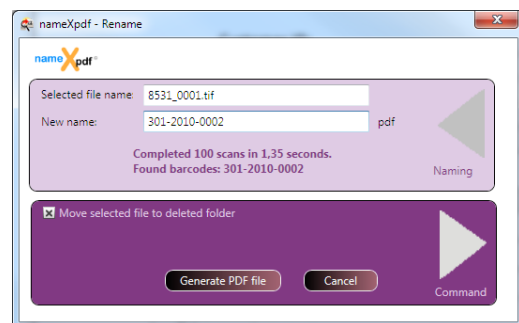
7.4. SEARCHING FOR BARCODE WITHIN SELECTED AREA

1. Select the document on the left side of the **nameXpdf** window.

- Select the part of the image where the barcode is located by pressing the left mouse button and dragging the selection towards the opposite side of the barcode until it is selected.
- Press the right mouse button on the selected part of the image and select **Scan for barcode in selection** from the popup menu that appears.



- A window with information about the source document/image and the value of the found and recognized barcode appears. This value can be changed manually.
- Click on **Generate PDF file** to generate a PDF file with the chosen options.



7.5. MANAGING UNRECOGNIZED DOCUMENTS

If **nameXpdf** cannot find and recognize barcode in a document, it is usually due to the following:

- The scanned document is of poor quality due to physical damage or deformation (smudges, dirt).

Please, rename the document manually.

- The scanned document has been scanned in incorrect format/resolution.

Please, format the barcode on your documents according to nameXpdf technical specifications.

- nameXpdf** cannot read the format of the barcode in the scanned document.

Please, rename the document manually.

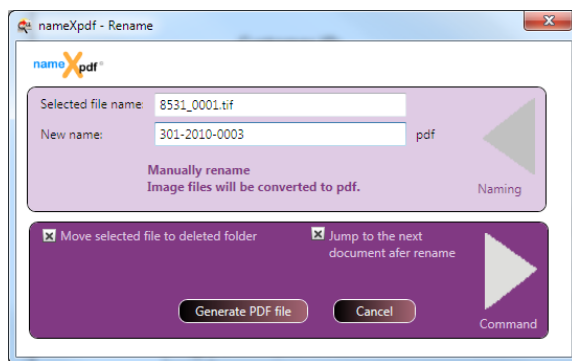
4. The area in which the barcode will be searched is set incorrectly.

Please redefine the Default search area and restart the automatic barcode recognition and renaming.

7.6. RENAME/CREATE DOCUMENTS MANUALLY

When certain documents cannot be processed successfully by **nameXpdf**, or when a document does not have a barcode at all, manual document creation or renaming is necessary.

Select the document to be manually renamed or generated on the left side of the **nameXpdf** window and click on **Create pdf rename selected document**, and under **New name** enter the name of the document and click on **Generate PDF file**.



or

The following options make this process easier and faster:

- Start the create/rename process manually by pressing F2 on the keyboard.
- Pressing Enter on the keyboard confirms the operation, i.e. the result is the same as clicking on **Generate PDF file** button.
- **nameXpdf** automatically select the next document and begins the process of manual generation/renaming.
- **nameXpdf** will remember the last entry as the New name and will position the cursor at the end of the filename to enable you to quickly and easily change only the last digit/character and increase the number by the value defined in settings.

7.7. JOINING PDF DOCUMENTS

nameXpdf will automatically join i.e. merge two documents with the same name:

- During automatic renaming and generation of PDF files.
- During manual renaming/generation of PDF files.

This is done by adding a new page at the end of existing PDF document.

This process can be fully automatic or you can have **nameXpdf** ask you whether you want to perform merging for each individual document, which is defined by option **ALWAYS ASK TO ADD NEW PAGE TO EXISTING DOCUMENT**.

8. INDEX

Activate	8	PDF	17, 18, 20
Archive	10	replace	11
bmp	3, 14	Replace	10, 11
COMMANDS	13	Run	5
Deleted	10, 11, 12, 15	SCANNING	14
ERASE	11	selection	15, 16, 17
Finish	7	SETTING UP	15
Finished	9, 10, 12, 15	SETTINGS	9, 11
Install	6	sms	8
Internet	8	system requirements	14
ISO A0	3	Template	See Templates
jpg	3, 14	Template name	See Templates
JPG	9	TEMPLATES	10
License agreement	5	tif 3, 14	
Move	13	TIFF	9
Name	10, 11	Unrecognized	10, 12, 15, 16
New	9, 10, 12, 13, 15, 18	wmf	3, 14
pdf	3, 4, 9, 10, 11, 12, 13, 15, 16, 18	Zoom	13

9. TROUBLESHOOTING

P

Adobe Acrobat/Reader that is running cannot be used to view PDF file in the Web Browser. Adobe Acrobat/Reader version 8 or 9 is required. Please exit and try again.

R

You need to install (a newer version) of adobe Acrobat/Reader. Please visit <http://get.adobe.com> to obtain (newer version) of software.

P

When you start installation, you get the error message: Cannot find file ...temp...

R

Right click on setup file, click on **Extract files** (you need to have a decompression tool installed).