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Introduction

Image Capture is a desktop application that allows you to scan documents into groups called “batches” that will later be organized into documents through an indexing process. The image Capture software must be installed on a computer that is attached to a scanner.

This manual will show you how to use the scanner settings within the program, create batches of scanned pages, and add annotations to those scanned pages.

Before using Image Capture for the first time, you must set your data source and synchronize your password. Neither application will open properly before completing these two steps.

Data Source

Setting the data source tells Banner which database to use. In all cases, except training and testing, you will use the Banner Production (PROD) database.

1. Go to: Start Menu -> All Programs -> Application Xtender Desktop -> AppXtender Data Source Selector

2. Click on the database you intend to use.
   
   NOTE: In all cases except for training and testing you will select PROD.

3. With the correct database highlighted, click Set as Default.

4. Click OK
Synchronize Your Password

Every time you have a new password in Banner you must synchronize your password before using Image Capture or Document Manager.

1. Go into Banner Forms

2. Click the first Banner Xtender button

3. WebXtender will open and your password is now synchronized. Close WebXtender. You may open Image Capture and Document Manager.
Login
When you open Image Capture you will be prompted for a login. The user name and password will be the same as your Banner Forms login.

1. Go to: Start Menu -> All Programs -> Application Xtender Desktop -> AppXtender Image Capture.

2. The application will open and you will be prompted to login. Enter your Banner Forms user name and password.

3. Click Login.
Scanner Setup

Select a Scanner

Once you have connected a scanner to the computer, you must select the scanner and the driver you intend to use inside the application. Before you do this the scanner operating buttons will all be grayed out.

1. With Image Capture open, click the drop-down arrow next to the scanner setup button.

2. Click on Select Scanner. A dialogue window will open with options for scanner drivers.
3. One scanner may have a few different driver sets. Choose the driver that starts with ISIS. It will work better and faster. Select this driver and click OK.

4. The Configure Device Setting dialogue window will open. Click OK.

5. The scanner operating buttons are now usable.
Scanner Settings
These are the basic settings that determine how each scan is initially brought into Image Capture. These settings control the paper feed, resolution, paper size, etc.

1. **Paper feed settings**: click the appropriate button on the tool bar.

   - **Auto Feed**: Scans all pages in the document feeder. Must click scan to scan additional pages.
   - **Manual Feed**: Scans all pages in the document feeder. If more pages are added within the 20 second timeout period, scanning will begin automatically.
   - **Single Feed**: Only one page at a time will scan.

2. **Resolution**: Determines the clarity of the scan. It also affects the total file size.

   - Click the dropdown to select the resolution. 300 is recommended.
3. **Color setting:** Color settings affect the total file size. Use bi-tonal (black and white) whenever possible.

   a. Click the dropdown to select **Bi-tonal**.

4. **Paper size**

   a. Click the dropdown to select the size of the paper you are scanning.

5. **Single sided v. double sided:** This will depend on the functionality of your scanner. Click the dropdown to select.

   a. **ADF Simplex:** Scans single-sided documents from a document feeder
   b. **ADF Duplex:** Scans double-sided documents from a document feeder
   c. **Flatbed:** Scans from the glass on a flatbed

   **NOTE:** If mixing and matching single and double-sided pages, choose duplex. Blank pages can be dropped automatically in the configuration settings.
6. **Rotation**: Pages cannot be rotated permanently once they have been scanned. You can set pages to rotate as they are scanned in. (Example: a page that can only be scanned as a portrait can be automatically rotated to landscape.)

   - **Front Rotation**: This will rotate the front of a page. Select the proper location from the dropdown.
   - **Back Rotation**: This will rotate the back of a page. Select the proper location from the dropdown.

   *NOTE*: Back rotation will only be an option when scanning in duplex mode.
Configuration Settings
These advanced settings allow you to get a cleaner image from your scanned document.

1. **Driver Configuration**
   a. Click the dropdown arrow next to the **Scanner Setup** button, and then click **Driver Configuration**. A dialogue window will open.

   ![Driver Configuration Dialogue Window]

   i. **Brightness**: affects how light or dark the scan is
      1. Select the **Main** tab
      2. Move the brightness slider left (darker) or right (lighter) to adjust.
      3. Click the **Preview** button with your document in the scanner to see how it affects your scan.

   ![Preview Button]

   **Move the slider**

   **See your scan**
ii. **Color Dropout**: If you are scanning pages on colored paper, use this function to remove the color from the scanned image.
   1. Select the **Color Dropout** Tab.
   2. Select red, green, or blue from the color dropout dropdown menu.

iii. Close this window when you are done.
a. Click the dropdown arrow next to the **Scanner Setup** button, and then click **Enhancement Configuration**. A dialogue window will open.

b. There are several checkboxes.

i. **Image de-skew**: Checking this box will auto fix crooked images.

ii. **Line Removal**: If these boxes are checked, any unwanted lines will be removed. Leave them unchecked if there are lines on the page you want to keep.

iii. Everything else should stay unchecked.

iv. Click the **Advanced** button

1. Deskew settings: If you need more straightening. Increase the numbers.
2. When you are finished, click **OK**.

v. Click **OK** to close the configuration window.

vi. The settings must now be activated by click the **Auto enhance** button.

![Click to activate enhancements](image)

3. **Remove Blank Pages**: Use this setting to auto remove blank pages when you are duplex scanning with some single-sided pages.

   a. Click the **Configuration** button.

   ![Configuration button](image)

   b. Click the **Scan** tab.

   c. Check the box for **Remove blank pages** and click **OK**.

![Configuration window](image)
Create a Batch

A batch is a collection of pages entered into Image Capture as an existing electronic file or captured through a scanner. Batches are later retrieved through Document Manager and indexed into documents.

Set Active Application
Before you can create a batch you must select the application the batch will be saved under.

1. If the applications are not visible, click the Application view button.
2. To set an application as active, right click on an application and select **Set as Active Application**. This application is now set and displays bold text.

**Batch Preparation**
Before scanning a selection of pages, make sure all staples, paper clips, and sticky notes have been removed. These may cause problems when going through the scanner. Also check for bent corners and anything that might not go through the document feeder smoothly.

**Scan to Create a Batch**
1. Insert pages into the scanner.
2. Click the **Scan** button.
3. You will be prompted to enter a batch name. Enter a name following department and college naming conventions, then click **OK**.
4. The pages will scan and display in the preview window.

5. Once the pages are scanned they are automatically saved under the batch name.
Import Documents to Create a Batch

Electronic documents and pictures on your computer can be imported into Image Capture to create a batch.

1. Go to the Batch menu and click Create.

2. A window will open. Navigate to the file or files to import.

3. Select files. (multiple files can be imported at once)

4. Enter a Batch Name following department and college naming conventions.

5. Click Open.
6. A status window will open displaying the number of pages imported. Click **Exit**.

7. The batch will not display. You will need to open the batch to see the imported pages. *(See Retrieving a Batch)*

### Retrieving a Batch

1. Click on the **Batch** menu.

2. Click **List**.
3. Choose the correct batch. You may need to scroll.

![Batch Scan interface](image1)

4. Click **Open**.

5. The batch will display in the preview window.

![Preview of scanned pages](image2)
Review Pages

1. Change your view to see one page or two pages at a time.
   a. Go to the View menu
   b. Select No Split to see only one page at a time
   c. Select Vertical or Horizontal Split to view two pages at a time.
See tool descriptions below.

2. Click the **Next** and **Previous page** buttons to see each page in the batch.

3. Use the **Rotate Left** and **Right** buttons to change the orientation of the page you are viewing. This change cannot be saved. You must use the rotation setting in the scanner setting to permanently rotate a page as it is scanned.

4. Use the **Zoom In** and **Out** buttons to move in closer to text and images on the page.

5. **Magnifier**: This tool allows you to see small pieces of text very close to check for readability.
   a. Click the magnifier button.
   b. Click an area on the page to select for viewing.
   c. A small window will appear with an enlarged view of the area you have selected.
   d. Use the slider at the top of the window to increase or decrease the magnification.

6. **Pan Mode**: This tool allows you to click and drag the document around when you are zoomed in.
   a. Click on the pan mode button to activate it.

7. Click the black X in the upper right corner to close the batch.
Delete a Single Page in a Batch

1. With the batch open, use the Previous or Next Page buttons to view the page you want to delete.

2. Click the Cut button.

3. A prompt will ask if you want to delete the page. Click Yes.

4. The page has now been removed from the batch.
Add Scans to a Batch

1. Insert the additional pages into the scanner.

2. With the batch open, go to the menu and click Page -> New -> Scan.

3. Select:
   a. Insert Before: to place the scans before the page you are currently viewing.
   b. Insert After: to place the scans after the page you are currently viewing.
   c. Append: to place the scans at the end of the batch.

4. The new pages will scan and appear in the preview window.
Add Imported documents to a Batch

1. With the batch open, go to the menu and click **Page -> New -> Import File**.

   ![Import File Menu](image)

2. Select:
   a. **Insert Before**: to place the imported page before the page you are currently viewing.
   b. **Insert After**: to place the imported page after the page you are currently viewing.
   c. **Append**: to place the imported page at the end of the batch.

3. A window will open. Navigate to the file you want to import.

   ![Import File Window](image)

4. Select the file and click **Open**.

5. The imported pages will appear in the preview window.
Annotations

Annotations allow you to add information, highlights, or hide information on a page in a batch. Annotations only overlay the page and will not change the original document.

1. To view the annotations tool bar go to the View menu.

2. Select Toolbars and click Annotation.

3. The Annotation toolbar will display at the bottom of the screen.
Tools
There are many tools available to create different types of annotations. See the instructions below for each tool. Always be sure to save your annotations.

Selection
This tool allows you to select an existing annotation to change the size or move its position.

1. Click the Selection tool.

2. Click an existing annotation and grab the handles with your mouse to change the size.

3. Click in the middle of the annotation. When the cursor changes to a , click and drag the annotation to a new location.
Text
This tool displays a note as a text box or sticky note icon on the page.

1. Click the Text tool.

2. Click somewhere on the page you would like to attach the note.

3. The Annotation Text Editor will open. Type text into the window.

4. Click the Advanced button to access the font and color options.
5. If you would like the note to display as an icon, check the **Display as icon** box.

6. When you are finished, click **OK**.

7. The note will appear on the page. Click and drag to move the note around.

8. To edit the note, double-click the note.

9. The **Annotation Text Editor** displays date and time stamps as well as the person who created or modified the note.
**Highlight**

This tool allows you to highlight sections of a document.

4. Click the **Highlight** tool.

5. Click and drag on the page to create a box.

6. The box will be a yellow semi-transparent color.

7. To change the shape of the box, click the **Selection** tool.

8. Click the highlight and grab the handles with your mouse to change the size.
Freehand
This tool allows you to draw any freehand line or shape on the document.

1. Click the Freehand tool.

2. To set the color of the line, click the **Color** button and select a color.

3. To set the width of the line, click the **Line Width** button and select a size.
4. Click and drag the cursor around the document to draw. A semi-transparent line will appear following the cursor.

![Banner Finance Desk Aid Forms Toolbar Guide](image)

5. To change the color or width of an existing drawing, choose the **Selection tool** and double-click the drawing.

6. A box will open with color and width options. Choose an option and click **OK** to apply the change.

![Annotation Properties](image)
Line
This tool allows you to draw a semi-transparent, straight line on a page.

1. Click the Line tool.

2. To set the color of the line, click the Color button and select a color.

3. To set the width of the line, click the Line Width button and select a size.
4. Click and drag your cursor on the page where you want the line. A line will appear on the page.

5. To change the color or width of an existing line, choose the **Selection** tool and double-click the line.

6. A box will open with color and width options. Choose an option and click **OK** to apply the change.
Arrow
This tool allows you to draw a semi-transparent, straight arrow on a page.

1. Click the Arrow tool.

2. To set the color of the arrow, click the Color button and select a color.

3. To set the width of the arrow, click the Line Width button and select a size.
4. Click and drag your cursor on the page where you want the arrow. An arrow will appear on the page.

5. To change the color or width of an existing arrow, choose the Selection tool and double-click the arrow.

6. A box will open with color and width options. Choose an option and click OK to apply the change.
Shapes
The shape tools allow you to draw various geometric shapes on a page. You can control the outline color and width as well as the fill the color.

1. Select a shape to draw.

![Shape Tools]

2. If you want the shape to have a fill color, click the Fill button. This turns fill mode on.

![Fill Button]

3. To set the outline and fill color of the shape, click the Color button.

![Color Palette]

   a. The current fill and outline colors display at the bottom. The top color swatch is the outline and the bottom color swatch is the fill.

   ![Outline Color and Fill Color]

   b. To change the either color, click the color swatch you want to change. A color palette will open. Click the desired color.
4. To set the outline width of the shape, click the **Line Width** button and select a size.

7. Click and drag your cursor on the page where you want the shape. The shape will appear on the page.

8. To change the shape of the box, click the **Selection tool**.

9. Click the shape and grab the handles with your mouse to change the size.
10. To change the color or width of an existing shape, choose the **Selection** tool and double-click the shape.

11. A box will open with color and width options. Choose an option and click **OK** to apply the change.
**Erase**

This tool will allow you to erase whole objects with one click.

1. Click the **Erase** tool.

2. Click an annotation on the page to erase.

3. The annotation disappears.
**Actions**
There are a few actions that can be applied to the annotation tools. These allow you to create redactions, show or hide the annotation, and change the layer order of individual annotations. Always be sure to save your annotations.

**Redactions**
A redaction allows you to hide information that appears on a page. Any of the existing drawing tools can be used to create a redaction. This will make the object opaque rather than semi-transparent.

1. To create a new redaction, click the **Redaction Mode** button.

2. Choose one of the drawing tools and create your annotation. In redaction mode it will appear opaque rather than semi-transparent. *(see the Tools section for information on each tool)*

3. To change an existing annotation into a redaction, choose the **selection tool** and double-click an existing annotation to open the properties dialogue box.

4. To make the annotation a redaction, check the **redaction** check box and click **OK**.

 ![Redaction Mode Button](image)
5. The annotation is now opaque.

**Layered Annotations**
If there are multiple annotations that overlap, you can control which annotation appears on top.

1. Where two annotations overlap, click the selection tool \[\text{selection tool}\] and select the annotation to move.

2. Click the **Bring to front** or **Send to back** button.

3. The relative position of the annotations will change.
**Select All**

Use this to quickly select all of the annotations.

1. Click the **Select All** button.

2. All of the annotations are now selected.

**Show/Hide**

This will show or hide all of the annotations.

1. Click the **Show/Hide** button.

2. The annotations are now invisible. Click the show/hide button again to redisplay the annotations.