Virtual Postman Manual

Version 7.11.4

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Abstract

This manual presents the Virtual Postman document management system, version 7.11.4. It describes the installation, configuration and usage of the system.

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Part I. The Virtual Postman Scan Client

The scan client manages batches of documents containing pages scanned from a scanner. You can create new batches by scanning pages from a scanner. Once a batch has been scanned, you can edit the batch, and upload it to the Virtual Postman server.

While editing a batch, you can scan more pages to the batch. You can organise the different pages in the batch into logical documents containing one or more pages. You can also index information about each document in the preconfigured index fields, and even retrieve additional index information about each document from your business operating system or accounting system if your installation has been configured for this.

After processing the batch, you can publish the batch to the server, or share it amoung colleagues for further processing before they publish it.

Chapter 1. Installing the Scan Client

1.1. System requirements

The Virtual Postman Scan Slient is a Java based application that requires the Java Runtime Environment (JRE) version 6 or later to run. The Java Runtime Environment should be installed before attempting to install the Virtual Postman Scan Client.

The Java Runtime Environment can be downloaded from `http://java.com/`. We recommend that you always use the latest version of Java for security, stability and performance reasons.

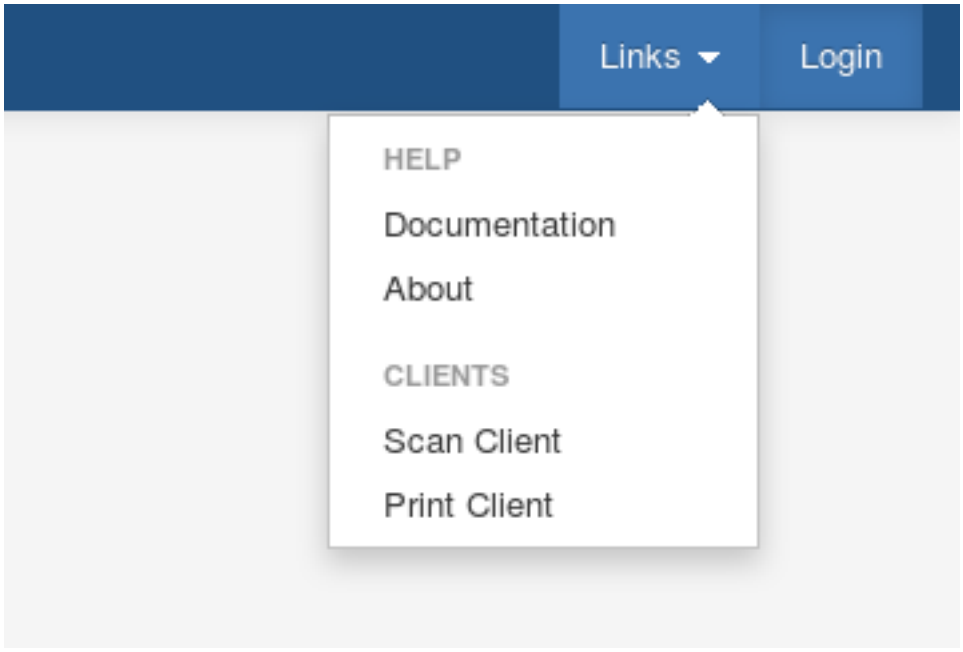
The Virtual Postman Scan Client is tested to work on Windows XP, Windows 7 and Windows 8, on both 32 bit and 64 bit processors. A minimum of 256 MB of RAM is suggested for Windows XP, while a minimum of 512 MB of RAM is suggested for Windows 7 and above.

Disk space requirements depend on the quality of images scanned (including image resolution and color), as well as the frequency at which documents will be uploaded to the server. 1 GB of free space should suffice for most use cases.

1.2. Installing with Java Web Start

To install the Virtual Postman Scan Client, click on the *Links* menu from the top right of the Virtual Postman web interface, and click on the *Scan Client* menu item.

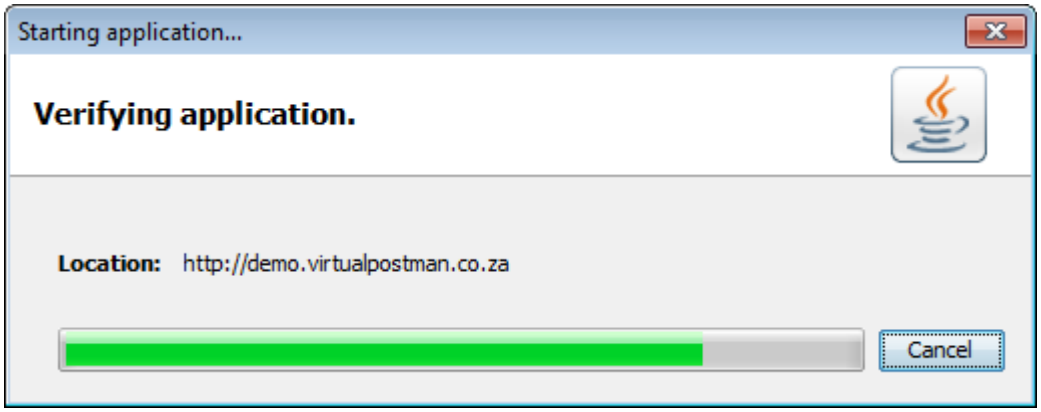
Figure 1.1. Links menu item in Virtual Postman web interface



With the Java Runtime Environment correctly installed, this will start the Java Web Start application. Initially, you will see a Java splash screen, as shown in Figure 1.2, “The Java Web Start splash screen”, which will be replaced shortly by a download progress dialog, which displays the progress being made while downloading the application files, as shown in Figure 1.3, “The Java Web Start download progress dialog”.

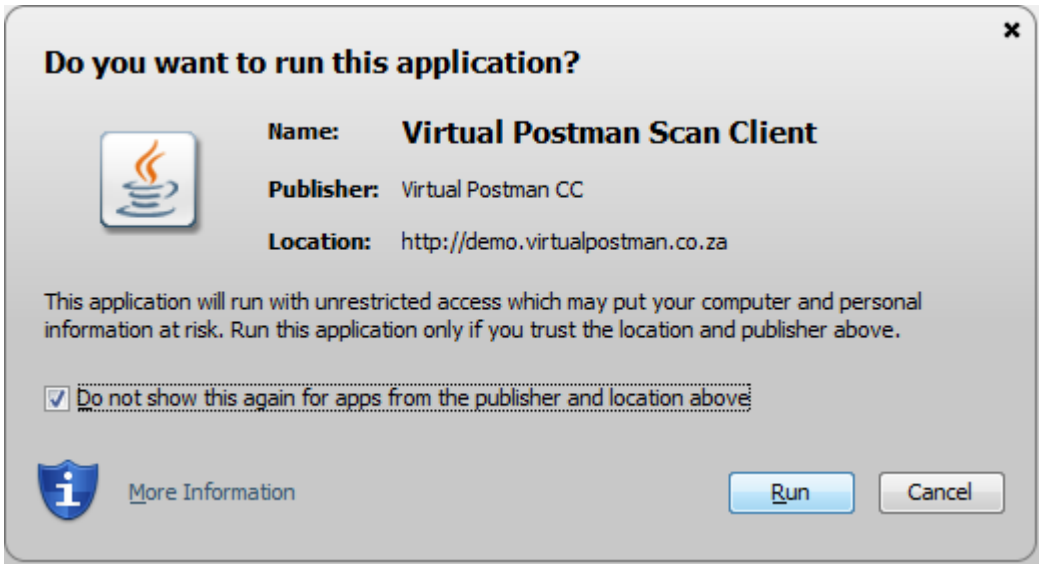
Figure 1.2. The Java Web Start splash screen

Figure 1.3. The Java Web Start download progress dialog



Once the application files have downloaded, you will be presented with a security confirmation dialog, as seen in Figure 1.4, “The Java Web Start security confirmation dialog”.

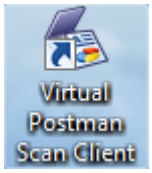
Figure 1.4. The Java Web Start security confirmation dialog



This dialog asks you to confirm that you wish to run the application. This is a security feature provided by Java, which notifies you before running applications from the Internet. This dialog will be presented when you first install the software, then again each time the software is upgraded. You can prevent it from coming up each time by selecting the checkbox as shown above.

Then, click on the "Run" button. This completes the installation and launches the Virtual Postman Scan Client. An icon will be automatically created for you on the desktop. You will be able to use this desktop icon to launch the Virtual Postman Scan Client after the initial installation.

Figure 1.5. Virtual Postman Scan Client desktop icon



1.2.1. Automatic updates

When the Virtual Postman Scan Client starts, it attempt to connect to the server to update itself. If a newer version of the software is avilable on the server, then it will automatically be downloaded and installed.

If, for whatever reason, you experience problems with automatic updates, you can simply click on the link on the web interface to force an update.

Chapter 2. Scan Client concepts

Now that the Scan Client is installed, we will introduce you to the concepts involved in using the Scan Client.

2.1. Definitions

In describing the Scan Client we will use some of the following terms:

Pages
: A page is a single piece of paper scanned into the scan client. A page refers to a single scanned image. One or more pages can be added to a document. Pages are not indexed or uploaded on their own - the documents they belong to are indexed and uploaded.

Documents
: The Scan Client can combine one or more pages into each logical document. Documents can be indexed and uploaded onto the Virtual Postman server. Each document is archived on the server as a single PDF file, containing one or more pages.

Batches
: A batch contains all the pages scanned at the same time, and are managed together. If 30 pages are placed in the scanner's feeder, then scanned into the scan client, then all those pages, and the documents created from those pages, will be managed in a single batch. Batches are uploaded and shared as a whole.

Document categories, or nodes
: On each Virtual Postman system, there are multiple nodes (otherwise known as document categories). Each different type of document should be archived into a separate node. Having separate nodes allows us to segregate the documents by document type, and record information relative to each document type.

  If you are scanning contracts between your company and your customers, information you may want to record about each document might include the customer's name, the customer's account number and the contract start and end dates. These fields would not be applicable if you were scanning delivery notes, where delivery note number, invoice number, delivery date etc. would be more relevant.

  Scanning documents into different nodes based on the document type allows you to configure different index fields per document type.

  All documents in a batch should be of the same document type.

Indexing
: Indexing is done when values are populated into the index fields configured for the document type you are scanning.

Uploading
: Once a batch has been scanned, processed and indexed, it is uploaded to the server. This makes the documents in the batch available other users logged into the server.

Chapter 3. Scan Client configuration

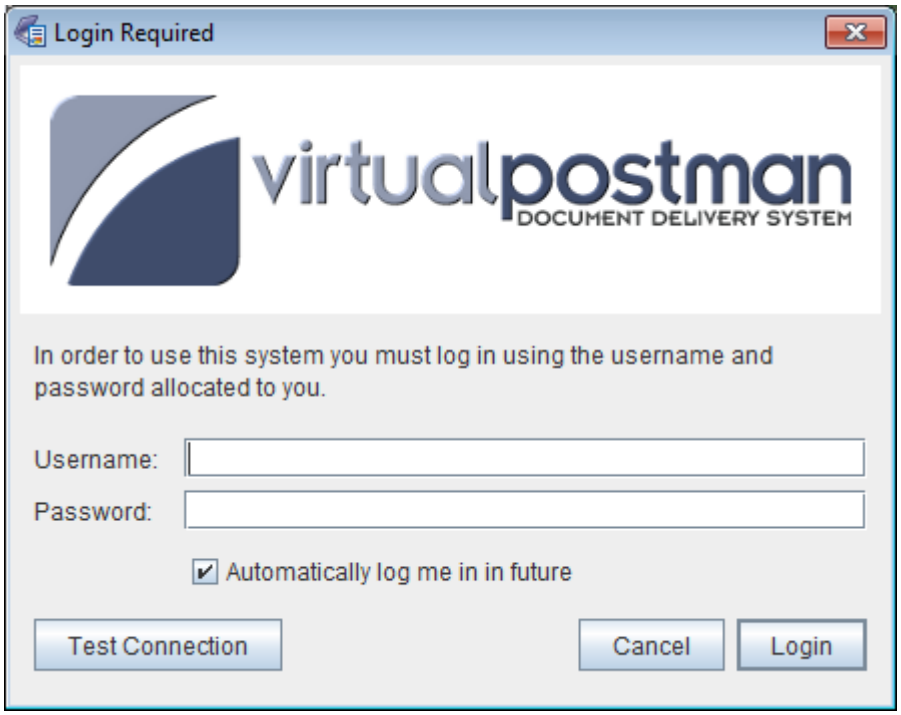
This chapter covers the configuration of the Virtual Postman Scan Client.

3.1. Authentication

When you use the Virtual Postman Scan Client for the first time, you will be presented with an authentication screen, as shown in Figure 3.1, “Virtual Postman Scan Client authentication window”.

In order to log in, type your username and password as provided by your system administrator. This will be the same username and password you use to log into the Virtual Postman web interface.

Figure 3.1. Virtual Postman Scan Client authentication window



If you select the checkbox labeled *Automatically log me in in future* then, once you have successfully logged in, you will not be asked for your username and password again - they will be remembered.

If you do not select the checkbox, you will be asked for your username and password each time the Virtual Postman Scan Client starts up.

The *Test Connection* button allows you to test whether or not communication with the Virtual Postman server can be established.

If the *Automatically log me in in future* is not visible, or if you would like to change the automatic login settings, you can select the *Authentication settings* option from the *Settings* menu of the Virtual Postman Scan Client main window, which will allow you to configure the automatic login feature, as shown in Figure 3.3, “Authentication settings dialog”.

Figure 3.2. Authentication settings menu item

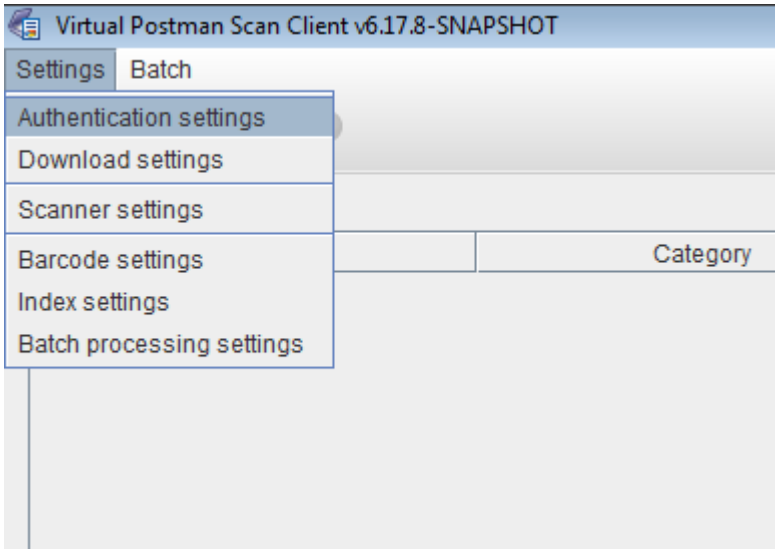
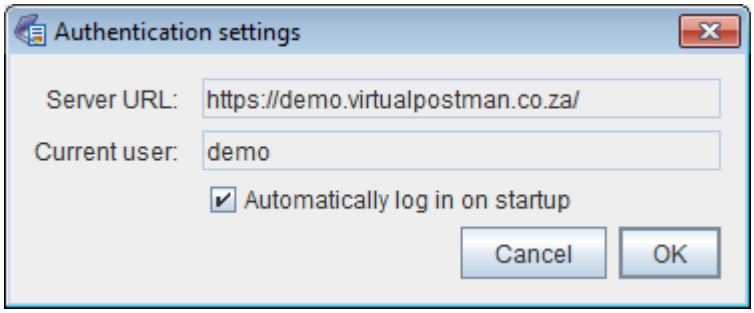


Figure 3.3. Authentication settings dialog



3.2. Centralised configuration

Some of the settings for Virtual Postman Scan Client are managed centrally on the Virtual Postman server. These settings include the the list of nodes the Scan Client user has access to as well as the names and configuration of the indexes for each node.

When the Scan Client is logged into for the first time, these settings are downloaded from the Virtual Postman server automatically. If the central settings on the server change, the new settings need to be re-downloaded to the Scan Client. This can be done by selecting the *Download settings* option from the *Settings* menu in the Virtual Postman Scan Client as shown below:

Figure 3.4. Selecting the Download settings menu option

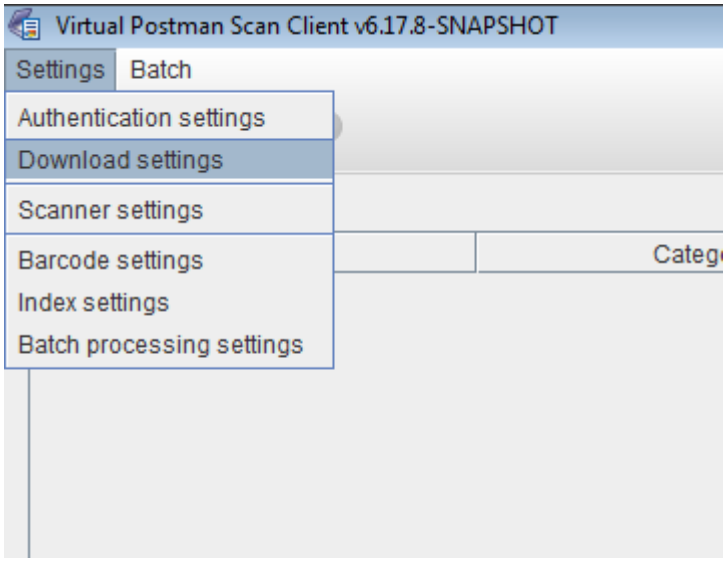
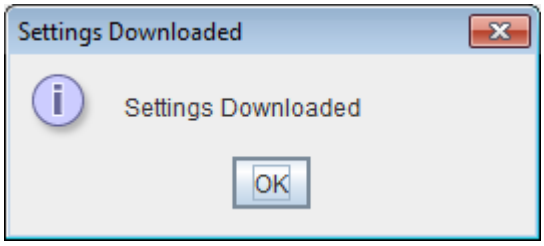


Figure 3.5. Central settings downloaded successfully

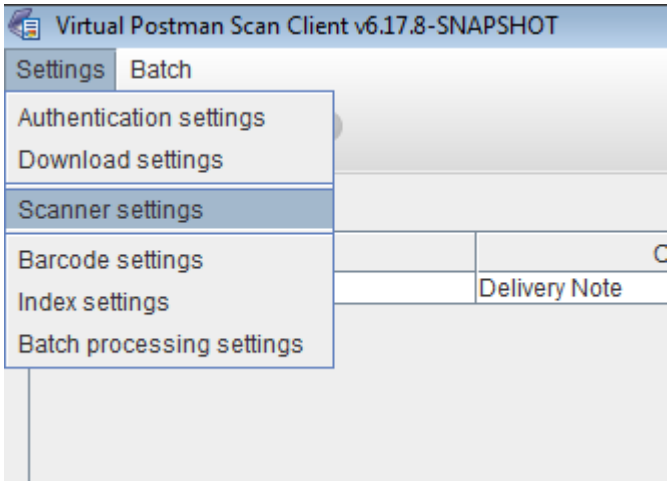


3.3. Scanner settings

The scanner settings of the Virtual Postman Scan Client configure how images are scanned into the Scan Client.

To access the scanner settings, select the *Scanner settings* option from the *Settings* menu of the Scan Client.

Figure 3.6. Selecting the Scanner settings menu option



The Virtual Postman Scan Client comes with multiple image sources installed. Each image source allows you to acquire images in a different way. The following images sources are available:

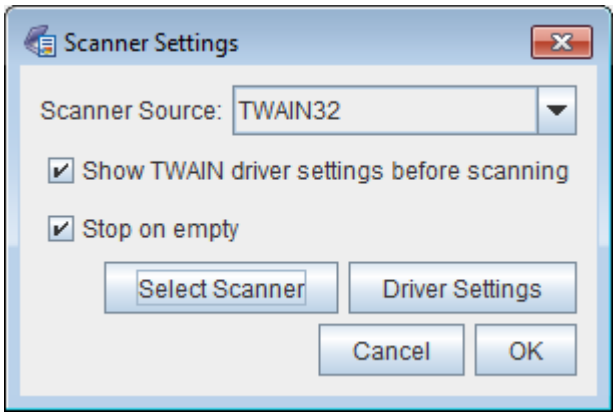
TWAIN32
: The TWAIN32 image sources uses the standard TWAIN API to communicate to a hardware scanner and scan images from using the scanner. This is the default image source.

File
: You can use the Files image source to select files (JPEG, PNG, PDF, TIFF) to import, and the Scan Client will import each image from the selected files as though they were scanned.

Test
: The Test image source is for testing, and creates automatically generated test images.

Figure 3.7, “TWAIN32 scanner settings” shows the scanner settings for the TWAIN32 image source. To select a different image source, choose a different entry from the *Scanner Source* drop down.

Figure 3.7. TWAIN32 scanner settings



3.3.1. TWAIN32 image source

Figure 3.7, “TWAIN32 scanner settings” shows the settings for the TWAIN32 image source.

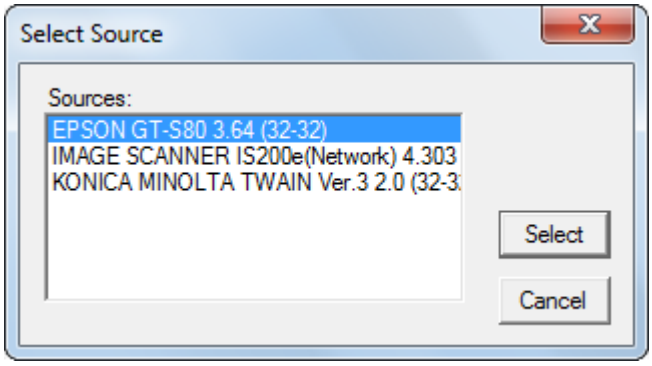
If the *Show TWAIN driver settings before scanning* option is selected, then the settings window from the TWAIN driver will be displayed each time the user scans. This allows the user to make adjustments to the scanner settings before each scan. If the option is not selected, the driver is requested not to display the settings window, and just scan without further prompting.

The *Driver Settings* button can be used to immediately bring up the TWAIN driver settings for the selected TWAIN scanner.

If the *Stop on empty* option is selected, the scanner will be asked to stop scanning when there are no more pages in the feeder. If not selected, the scanner driver will typically show a window asking the user to click *Cancel* once there are no more pages, allowing the user to add more pages to the feeder if desired.

The *Select Scanner* button causes a window to be displayd in which the user can select the TWAIN scanner to use when scanning, as shown in Figure 3.8, “Selecting a TWAIN scanner”.

Figure 3.8. Selecting a TWAIN scanner

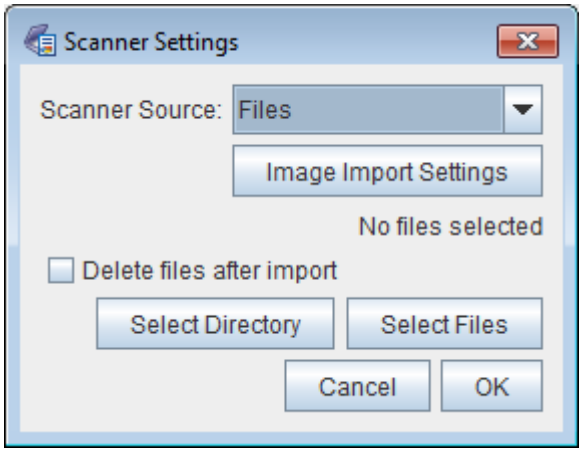


If the desired scanner does not appear in the list, please make sure that the scanner is correctly connected to the computer, ad that the driver software is installed. If an error occurs when scanning, please use this feature to make sure the correct scanner is selected.

3.3.2. Files image source

The Files image source allows importing images from a file. The settings for the Files image source are shown in Figure 3.9, “Files image source settings”.

Figure 3.9. Files image source settings



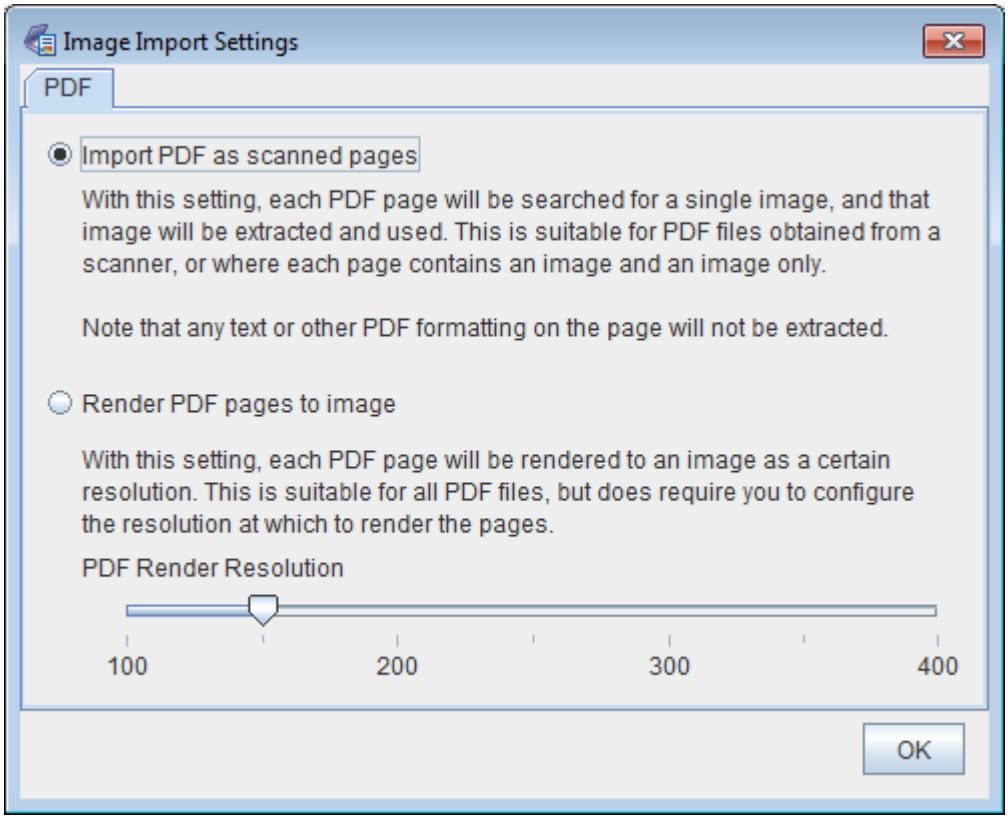
The user can select one or more images to import by selecting the *Select Files*.

The user can select an entire directory from which to import all images by using the *Select Directory* button.

If the *Delete files after import* option is selected, then each image file that is imported will be deleted if all images are imported successfully.

The exact details of how images are imported can be controlled by using *Image Import Settings* button. This button will cause the window shown in Figure 3.10, “Image import settings” to be displayed.

Figure 3.10. Image import settings



3.3.2.1. PDF image import options

Figure 3.10, “Image import settings” displays the settings for importing PDF files. As described on the screen, there are two methods that can be used when importing PDF files. If the PDF file contains a scanned image, we can open the PDF file, and extract just the image contained on each page. This only works for PDF files where each page contains only a scanned image.

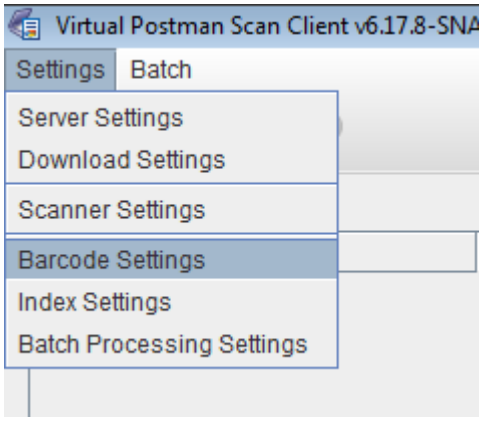
For more complex PDF files, we can render each page to an image, and import that rendered image. Rendering of PDF files to images is done on a best effort basis, as this is not within the scope of the Virtual Postman Scan Client, but is merely added as a covenience feature.

When rendering a PDF file to an image, the user should select the resolution at which to render the PDF file. We have found that a resolution of 100 to 150 usually suffices.

3.4. Barcode settings

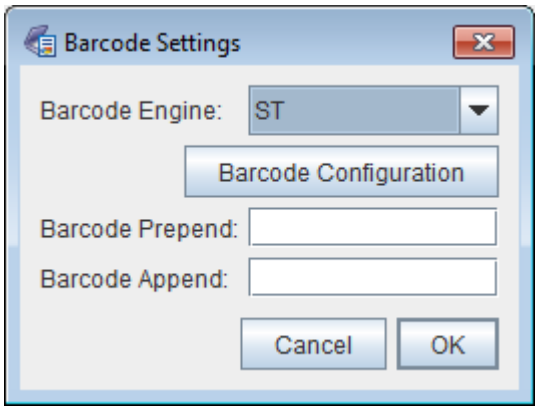
The barcode settings configure how the Virtual Postman Scan Client finds barcodes in scanned images. To access the barcode settings, select the *Barcode settings* option from the Scan Client's *Settings* menu.

Figure 3.11. Barcode settings menu item



In Figure 3.12, “Barcode settings dialog” the barcode settings window is shown. The Virtual Postman Scan Client includes two different barcode recognition engines, *ST* and *ZX*. We recommend using the *ST* barcode recognition engine unless specifically advised otherwise.

Figure 3.12. Barcode settings dialog



Using the *Barcode Prepend* and *Barcode Append* fields you can configure a standard prefix or suffix to be prepended or appended to barcodes found in scanned images. This can be used in situations where the barcode on the scanned document does not contain all the desired information to be stored in an index.

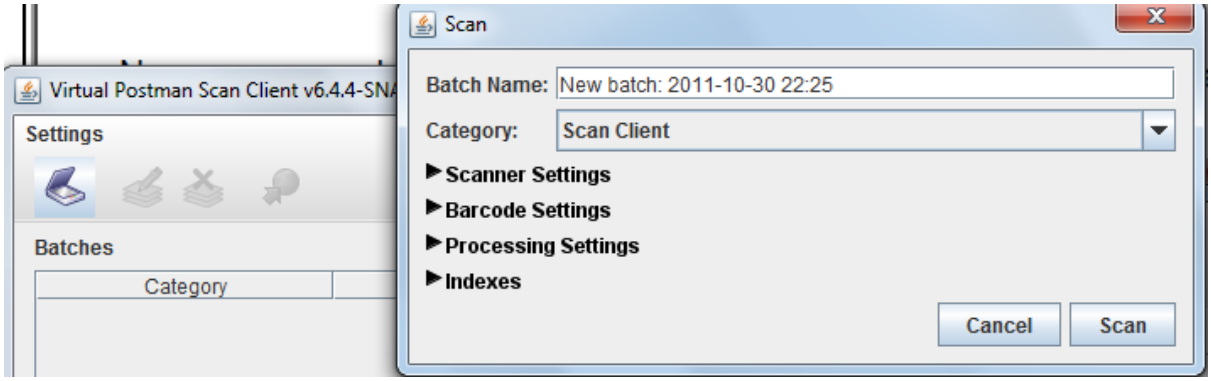
For example, if a page has a barcode with a value of `12345`, but you would like to record the value of `ABC12345` in the index, you would set the *Barcode Prepend* field to `ABC`.

Chapter 4. Scan Client Usage

4.1. Scanning

From our home screen, shown in ???, press the scanner icon at the top left of the home screen to bring up the scanning interface, as shown below in figure Figure 4.1, “Virtual Postman Scan Client Scanner Interface”.

Figure 4.1. Virtual Postman Scan Client Scanner Interface

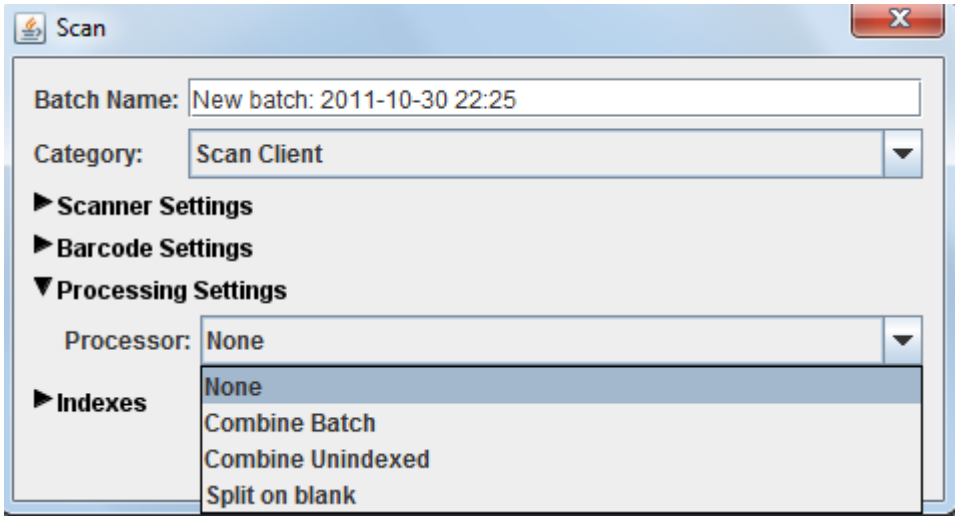


The batch name is giving to an entire batch of scanning (1 continues flow of documents in the scanner), and may be edited to suit your needs. There will always be a default unique batch name before you edit it.

The Category is the location on the server(virtual postman) where your scans will be sent to once you have verified and uploaded.

Click on "Processing Settings" to choose which type of batch processing you would like to perform, shown below in Figure 4.2, “Virtual Postman Scan Client Scanner Interface”.

Figure 4.2. Virtual Postman Scan Client Scanner Interface



- None : this will not use any batch management process and all pages will be scanned individually.

- Combine Batch : this will put all pages scanned in this instance into one multi-paged document

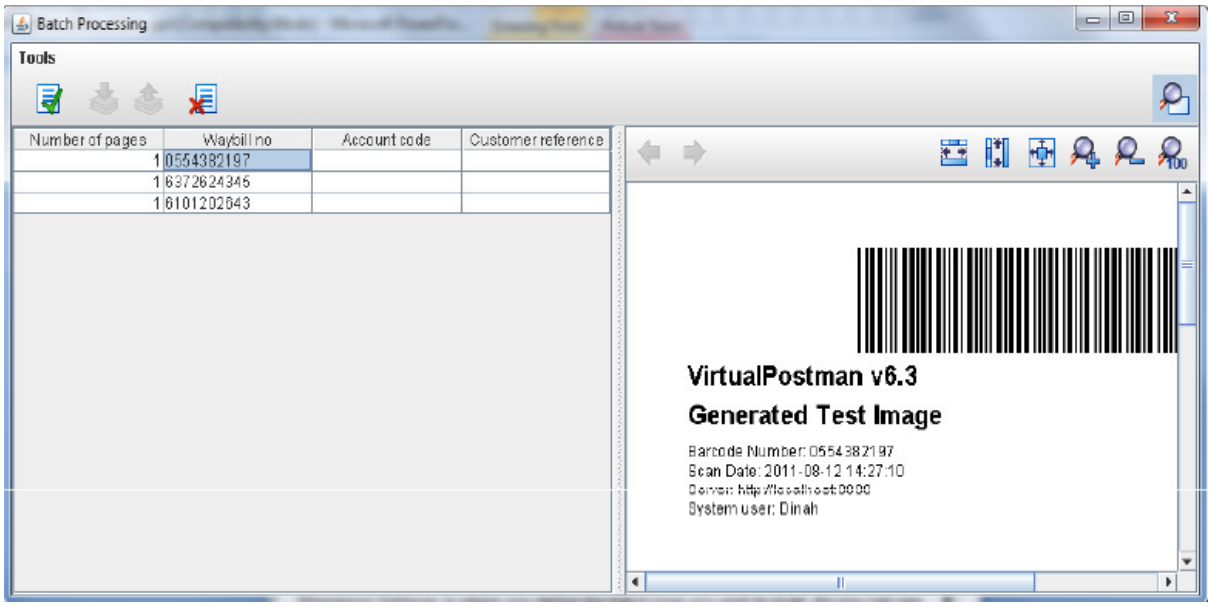
- Combine Unindexed : this will put all unbarcoded pages following a barcoded page into one document as attachments to the barcoded page.

- Split on blank : this will combine pages into one document until a blank page is scanned, and then create a new document.

Click on the "Scan" button when you are ready to scan.

Once all your documents have been scanned, all pages will be listed in a table on the left side of the scan Client, and clicking on an individual document will display a preview of that page on the right hand side, as show below in Figure 4.3, “Virtual Postman Scan Client After Scanning”.

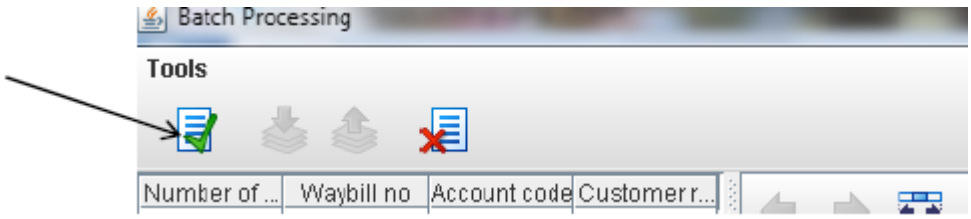
Figure 4.3. Virtual Postman Scan Client After Scanning



4.2. Verifying

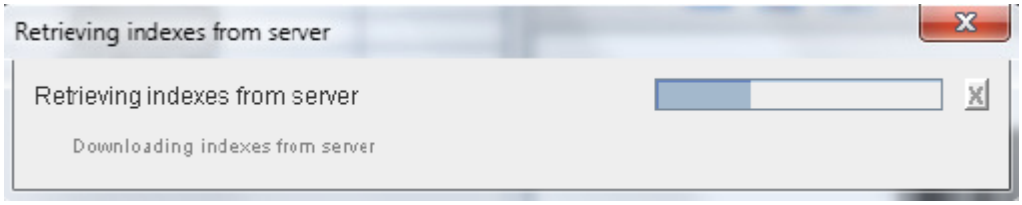
Verifying is the process in which the document name is matched against your company database and all supporting information (e.g. account number, invoice number etc.) is returned to the scan client dashboard. Verification only takes place after you have scanned in some pages. Click the green 'tick' at the top left to start verifying your scans. As shown below in Figure 4.4, “Virtual Postman Scan Client Verifying”.

Figure 4.4. Virtual Postman Scan Client Verifying



You will see a progress bar whilst the verification process is still busy,as shown below in Figure 4.5, “Virtual Postman Scan Client Verifying Progress”.

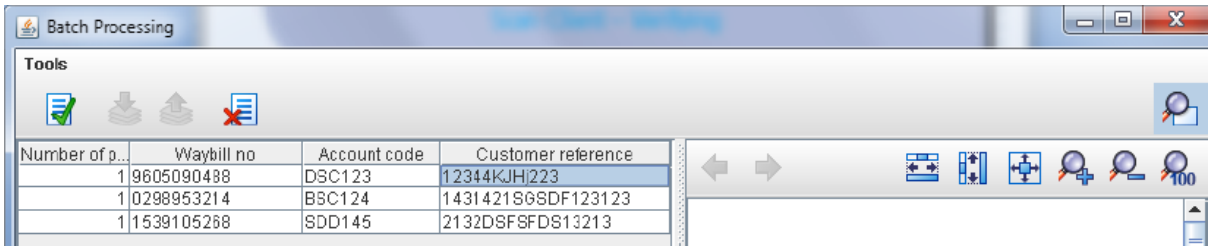
Figure 4.5. Virtual Postman Scan Client Verifying Progress



You will receive confirmation that the verification process has ended.

Refer to the table that contains all your scanned documents. The indexes should now have data in them. As shown below in Figure 4.6, “Virtual Postman Scan Client Verifying Done”.

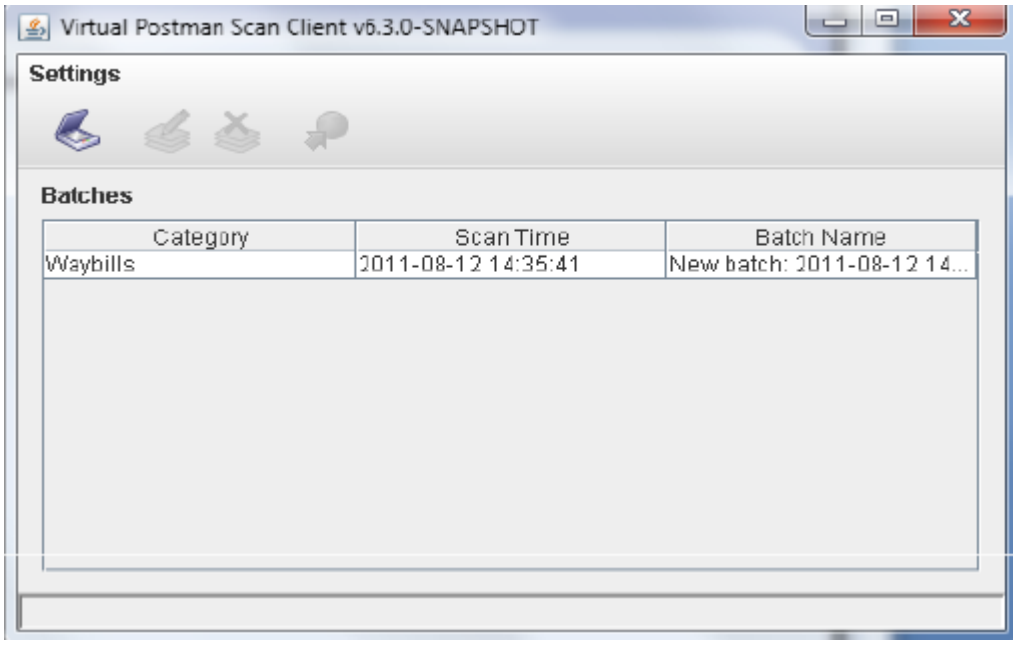
Figure 4.6. Virtual Postman Scan Client Verifying Done



4.3. Uploading

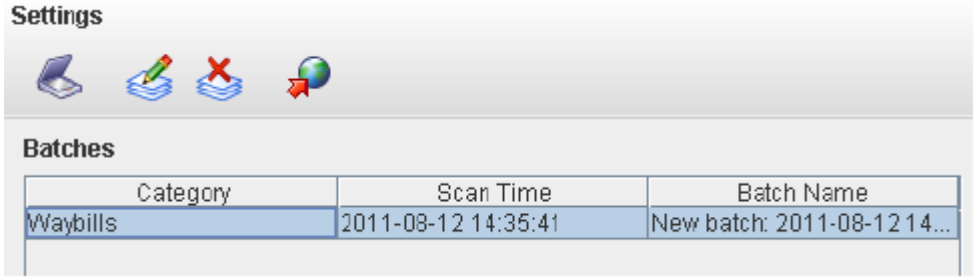
Now that all the indexes for your scanned documents have been updated, close the current screen to return to the scan client home screen. Under batches, you will see the batch that you just scanned in and verified. As shown below in ???.

Figure 4.7. Virtual Postman Scan Client Publishing



Clicking on the line of the batch you want to publish (upload to the server), will activate more buttons at the top left of the scan client. This will allow you to edit (pencil), delete (X) or send (World) your batch to the server. As shown below in Figure 4.8, “Virtual Postman Scan Client Publishing Selected Index”.

Figure 4.8. Virtual Postman Scan Client Publishing Selected Index



Note : The buttons will only affect the row you have currently selected.

Part II. The Virtual Postman Web Interface

The web interface of Virtual Postman is the portal where you can access to view and download documents that are imported to the Virtual Postman server, index or re-index, or send them off to an external location using e-mail or FTP.

Using the web interface you can go through all the nodes and documents that you have permisions to and check the quality of documents that are being scanned. You can also download documents off the server using this interface should you need to give records to your clients or colleagues. You can also send off documents via e-mail and FTP. This will deliver docuements directly to the client or wherever you wish to send it using these platforms described.

Chapter 5. Web Interface concepts

Now that Virtual Postman is installed, we will introduce you to the concepts involved in using the web interface.

5.1. Definitions

In describing the web interface we will use some of the following terms:

Node
: A node is a document type in which documents where imported to from your ERP/accounting system, scanned in from the Scan Client, or uploaded directly through the web interface.

Category
: A category is a parent to a node. It will contain a whole set of nodes that relate to that category. A Virtual Postman system can have multiple categories.

Index
: An index is a column within the document listing that will describe certain attributes of the document and can be used when searching for documents that have specific value. The indexes are not predefined and can be changed as and when neccessary.

Envelopes
: An envelope is the packaging of the of a document and it destination details, subject and message body. This is used when sending e-mails, FTPs, print jobs or zipping documnets you want to download onto your machine.

Uploading
: Uploading is the act of putting a document onto the server from your machine or external drive.

Chapter 6. Logging In And Quick Search

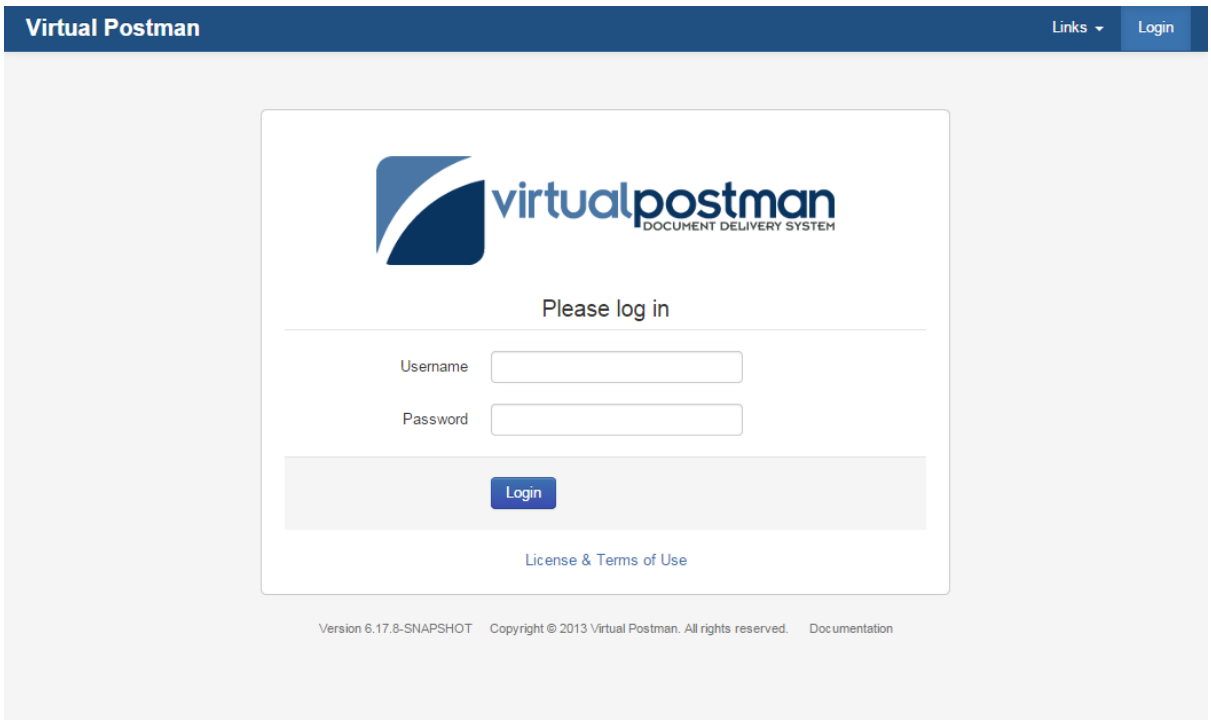
This chapter covers logging into Virtual Postman and how to use the quick search functionality

6.1. Login

Once Virtual Postman has been installed, you will have to go to go the URL or I.P. address of the server. When you go to this page, you will arrive at the following page: Figure 6.1, “Login Screen”

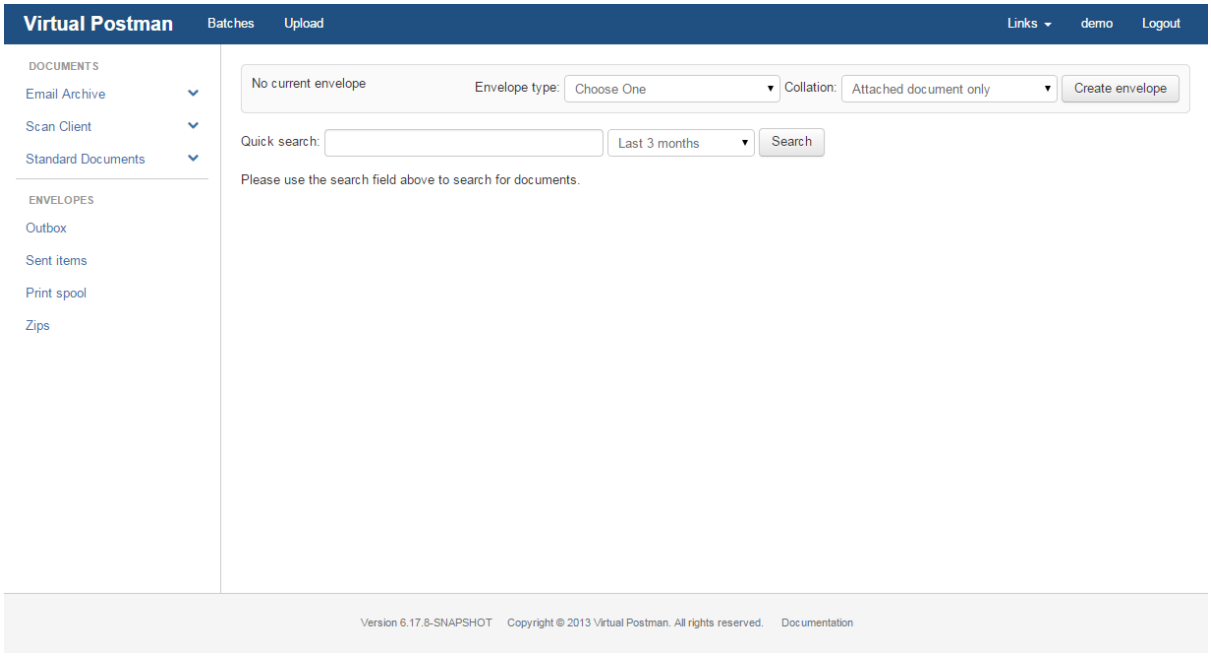
In order to log in, type your username and password as provided by your system administrator.

Figure 6.1. Login Screen



Once you have successfully logged in, you will be redirected to the following home page: Figure 6.2, “Home Page”

Figure 6.2. Home Page

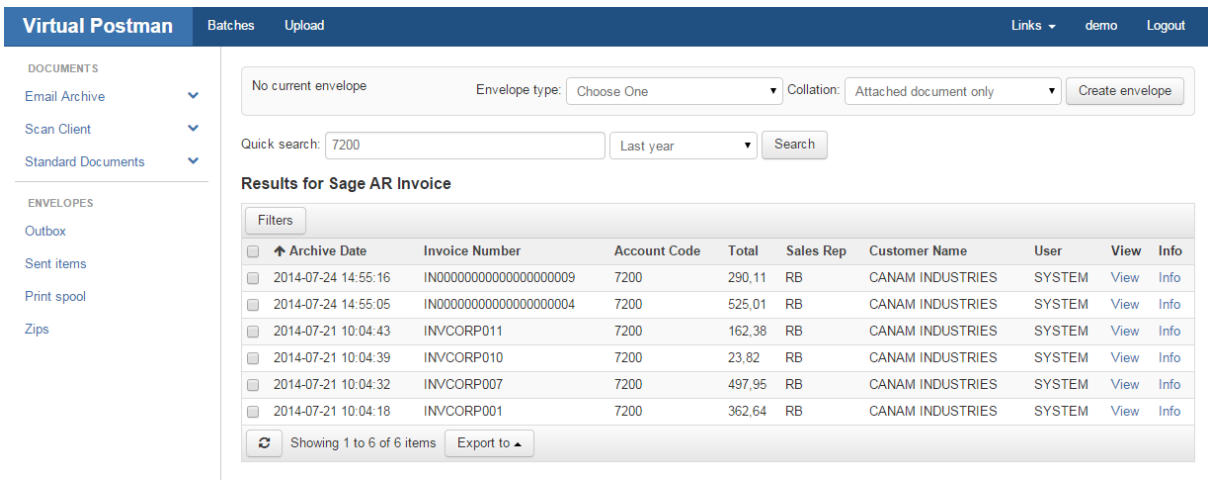


6.2. Quick Search

On the the home screen of Virtual Postman, you will be able to quickly search for documents if you know the document number or another index stored for that document on Virtual Postman.

You can acheive this by simply typing that value into the "Quick search" box, modifying the date accordingly and clicking the search button. This will then return a result or set of results matching that value as shown below: Figure 6.3, “Quick Search”

Figure 6.3. Quick Search



From here, you should be able to view any of the documents by clicking on the "View" link on the line item that you are looking for.

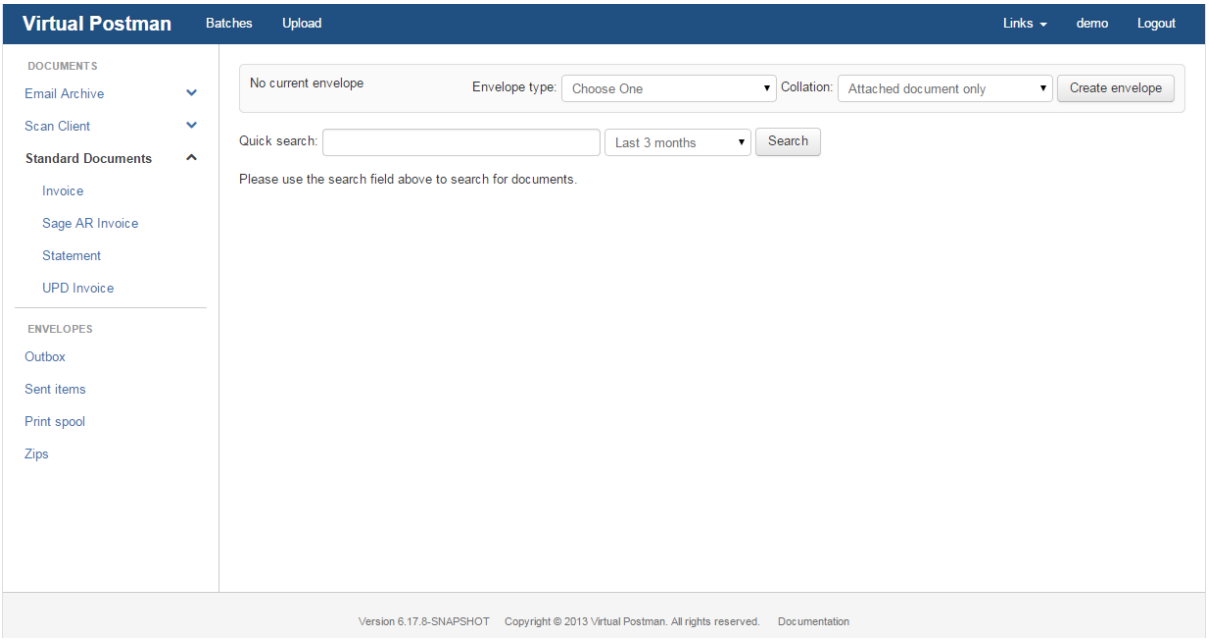
Chapter 7. Advanced Searching

In this chapter we will cover how to navigate through the Web Interface and also how to do more specific searches using filters.

7.1. Selecting Nodes

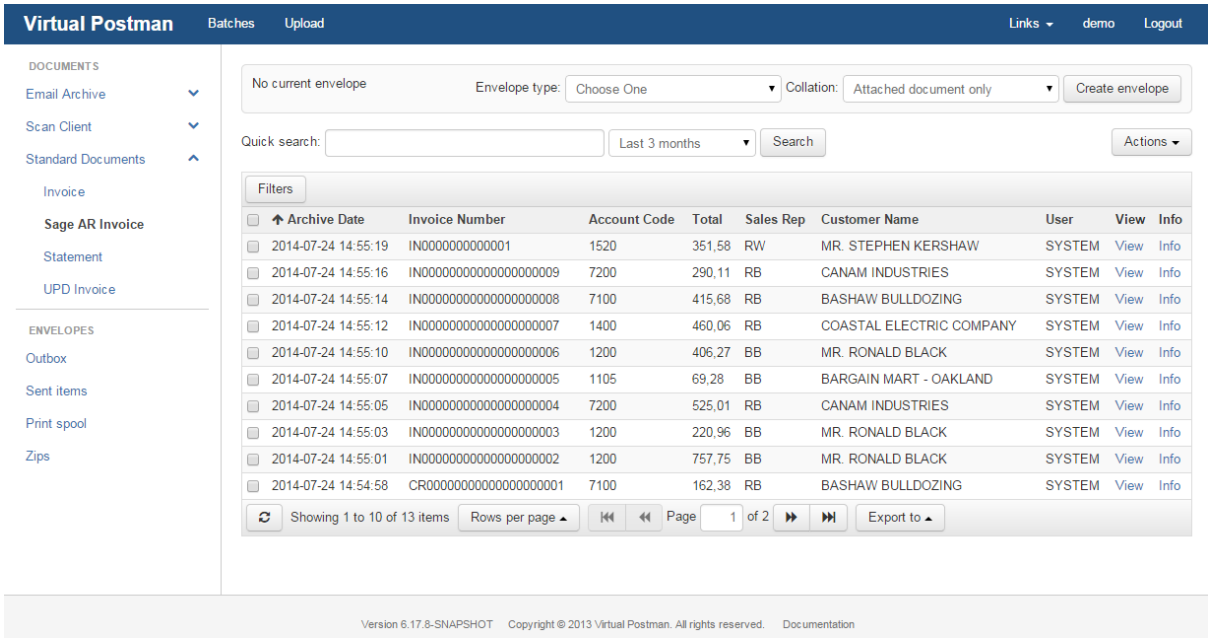
When logging in to Virtual Postman, you will see a list of node categories on the left panel. Selecting a node category will expand it and show you the list of nodes that fall under that category, as shown in Figure 7.1, “Node List”.

Figure 7.1. Node List



If you click on any of the nodes under the node category, a list of all the documents that are in that node will appear on the screen sorted by the archive date from newest to oldest. A list will appear in your browser when you click on a node as shown in Figure 7.2, “Node Search Result”.

Figure 7.2. Node Search Result

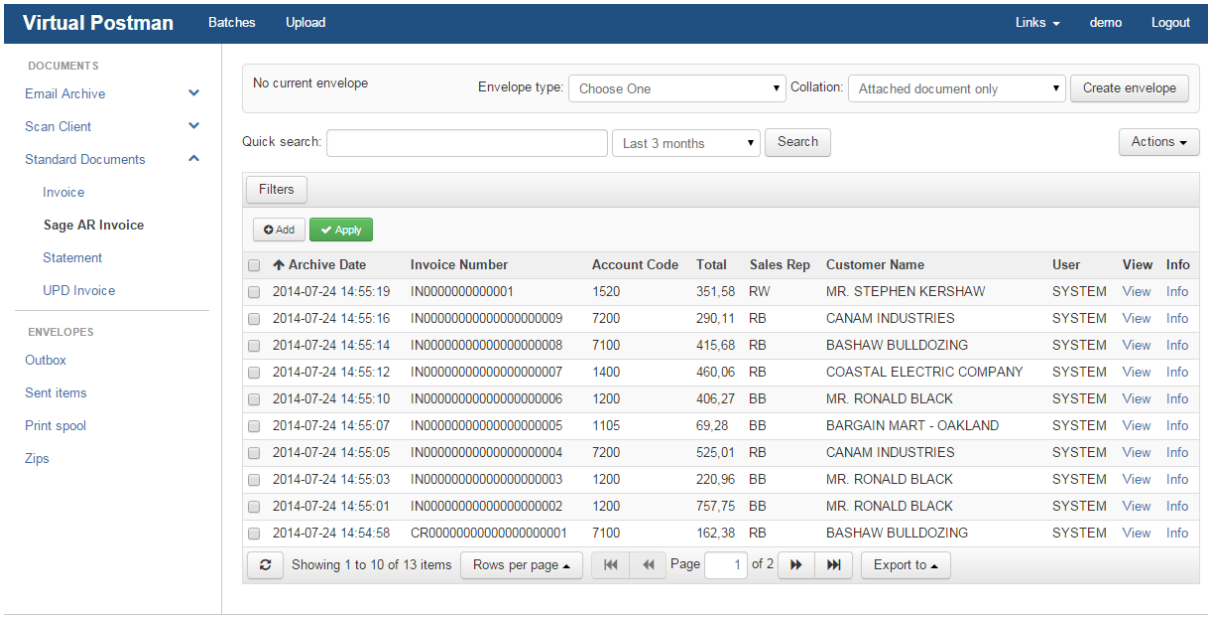


7.2. Using Filters

For more specific searching, you can use filters to focus on a select group of documents using the indexes to define exactly what you want Virtual Postman to output onto your browser.

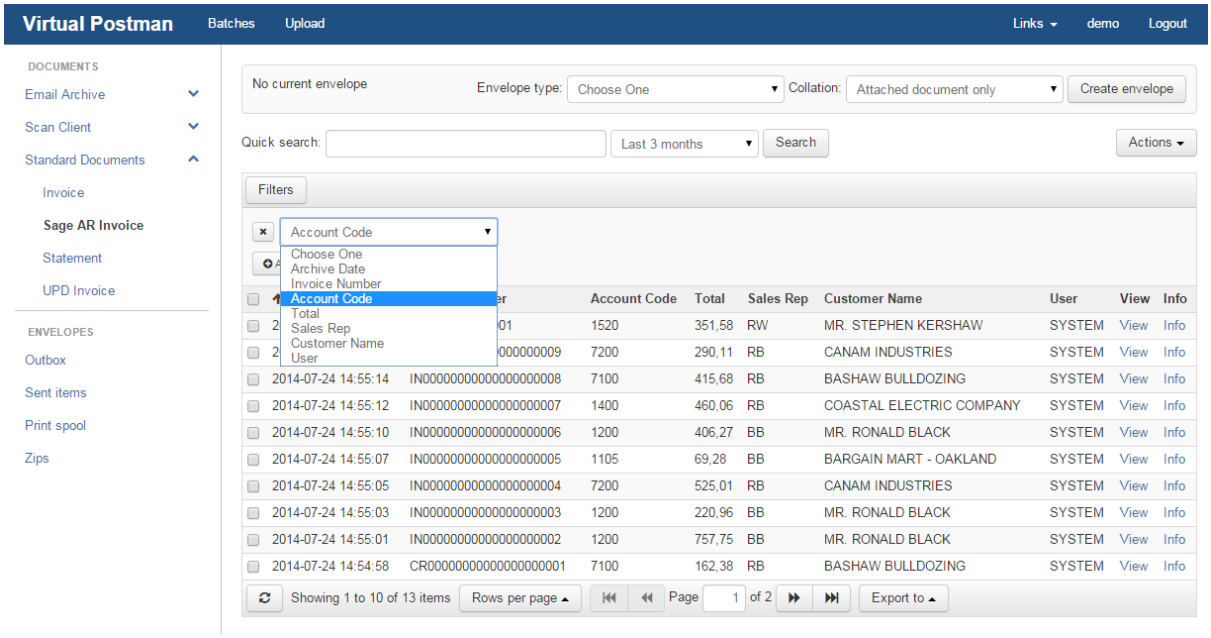
To set the filters, you need to click on the "Filters" button just below the "Quick search" box. When you click on the filters button, the following screen will appear. Figure 7.3, “Filtering”

Figure 7.3. Filtering



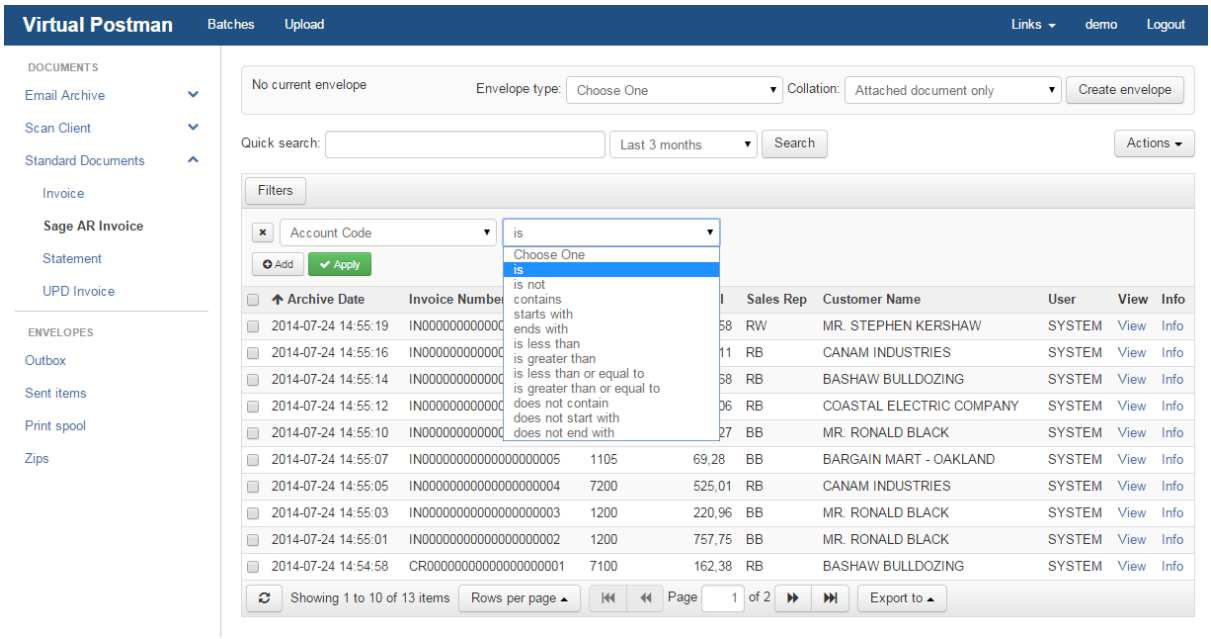
From here you will be able to start adding filters. Filters work on searching for index values that match the criteria you give the filter. When you click "Add", it will start by asking you which index you want to set a filter on, as shown in Figure 7.4, “Selecting an index”.

Figure 7.4. Selecting an index



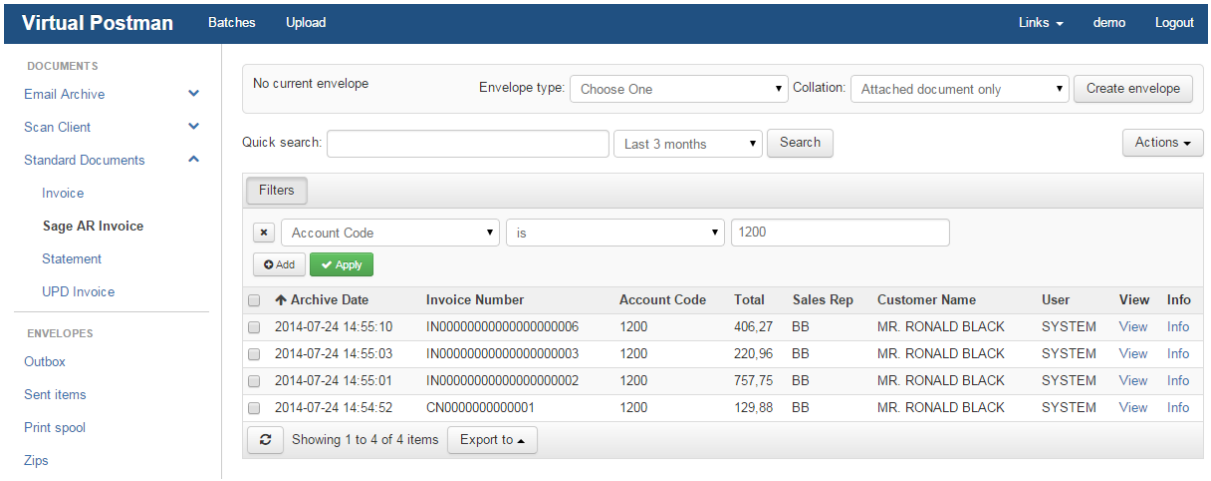
Once you have selected the index you want to filter on, you will be required to select a relation criteria. This depicts how you want to filter the that index, there are multiple options you can choose from, as shown in Figure 7.5, “Criteria Selection”.

Figure 7.5. Criteria Selection



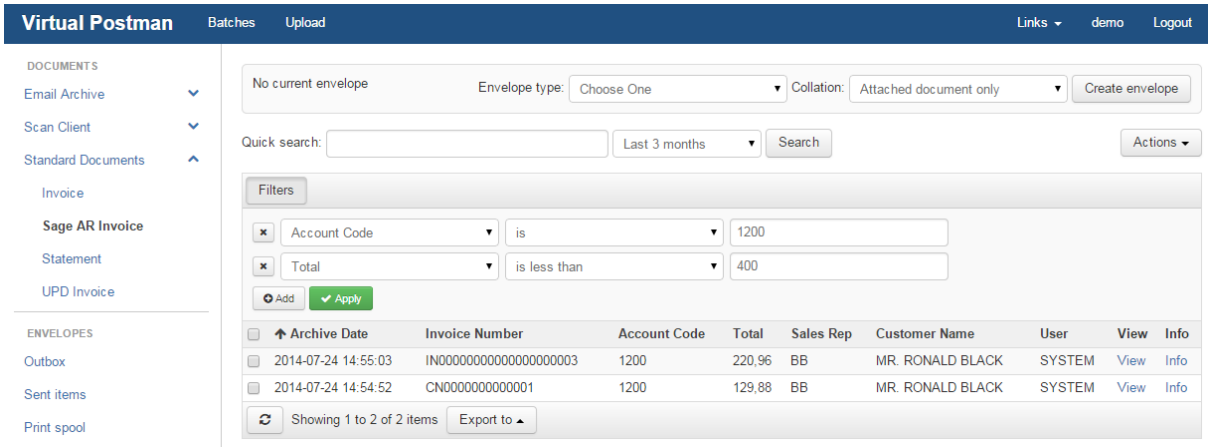
Once you have set the criteria, another text box will appear. In this text box you must enter the value that you want your criteria to match. After typing th value, you must click on the "Apply" button for the filter to be set and a list of documents matching that filter will be shown on your browser, as shown in Figure 7.6, “Filter Results”.

Figure 7.6. Filter Results



You are not limited to only having one filter. You can set multiple filters to narrow down your search results as needed. To accheive this, you simply have to click on the "Add" button again, follow the above process again, and you will get a more defined list based on the new filter you set, as shown in Figure 7.7, “Multiple Filters”.

Figure 7.7. Multiple Filters

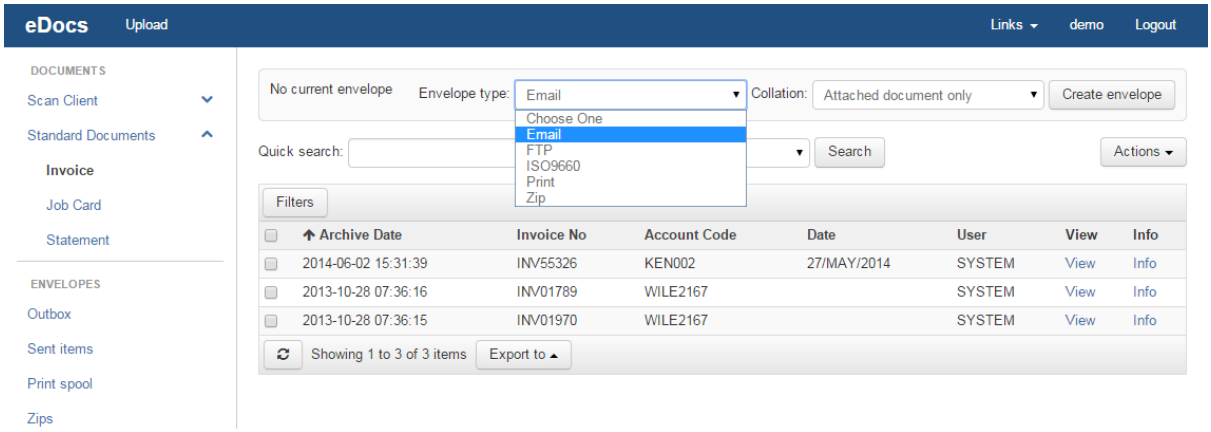


Chapter 8. Envelopes

Envelopes are the packages that are used to send documents from the server to other destination. With Virtual Postman, you can create various types of envelopes depending on how you want this envelope to be delivered.

To create an envelope, you simply click on the "Envelope Type" drop down and select the type of envelope, and then click "Create Envelope", "Collation" allows you to select if you want any child documents to be automatically attached to the envelope. Child documents are documents which belong to the parent document, such as a POD that belongs to an invoice. The following different types of envelopes are available for use on Virtual Postman as shown in the selection list in Figure 8.1, “Envelope Types”

Figure 8.1. Envelope Types



8.1. E-mail Envelopes

E-mail envelopes are the most used envelope type as you can use this to send documents directly from Virtual Postman to a specific client or colleagues e-mail address and the documents will appear as an attachment.

8.2. FTP Envelopes

FTP envelopes are used to send documents to clients FTP servers where they can be pulled by the customer and used as required. Virtual Postman uses the normal FTP convention for sending documents to FTP server, which ftp://username:password@ftp.client.com/desired/path.

8.3. Print Envelopes

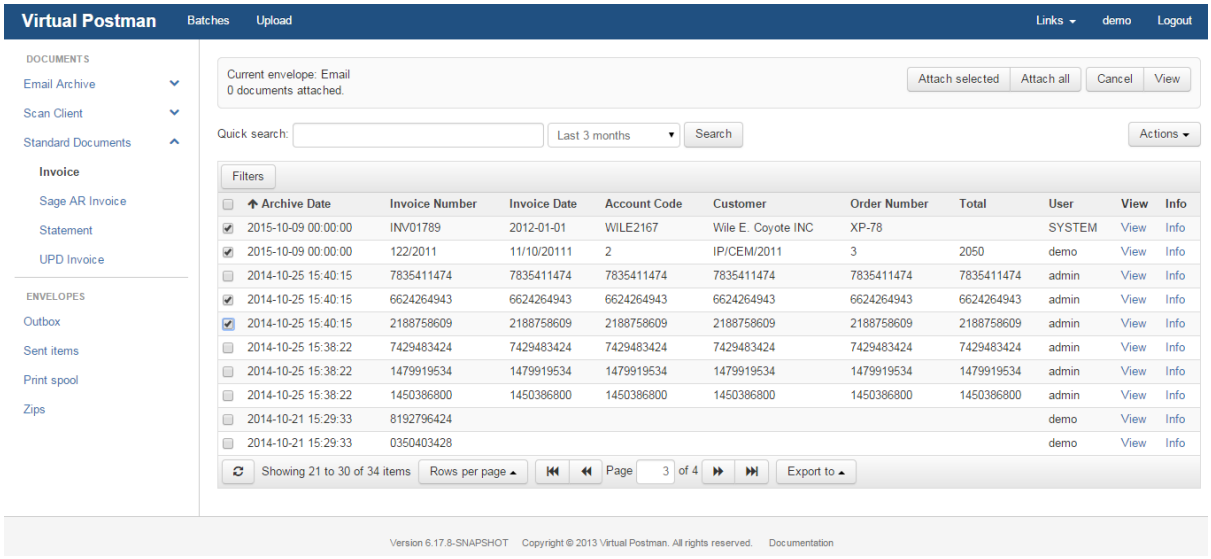
Print envelopes are used for printing documents directly from Virtual Postman without having to send or save them anywhere off the server. They can be sent directly to your print driver.

8.4. Zip Envelopes

Zip envelopes are used for downloading documents directly to your computer in an organised package, as well as an index.html page to help navigate through the zip file once downloaded from the server.

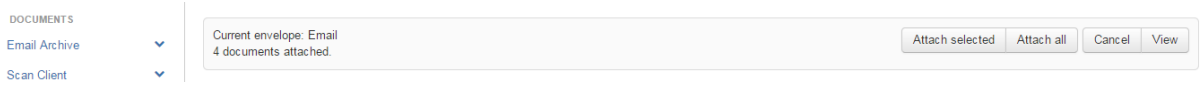
Once you have clicked create envelope, you can either click "Attach selected" or "Attach all". Attach all will attach all documents shown in the list and attach selected will only attach documents which have been selected. You can select specific documents you want to attach and click on "Attach selected" as shown in Figure 8.2, “Attaching Documents”

Figure 8.2. Attaching Documents



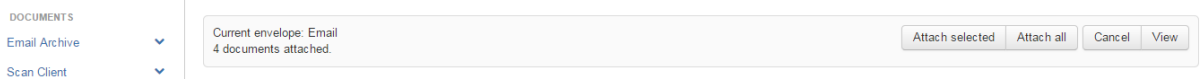
Once you have clicked *Attach selected*, the document count will show you how many documents have been attached to the current envelope, as well the the envelope type, as shown in Figure 8.3, “Count” below. You can continue to add documents to this envelope until you have attached all the documents you need.

Figure 8.3. Count



Once you have attached all the documents you need, you can then click on "View", which will take you to the below page Figure 8.4, “Count”, from here you can type the e-mail or FTP destination of where you wish to send the documents.

Figure 8.4. Count



If you have created a zip or print envelope, there will be an option to send documents directly to the "Zips" or "Print spool" as shown in Figure 8.5, “Zip Envelopes” and Figure 8.6, “Print Envelopes” below.

Figure 8.5. Zip Envelopes

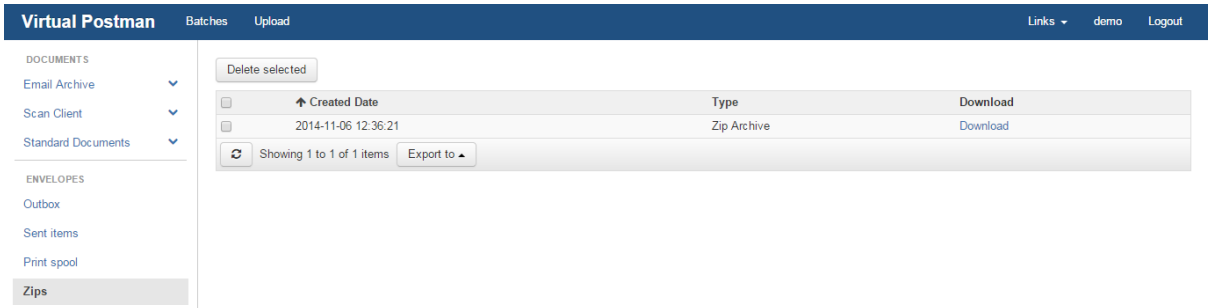
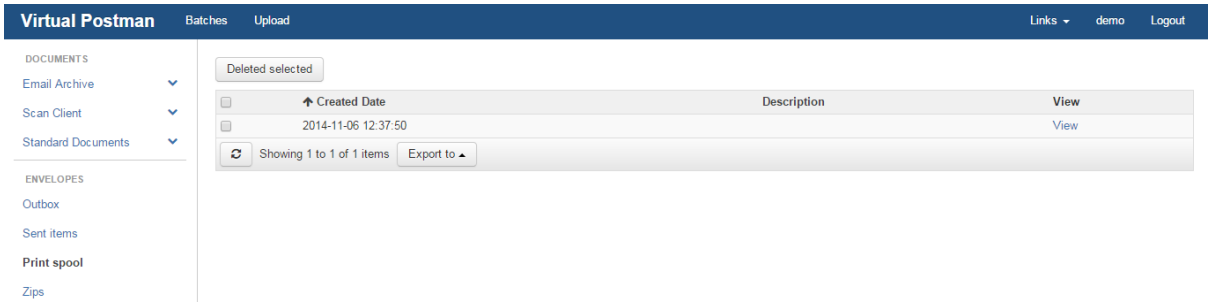


Figure 8.6. Print Envelopes



Part III. The Virtual Postman Administration

The adminisitration section of Virtual Postman is the where administrators can set up users, roles and other adiministrative features provided by Virtual Postman. Administrative settings can only be seen by users who have been assigned an admin role.

Using the the adminisitration section you can setup the mail server which Virtual Postman will use when sending e-mails to customers, which ftp directories must be polled for documents which will be archived on Virtual Postman, create internal and external users that will log onto the system, aissgin roles to the users which will control what types of documents users will have access to, and also be able to view reports from Virtual Postman.

Chapter 9. User Administration

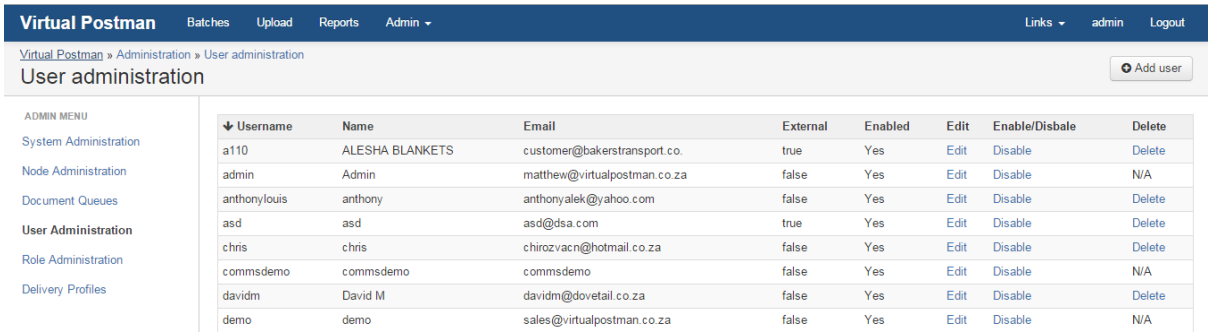
This chapter will cover how to create users and assign roles to users.

This chapter will also cover how cover how to remove users, change user passwords, and set whether this will be an internal user or external user.

9.1. Adding Users

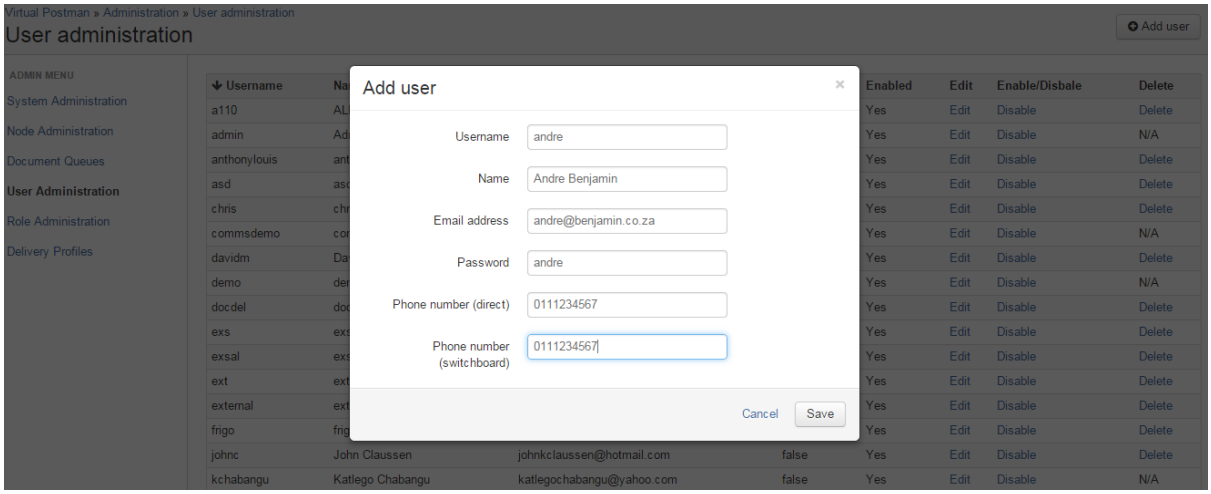
To add a user on Virtual Postman, you click on Admin at the top of the page, then select *User administration* as shown in Figure 9.1, “Adding Users”.

Figure 9.1. Adding Users



You then click "Add user" on the top right and screen will pop up where you will be required to insert four(4) mandatory fields, and two(2) optional fields. The mandatory fields required are the "Username", "Name", "Email address" and "Password" for the new user, and the optional fields are "Telephone number(direct)" and "Telephone number(switchboard)" for the user. After entering these details, you click the "Save" button and the user will be created as shown in Figure 9.2, “Creating a user”.

Figure 9.2. Creating a user

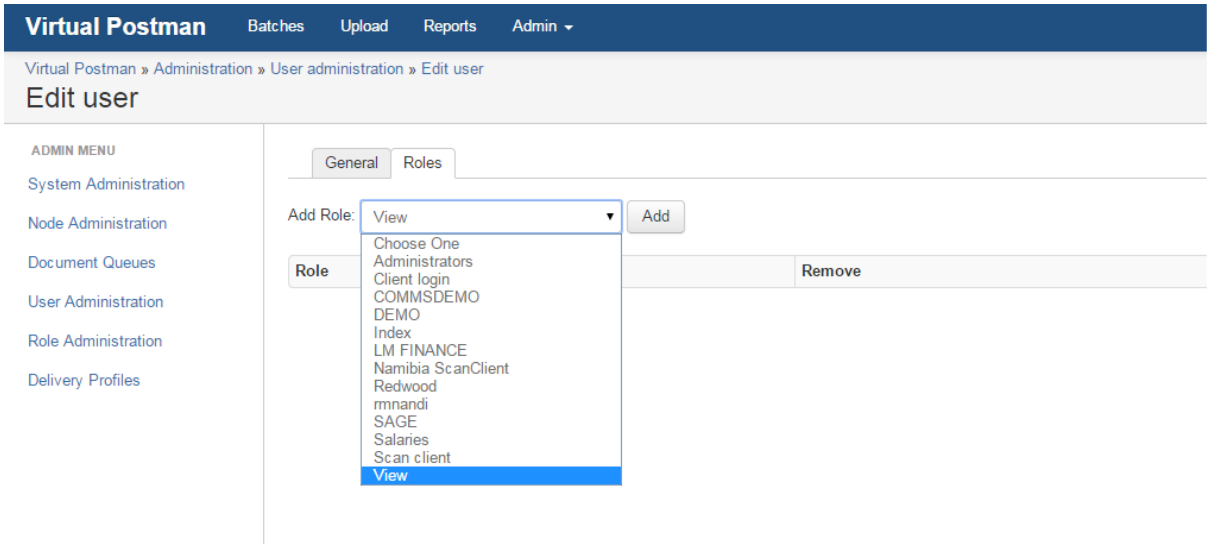


Once you have created the user, you will be able to edit the users' settings and assign them a role if they are an internal user, or assign them permissions on a node and set up an index match if they are an external user.

9.1.1. Creating Internal Users

Internal users will be assigned roles, these roles will govern which document types the user will be able to see. To assign a role to an internal user you click on "Edit" in the user administration menu and click on the "Roles" tab and select the required role as shown in Figure 9.3, “Internal User Config” and click "Add".

Figure 9.3. Internal User Config

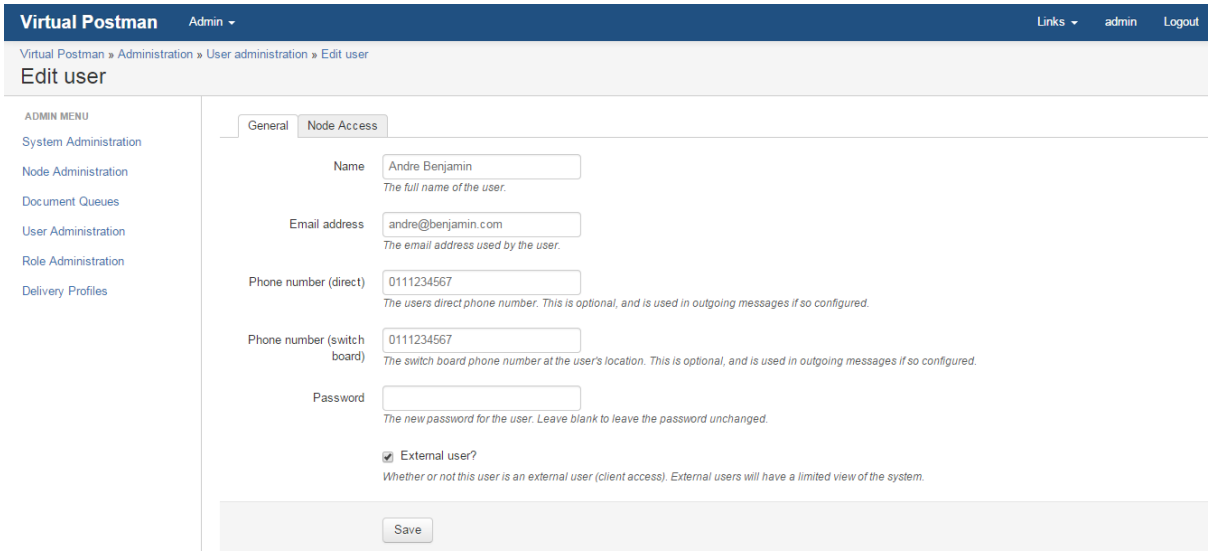


9.1.2. Creating External Users

External users will be assigned node access, and under this node you will be able to set and index match. Index match sets that the user will only be able to view documents in that node that belong to a particular account number or numbers.

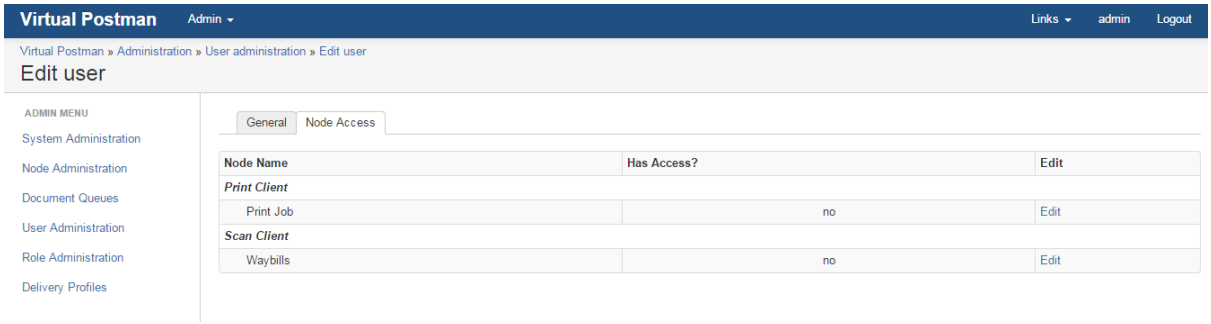
You set up the external user by clicking "Edit" in the User Administration menu on the users entry, then click the "External user?" checkbox as shown in Figure 9.4, “External User Config” and click save.

Figure 9.4. External User Config



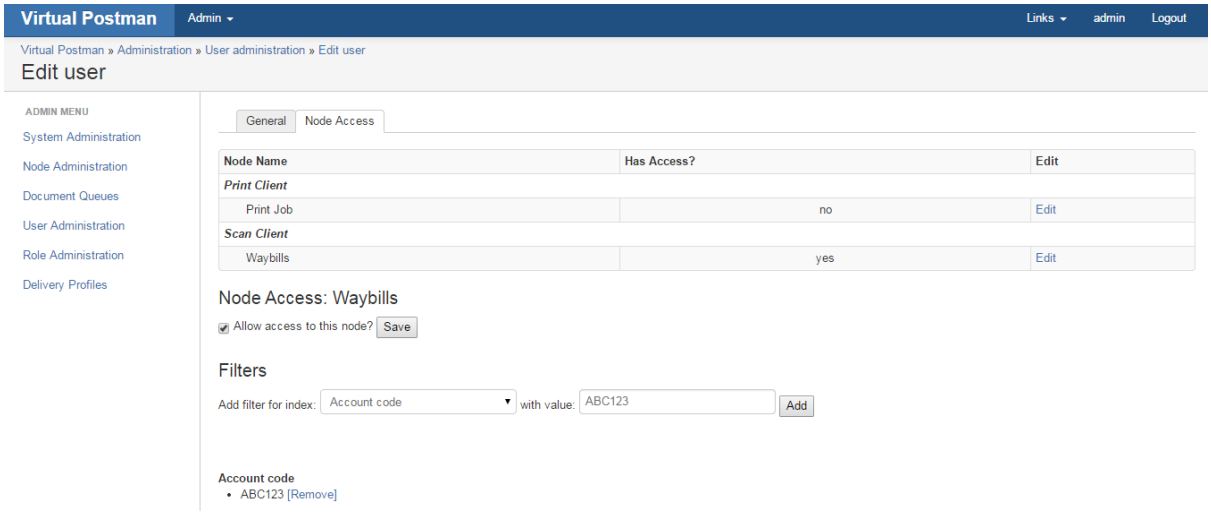
After clicking save, you will see that a "Node Access" tab will appear at the top, if you click on this tab you will have the option to select which nodes the user will have access to as shown in Figure 9.5, “Node Access Setup”.

Figure 9.5. Node Access Setup



From here you can click "Edit" on the desired node, click on the "Allow access to this node?" checkbox, click the "Save" button, then click on the "Add filter for this node?" drop down, select an index to match and click what value must be macthed to the index as shown in Figure 9.6, “Node Access Setup” and click "Add".

Figure 9.6. Node Access Setup

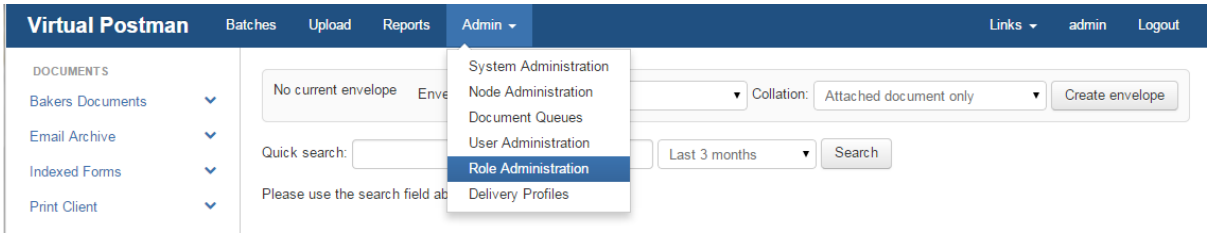


Chapter 10. Role Administration

This chapter is going to cover how to create and manage roles on Virtual Postman.

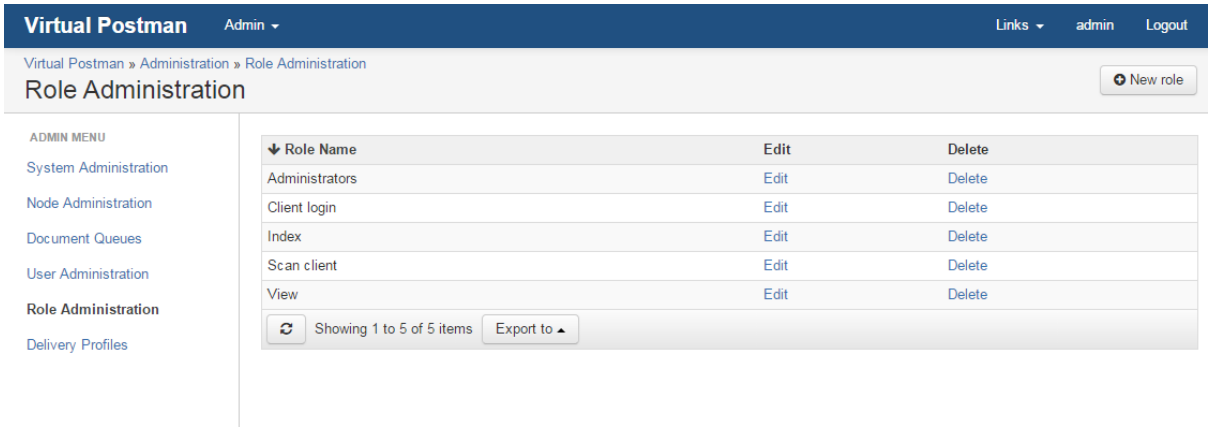
Roles can be accessed by going clicking "Admin" and selecting "Role Administration", as shown in Figure 10.1, “Adding Users”.

Figure 10.1. Adding Users



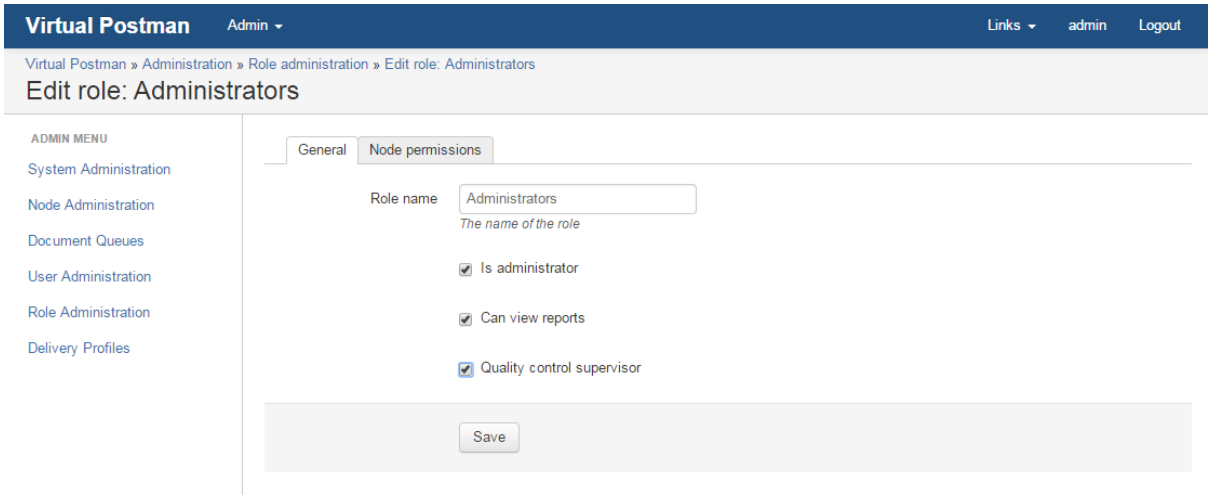
When you land in the Role Administration page, you will see a list of the current avalailbe roles. All the roles can be edited to allow access to specific nodes. To edit a role you simply click on "Edit", which will take to the general role settings as shown in Figure 10.2, “Adding Users”.

Figure 10.2. Adding Users



From this page you can change the name of the role, set whether the role is an administrative one and whether the role can view reports as shown in Figure 10.3, “Adding Users”.

Figure 10.3. Adding Users



Once you have set all the general settings for the role, you can then alter the roles node permissions. To set the node permissions, you click on the "Node permissions" tab, and you will see all the available nodes. From here you can set specific permissions for each node as shown in Figure 10.4, “Adding Users”.

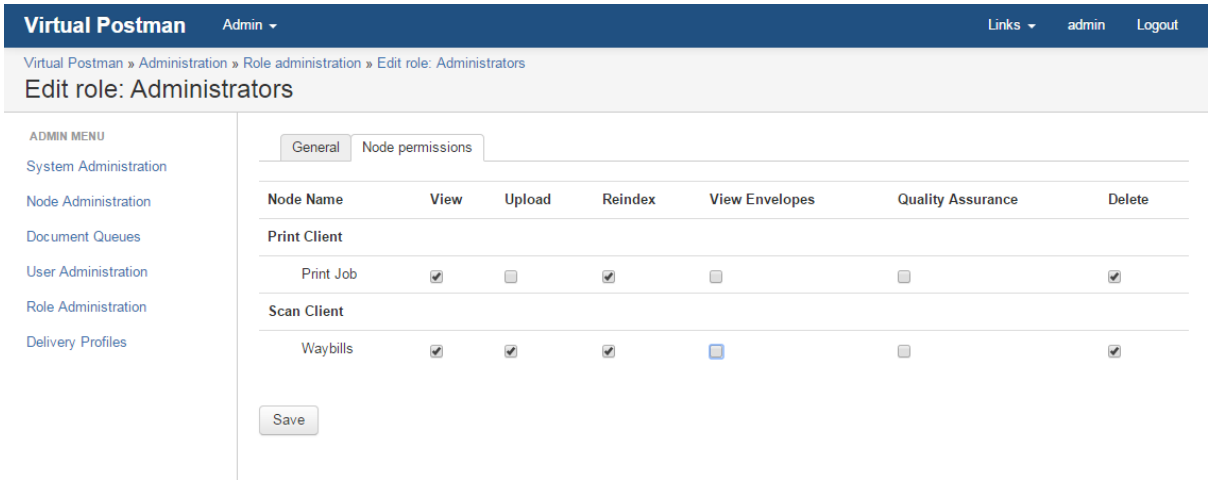



Figure 10.4. Adding Users