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## Introduction

### **Welcome...**

... to VersiDoc, the all-in-one document production system. This program, along with the connected Multi-Function Device (MFD), will provide you with everything you need to scan and print with the greatest of ease.

### **What can you do with VersiDoc?**

Using the touch screen attached to your MFD you will be able to log into the system to get your assignments, review the instructions, scan and print. You will never need to change the settings or worry about the setup of the tasks assigned to you. Your manager will already have configured the program to scan and print as the job requires.

### **About this manual**

This manual is made up of two parts. There are tutorials and a reference section.

The tutorials will walk you through, step by step, most of the operations you will need to perform.

The reference section explains all of the screens and options you will need to know about.

### **What makes up the VersiDoc workstation?**

The operator's workstation consists of an MFD, a computer with a touch screen attached to the MFD, a virtual keyboard and the VersiDoc program.

#### **The MFD**

The Multi-Function Device is the workhorse of the VersiDoc setup. If VersiDoc were a car, the MFD would be the engine. What VersiDoc does is connect that MFD to a larger system – a system controlled and monitored by many other members of the production team. Since paper is either the source or the product of the work you do, the MFD is either the start or the end of every job you work on as a scan or print operator.

#### **Touch Screen & CPU**

Just about every MFD includes a small touch screen that controls the device. You are probably used to using the MFD's touch screen to control it as a copier. If you examine a VersiDoc MFD you will find a computer attached to the back of it and an additional touch screen mounted on it as well. To go back to the car analogy, this computer and touch screen are like the steering wheel and dashboard of the car. These parts are also what connect the MFD to the larger VersiDoc network and allow the work to be managed, monitored and distributed throughout the shop.

### **Virtual Keyboard**

Every VersiDoc CPU will have a virtual keyboard installed that will allow you to enter text without having to deal with an attached keyboard and mouse cluttering up your workspace. The virtual keyboard lets you type directly into the touch screen.

### **The VersiDoc Program**

Of course, the heart and soul of the VersiDoc workstation is the VersiDoc program. It is with this program that you will do all of your work. In this manual, we will cover how you use the VersiDoc program to:

- Log in
- Get your assignments
- Start an assignment
- Scan
- Print
- End an assignment
- Log out

The tutorials that follow will show you how to do all of these things and more.

### **Getting Started**

Now that you know what the VersiDoc workstation is and what it will do for you, let's get started with learning how to use it. Find yourself a VersiDoc MFD and let's get going.

## Tutorials

### **Introduction to the Tutorials**

Welcome to the VersiDoc Tutorials.

There are a total of 18 tutorials in this manual.

The first 6 tutorials cover the basic operations: logging in and out, starting and ending assignments, scanning and printing.

Tutorials 7-16 cover more advanced scanning processes: deleting, manipulating and inserting pages, working with document groups and scanning color originals.

The final tutorials, 17-18, cover additional printing processes: printing a range of documents and printing boxes with color or oversized pages.

For a complete list of the tutorials, refer to the Table of Contents.

Before we move on to the tutorials, please note one thing:

***If you see text in this format, it is an instruction for you to follow.***

Text formatted any other way is an explanation.

Let's begin. If you have any questions or problems while running through a tutorial, contact your manager for assistance.

Before you begin

Make sure you are at a workstation with a CPU & touch screen and the computer is turned on.

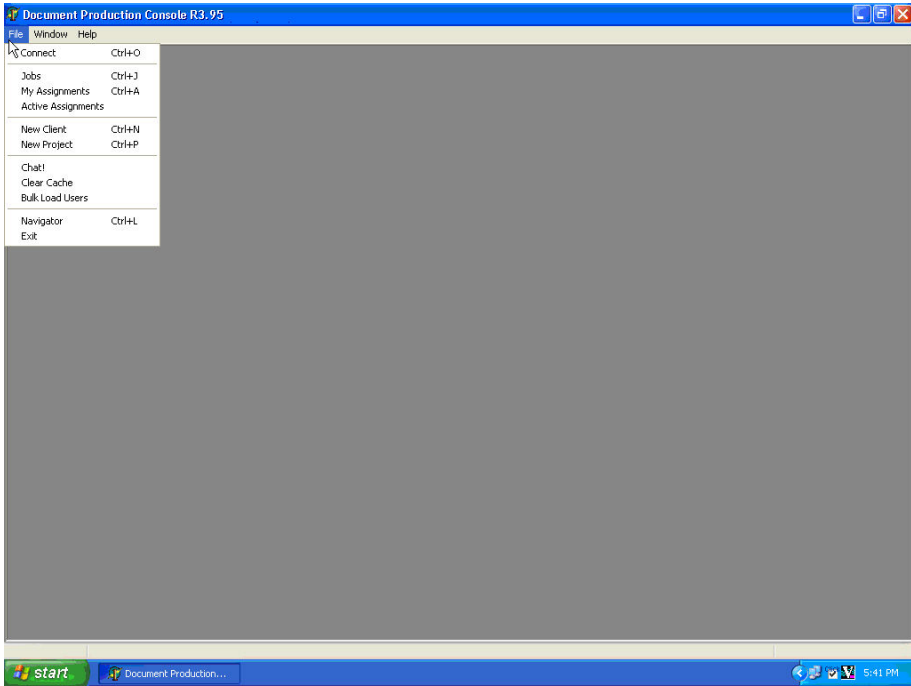
### Tutorial 1 – Logging In

**Start VersiDoc by double clicking on the VersiDoc icon on the computer's desktop.**

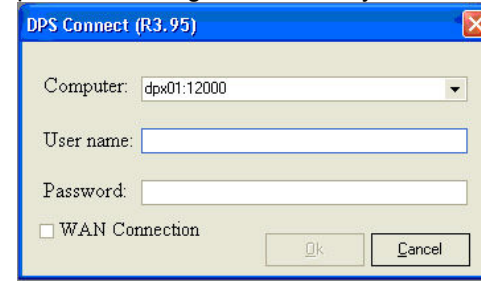


Once the program is running you will see what looks like a blank screen.

**Select “File” then “Connect” in VersiDoc by touching the menus on the touch screen.**



Once the login window is up, you will need to enter your user name and password using the virtual keyboard.



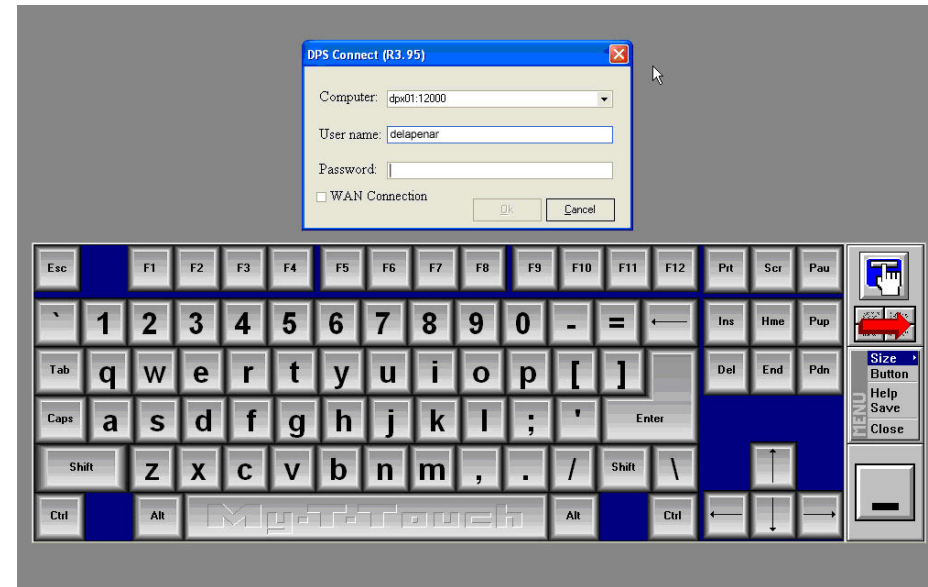
Virtual Keyboard System Tray Icon



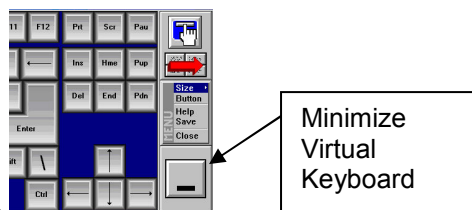
**Bring up the virtual keyboard by clicking on the virtual keyboard icon in the system tray.**

**Type in your user name and press “tab” in the virtual keyboard.**

The cursor should now be in the password edit box of the login screen.



**Type in your password and press “enter” in the virtual keyboard.**

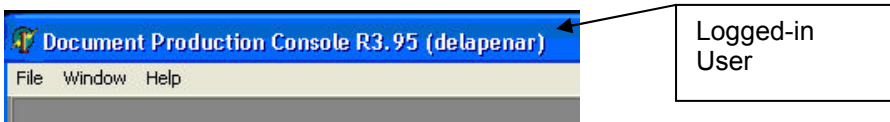


**Minimize the virtual keyboard.**

You are now logged into the system and ready to start work.

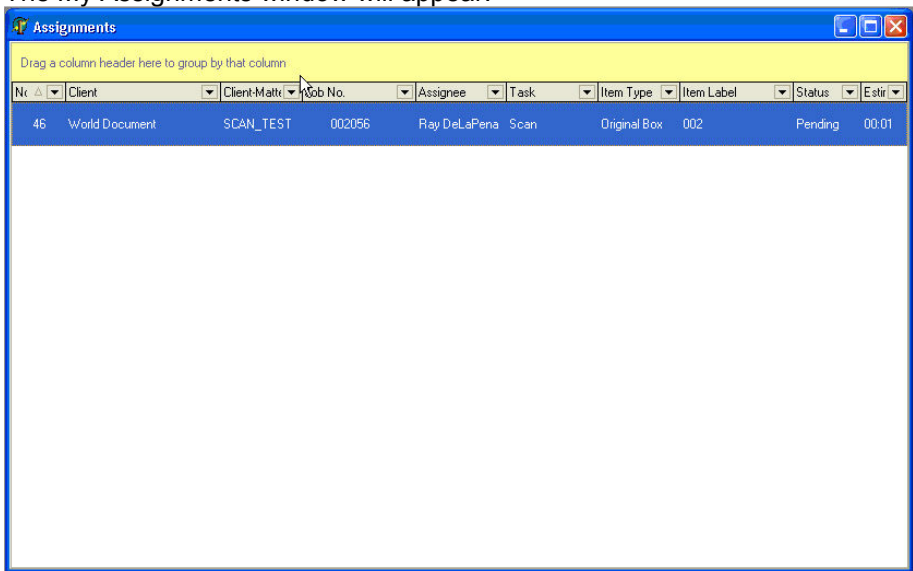
**Tutorial 2 – Retrieving and Starting Assignments**

If you have not just logged in, before retrieving your assignments you should make sure you are the logged-in user by checking the top of the screen and making sure your user name is in the title bar.



**Select “File” then “My Assignments” in VersiDoc by touching the menus on the touch screen.**

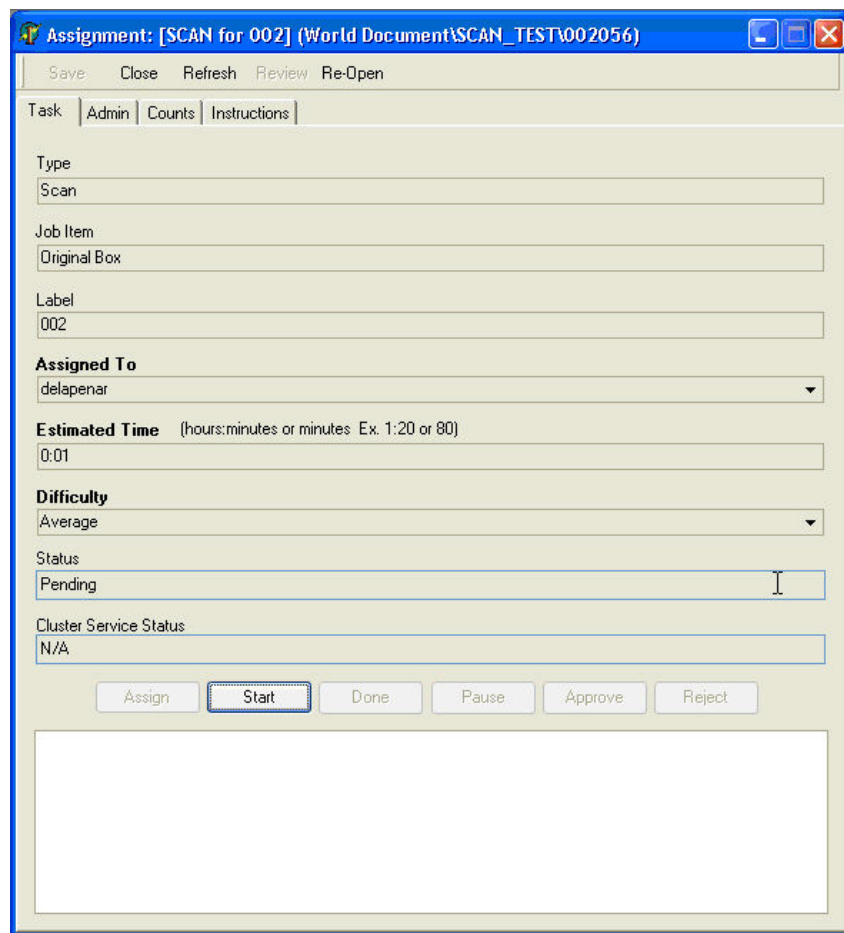
The My Assignments window will appear.



The My Assignments window shows all of the work assigned to you by the manager. It lists all of the job information for the items you will be working on.

**Select an assignment by double clicking on the assignment row.**

The assignment window will appear.  
Take a moment to get familiar with the assignment window.



**Click on the Instructions tab of the assignment window and review the instructions for the assignment.**

You should always make sure you understand all of the instructions for the task before you begin. If you have any questions, ask your manager.

**Retrieve any boxes or other materials you will need for your assignment.**

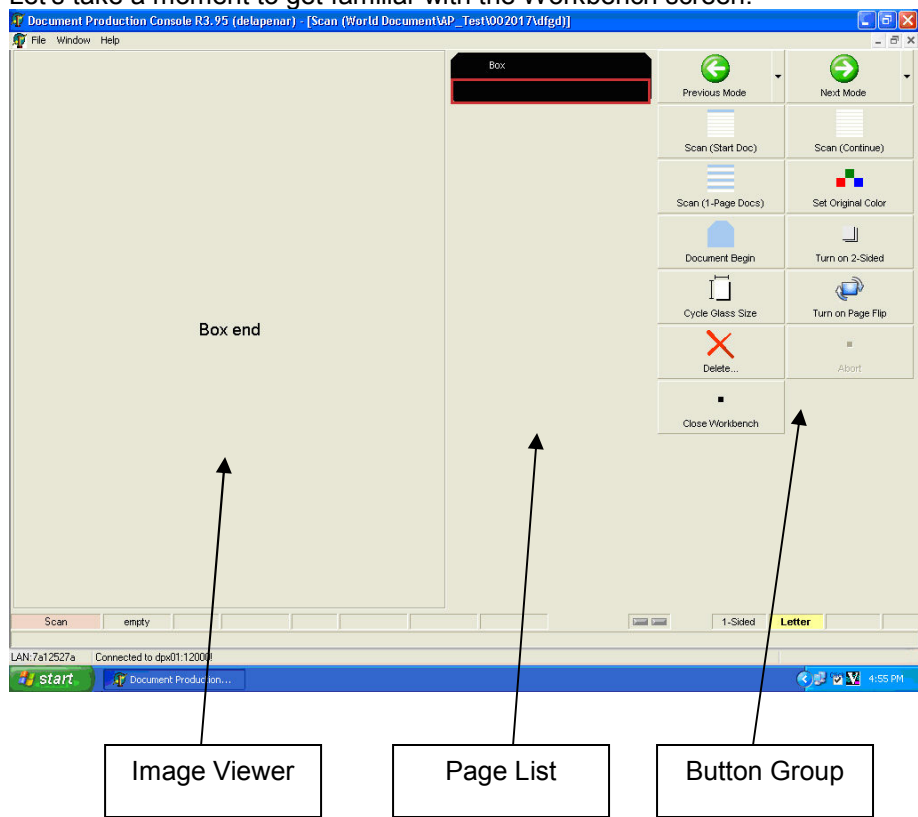
If you are scanning a box, get the original box. If you are printing, you will need an empty box, a label and some paper.

**Click the “Start” button to begin working on your assignment.**

Depending on the type of assignment you have started (scanning or printing) the proper window will launch.

### Tutorial 3 – Scanning (Documents Only)

In this tutorial we will scan some documents. In addition to scanning documents, VersiDoc is able to scan many types of *document groups*, such as folders or Redwelds. In this tutorial we will only be scanning documents. You will always know which document groups you are supposed to be capturing for your assignment. First, you will have seen them listed in the instructions and, second, they will only appear on the scanning screen (Workbench) when they are supposed to be captured. We'll cover more about document groups later. For now, let's get scanning. If your assignment is to scan, when you click the start button on the assignment screen the Workbench screen will open. Let's take a moment to get familiar with the Workbench screen.



Workbench has three main parts:

- Image Viewer – Shows a full-sized image of each page scanned.
- Page List – Shows a row for every page and document group scanned.
- Button List – Contains seven groups of buttons to control the program. The default button group contains the scan controls. This is where you will spend most of your time.

**Take a look at the scan buttons and make sure the document groups on the screen match the instructions and the contents of the box.**

For this assignment you should see the following buttons:

**Take the first document out of your box and remove any staples or other bindings.**

Make sure you fan through the pages and do not overfill the feeder. If your document is very large, place only the first 50 or fewer pages in the feeder. You'll be able to add the remaining pages later, without any problems.

**Place the original document in the feeder.**

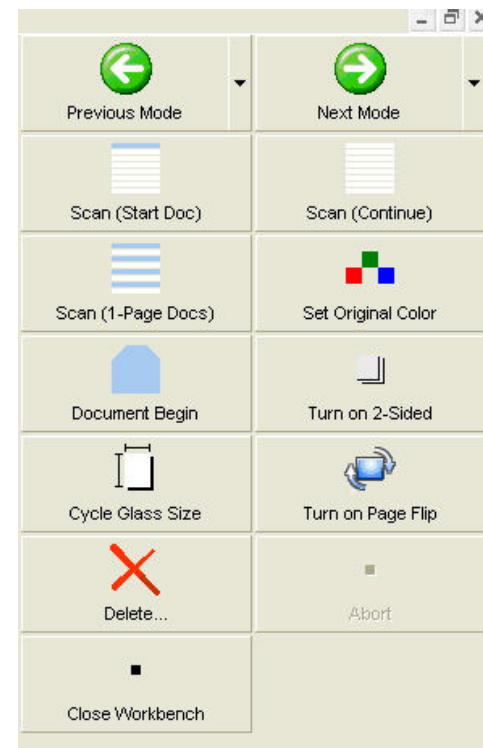
Make sure the pages are face-up and secure in the feeder.

**Press the “Scan (Start Doc)” button.**

The pages will automatically start scanning and the images will show up in the image viewer on your screen.

Always watch for quality issues while the pages are being scanned. Keep your eyes peeled for:

- Upside down pages
- Blank pages not recognized as blank
- Pages too dark or too light
- Lines or other marks obscuring the page
- Double-pulls



**If the document has been completely scanned, restaple it, turn it face down on your completed stack and retrieve the next document.**

**If you could not fit all of the pages for a single document in the feeder, when you put in the next section press the “Scan (Continue)” button instead of the “Scan (Start Doc)” button.**

Repeat these steps until you have scanned all of the documents in your box. Once you're finished scanning you have to close Workbench before you can end your assignment.

**Click “Close Workbench.”**

### Tutorial 4 – Printing

VersiDoc can print documents with colored separator sheets that show any information the client may want. By the time you have your assignment the project manager will have all of the patch pages and whatever information should be on them all set up and locked into the system. All you will have to do is load up the printer with the proper paper, box it up and make sure everything prints OK.

If your assignment is to print, when you click the start button on the assignment screen the Print screen will open.

Before you begin printing, you should be provided with a *Print Package*, which consists of:

- A box label with all of the correct job and client information.
- A Quality Control (QC) checklist that lists all of the documents' beginning Bates numbers in the order they should be printed.

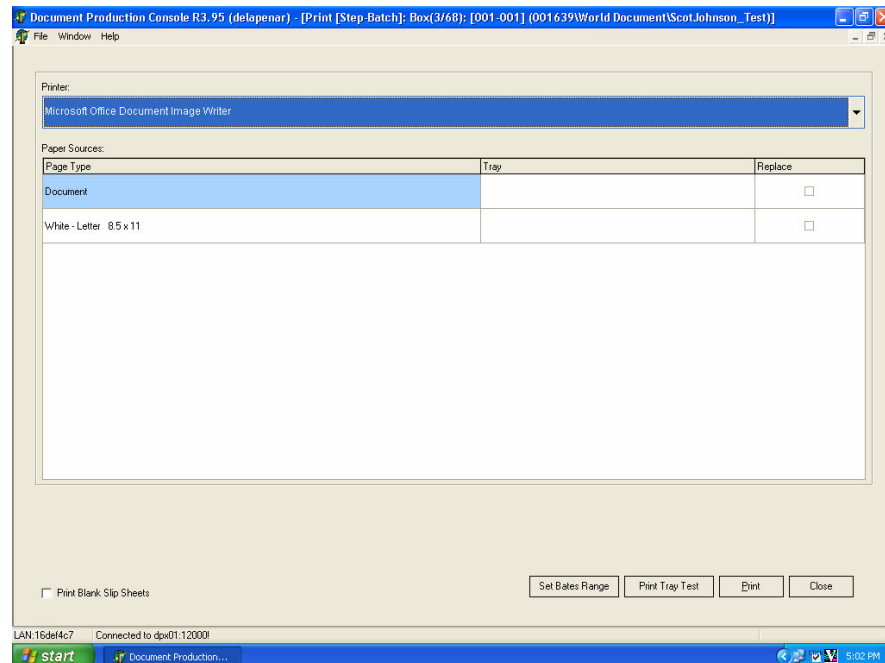
**Always take a look at the box label and QC checklist to make sure the contents and instructions match.**

If everything looks right in your Print Package and you understand your instructions you are almost ready to begin. There are just a few more things to set up.

**Get an empty box and attach the label on the correct side.**

Once we have the Print Package and our labeled box ready we can start using the program.

Let's take a moment to get familiar with the Print screen.



The Print screen is pretty simple. It has a section where the printer is specified, a table that lists the paper types and their trays, and a group of control buttons on the bottom.

**Select your printer by clicking on the down arrow (“▼”) on the right side of the printer name to bring up the list.**

You should see the name of the MFD in front of you on the list. Each MFD is usually labeled with its printer name.

**Select the correct printer by clicking on its name in the list.**

Don't worry; you'll check that you have selected the right printer before sending 3,000 pages to it.

Next, we will assign trays to all of the paper types needed for the job. The Paper Source section of the Print Screen contains a table with three columns.

The Page Type column will have a row for every type of page that will print in the job. That will include both document pages and separator sheets. The paper types will show their dimensions and what color they should print on. The cells in the Tray column are drop-down lists that contain a list of every tray in the MFD.

The checkboxes in the Replace column are used when the pages printed need to be swapped with a color copy or some other type of page that could not be printed by the MFD.

**Load your MFD's trays with every type of paper needed for the job.**

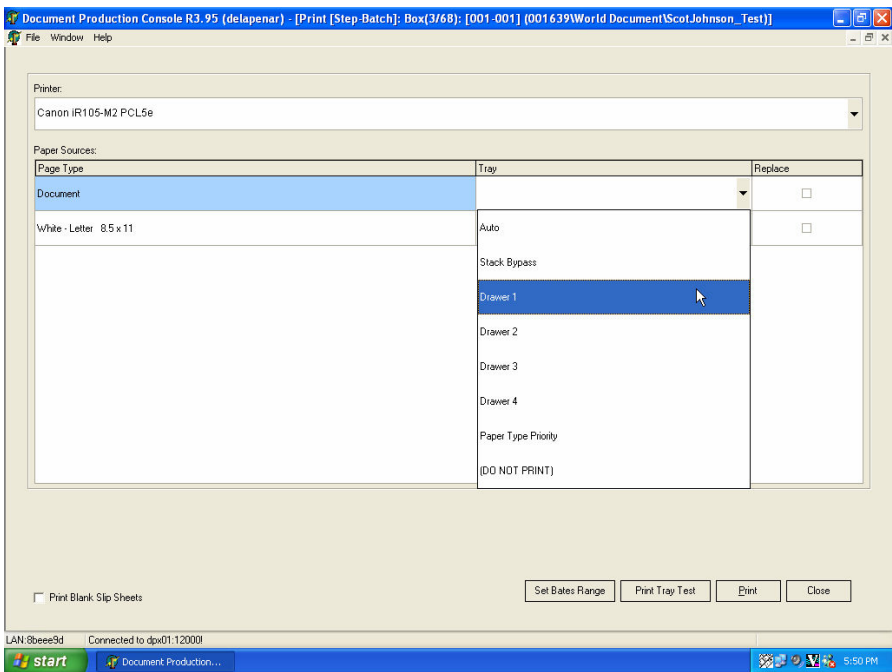
Now that your MFD is all loaded up with its ammo, you need to assign the trays to the proper paper types.

**Click on the Tray cell for each paper type and select the tray that contains that paper.**

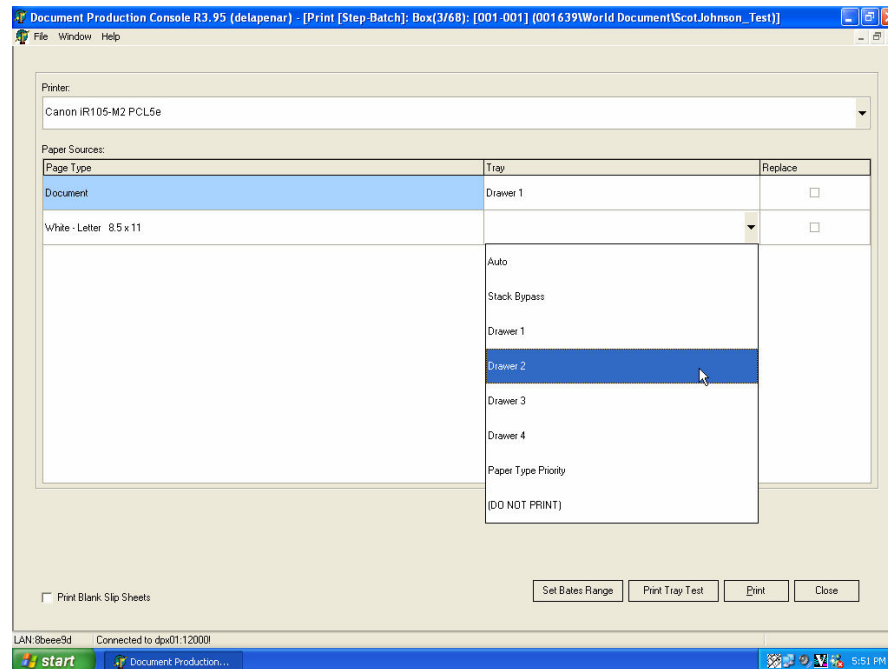
For example, let's say you loaded blue letter-sized paper in tray 1 and white letter-sized paper in tray 2. Most print jobs print document separator sheets on blue and regular document pages on white 8.5 X 11 paper. In this example your page source table would look like this:

Page Type	Tray	Replace
Document		<input type="checkbox"/>
White - Letter 8.5 x 11		<input type="checkbox"/>

To assign the blue document separator sheets to tray 1 you would click on the tray cell in that row, and then click on tray 1.



To assign the white document separator sheets to tray 2 you would click on the tray cell in that row, and then click on tray 2.



It sounds more complicated than it is, doesn't it? Remember, we'll test our selections before we start the job.

**Once all page type assignments are made, press the "Print Tray Test" button and check the output.**



The MFD will now print a page from each tray with the expected size and color printed on it. If your blue letter size page says "Doc Patch Page, Blue, 8.5 x 11" and your white letter size page says "Doc Page, White, 8.5 x 11" you're ready to roll. If it doesn't, just reassign your trays and test again until everything matches up. Once they do...

**Click the "Print" button**

Within a few moments of pressing the print button the printer should begin printing pages. If it doesn't, contact the floor manager. The entire box has now been sent to the printer. It will continuously print until the job is done. You can monitor the progress of the job by watching the status bars beneath the paper source table.

**Remove batches from the output tray, check the documents against the QC checklist and box them up.**

As you take a stack of printed documents from the output tray, make sure you:

- Fan through documents as they are removed from the hopper and placed in the box. Look for print problems like lines, dark pages or pages printed with gibberish. If anything is questionable, ask the floor manager.
- Every document separator sheet (usually blue) has a number printed on it. As documents are printed, check the ID number printed on the blue sheet. Make a check mark on the QC sheet for every document that has been verified. If there are any mismatches between the printed blue sheets, immediately stop the job and contact the floor manager.

Once you're finished printing you have to close the Print screen before you can end your assignment.

**Click "Close."**

### Tutorial 5 – Ending Assignments

When assignments are complete or when you need to stop working, it's important to end any active assignment so the manager can continue the item on its way through the workflow. If you have closed the working window (Workbench or Print) when you finished that task you should see the Assignment window again.

**Click "Done" in the Assignment window.**

The program will ask you if the task is complete.



**Click "Yes" if the task is complete. Click "No" if there is more work to be done for the assignment.**

Now you can either check if you have more assignments or log out of the system.

### Tutorial 6 – Logging Out

It is very important to log out of the system when you are not working. This will prevent another user from accidentally doing work assigned to you or the manager from assigning you more work when you have left the office.

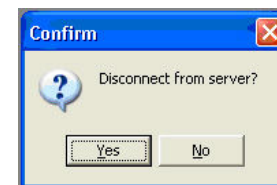
First you will have to make sure all assignments are marked as done and all working windows are closed.

**Select "File" then "My Assignments" in VersiDoc by touching the menus on the touch screen.**

The My Assignments window will appear.

You should either have no assignments or, if you do, the status should be either Pending or Completed. If any of your assignments are In Progress you have to click on them and end them. If a box has not been completely scanned or printed, end the assignment and answer "No" when the program asks if the task is complete.

**Select "File" then "Disconnect" in VersiDoc by touching the menus on the touch screen. Then click "Yes" to disconnect.**



You're done. Nice work!

### Tutorial 7 – Deleting scanned pages

Everything doesn't always go perfectly on the production floor. Don't worry; VersiDoc can handle all of the problems you are likely to come across.

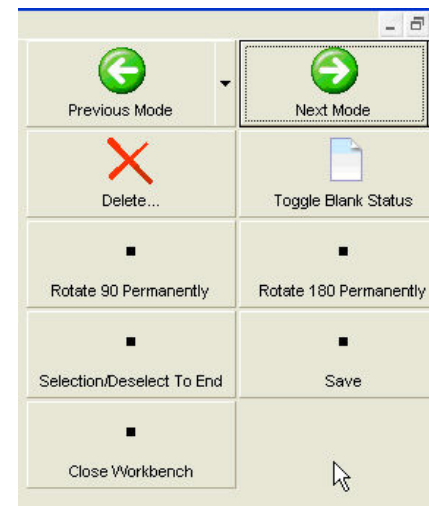
Tutorials 7 (this one) through 16 cover processes that take place in the Workbench window. They assume you have started a scan assignment and the Workbench window is open.

This tutorial covers deleting pages.

There may have been a page mistakenly placed in the box that you were not supposed to scan. Since you are no doubt keeping an eye on all of the scanned pages as they come in, and you are aware of the job instructions, all you have to do when you see a page in the image viewer that shouldn't be there is go into that document and delete it.

**Click on the "Next Mode" button until you get to the Manipulate button group.**

Take a moment to get familiar with



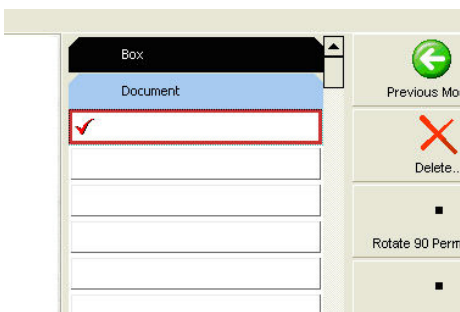
the Manipulate button group. This button group allows you make changes to scanned images. You can delete, rotate, select multiple pages and toggle whether a page is blank or not (more on this later).

**Click on the page you want to delete in the page list.**

When you double click on a page there will be a red check mark indicating that the page is selected.

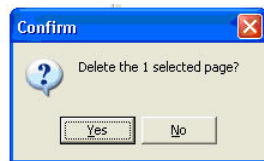
If you need to delete a group of pages, you can simply continue clicking on pages to select them. All selected pages will have a check mark.

If you need to delete the entire group of pages you just scanned, up to and including the last page, after you click on the first page in the range, click on the "Select/Deselect to End" button. Every page from the first one you clicked on to the end of the box would be checked.



**Click on the "Delete" button.**

The program will ask you to confirm that the page should be deleted.



**Click "Yes."**

The pages are now deleted. If the page you deleted was not the last page in the box and you have more documents to scan, make sure you are at the end of the box before scanning any more documents. You will need to move to a different button group to navigate to the bottom of the box.

**Click on the "Next Mode" button until you get to the Navigation button group.**

Take a moment to get familiar with the Navigation button group. This button group allows you to easily move around in a scanned box. You can move from page to page, document to document, document group to document group, or to the beginning or end of the box.



**Click on the "Last" button.**

The end of box marker should now be highlighted in red at the bottom of the page list.

**Click on the "Previous Mode" button until you get back to the scan button group.**

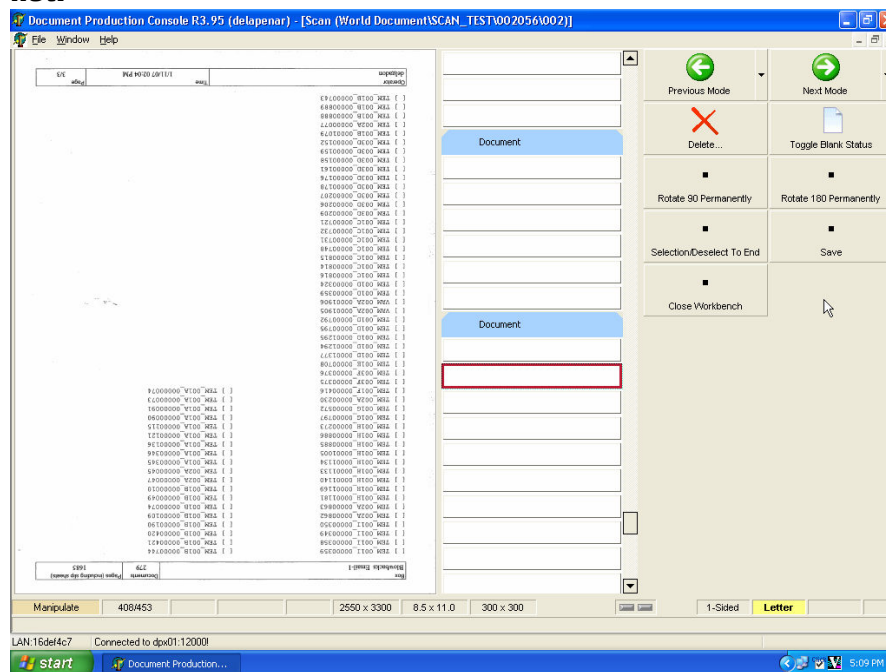
You are now ready to continue with the next batch of scanning.

**Tutorial 8 – Rotating a page that was scanned upside down**

Sometimes pages are scanned upside down. It is important to watch for this as documents are being scanned. If you notice an upside down page in the image viewer, wait until the current document in the feeder has been scanned. When it is done, you can go back in and fix any upside down pages by rotating them in the manipulate button group.

**Click on the "Next Mode" button until you get to the manipulate button group.**

**Click on the upside down page you want to rotate in the page list.**



When you click on a page that page row will be outlined in red, indicating that the page is selected.

**Click on the "Rotate 180 Permanently" button.**

The program will ask you to confirm that the pages should be permanently rotated.

**Click "Yes."**

You will see the page displayed with the new orientation. If it is correct, you can move on.

**Click on the "Next Mode" button until you get to the navigation button group.**

If you have more to scan for this assignment, make sure you return to the end of the box before you continue.

**Click on the "Last" button.**

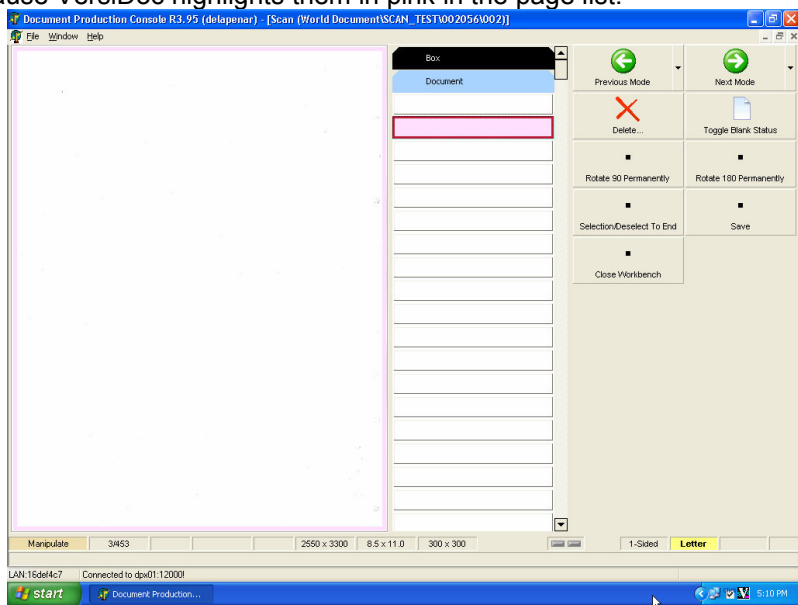
The end of box marker should now be highlighted in red.

**Click on the "Previous Mode" button until you get back to the scan button group.**

You are now back where you started, ready to continue.

**Tutorial 9 – Toggling the blank status of a page**

VersiDoc automatically recognizes when blank pages are scanned. Sometimes they need to stay in the scanned box, sometimes they need to be deleted. You do not have to worry about which one the client wants. The project manager will already have set up the rules for the job elsewhere in the system. You do, however, need to make sure VersiDoc knows which pages are blank. You can tell which pages have been identified as blank because VersiDoc highlights them in pink in the page list.



If you notice a blank page in the image viewer as you are scanning pages and you don't see that page's row highlighted in pink in the page list, or if you notice a page with some information on it that gets flagged as blank, you will need to go back into the page list and change it to the correct blank status. Wait until the current document being scanned is complete before you begin.

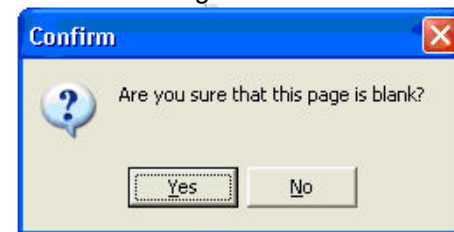
**Click on the "Next Mode" button until you get to the manipulate button group.**

**Click on the page in the page list for which you want to change the blank status.**

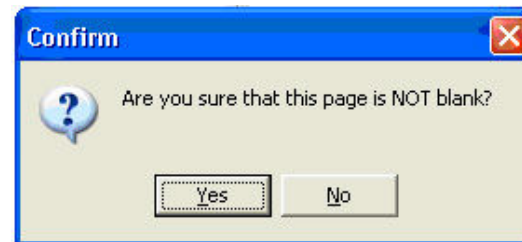
When you click on a page there will be a red check mark indicating that the page is selected.

**Click on the "Toggle Blank Status" button.**

If the page was not recognized as a blank, the program will ask you to confirm that you want it to be changed to a blank.



If the page was recognized as blank and you are changing it to non-blank, the program will ask you to confirm that you want to change it to a non-blank.



**Click "Yes."**

You will see the page's row in the page viewer change to pink if you made it a blank or white if you made it a non-blank. If it is correct, you can move on.

**Click on the "Next Mode" button until you get to the navigation button group.**

If you have more to scan for this assignment, make sure you return to the end of the box before you continue.

**Click on the "Last" button.**

The end of box marker should now be highlighted in red.

**Click on the "Previous Mode" button until you get back to the scan button group.**

You are now back where you started, ready to continue.

**Tutorial 10 – Fixing a scanned page that needs to be replaced**

Sometimes a page is scanned in a way that cannot be fixed simply by manipulating the page (rotating it or making it blank or non-blank). If a page gets folded over in the feeder or if two pages are pulled at once and scanned as a single page you will need to go back into the box and fix the problem. This procedure simply consists of deleting the bad page or pages and replacing them with good pages.

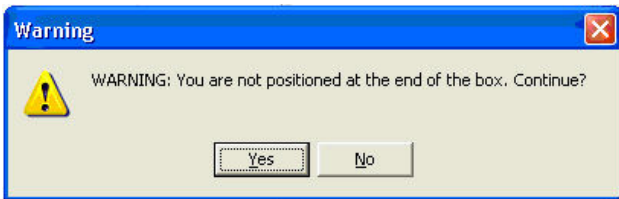
**Follow the instructions in the "Deleting Scanned Pages" tutorial above, but after you have deleted the bad page or pages do not go to the end of the box.**

**Instead, make sure you are positioned on the page in front of where you want to insert the replacement pages.**

Remember, the selected page's row in the page list will be outlined in red.

**Place only the pages you want to insert in the feeder and click the "Scan (Continue)" button.**

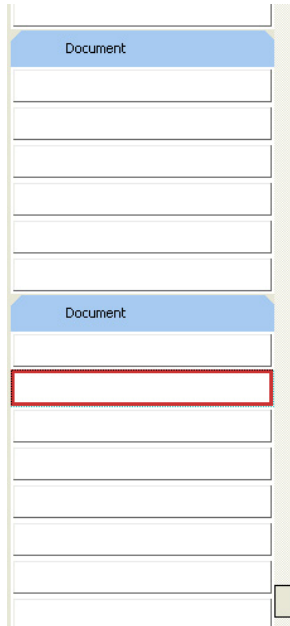
The program will let you know that you are not positioned at the end of the box and ask if you want to continue.



**Click "Yes."**

The pages will begin scanning after you click "Yes." You will see them in the image viewer. Make sure they are correctly scanned this time and that they are in the right position in the box. If anything is still wrong, simply repeat the delete & scan procedures again. If everything is correct, you can move on.

**Click on the "Next Mode" button until you get to the navigation button group.**



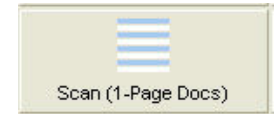
If you have more to scan for this assignment, make sure you return to the end of the box before you continue.

**Click on the "Last" button.**

The end of box marker should now be highlighted in red.

**Tutorial 11 – Scanning a group of single-page documents**

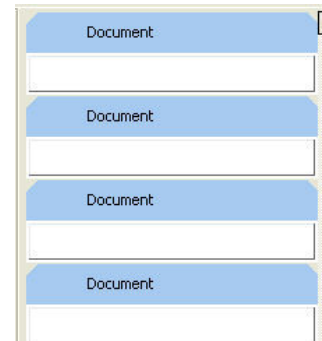
Usually, every document you scan will be stapled or clipped in some way because most documents are more than one page. In these cases your procedure is always the same: Remove the staple or clip. Scan the pages by pressing the Scan (Start Doc) button and a document begin marker appears in the page list before the scanned pages. Restaple or re-clip the document and repeat. However, when you have a stack of single-page documents you wouldn't want to repeat this procedure for every single page in a stack of 50 pages. VersiDoc makes it easy to insert document breaks before every page in a group by using the "Scan (1-Page Docs)" button.



**Make sure the feeder is filled with only single-page documents.**

**Press the "Scan (1-Page Docs)" button.**

As these pages are scanned you will see a document begin marker before every page in the page list.



**Tutorial 12 – Inserting & deleting document breaks**

Just as pages sometimes need to be added or deleted, the same may be necessary for document breaks. If you accidentally pressed the wrong scan button and are either missing a document break or you have inserted a document break where there should not be one, VersiDoc has the tools to handle it.

Adding or deleting document breaks is handled in much the same way as adding or deleting pages.

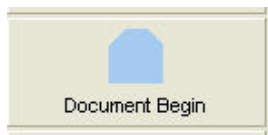
**To insert a document break, click on the page you want to insert the document break in front of.**



Remember, the selected page's row in the page list will be outlined in red.

**Press the "Document Begin" button.**

The document break will appear in front of the page you selected. You don't need to scan anything.



**To delete a document break, click on the document break you want to remove in the page list.**

The document page will have the same red border as a selected document page.

**Click on the "Next Mode" button until you get to the manipulate button group.**

**Click the "Delete" button.**

The program will ask you to confirm that you want to delete the selected document break.

**Click "Yes."**

If you have more scanning to do, remember to move to the end of the box before proceeding.

**Click on the "Next Mode" button until you get to the navigation button group.**

If you have more to scan for this assignment, make sure you return to the end of the box before you continue.

**Click on the "Last" button.**

The end of box marker should now be highlighted in red.

**Tutorial 13 – Scanning with multiple document groups**

All of the previous tutorials have dealt only with documents. VersiDoc handles much more than documents alone. There are often other types of containers in a box of documents. There are folders, Redwelds, clipped groups of documents, etc. The project manager will have already set up the job to capture every type of document group the client wants. You will know which ones you will be capturing from the instructions for the task. In addition, the scan button group in Workbench will show all of the document groups you will need for the job. If the job calls for you to scan folders, there will be folder buttons in the scan button group.

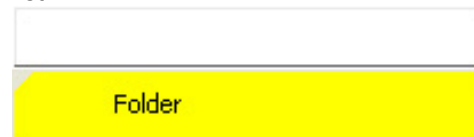
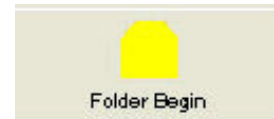


This tutorial will describe how to scan a document contained in a folder.

**Remove the folder containing the document from the original box.**

**Press the "Folder Begin" button.**

A folder begin break will appear in the page list.



**Remove the document from the folder and place the folder on your completed document pile. Leave the folder open.**

**Follow the instructions in the Scanning Documents tutorial to scan the document(s).**

**Place the completed document(s) on the open folder in your completed document pile.**

**When you have finished scanning the last document in the folder, press the "Folder End" button.**

A folder end break will appear in the page list after the last page you scanned.



**Close the folder.**

You can now move on to the rest of the originals in your box.

Follow this procedure for every type of original container in your box. If your box contained paper clips, there would be "Paper Clip Begin/End" buttons. If it contained Redwelds, there would be Redweld buttons. If you come across an original container that is not in the scan button group, let your manager know.

**Tutorial 14 – Inserting & deleting document groups**

Inserting and removing document groups works the same way as document breaks except for one important difference. With document breaks, there is only a start. With document groups there is always a begin and an end marker. If you add or remove a begin marker, make sure you also add or remove the end, and vice versa. We will insert and delete folder breaks in

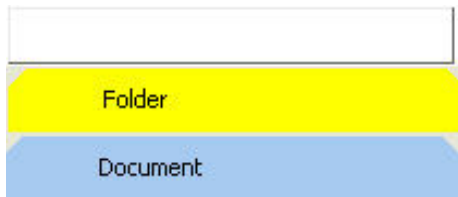
this tutorial. The procedure works the same for every type of document group.

**To insert a folder begin break, click on the document you want to insert the beginning of the folder in front of.**

Be sure you always insert the beginning of the folder *before* a document break, not in front of a regular page.

**Press the “Folder Begin” button.**

The folder begin break will appear in front of the document break you selected.



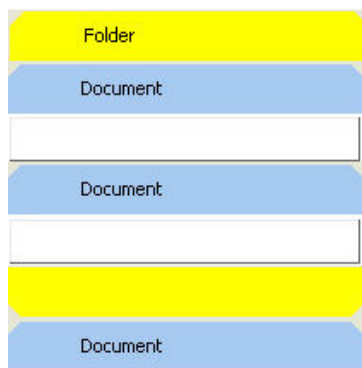
Remember, every folder that begins must also end.

**To insert a folder end break, click on the document you want to insert the folder end in front of.**

This will be after the last page of the last document in the folder. Be sure you always insert the end of the folder before a document or other document group break, not in front of a regular page.

**Press the “Folder End” button.**

The folder end break will appear in front of the document group break you selected.



**To delete a folder begin or end break, click on the folder begin or end break you want to remove in the page list.**

The folder page will have the same red check mark as a selected document page. Just remember that every beginning must have an end, so don't leave a single begin or end alone.

**Click on the “Next Mode” button until you get to the manipulate button group.**

**Click the “Delete” button.**

The program will ask you to confirm that you want to delete the selected folder.

**Click “Yes.”**

If you have more scanning to do, remember to move to the end of the box before proceeding.

**Click on the “Next Mode” button until you get to the navigation button group.**

If you have more to scan for this assignment, make sure you return to the end of the box before you continue.

**Click on the “Last” button.**

The end of box marker should now be highlighted in red.

**Tutorial 15 – Scanning a color original page (used when a page needs to be blown back in/on color)**

Sometimes you will be scanning documents that will also be printed later in the job's workflow. If some of the pages in the originals are either printed in color or printed on colored paper you will need to let the program know you are about to scan a colored page before you do so.

In this tutorial we will presume that some of the pages in the box you are scanning are on blue paper and, when they are printed, the client wants them printed on blue paper.

**Before you scan the colored paper, press the “Set Original Color” button in the scan button group.**



A new button group will appear where you can select the correct color of the original page.

**Click on the “Blue” button.**

**Place the blue original page or pages in the feeder.**

Make sure you place only the colored pages in the feeder because the program will mark every page in the batch as blue until you change the setting back to white paper.

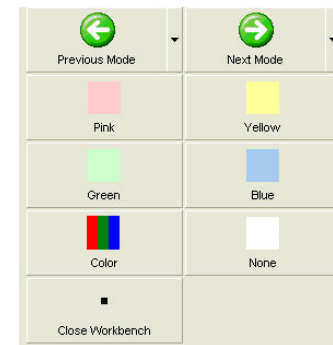
**Click the “Scan (Start Doc)” button.**

The blue pages will be scanned and appear blue in the image viewer and in the page list.

**When you have completed scanning the colored pages, click on the “Set Original Color” button in the scan button group.**

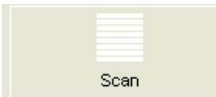
**Click on the “None” button.**

The setting is now back to normal and document pages will be scanned as white with black text.



## Tutorial 16 – Scanning prepared documents

Sometimes a client will have prepared the documents you need to scan with bar-coded patch pages that the program will recognize as they are being scanned. In these instances, the manager will have set up the job to accept prepared documents. When you start the assignment, Workbench will open displaying the scan button group. Instead of the “Scan (Start Doc)” and “Scan (Continue)” buttons you have seen before, there will only be a “Scan” button with no colored first page in the icon.



**Make sure there are no staples, clips or other bindings in the documents.**

**Fill the feeder with the prepared documents.**

**Click on the “Scan” button.**

The pages will be scanned and the program will recognize the bar-coded break sheets as document breaks. They will appear in color in the image viewer and as document breaks in the page list. Be sure to keep an eye on the image viewer as pages are scanned to make sure the break sheets are being recognized. If they are not, notify your manager.

## Tutorial 17 – Printing or reprinting a range of documents

The remaining tutorials (17 -18) cover processes that take place in the print window. They assume you have started a print assignment and the Print window is open.

Usually, print jobs are set up by the program to print in a single batch and completely fill a box. Sometimes there may be problems during a printout and you may need to print or reprint a subset of the entire box. VersiDoc allows you to do this quite easily.

**Follow the instructions in the Print Documents tutorial for printer selection, tray assignment, loading paper and testing the tray assignments.**

**To print a range of documents, click the “Set Bates Range” button in the print window.**

The Bates Range selection window will appear.



**Enter the beginning and ending Bates number or document ID in the boxes.**

If you are reprinting a range because of some printer problem (a paper jam, lines on some pages or toner running out) it is a good idea to reprint the last good document and perhaps one document after the problem ended. You can get the Bates numbers or document IDs from the colored separator sheets in your output pile or you can ask the floor manager.

**Click “Print.”**

The range of documents you entered will print to the output tray of the MFD.

**Place the reprinted range in the proper place in your output box.**

Always verify that you are not placing more than one copy of a document in your output box and that every document you place in the box has been checked off on your QC checklist and that there are no documents missing in the box that appear on the QC checklist.

## Tutorial 18 – Printing a job with color or oversized pages

Sometimes there are scanned pages that need to be printed in a way that your MFD cannot output. If the job calls for a color copy and you are working with a black & white MFD, or if there paper sizes larger than your MFD supports, do not worry. VersiDoc was built to handle this.

If your box contains color originals, those pages were marked as such during the scan step and the color pages you will need to insert in the output will be included in your print package. You will see a row in the paper source section of the print window for color document pages. If there are any oversized documents to be inserted in your box, there will be a row for the paper size you need to insert and the oversized pages in your print package. If you see a row for color or oversized originals and there are none in your print package, notify the floor manager.

**[graphic of paper source table with callout to color page row]**

You will want to print this page on a colored sheet so it stands out in the printed output. This tutorial will cover replacing a color original in the printed output. Follow the same procedure for oversized documents.

**Follow the instructions in the “Print Documents” tutorial for printer selection, tray assignment, and loading paper for all of the paper types other than color pages.**

**Click on the tray cell next to the color page paper type and select a tray that contains colored paper that is a different color than your other document group patch pages.**

Ideally you will have a tray loaded with a color different from your other document group patch pages. Usually document sheets are printed on blue, folders on yellow, Redwelds on pink, so a tray loaded with some green paper would be best. If you are printing only document patch pages, then any color other than blue will work.

**Check the Replace box in the row for color pages.**

**[graphic of color page row with callout to checked replace box.]**

**Once all page type assignments are made, press the "Print Tray Test" button and check the output.**

The MFD will now print a page from each tray with the expected size and color printed on it. You should get a green letter-sized page that says "Replace Color Original." If it doesn't, just reassign your trays and test again until everything matches up.

**Click the "Print" button.**

Within a few moments of pressing the print button the printer should begin printing pages. If it doesn't, contact the floor manager. The entire box has now been sent to the printer. It will continuously print until the job is done.

**Remove batches from the output tray, check the documents against the QC checklist and box them up.**

As you take a stack of printed documents from the output tray, make sure you:

- Fan through documents as they are removed from the hopper and placed in the box. Look for print problems like lines, dark pages or pages printed with gibberish. If anything is questionable, ask the floor manager.
- Every document separator sheet (usually blue) has a number printed on it. As documents are printed, check the ID number printed on the blue sheet. Make a check mark on the QC sheet for every document that has been verified. If there are any mismatches between the printed blue sheets, immediately stop the job and contact the floor manager.

**When you find a green sheet that says it should be replaced with a color copy, get the correct color copy from the print package and replace the green patch page with it.**

Once you're done printing, make sure there are no extra color originals in your print package and close the Print screen before you end your assignment. If you have printed the entire box and there are no more green pages in it, but you have some color pages left in your print package or you have some green pages in your box but no more color originals in your print package, notify the floor manager. If you have replaced all the color pages

and there are no more green pages in the box and no more color pages in your print package, you can close out the assignment.

**Click "Close."**

**Tutorial Summary**

Congratulations! You have finished the tutorials.

You have covered just about everything you can expect to come across while using VersiDoc to scan and print, maybe more.

First you covered the basics. How to:

1. Start the program and log in
2. Retrieve and Start Assignments
3. Scan (Documents Only)
4. Print
5. End Assignments
6. Log Out

The next group of tutorials covered more advanced scanning processes:

7. Deleting scanned pages
8. Rotating a page that was scanned upside down
9. Toggling the blank status of a page
10. Fixing a scanned page that needs to be replaced
11. Scanning a group of single-page documents
12. Inserting & deleting document breaks
13. Scanning with multiple document groups
14. Inserting & deleting document groups
15. Scanning a color original page
16. Scanning prepared documents

Finally we covered more printing processes:

17. Printing or reprinting a range of documents
18. Inserting color or oversized pages into a print job

For more details on any part of the program, see the reference section below.

Feel free to go back over these lessons if you ever need a refresher. If you can't figure out how to do something, don't be afraid to ask. Your manager is there to help.

## Reference

### Introduction

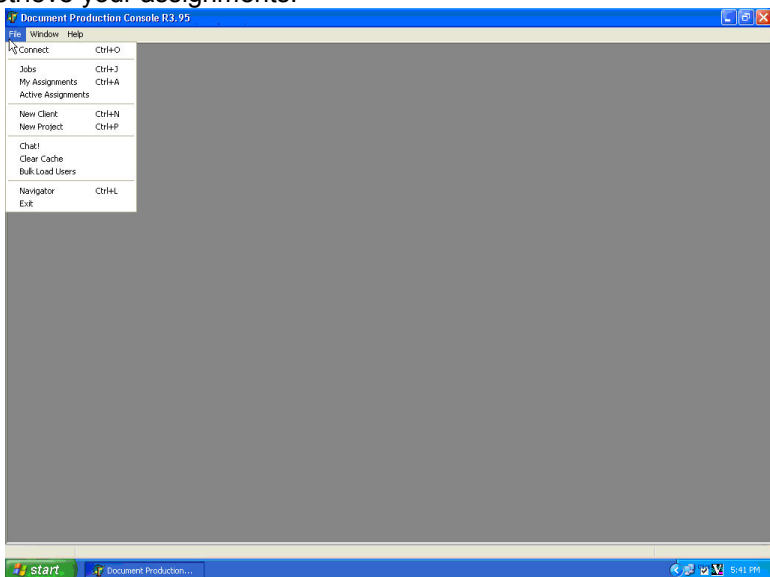
Welcome to the complete reference for VersiDoc scanning and printing. If you have completed the tutorials above you will be familiar with most of the scanning and printing capabilities of VersiDoc. This section will fill in all the gaps and describe all of the other buttons, screens and modes that were not covered in the tutorials, as well as recap what was covered above.

### The Basics

VersiDoc is an all-in-one document processing and production system. It connects scanners, printers, managers, clients, operators, and processing computers and combines all of these resources into an integrated machine. As an operator, you are an important part of the machine. You control the MFDs in their capacity as scanners and printers. You also handle all of the input and output for the process. You connect to the system by logging in, as we described above, and everything you do moves the job along in the machine. This reference describes all of the tools at your disposal as a VersiDoc Operator.

### The Welcome Screen

Once VersiDoc is started you will see the welcome screen. This screen serves as your entry to the system and in it you log in, log out, and retrieve your assignments.



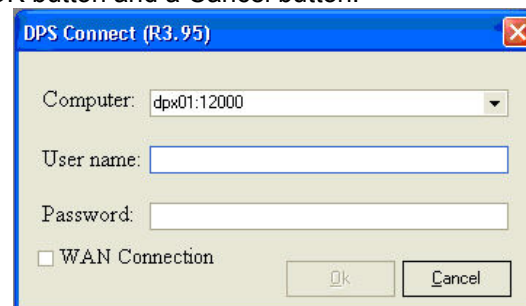
### The File Menu

The File menu, which is the main menu used in VersiDoc, contains 11 items:

- Connect/Disconnect – This menu item is used to log into and out of the system. The login screen can be brought up by clicking Ctrl+O on the virtual keyboard. If a user is already logged in, the menu item will change to Disconnect and clicking Ctrl+O will log them out.
- Jobs – Brings up a list of all active jobs in the system.
- My Assignments – Brings up the assignment list, displaying the logged-in user's assignments.
- Active Assignments – Brings up the assignment list with all assignments for all users.
- New Client – Allows managers to create new clients.
- New Project – Allows managers to create new projects.
- Chat! – Brings up a chat window to communicate with other logged-in users.
- Clear Cache – Allows managers to clear all local image copies from the computer.
- Bulk Load Users – Allows managers to load a list of users.
- Navigator – Allows managers to navigate projects.
- Exit – Closes the VersiDoc program.

### The Login Window

The login window has one dropdown list, two edit boxes, a WAN Connection checkbox, an OK button and a Cancel button.



- Computer – This drop-down list contains a list of the VersiDoc servers.
- User Name.
- Password.
- WAN Connection – This box is checked only when connecting to a VersiDoc server over the Internet.

### The Virtual Keyboard

The virtual keyboard is installed on all machines with a touch screen monitor. Clicking on the Virtual Keyboard icon in the task tray at the bottom of the screen brings up the full-sized keyboard.



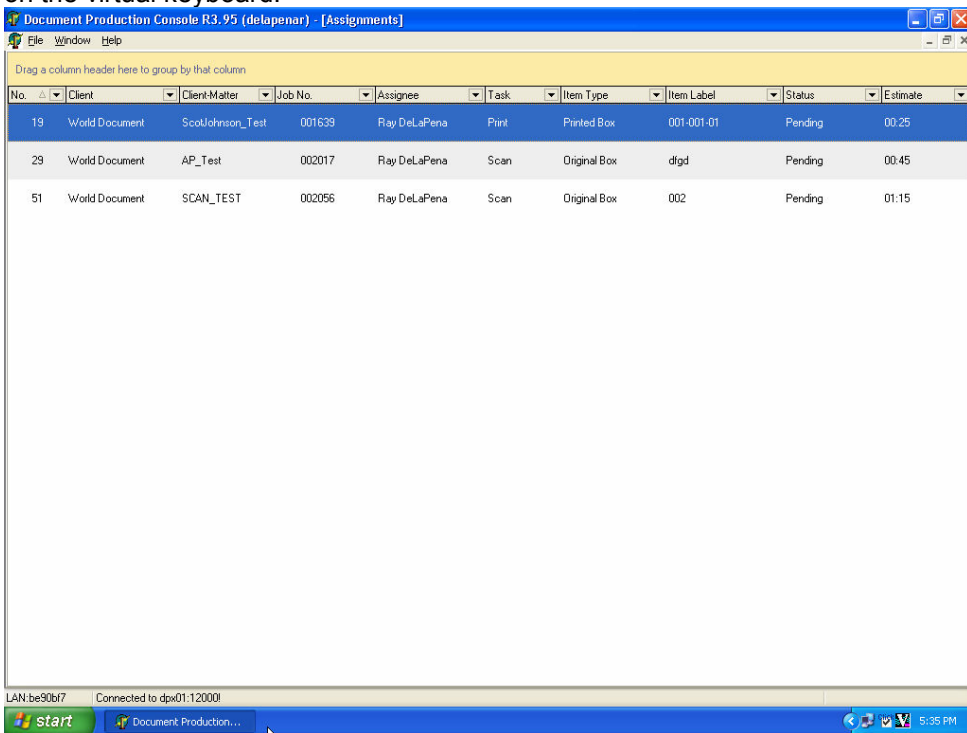


The Virtual keyboard functions just as a normal keyboard does. It can be minimized back to the task tray by pressing the minimize button on the lower right corner.

Minimize Button

### My Assignments

The My Assignments window contains a list of all the work assigned, by the manager, to the logged-in user. The window is brought up by selecting "My Assignments" from the "File" menu of the main screen or by typing "Ctrl+M" on the virtual keyboard.



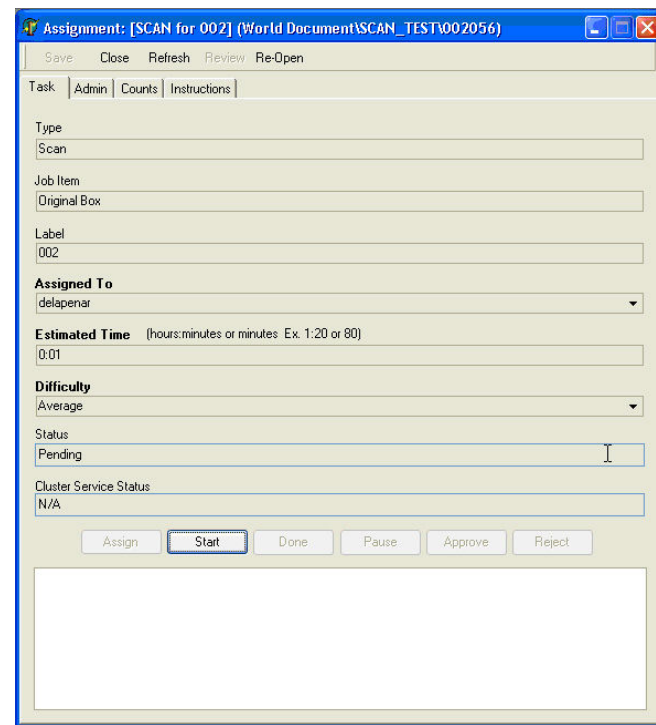
The assignments list has all the information needed to begin a task:

- Client – The name of the client, as it appears on the label.
- Client-Matter – The client-matter number, as it appears on the label.

- Job Number – This is the internal VersiDoc job number. If there is a paper copy of the work order for the assignment, this job number should match the one on the paper copy.
- Assignee – The name of the operator.
- Task – Scan, Print, Prep, Assemble, etc.
- Item Type – What kind of original container will be worked on (e.g., box, Redweld, folder, etc.).
- Item Label – This is usually the box number but will match whatever is used to label the item.
- Status – Shows the current state of the assignment. This part of the assignment information is helpful when there is more than one assignment queued up. It could be any of the following:
  - Pending – The assignment has not been started.
  - In progress – The assignment is currently being worked on.
  - Completed – The assignment is done, but has not been approved by the manager.
- Estimated Time – This section shows the amount of time the manager expects the assignment to take.

### Assignment Window

The assignment window appears when a single assignment is chosen from the list in the My Assignments window. This window will be used to begin the assigned task. The assignment window displays all of the information from the assignment list but also has a few more functions. There are four tabs at the top of the assignment window.



### Task Tab

This is the default view once an assignment is opened. It displays all of the information about the assignment as well as the buttons that allow the task to be started, paused and ended.

- Type – The assignment type (e.g., Scan, Print, Prep, Assemble, etc.).
- Job Item – The type of container to be worked on.
- Label – Usually the box number but will match whatever is used for the label of the item.
- Assigned To – The name of the operator. **[Programmers – should this be changed to Assignee to match the My Assignments table?]**
- Estimated Time – Shows the amount of time the manager expects the assignment to take.
- Difficulty – Shows the type of work, or grade, the manager assigned to the box (e.g., easy, medium or difficult).
- Status – Shows the current state of the assignment. This part of the assignment information is helpful when there is more than one assignment queued up. It could be any of the following:
  - Pending – The assignment has not been started.
  - In progress – The assignment is currently being worked on.
  - Completed – The assignment is done, but has not been approved by the manager.
- Cluster Service Status – *Not applicable.*<sup>1</sup>
- Buttons – The button section of the assignment window is used to control the task.
  - Assign – *Used by managers to assign work.*
  - Start – This button begins the task. For example, if the task is to scan a box, when the operator clicks this button the task will become “in progress,” the start time will be logged and Workbench will launch, configured for the task.
  - Done – This button will be pressed when the operator is finished working on the task. Usually, when the operator is done with the task, the task is complete, but sometimes it is not (for example, the operator gets sick or has to leave). When this button is pressed the operator will also be asked if the task is complete. If it is, the manager will know that they it needs to be reviewed and the box can move to the next step in production. If it is not, the manager will know it needs to be assigned to another operator to complete.
  - Pause – This button is only used for system tasks (OCR, Stamping, etc.)

- Approve – This button is used by managers to approve completed tasks.
- Reject – This button is used by managers to reject completed tasks.

### Admin Tab

The administrative tab contains assignment tracking information and is not used by operators.

### Counts Tab

This tab displays the counts associated with the item (e.g., total pages scanned, total documents, etc.).

### Instructions Tab

This tab shows the instructions for the task. If there is any special handling for the assignment it will be shown here.

## Workbench (Scan Mode)

Workbench automatically launches when an operator starts a scan task. Workbench is also used by Document Specialists to quality check scanning and document breaks and to enter Bates numbers. This manual covers only Workbench's scan capabilities. The window is divided into three main sections.

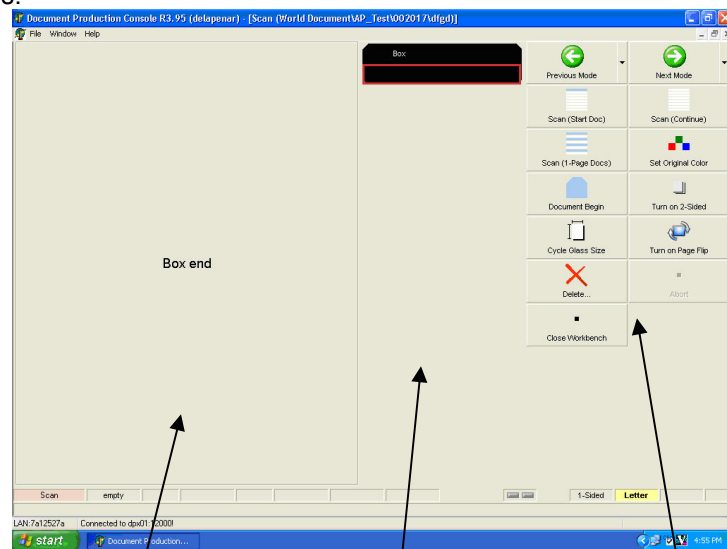


Image Viewer

Page List

Button Group

<sup>1</sup> Items that will be disabled or are not appropriate for operators are printed in gray.

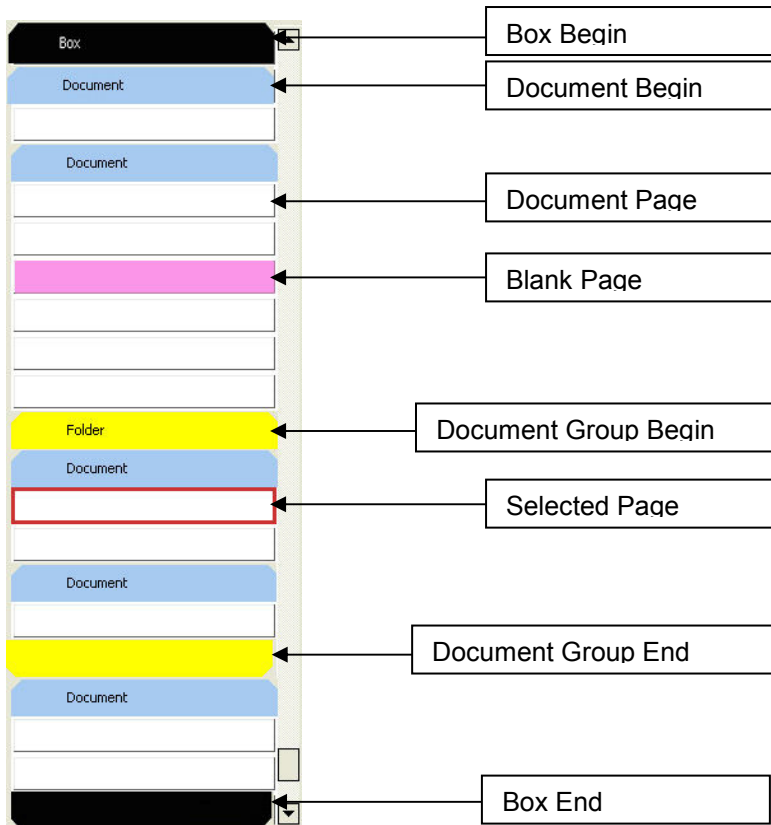
## Image Viewer

The left side of the window displays the scanned pages.

## Page List

The middle section of the window contains a row for each page and document group scanned. Different page types are indicated by different color rows in the list. The page row of the current page (the page displayed in the image viewer) is always highlighted in red in the page list.

There are five types of pages in the page list:



- **Box Begin/End** – The beginning and end of the box is always indicated by a black page in the page list.
- **Document Begin** – always in front of the first page of a document and colored blue by default.
- **Document Page** – Document pages are the scanned original pages. They usually appear as white rows in the page list unless they are color pages. In these cases, the row is colored to match the color of

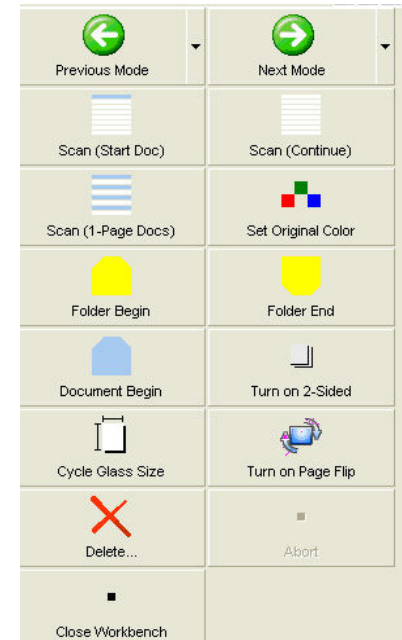
the original page. (See the Scanning an Original Color Page Tutorial.)

- **Blank Page** – Blank pages are scanned document pages that contain no information. VersiDoc recognizes these pages and highlights the page row in pink.
- **Document Group Begin/End** – Document groups represent any type of container in which documents can be grouped together. Some common examples are folders, paper clips, Redwelds or even rubber-banded groups. Whenever documents are grouped together, there needs to be a page that marks the beginning of the grouping (before the document begin page of the first document) and a page that marks the end of the grouping (after the last page of the last document in the group.) Usually document group page rows are colored to match the type of container they represent. Folders are yellow, Redwelds red, etc., but the important thing is that they are not white (like document pages), blue (like document begin markers), or pink (like blank pages). The document groups, if any, that are available for a particular assignment are configured by the project manager and should match the instructions for the job as well as the contents of the original box.

## Button List

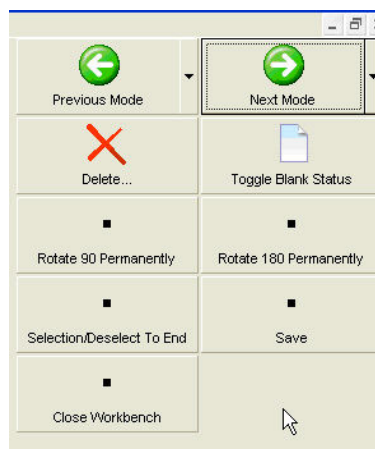
The right side of the Workbench window contains two columns of buttons. There are seven groups of buttons, grouped for different purposes. The top two buttons of every group are used to switch between button groups.

- **Scan** – The Scan button group is the default button group displayed when Workbench opens. It contains buttons to control the scanner and indicate the beginning and end of all document groups set up for the task.
  - **Scan (Start Doc)** – Inserts a document begin page before the first page of the group and scans all of the pages in the feeder.
  - **Scan (Continue)** – Scans all of the pages in the feeder without inserting a document begin page. This effectively adds the pages to the previous document in the page list.



- Scan (1-Page Docs) – Scans the pages in the feeder and inserts a document begin page before each one. If double-sided scanning is turned on, a document begin will be inserted every two pages, making each sheet a two page document.
- Begin/End Document Group(s) – Inserts a begin or end marker for the document group. Some jobs call for folders or Redwelds to be scanned. If the job is set up this way, pressing the begin document group button will scan the first page in the feeder and treat it as the document group begin page.
- Document Begin – Inserts a document break in front of the current position in the page list. This button is usually used to insert document breaks between scanned pages. If you are scanning a document that needs a document begin break in front of it, the “Scan (Start Doc)” button is recommended.
- Turn on/off 2-sided – Toggles scanner between simplex and duplex scanning.
- Cycle Glass Size – Changes the default glass size for non-standard-sized paper.
- Turn on Page Flip – Automatically rotates all scanned pages.

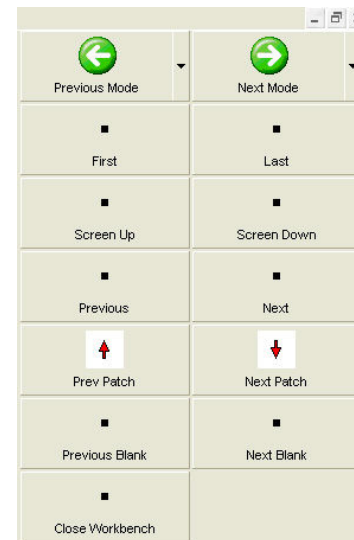
- **Manipulate** – This button group is used when changes need to be made: If an operator spots an upside down page or a page double-pulls or a blank page is not recognized as blank. It is equivalent to the floor operator's QC mode. There are four buttons in the Manipulate button group:



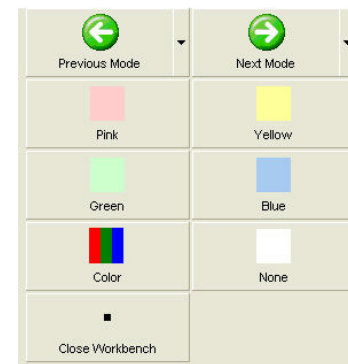
- Delete – Deletes selected page(s). Selected pages are marked with a red check mark in the page list.
- Toggle Blank Status – Marks or unmarks selected pages recognized as blanks.
- Rotate 90 Permanently – Rotates and saves selected scanned page.
- Rotate 180 Permanently – Rotates and saves selected scanned page.
- Save – Saves any rotation or other manipulation.
- Select/Deselect to End – If a selected page is not the last page of the box, pressing the “Select/Deselect to End” button will select all of the remaining pages in the box.

- **Navigate** – This button group lets the users move around through the scanned images.

- First/Last Page of box – Moves the current position to the beginning or end of the box.
- Screen Up/Down – Moves one screen's worth of pages in the page list. This button is equivalent to page up/page down in common usage.
- Next/Previous Page – Moves one page in either direction.
- Next/Previous Patch Page – Moves to the next or previous document or document group patch page.
- Next/Previous Blank Page – Moves to the next or previous page that has been recognized as blank.



- **Color** – When the “Set Original Color” button is pressed, the color selection button group appears. This button group sets the paper color of the originals scanned. Once a color is pressed in this button group, the scan button group automatically reappears and all document pages are shaded and stored as the selected color.



These pages can be blown back on their original color paper or, in the case of color originals, replaced with a color copy. For example, if the first page of a document is blue and the client wants a blowback set to match it, each time that page is scanned the operator would set the page color to blue before scanning. (See the “Scanning a color original page” tutorial above.)

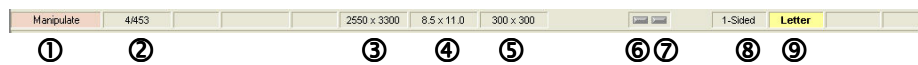
- **Import** – Imports images directly from a disk or network. (Usually not done by scan/print operators on the floor.) This feature requires a directory or directories of images and a VersiDoc approved image list

referencing those images to directly import the images without having to scan paper documents.

- **QC** – Quality Control buttons used for validation.
  - Generate Thumbnail Images – Creates a page of thumbnail images for quick review and identification of misrecognized scan patch pages.
  - Check for Errors (Used in Validation) – This button checks for Bates or page ID sequence errors or duplication.
- **Administration** – (Disabled for operators)
  - Scan Blank Test Page – Tests scanner recognition of blank pages
  - Change Blank Color – Changes the display color in the Page List of detected blanks.
  - Scan with UI – Starts the native user interface for scanning.
  - Image on Right – Moves image viewer to right side of screen.
  - Show Subimage – Displays blown up region of image. For use when recognizing existing Bates numbers during scanning.
  - Show Bates Editor – Shows recognized Bates values
  - Resynchronize images – Synchronizes images on local machine with server.
  - Allow Unsafe Deletes – Allows deletions without confirmation.
  - Don't Limit Glass Size – Allows the scanning of oversized documents larger than the platen glass.
  - Information – Displays image information.

**Status Bar**

On the bottom of the Workbench screen there is a status bar that displays some additional useful information:

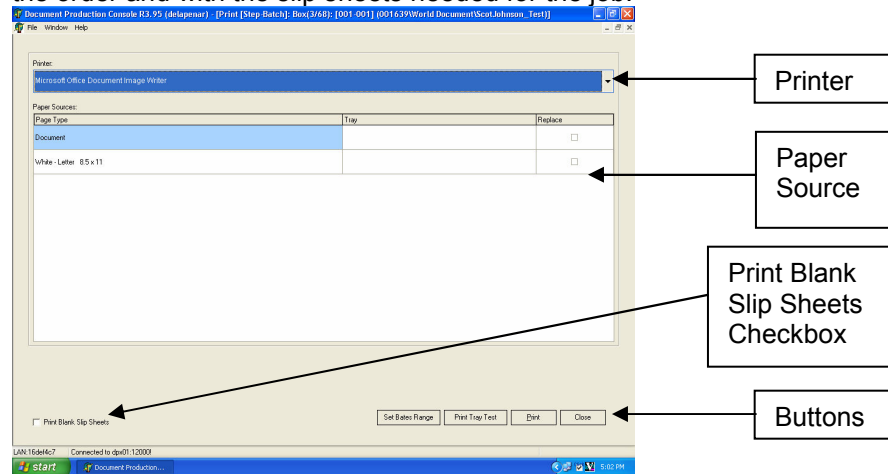


1. **Current Button Group** – Displays the name of the currently displayed button group.
2. **Page selected/total pages** – Tells the operator which page in the box is being displayed in the image viewer.
3. **Image Size** – Displays the scanned image resolution (e.g., 2550x3300 is the image size of an 8.5 x 11 page scanned at 300 DPI).
4. **Paper Size** – Displays the scanned image's original paper size (e.g., 8.5 x 11.0).
5. **Image Resolution** – Displays the image resolution being scanned (usually 300x300).

6. **Scan/Save Status Light** – When a page is being scanned and saved locally, this icon will light up green.
7. **Thumbnail Generation Light** – When thumbnail pages are being created this icon will light up green. (Used in validation.)
8. **1-Sided/2-Sided** – Shows which scan mode is currently set.
9. **Paper Size** – Displays the size page recognized by the scanner.

**Print**

The print window automatically starts when an operator begins a print assignment. Each print task is set up, by the system, to print one full box in the order and with the slip sheets needed for the job.



The print screen has three main sections and a check box:

**Printer**

This drop-down list contains all available network printers.

**Paper Source**

This section looks like a table and has a row for each paper type found in the box. The table contains three columns:

- **Page type** – This column lists all slip sheets and paper sizes found in the box. Each type of page needs to be assigned to a tray or it will not print.
- **Tray** – Each row in this column is a drop-down list that contains all of the available trays in the printer.
- **Replace** – If "replace" is checked for a page type, a special page will be printed instead of the actual image. The special page instructs the operator to "replace this page with..." It is used to handle pages that need special handling, like color copying or oversized pages.

**Buttons**

There are four buttons in the print window:

- **Set Bates Range** – Pressing this button brings up another window where a begin/end range is entered.



By entering a beginning and ending Bates number or page ID, operators can print all pages in the range.

- **Test** – The test button prints a sample page from every assigned page type. The sample pages print from the associated tray with the paper size and expected color printed on the sheet. This test allows tray assignments to be verified before sending the entire batch for printing.
- **Print** – The print button sends the entire batch to the printer for continuous printing. As the hopper fills, users remove sections and check the slip sheets against the QC list to make sure every document has been printed and is in the proper order.
- **Close/Abort** – Pressing the close button before printing will close the print window. Once the print button has been pressed, the “close” button changes to “abort.” Pressing abort during the print process aborts the job and stops printing.

### Print Blank Slip Sheets Checkbox

Normally, there are several pieces of information printed on the slip sheets of a blowback. This information allows both the client and the operator to verify that the correct documents have printed in the correct order. In the case of printouts from electronic files, it allows the client or document specialist to get back to the original file on a PC. If this box is checked, the document separator sheets will have nothing printed on them.

### Print Progress Bar

The print window displays a progress bar under the Paper Source window that displays the overall progress of the print job.

## Conclusion

This concludes the VersiDoc Operator's Manual for Scanning and Printing. As you can tell from using the program throughout this process, VersiDoc has many more capabilities and can do far more than simply scan and print. Refer to the other VersiDoc manuals for instructions on Project Management, Electronic Discovery and Administration.

Thanks again for using VersiDoc. We trust these tools will allow you to work efficiently and productively. If you have any suggestions on how to improve the VersiDoc system or this manual, please contact us at [suggestions@versidoc.com](mailto:suggestions@versidoc.com).