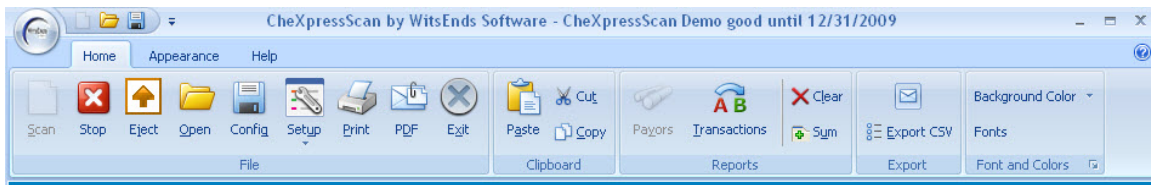


CheXpressScan Tutorial

By
WitsEnds Software
June, 2009

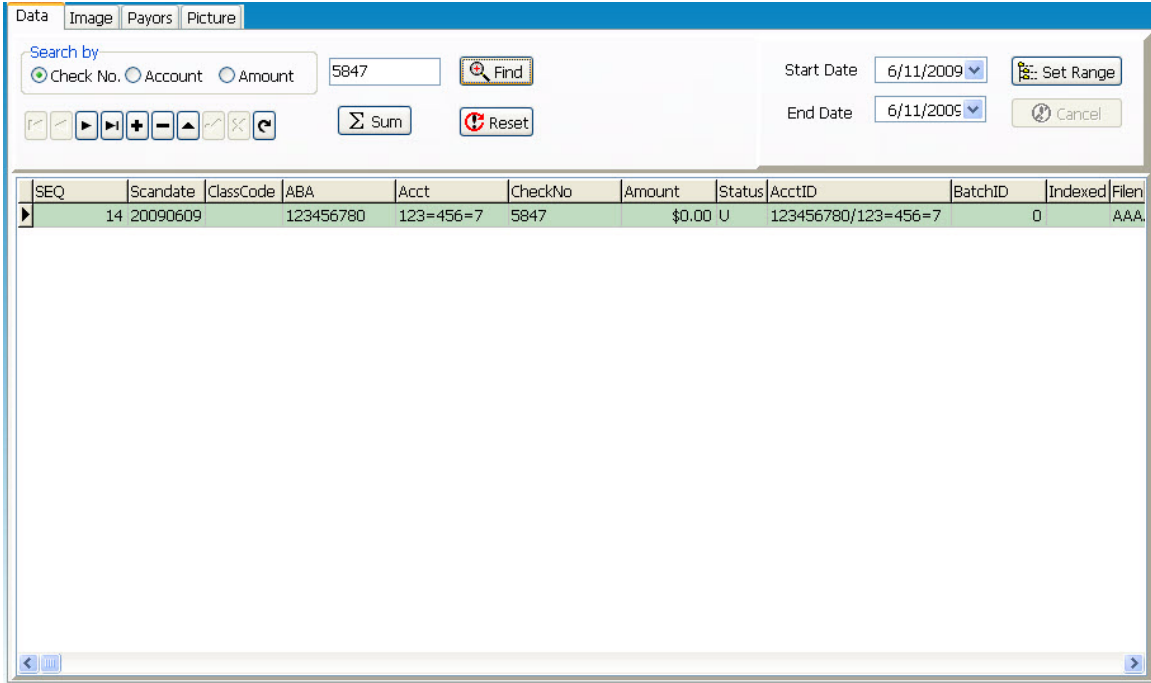
Here's The opening view toolbar on top, and a page of tabs below, normally showing the data tab first. Because the CX-30 is a single check scanner, there's no active "scan" button, since the scanner is ready at any time and just inserting a check (facing out) will start the process. Two buttons to note, however. One is "Stop" and that will stop any process which is executing, whether it is an export, import, ftp upload or ACH process. Also, if you insert a check improperly or the check is ragged and the scanner halts, the "Eject" button will start the scanner motors and eject the check. Normally that means to the program that nothing happened, but if for some reason the operator holds on to the check a little too long while feeding, a partial image could be created. One of the examples in the data table shows this.



SEQ	Scandate	ClassCode	ABA	Acct	CheckNo	Amount	Status	AcctID	BatchID	Indexed	FI
2	20090607		125008039	6400052046	005580	\$1,617.00	U	125008039/6400052046		0	A
3	20090607		062000019	0018148468	001303	\$1,023.00	U	062000019/0018148468		0	A
4	20090607		062000019	0018148468	001479	\$0.00	U	062000019/0018148468		0	A
5	20090607		062202778	82025169	003147	\$0.00	U	062202778/82025169		0	A
6	20090607		12500286	307418231	001127	\$0.00	U	125000286/307418231		0	A
7	20090607		062202778	82025169	003145	\$0.00	U	062202778/82025169		0	A
8	20090608		062000019	0018148468	001482	\$147.00	U	062000019/0018148468		0	A
9	20090608		125000286	307418231	001133	\$750.00	U	125000286/307418231		0	A
10	20090608		062202778	82025169	003143	\$2,304.00	U	062202778/82025169		0	A
11	20090608		0	@		\$0.00	B	0/@		0	A
12	20090608		125008039	6400052046	005583	\$556.56	U	125008039/6400052046		0	A
13	20090609		123456780	123=456=7	5850	\$0.00	U	123456780/123=456=7		0	A
14	20090609		123456780	123=456=7	5847	\$0.00	U	123456780/123=456=7		0	A
15	20090609		123456780	123=456=7	9418	\$22.57	U	123456780/123=456=7		0	A
16	20090609		125008547	3410002202	08441	\$218.67	U	125008547/3410002202		0	A
17	20090609		291070001	2851536012	7732	\$0.00	U	291070001/2851536012		0	A

This data table shows a sample of 16 records as it would look just after scanning some sets of checks. Notice that in the Scandate column there are three different dates, June 7, June 8, June 9 of 2009

The Screenshot below shows finding a check by check number. You can choose three methods for finding images – by Check#, by Account number, or by Amount. Choose the index you want to use, enter the value you’re looking for, and press “find” You’ll see ALL records that match that value. After viewing the records displayed, double click on the row of interest and you’ll see the image displayed in the “Image” tab. “Reset” cancels the “find” and restores the visibility of all records.



Here's a picture of using a date range to *find a group* of records. On the right hand side, notice we selected 6/7 as the start date and 6/8 as the end date, thus the records for 6/9 do not qualify. This is often used to select one day's work (today) so as to be able to view the group one at a time and enter amounts for each check.

The screenshot shows a software interface with a search and date selection area at the top. The 'Start Date' is set to 6/7/2009 and the 'End Date' is 6/8/2009. A calendar for June 2009 is open, with the 11th highlighted. Below the calendar is a table of records.

SEQ	Scandate	ClassCode	ABA	Acct	CheckNo	Amount	Status	AcctID
2	20090607		125008039	6400052046	005580	\$1,617.00	U	125008039/6400052046
3	20090607		062000019	0018148468	001303	\$1,023.00	U	062000019/0018148468
4	20090607		062000019	0018148468	001479	\$0.00	U	062000019/0018148468
5	20090607		062202778	82025169	003147	\$0.00	U	062202778/82025169
6	20090607		125000286	307418231	001127	\$0.00	U	125000286/307418231
7	20090607		062202778	82025169	003145	\$0.00	U	062202778/82025169
8	20090608		062000019	0018148468	001482	\$147.00	U	062000019/0018148468
9	20090608		125000286	307418231	001133	\$750.00	U	125000286/307418231
10	20090608		062202778	82025169	003143	\$2,304.00	U	062202778/82025169
11	20090608		0	@		\$0.00	B	0/@
12	20090608		125008039	6400052046	005583	\$556.56	U	125008039/6400052046
13	20090609		123456780	123=456=7	5850	\$0.00	U	123456780/123=456=7
14	20090609		123456780	123=456=7	5847	\$0.00	U	123456780/123=456=7
15	20090609		123456780	123=456=7	9418	\$22.57	U	123456780/123=456=7
16	20090609		125008547	3410002202	08441	\$218.67	U	125008547/3410002202
17	20090609		291070001	2851536012	7732	\$0.00	U	291070001/2851536012

Data | Image | Payors | Picture

Search by
 Check No. Account Amount

Start Date: 6/ 7/2009
 End Date: 6/ 8/2009

SEQ	Scandate	ClassCode	ABA	Acct	CheckNo	Amount	Status	AcctID	BatchID	Indexed	Fi
2	20090607		125008039	6400052046	005580	\$1,617.00	U	125008039/6400052046		0	A
3	20090607		062000019	0018148468	001303	\$1,023.00	U	062000019/0018148468		0	A
5	20090607		062202778	82025169	003147	\$0.00	U	062202778/82025169		0	A
4	20090607		062000019	0018148468	001479	\$0.00	U	062000019/0018148468		0	A
6	20090607		125000286	307418231	001127	\$0.00	U	125000286/307418231		0	A
7	20090607		062202778	82025169	003145	\$0.00	U	062202778/82025169		0	A
12	20090608		125008039	6400052046	005583	\$556.56	U	125008039/6400052046		0	A
11	20090608		0	@		\$0.00	B	0/@		0	A
8	20090608		062000019	0018148468	001482	\$147.00	U	062000019/0018148468		0	A
9	20090608		125000286	307418231	001133	\$750.00	U	125000286/307418231		0	A
10	20090608		062202778	82025169	003143	\$2,304.00	U	062202778/82025169		0	A

Here's what it looks like just selecting the current day:

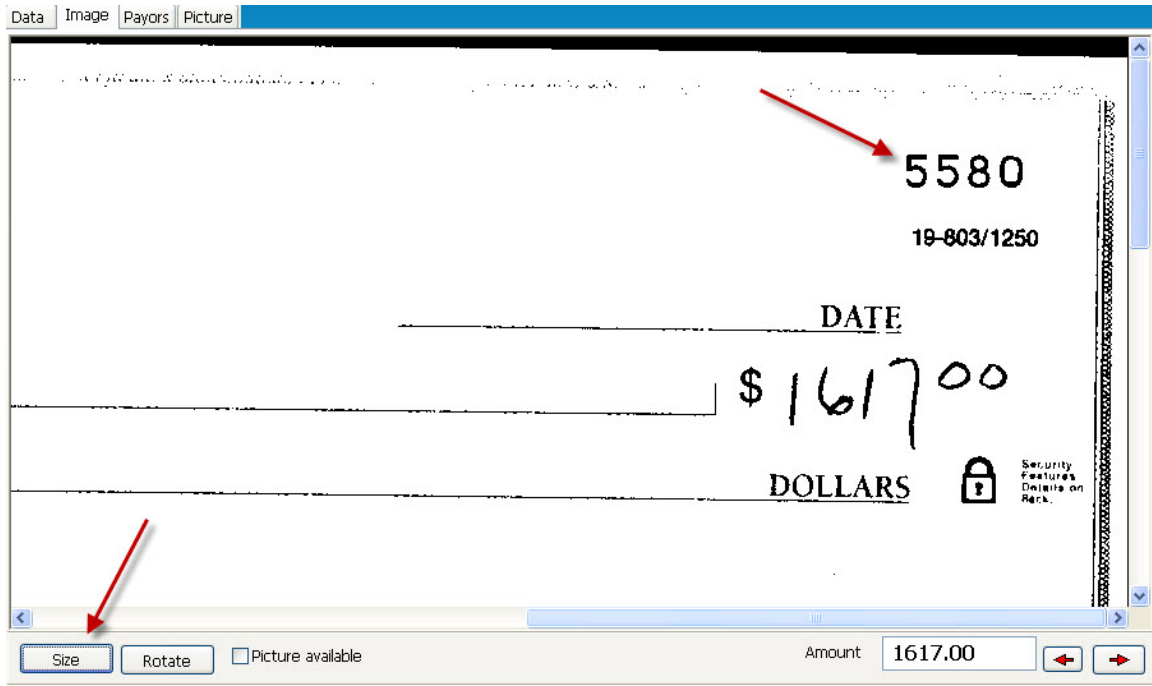
Data | Image | Payors | Picture

Search by
 Check No. Account Amount

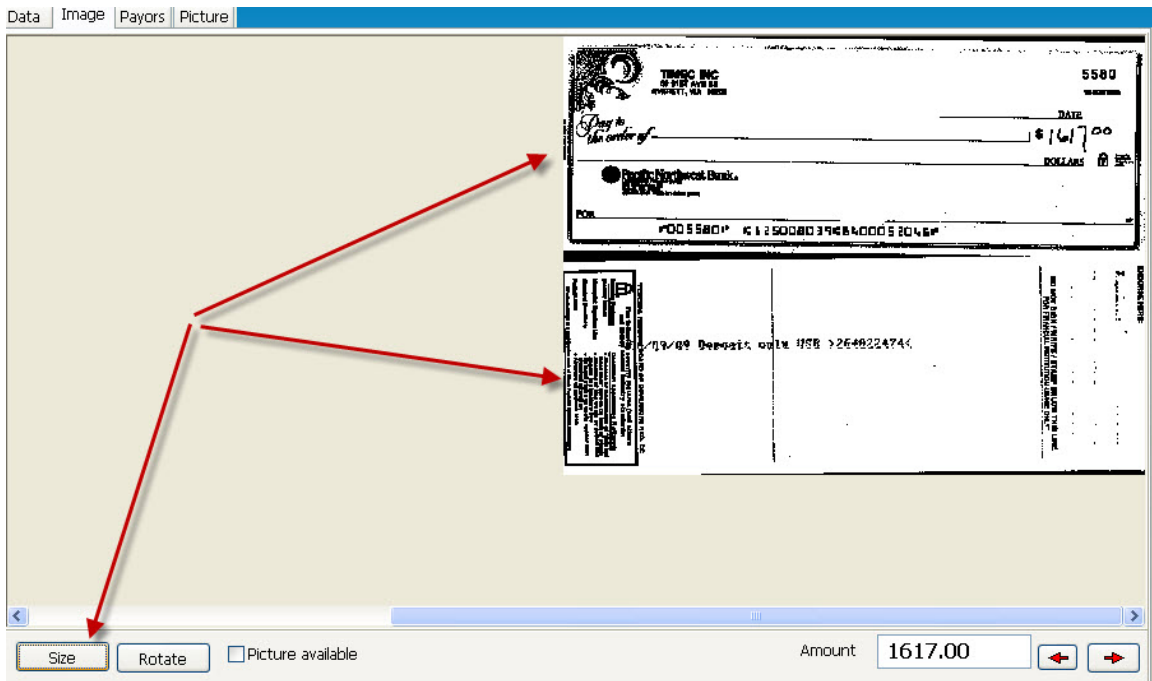
Start Date: 6/ 7/2009
 End Date: 6/ 7/2009

SEQ	Scandate	ClassCode	ABA	Acct	CheckNo	Amount	Status	AcctID	BatchID	Indexed	Fi
2	20090607		125008039	6400052046	005580	\$1,617.00	U	125008039/6400052046		0	A
3	20090607		062000019	0018148468	001303	\$1,023.00	U	062000019/0018148468		0	A
5	20090607		062202778	82025169	003147	\$0.00	U	062202778/82025169		0	A
4	20090607		062000019	0018148468	001479	\$0.00	U	062000019/0018148468		0	A
6	20090607		125000286	307418231	001127	\$0.00	U	125000286/307418231		0	A
7	20090607		062202778	82025169	003145	\$0.00	U	062202778/82025169		0	A

When you do select an image to view, the image is located so as to view the amount for easy data entry as shown



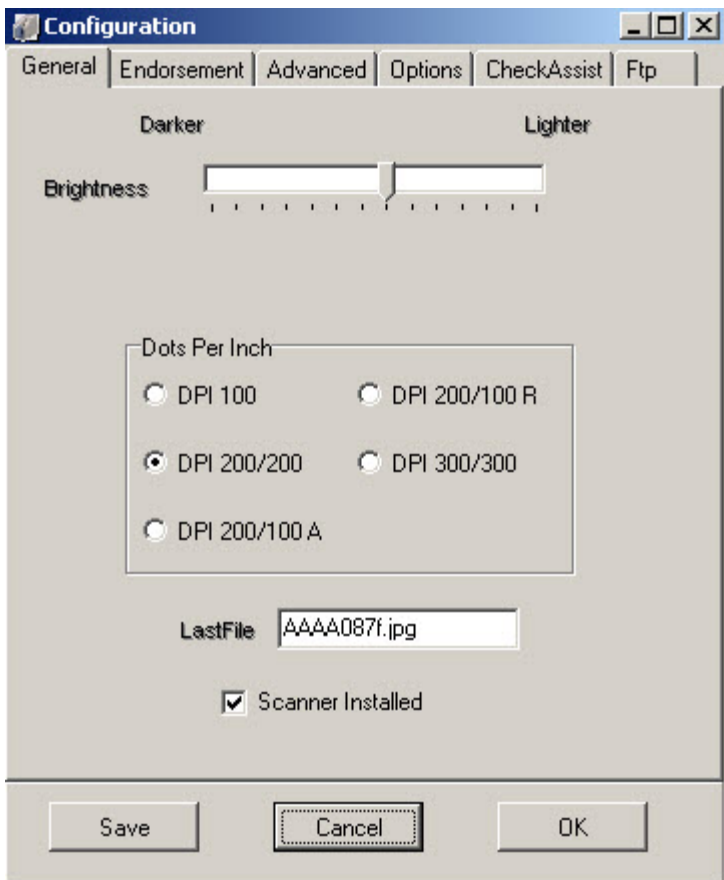
You can easily change to view style by clicking on the "size" Button at lower right.



Notice that, since we have chosen duplex (two-sided) scanning, the two images front and back are combine into one image for display.

Configuration Options

Press the “Config’ Button to see how to configure CXScan and what options are available

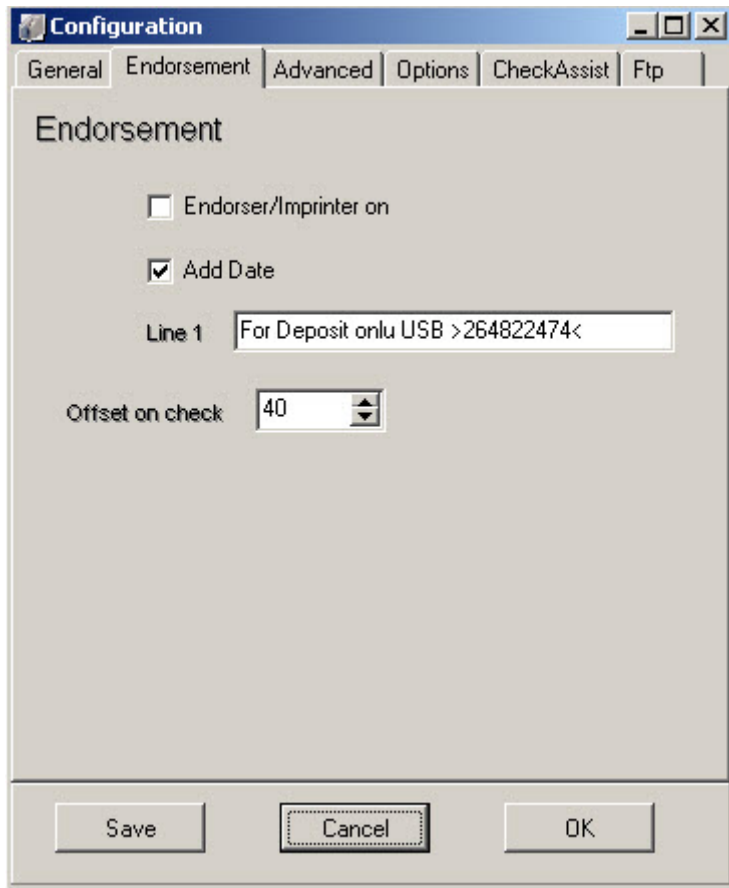


As Shown, there are six major areas – General, Endorsement, Advanced, Options, CheckAssist and Ftp.

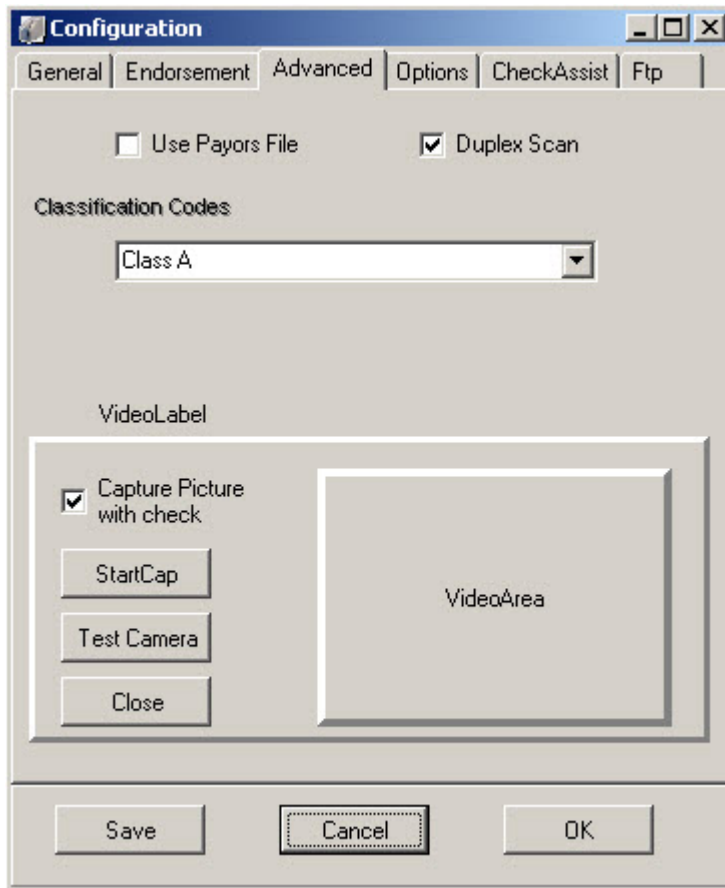
On the General tab, set the brightness / contrast of the scanner, and how fine an image you want (dots per inch). 200X / 200Y is typical, but for many people storing large volumes 200 / 100 is just as good. If storage is not a problem and you want the highest quality image, you could choose 300 / 300. A TIFF Image will take maybe 13k (13,000 bytes) for an image (one side). A JPEG image at 200 dpi will be close to 100k. A JPEG color image at 300 / 300 might be 225k per side.

The program controls the names and locations of all image files, so the operator does not have to do anything about naming, file locations or any of that. The lastfile entry is shown here so that it could be changed if needed, but normally it is not used by the operator except after discussion with technical support.

The “Scanner Installed” checkbox allows a sample program to run without looking for a scanner, thus there are no “scanner missing” error messages. Of course, the actual scanning functions can’t work in this mode.



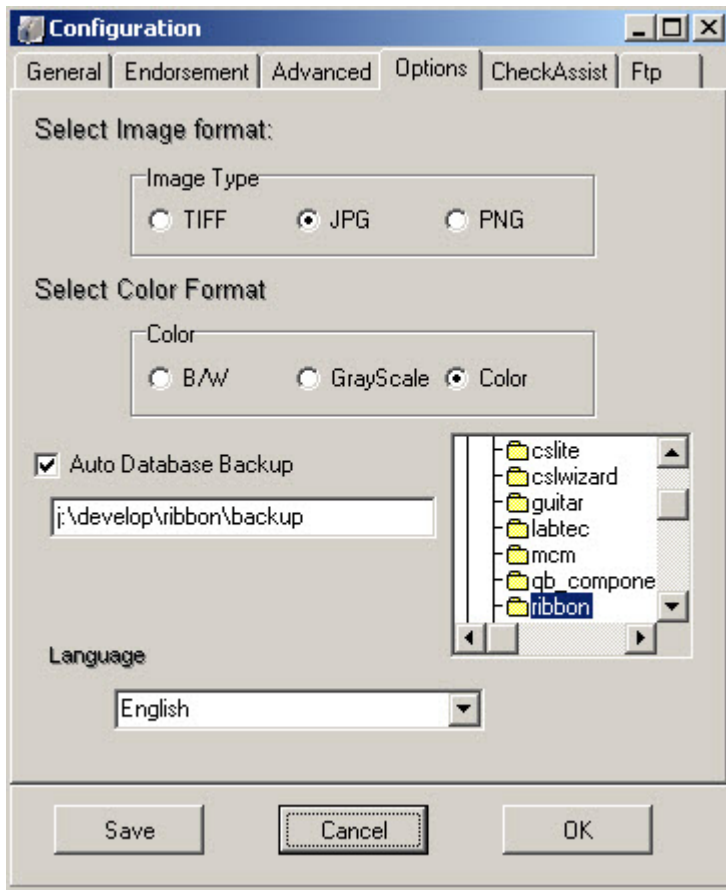
In the Endorsement tab, you can turn on the endorser, specify the text, and if the data should be added. The Check Offset controls where on the back of the check the line starts, and somewhere between 10 and 50 is suitable for the CX-30.



Under Advanced Options, you can (in some versions) enable the use of a Payors file, populated with data from an existing customer list, to help identify checks for routine payments or donations.

Classification codes allow the operator to place a user-defined class code in the database along with the other info to aid in finding a particular check.

The Video Panel uses a webcam to take a picture each time a check is scanned (in some versions) – good for check cashing operations. “Start Cap” starts up the video interface for testing. “Test Camera” takes a snapshot with the webcam and shows it in the VideoArea. “Close” turns off the video activity. If you get a good snapshot using “test”, you only have to check “Capture Picture with check” (and save changes) to enable this feature.



Under Options, you can choose the Image type you prefer and the color format. TIFF is Black And White (B/W), and JPEG (JPG) can be either color or grayscale.

AutoBack means that everytime the program starts up it will create a backup copy of the database in the whatever folder is specified, using the folder browser.

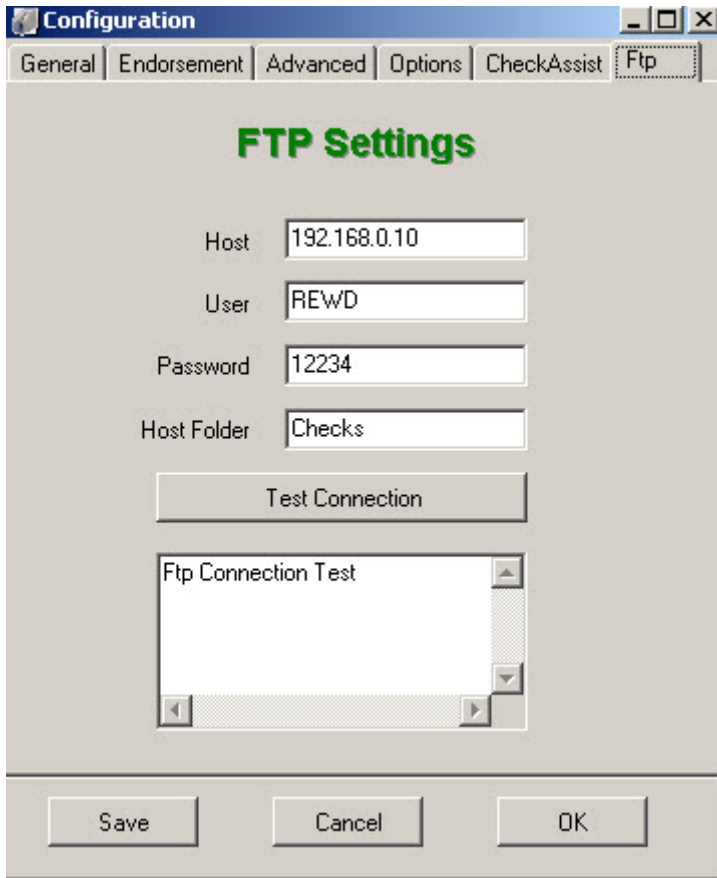
“Language” only supports English so far, but provision is made for adding other languages – Quebec French, for instance.

The image shows a 'Configuration' dialog box with the 'CheckAssist' tab selected. The dialog contains the following fields and values:

Field	Value
User	Dave's Checks
UserName	Dave
Password	g23D2Aui
SiteID	TESW
SiteKey	453790

At the bottom of the dialog, there are three buttons: 'Save', 'Cancel', and 'OK'.

There are two ways to use CheXpressScan for ACH – via CheckAssist and via generic FTP. On this screen you'll fill in the parameters give by the CheckAssist people to transmit and receive data from them.



This configures the FTP interface for transmitting groups of images and data to a waiting server. This, like the CheckAssist interface, presumes checks are scanned along the way, then grouped (usually by date range) and transmitted as a group, after some end-of-day processing.