Version

9.0

Imaging X Module

TITLE:	Imaging X		
PART:	General System		
MODULE:	Imaging X	**BUILD**	9.0.0.33
RESPONSIBILITY:	Procedures Specialist, Pentagon 2000	**REVISION:**	00
APPROVED BY:	Vice President, Operations, Pentagon 2000	**EFFECTIVE DATE:**	06/06/2014

Purpose

This module enables scanning and viewing images associated with parts master and inventory records. Images may be scanned or linked and viewed within the following locations:

- Parts master record
- Warehouse inventory record
- Purchase and sales receivers
- Pick tickets and purchase shippers
- Sales and vendor invoices

Overview

This procedure outlines the steps for setup and use of the Imaging X module.

Required Modules/Features

- Pentagon 2000 Core
- Imaging X Module

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Procedure

1. **Hardware Setup**

   a. Scanner

      i. Any TWAIN compatible scanner may be utilized.

      ii. The scanner drivers must be installed on the workstation on which the scanning is to be performed.

   b. Disk Storage Space

      i. Ensure the drive(s) on which images will be stored has the capacity for the volume of imaging that you desire.

      ii. Any drive on your network may be used provided that it has been mapped identically on each workstation.
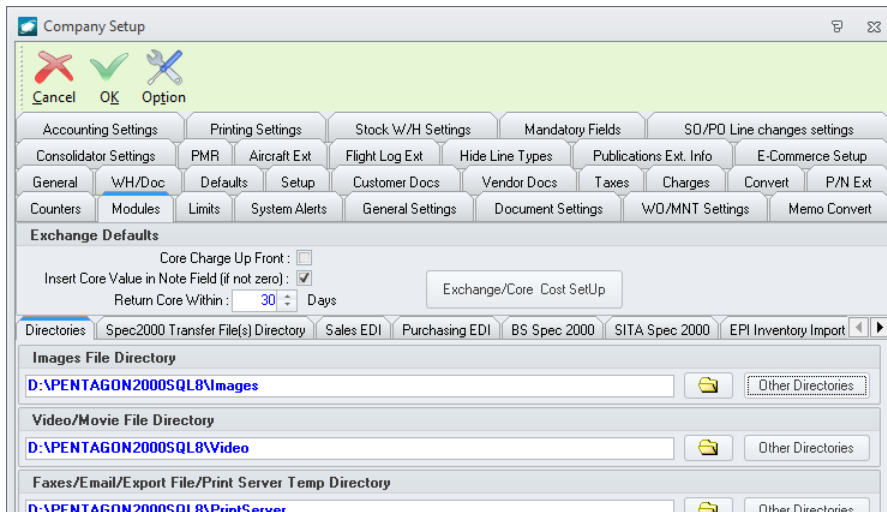
END OF SECTION

2. **Administrative Setup**

    a. Image File Directory

        i. From the ribbon, left-click **Administration**, left-click **System** and left-click **System General Defaults**.
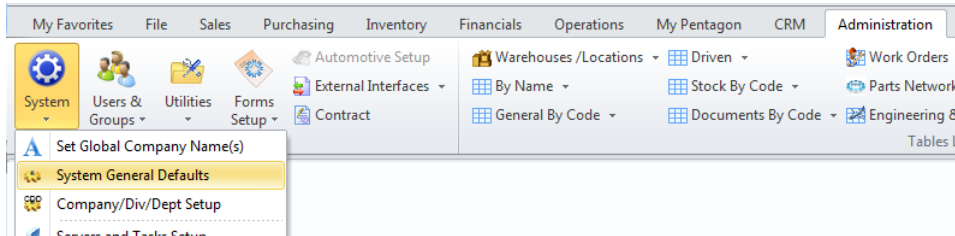
        ii. The **Company Setup Window** will appear. Left-click the **Modules** tab, then left-click the Directories sub-tab (if not already selected).


        iii. The **Images File Directory** field will default to the "Images" folder in your main Pentagon folder (where pentagon.exe resides). This path may be changed to identify the drive where images should be stored.

        iv. When the path is correct, left-click the **OK** button on the **Company Setup** window toolbar to save the changes.

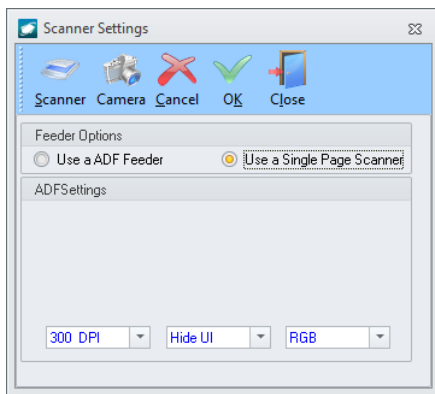   v. A **Confirm** dialog box will appear with the following message:
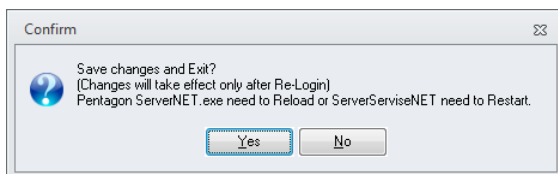
        vi. Left-click the **Yes** button.

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b. Scanner Settings

   i. From the ribbon, left-click **My Pentagon** and left-click **Scanning Setup**.

   ![Ribbon showing My Pentagon tab with Scanning Setup highlighted]
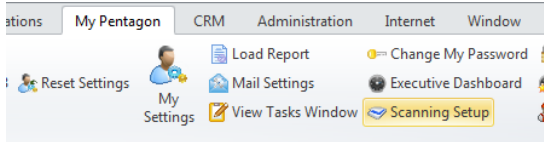
   ii. The **Scanner Settings** window will appear.

   ![Scanner Settings window with Feeder Options and ADF Settings]

   1. **Feeder Options** group box

      a. **Use a ADF Feeder** radio button – Select if your scanner is equipped with an automatic document feeder and you intend to utilize it.

      b. **Use a Single Page Scanner** radio button – Select if your scanner is either (1) not equipped with an automatic document feeder or (2) you do not intend to use the automatic document feeder.

   2. **ADF Settings** group box

      a. DPI field – Select the DPI that you would like to scan (as a default).

      b. Scanner UI field – Select whether or not you would like the scanner's native interface to appear when scanning ("Show UI" option) or not ("Hide UI" option).

      c. Color field – Select the type of scanning that you would like (as a default).

   3. Toolbar

      a. **Scanner** button – Left-click to select the default scanner from a list of scanners installed on the workstation.

      b. **Camera** button – Left-click to select a default web camera installed on the workstation.

4. Left-click the **OK** button on the **Scanner Settings** window toolbar to save the settings and close the window.

END OF SECTION

3. **Pentagon 2000 IMAGEination**

    The **Pentagon 2000 IMAGEination** window is Pentagon 2000's image viewer. This viewer is accessible throughout the system.

    a. Open the Pentagon 2000 IMAGEination window in the location where the image should be added or viewed.

        i. From a parts master record (**Partnumber** window)

            1. Left-click the **Opt** (options) button on the **Partnumber** window toolbar and left click **1. Images**.
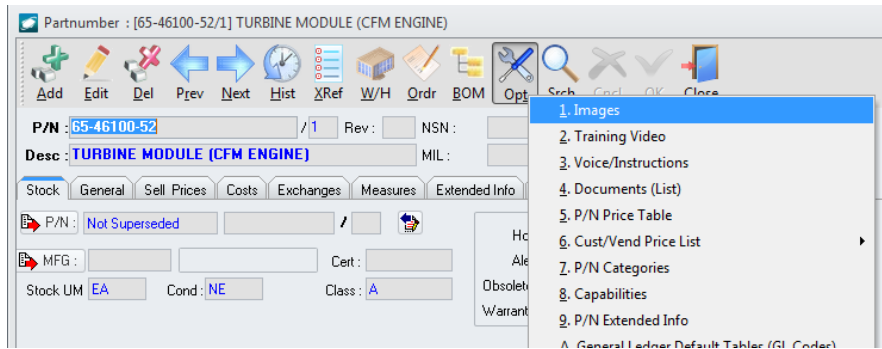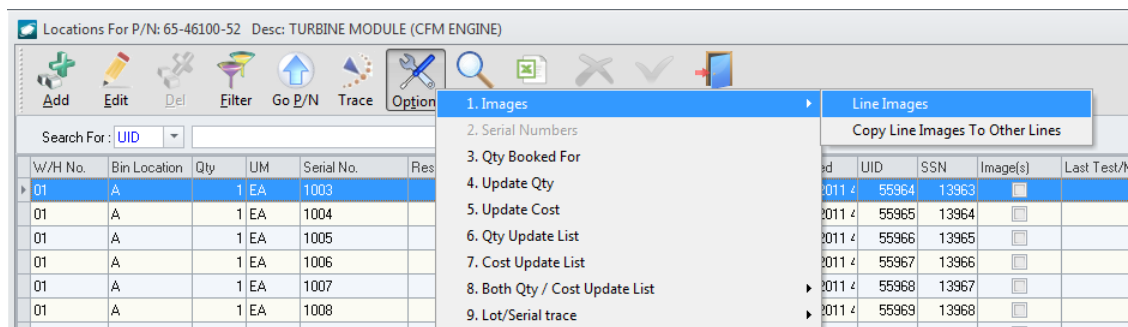

            2. The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.
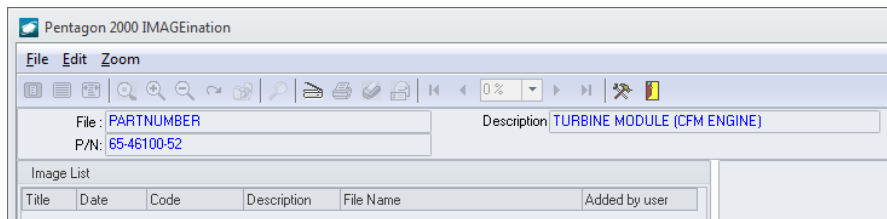
   ii. From a warehouse location (**Locations** window)

            1. Select the line for which images are to be added or viewed, left-click the **Options** button from the **Locations** window toolbar, select **1. Images** and left-click **Line Images**.

> **NOTE:** If images are added DURING the receiving process (in the Purchase Perceiver Information window), those images will be linked to both the receiver and the warehouse location. If scanning is skipped during the receiving process, images may be linked to the warehouse location and images will appear in both the warehouse location and the applicable receiver.
>
> **NOTE:** When an item has been removed from the warehouse, the attached images will no longer be found in the warehouse. However, they will remain attached to the receiver.

2. The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.
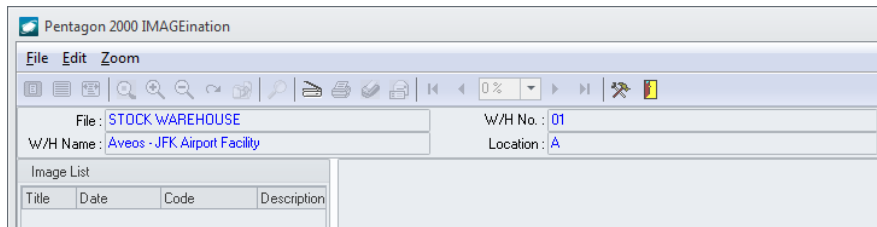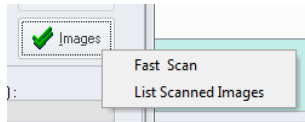

iii. During the receiving process

1. When particular line types are received, the **Purchase Receiver Information** window will appear for each line being received. Left-click the **Images** button in the upper right of the window.
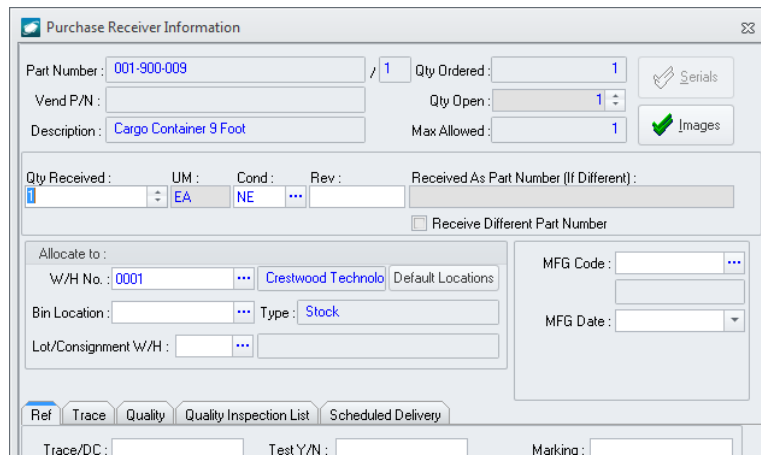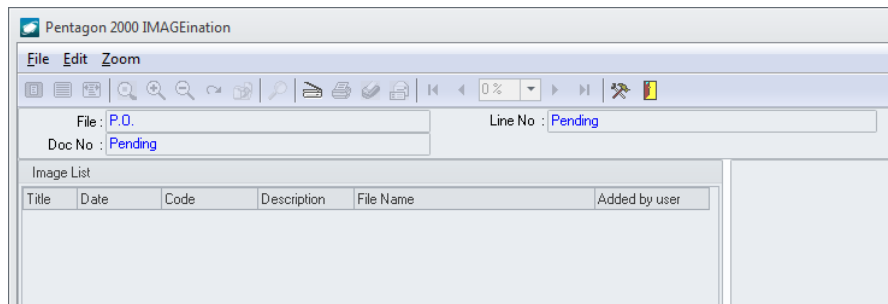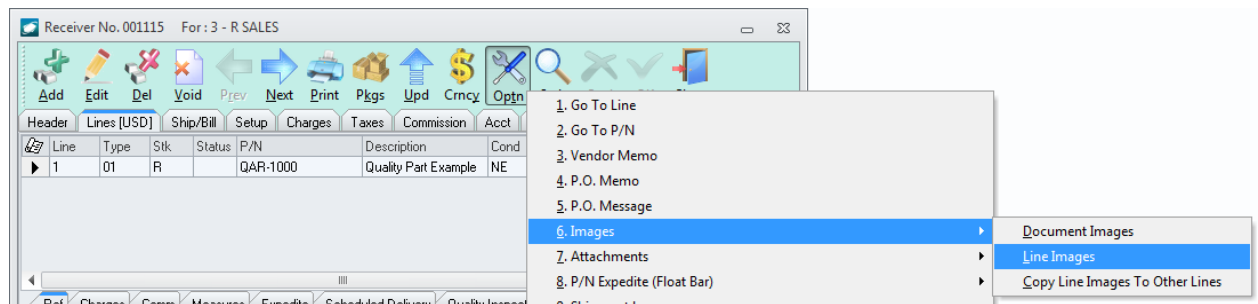

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2. A menu will appear.

a. Fast Scan – Refer to the Fast Scan section of this procedure below.

b. List Scanned Images - The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.

> **NOTE:** If images are added DURING the receiving process, those images will be linked to both the receiver and the warehouse location.

iv. From a purchase receiver

1. Select the line for which images are to be added or viewed, left-click the **Optn** (options) button from the **Receiver** window toolbar, select **6. Images**.
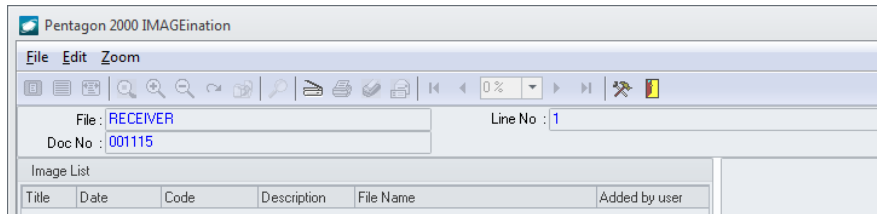

a. Left-click the **Document Images** option to view/edit images associated with the document as a whole.

CONTINUE TO NEXT PAGE

b. Left-click the **Line Images** option to view/edit images associated with the document line.

> **NOTE:** When images are attached to the receiver from the options menu displayed above, the images are NOT also linked to the warehouse location for the received line.

2. The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.

v. From a purchase shipper

1. Select the line for which images are to be added or viewed, left-click the **Optn** (options) button from the **Purchase Shipper** window toolbar, select **4. Images** and left-click **Line Images**.
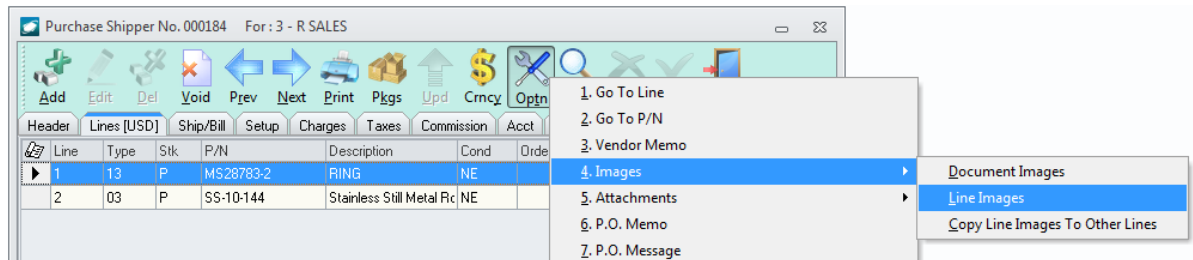
a. Left-click the **Document Images** option to view/edit images associated with the document as a whole.

b. Left-click the **Line Images** option to view/edit images associated with the document line.

2. The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.
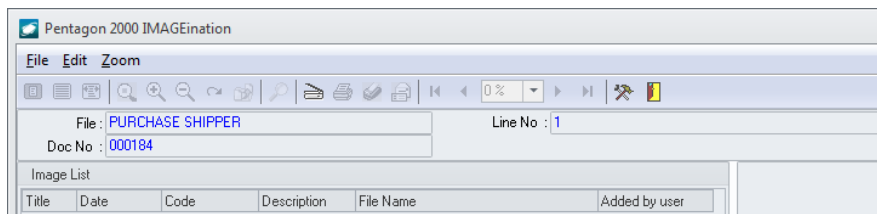
vi. From a vendor invoice

1. Select the line for which images are to be added or viewed, left-click the **Optn** (options) button from the **Purchase Invoice** window toolbar, select **4. Images** and left-click **Line Images**.
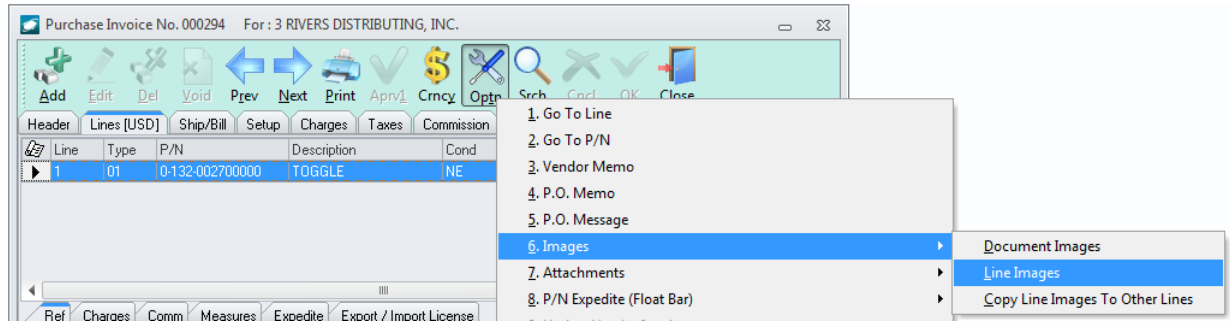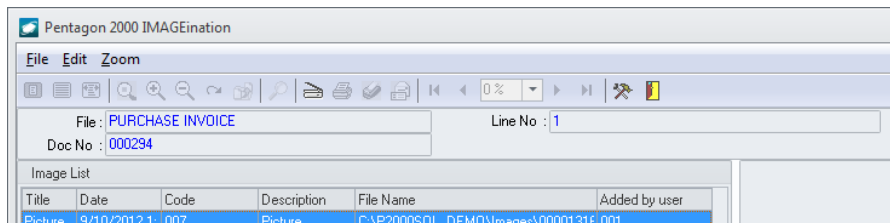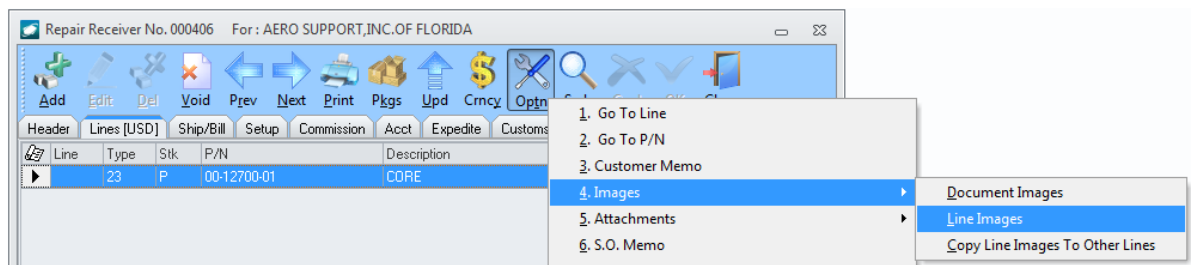

a. Left-click the **Document Images** option to view/edit images associated with the document as a whole.

b. Left-click the **Line Images** option to view/edit images associated with the document line.

2. The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.

vii. From a sales receiver

1. Select the line for which images are to be added or viewed, left-click the **Optn** (options) button from the **Repair Receiver** window toolbar, select **4. Images** and left-click **Line Images**.

a. Left-click the **Document Images** option to view/edit images associated with the document as a whole.

b. Left-click the **Line Images** option to view/edit images associated with the document line.

2. The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.
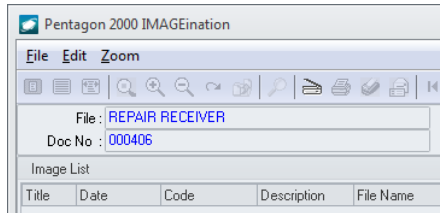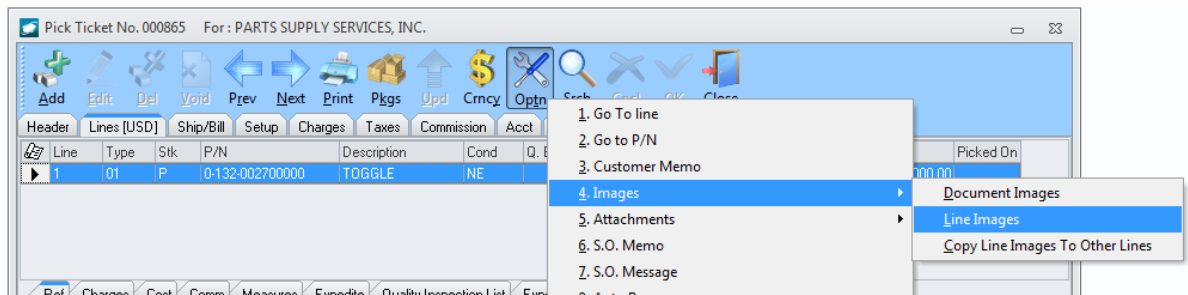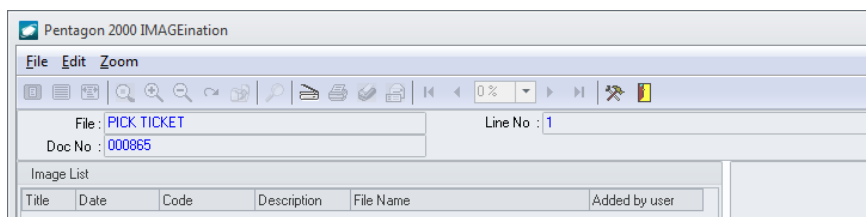

viii. From a pick ticket,

1. Select the line for which images are to be added or viewed, left-click the **Optn** (options) button from the **Pick Ticket** window toolbar, select **4. Images** and left-click **Line Images**.

a. Left-click the **Document Images** option to view/edit images associated with the document as a whole.

b. Left-click the **Line Images** option to view/edit images associated with the document line.

2. The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.

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ix. From a sales invoice,

1. Select the line for which images are to be added or viewed, left-click the **Optn** (options) button from the **Sales Invoice** window toolbar, select **6. Images** and left-click **Line Images**.
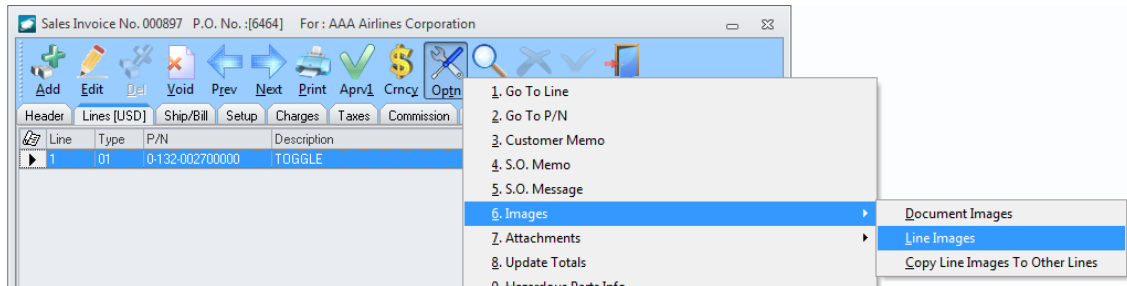

a. Left-click the **Document Images** option to view/edit images associated with the document as a whole.

b. Left-click the **Line Images** option to view/edit images associated with the document line.

2. The **Pentagon 2000 IMAGEination** window will display the following fields in the header to identify the record for which the image is associated.
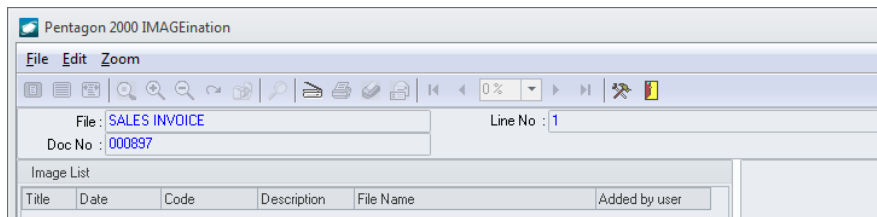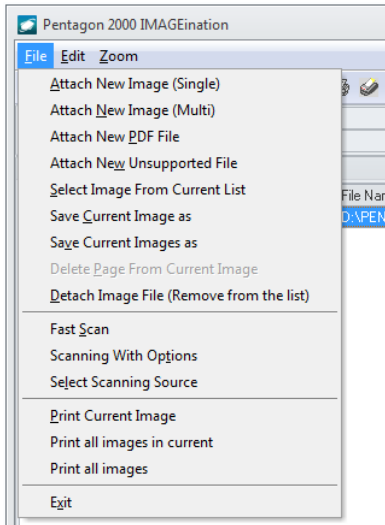

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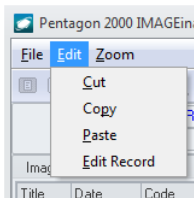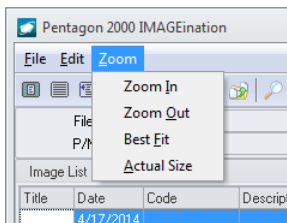b. Pentagon 2000 IMAGEination Window Menu Toolbar

i. **File** menu

1. **Attach New Image (Single)** menu item – Left-click to create a link from an image file on your network to the record.

2. **Attach New Image (Multi)** menu item – Left-click to create a link from multiple image files on your network to the record.

3. **Attach New PDF File** menu item – Left-click to create a link from an adobe acrobat file on your network to the record.

4. **Attach New Unsupported File** menu item – Left-click to create a link from virtually any file on your network to the record.

5. **Select Image From Current List** menu item – Left-click to create a link from a previously saved image within the Pentagon 2000 database to the record.

6. **Save Current Image as** menu item – Left-click to save the current image to a new location on your network.

7. **Save Current Images at** menu item – Left-click to save multiple selected images to a new location on your network.

8. **Delete Page from Current Image** menu Item – Left-click to remove a page from the current image (for PDF files).

9. **Detach Image File (Remove from the list)** menu item – Left-click to remove the link between the selected image and the record.

10. **Fast Scan** menu item – Left-click to open the **Fast Scan** window (discussed below).

11. **Scanning With Options** menu item – Left-click to open the **Scanning** window (discussed below).

12. **Select Scanning Source** menu item – Left-click to temporarily change the scanning source.

13. **Print Current Image** menu item – Left-click to print the selected image.

14. **Print all images in current** menu item – Left-click to print multiple selected images.

15. **Print all images** menu item – Left-click to print all images associated with the record.

16. **Exit** menu item – Left-click to close the Pentagon 2000 IMAGEination window.

ii. **Edit** menu

iii. **Zoom** menu

END OF SECTION

4. Fast Scan

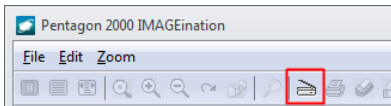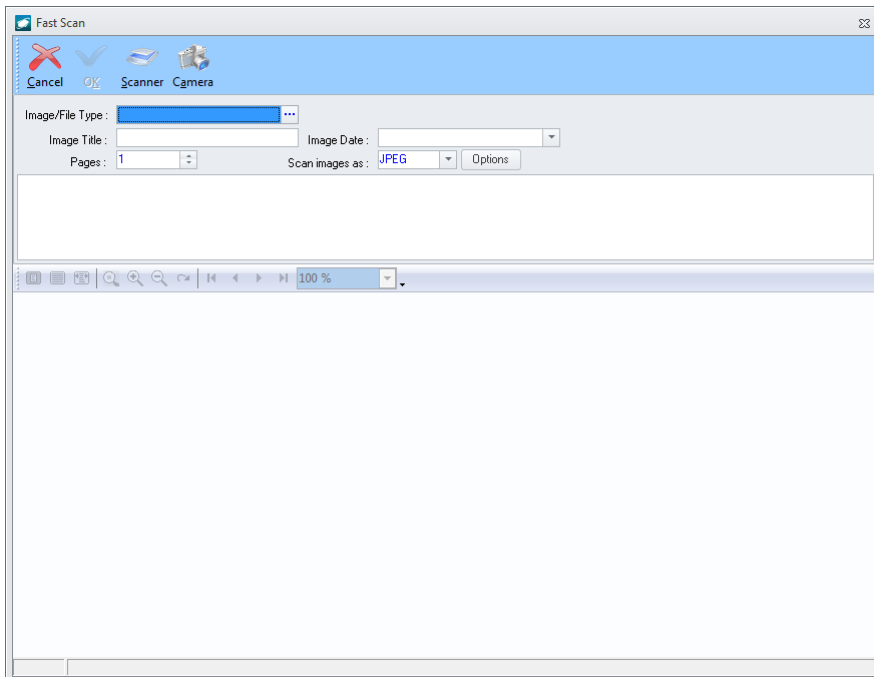   a. From the **Pentagon 2000 IMAGEination** window:

        i. Left-click **File** from the **Pentagon 2000 IMAGEination** window menu toolbar and left-click **Fast Scan**, OR
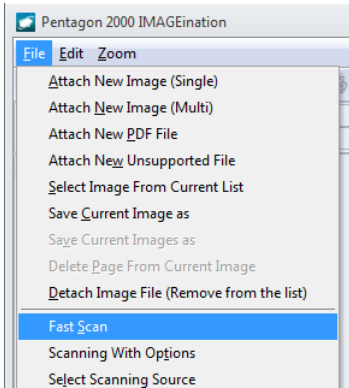
        ii. Left-click the **Fast Scan** button from the **Pentagon 2000 IMAGEination** window button toolbar.



    b. The **Fast Scan** window will appear.

        i. **Image/File Type** field – Select the image/file type (optional).

ii. **Image Title** field – Enter an image title (optional).

iii. **Image Date** field – This field will be populated with the current date/time when the document is scanned; however, this date/time may be overwritten.

iv. **Pages** field (for ADF scanning only) – Enter the number of pages to be scanned (optional).

> *NOTE:* Each page will be saved as separate images with an assigned suffix. However, the information in the fast scan will be allocated to all images (except the Note field, which is assigned to the first image of the set.

v. **Scan images as** field – Select the type of image which the scan should be saved.

vi. **Options** button – Allows selection of the appropriate image options related to the type of image selected in the **Scan images as** field.

vii. Note field – Allows information relevant to the image to be associated with the image.

c. If using a scanner:

i. Left-click the **Scanner** button from the **Fast Scan** window toolbar.

ii. The image(s) will appear and any of the information may be modified after the scan.

iii. Left-click the **OK** button from the **Fast Scan** window toolbar to save the image(s).

d. If using a camera:

i. Left-click the **Camera** button from the **Fast Scan** window toolbar.

ii. The **Camera Capture** window will appear.
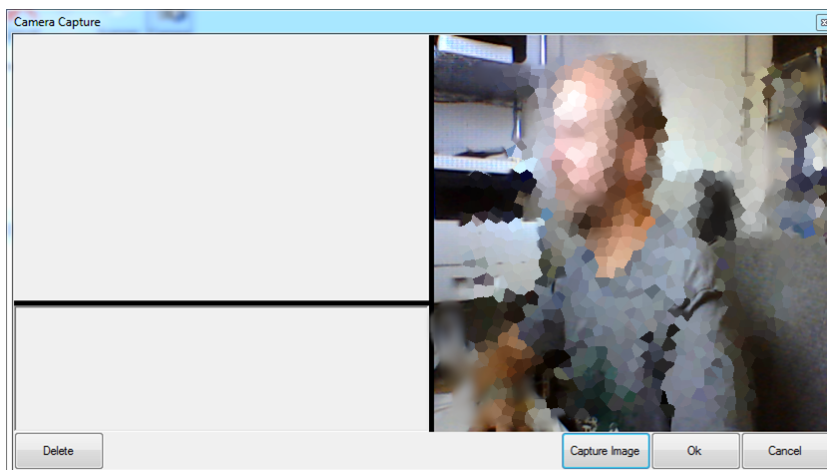
iii. Left-click the **Capture Image** button.

iv.   The image will appear in the **Capture Image** window. Multiple images may be captured.

v.   Left-click **OK** in the **Capture Image** window.

vi.   The image(s) will appear and any of the information may be modified after the scan.

vii.   Left-click the **OK** button from the **Fast Scan** window toolbar to save the image(s).

e.   Image(s) will be linked to the document or line and will be stored in the directory identified in the **General Settings**.

END OF SECTION

5. **Scanning With Options**

a. From the **Pentagon 2000 IMAGEination** window, left-click **File** from the **Pentagon 2000 IMAGEination** window menu toolbar and left-click **Scanning With Options**.
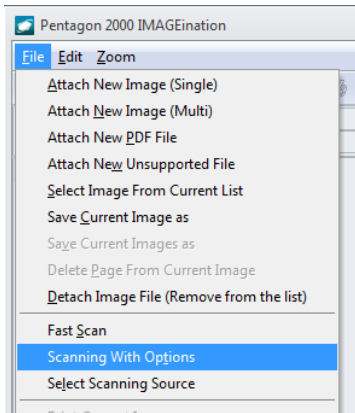
b. The Scanning window will appear.
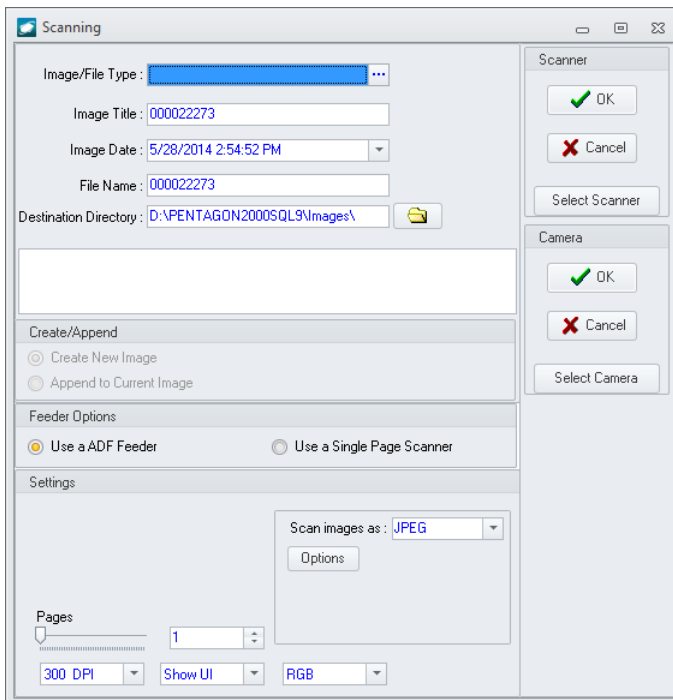
i. **Image/File Type** field – Select the image/file type (optional).

ii. **Image Title** field – Enter an image title (optional). This field will default using a counter.

iii. **Image Date** field – This field will be populated with the current date/time when the window was opened; however, this date/time may be overwritten.

iv.   **File Name** field – Enter the name under which the file will be saved.

v.   **Destination Directory** field – Identifies the directory into which the file will be scanned.

vi.   Note field – Allows information relevant to the image to be associated with the image.

vii.   **Scan images as** field – Select the type of image which the scan should be saved.

viii.   **Options** button – Allows selection of the appropriate image options related to the type of image selected in the **Scan images as** field.

ix.   **Create /Append** group box

   1.   **Create New Image** radio button – Identifies that the next scan should create a new unique file. This is the default option.

   2.   **Append to Current Image** – Identifies that the next scan will be added to the existing file.

x.   **Feeder Options** group box

   1.   **Use a ADF Feeder** radio button – Select if your scanner is equipped with an automatic document feeder and you intend to utilize it.

   2.   **Use a Single Page Scanner** radio button – Select if your scanner is either (1) not equipped with an automatic document feeder or (2) you do not intend to use the automatic document feeder.

xi.   **Settings** group box

   1.   **Pages** field (for ADF scanning only) – Enter the number of pages to be scanned (optional).

   > *NOTE:* Each page will be saved as separate images with an assigned suffix. However, the information in the fast scan will be allocated to all images (except the Note field, which is assigned to the first image of the set.

   2.   DPI field – Select the DPI that you would like to scan (as a default).

   3.   Scanner UI field – Select whether or not you would like the scanner's native interface to appear when scanning ("Show UI" option) or not ("Hide UI" option).

   4.   Color field – Select the type of scanning that you would like (as a default).

   5.   Image Settings group box

       a.   **Scan images as** field – Select the type of image which the scan should be saved.

       b.   **Options** button – Allows selection of the appropriate image options related to the type of image selected in the **Scan images as** field.

c. If using a scanner:

    i. Left-click the **OK** button from the **Scanner** group box.

    ii. The image(s) will be scanned, linked to the document or line and will be stored in the directory identified in the **Destination Directory** field.

    iii. Left-click the **Select Scanner** button in the **Scanner** group box to temporarily change the scanner.

d. If using a camera:

    i. Left-click the **OK** button from the **Scanner** group box.

    ii. The **Camera Capture** window will appear.

    iii. Left-click the **Capture Image** button.

    iv. The image will appear in the **Capture Image** window. Multiple images may be captured.

    v. Left-click **OK** in the **Capture Image** window.

    vi. Image(s) will be linked to the document or line and will be stored in the directory identified in the **Destination Directory** field.

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