

# ATIPXpress

## Scanning Solution

v11.11.0

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# ATIPXpress v11.11.0 Scanning Solution

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# 1 Introduction

ATIPXpress integrates with an industry-standard scanning solution, Dynamsoft Web TWAIN. This tool allows you to scan documents directly into the application for a convenient document upload experience.

Once documents have been scanned into the application, you have options to manipulate the images for clarity (including color, grayscale, pixel selection, etc.) and corrections (including line straightening, rotation, cropping, etc.). The ability to scan physical documents into the application is made available in the system for Document Management, Collaboration Portal, Correspondence, and on the Request page.

**Note: This is an add-on feature that requires additional licensing. Please reach out to OPEXUS Customer Success for more information.**



# 2 Setting Up the ATIPXpress Scanning Solution

## 2.1 Confirm License Count

The ATIPXpress scanning solution is an add-on feature that requires additional licensing. If you do not already have scan licenses, please reach out to OPEXUS Customer Success for more information.

You can confirm your scan license count by navigating to **Help > About ATIPXpress**.

Number of user licenses:	Unlimited
Number of administrative licenses:	10
Maximum number of connections:	Unlimited
Number of Electronic Document Review (EDR) licenses:	100
Number of AI Licenses:	3
Number of Collaboration user licenses:	100
Number of scan licenses:	30
Serial Key:	

[Export License](#) [Email License](#)

## 2.2 Enable the Scan Pages Feature

Once the OPEXUS team has distributed your organization’s scan licenses, an Administrator will need to enable the Scan Pages feature for your organization’s environment. Navigate to **Administration > Features and Licenses > Application Features**. You can turn on/off the scanning tool using the *Scan Pages* checkbox.



## Setting Up the ATIPXpress Scanning Solution

The screenshot shows the 'Application Features' window with a list of features and their status (checked or unchecked). The 'Scan Pages' checkbox is circled in red.

Feature	Status
Add to Reading Room	Checked
Advanced Workflow	Checked
Archiving	Unchecked
Collaboration Portal	Checked
Create Complaint	Checked
Dispositions	Checked
Electronic Document Review (EDR)	Checked
Link Requests	Checked
Media Redaction	Unchecked
Multi-Track Type	Unchecked
Reason for Delay	Checked
Relativity Integration	Unchecked
Request Complexities	Checked
Response Package Approval	Checked
RFD Records Provider	Unchecked
Secondary Assignments	Checked
SharePoint Integration	Unchecked
TeleMessage Integration	Unchecked
Translations	Checked
Add/Remove Documents to Request Folder	Checked
ADX	Unchecked
AWS Comprehend	Unchecked
Copy Request	Checked
Custom Fields	Checked
EDR Document Clustering	Checked
Extensions	Checked
Lock/Unlock Review Layer	Checked
Method of Access	Checked
Pdf Editor	Unchecked
Record Search Processing Costs	Checked
Reminder Management	Checked
Request for Documents	Checked
Restrict Description	Checked
S2S Integration	Unchecked
Section 69	Checked
Staff Processing Costs	Checked
TimeXpress	Unchecked
Add/Remove Documents to Review Log	Checked
Application Fee	Checked
Barcode	Checked
Corrections	Checked
Declassification	Checked
eFlow Composer	Unchecked
Global Address List	Checked
Mass Assignment	Checked
Move/Copy Folder	Checked
Perfect Request	Checked
Redaction Artificial Intelligence	Checked
Request Addresses	Checked
Request Owner	Checked
Review Templates	Checked
Scan Pages	Checked
Send/Save Consultations	Checked
Sub Requests	Checked
Transfer Request	Checked

Note: To activate the Electronic Document Review(EDR) feature, you must upgrade the license file.

Buttons: Save, Close

## 2.3 Give Users Scan Pages Access

The next step is to enable scanning permissions for individual users.

1. Navigate to **Administration > Organization Setup > Application Roles**.
2. Locate the *Scanning Users* role in the list and click the link to open it.
3. The *Scanning Users - Edit Role* window opens. From here, you can click **(A) Add Users** to select the users you'd like to give a scanning license. The users you add will appear in the **(B) list**. When you're finished adding users, click **(C) Save**.



## Setting Up the ATIPXpress Scanning Solution

The screenshot shows a web application window titled "Scanning Users - Edit Role". It is divided into three main sections:

- Role Information:** Contains a "Role Name\*" field with the value "Scanning Users" and a "Description" field with the text "Users assigned to this role are given access to the Scanning feature of the application and are counted against the purchased Scanning license count."
- Role Assignment:** Contains a "Users:" field with the value "Admin, Admin". To the right of this field are two buttons: "Add Users" and "Remove". A red circle labeled "A" is positioned over the "Add Users" button, and a red circle labeled "B" is positioned over the "Users:" field.
- Role Permissions:** Contains a "Scan User" field. A red circle labeled "C" is positioned over the "Save" button at the bottom right of this section.

At the bottom left of the window, there is a note: "Note: \* fields are mandatory". At the bottom right, there are three buttons: "Save", "Back", and "Close".

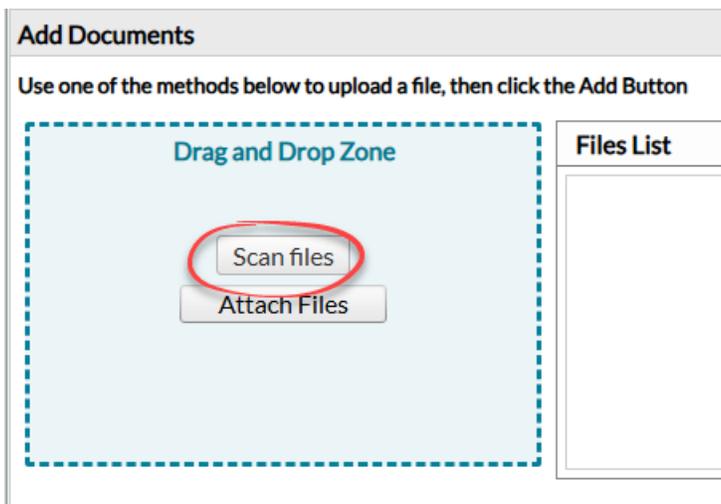
If you need to reallocate scanning licenses, you can simply add/remove users from this Role Assignment.



## 3 Using the Scanning Tool

Once an Administrator has enabled the Scan Pages feature and configured user permissions, users can access the feature in the application.

The scanning tool is available throughout the application, anywhere you would need to upload a document. Where scanning is enabled, you'll notice a **Scan files** button as shown below.



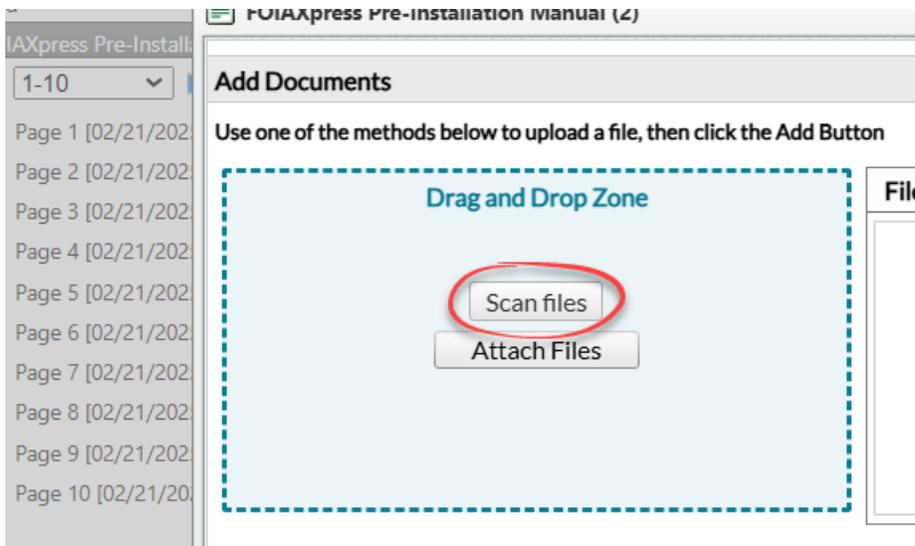
### 3.1 Accessing the Scanning Tool

#### 3.1.1 Scanning in Document Management

You can use the scanning tool to add pages to Document Management. Once you've opened a folder in Document Management, right click on the folder and select **Add Pages**. You'll see the option to **Scan files** into the folder.

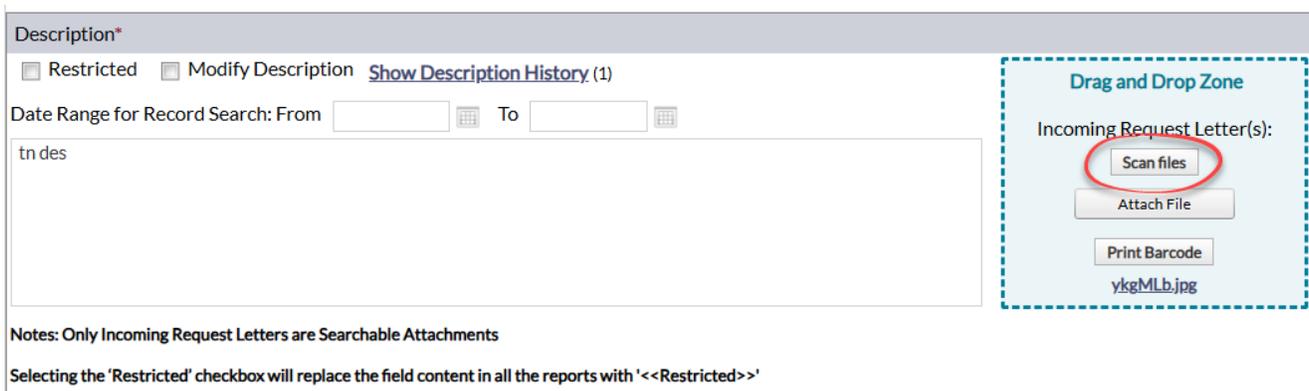


## Using the Scanning Tool



### 3.1.2 Scanning in a Request

The scanning feature is also available on the Request page. There are multiple locations where you can access the **Scan files** button, depending on your environment's configuration. This includes the *Description* field, to scan and attach a Request Letter, the *Fee Waiver Requested* field, and certain custom fields.

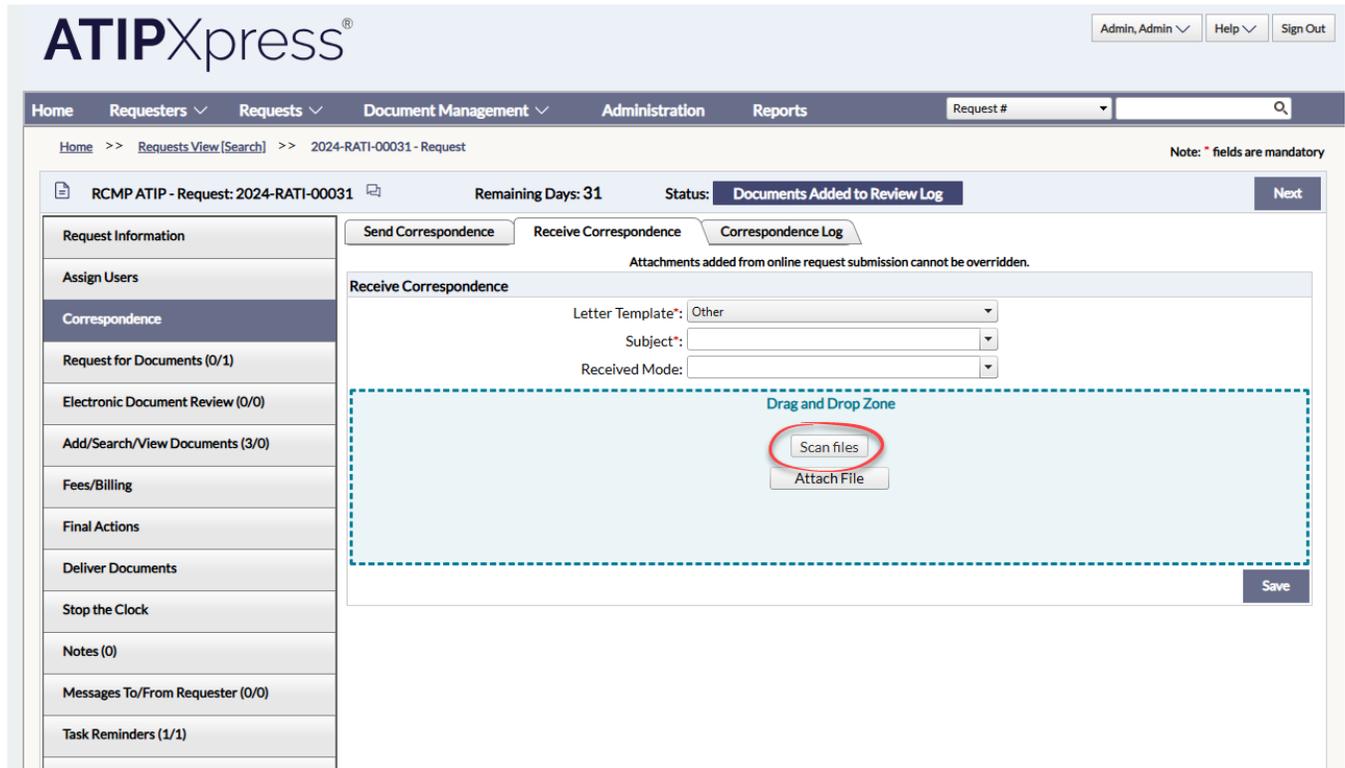


The scanned files will be upload to the field where you accessed the scanning tool from – if you click **Scan files** from the *Description* field, the files will automatically be added to the Description section.



### 3.1.3 Scanning in Correspondence

On the Correspondence tab of a Request, you can scan in correspondence files you have received. Navigate to the *Receive Correspondence* tab and you'll see the **Scan files** button in the Drag and Drop zone.

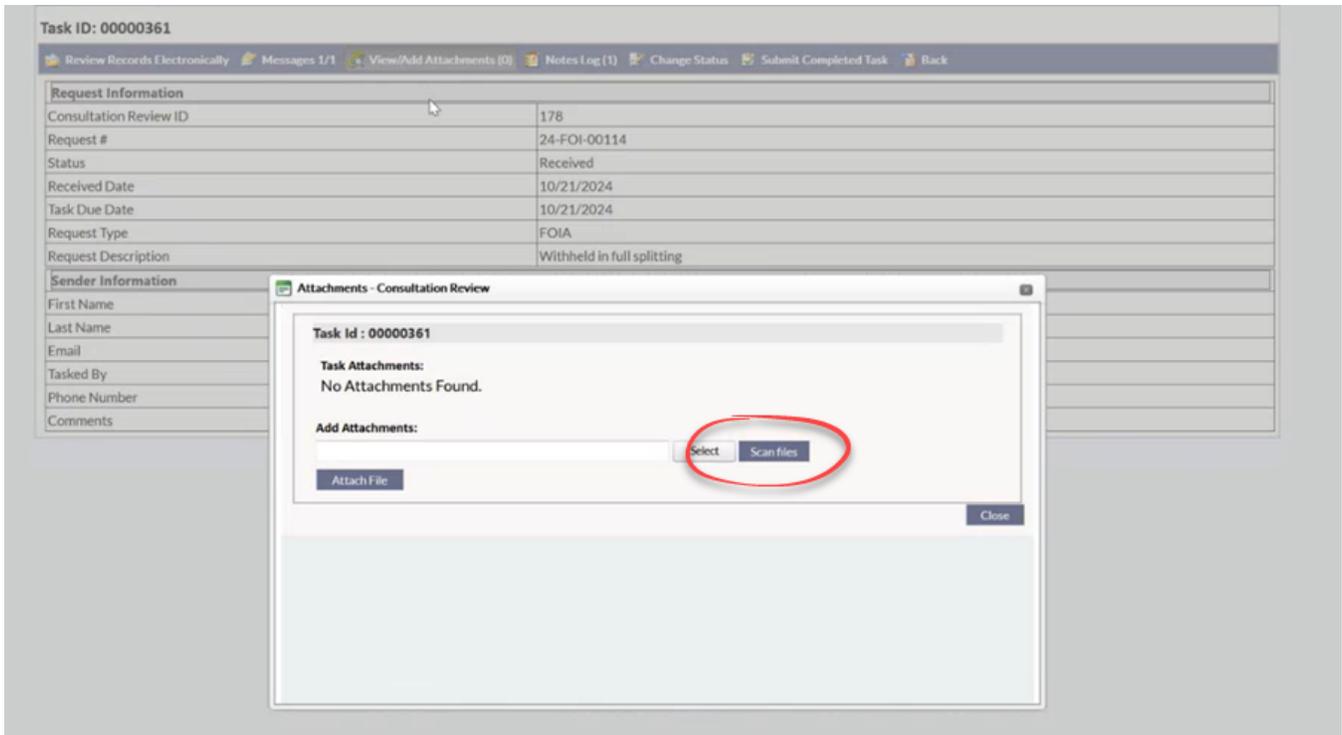


### 3.1.4 Scanning in Collaboration Portal

Collaboration Portal users can also access the scanning tool. Click **View/Add Attachments** on a Request for Documents or Consultation task for the option to scan in a file to add as a task attachment.

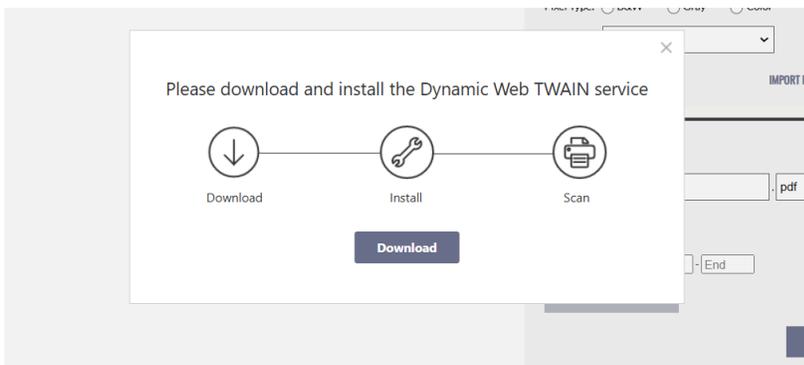


## Using the Scanning Tool



### 3.2 First Use

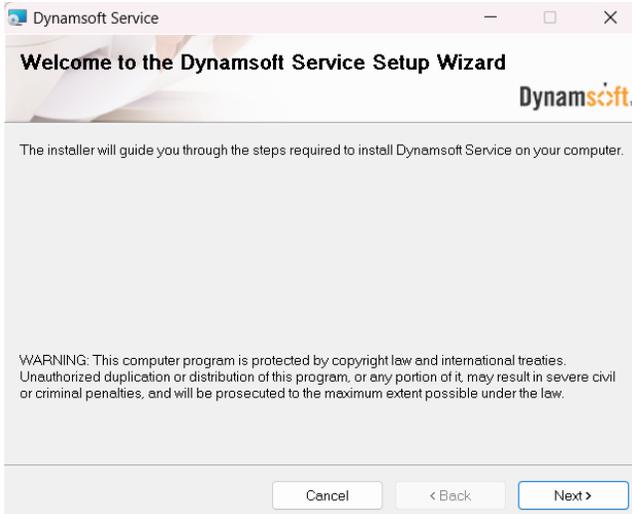
The first time you access the scanning tool on your machine, you will need to download and install the Dynamic Web TWAIN service. Once you've clicked **Scan files**, the following prompt will appear.



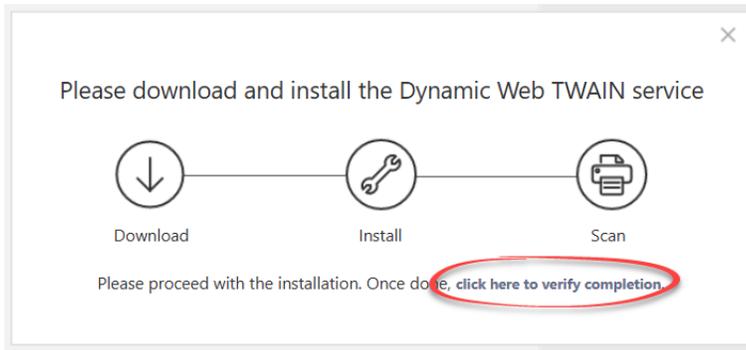
Click **Download**. Once download is complete, open the file and follow the prompts to complete installation.



## Using the Scanning Tool



After the installation has finished, you can click **Close** and navigate back to the scanning window. Click the link (circled below) to verify installation.



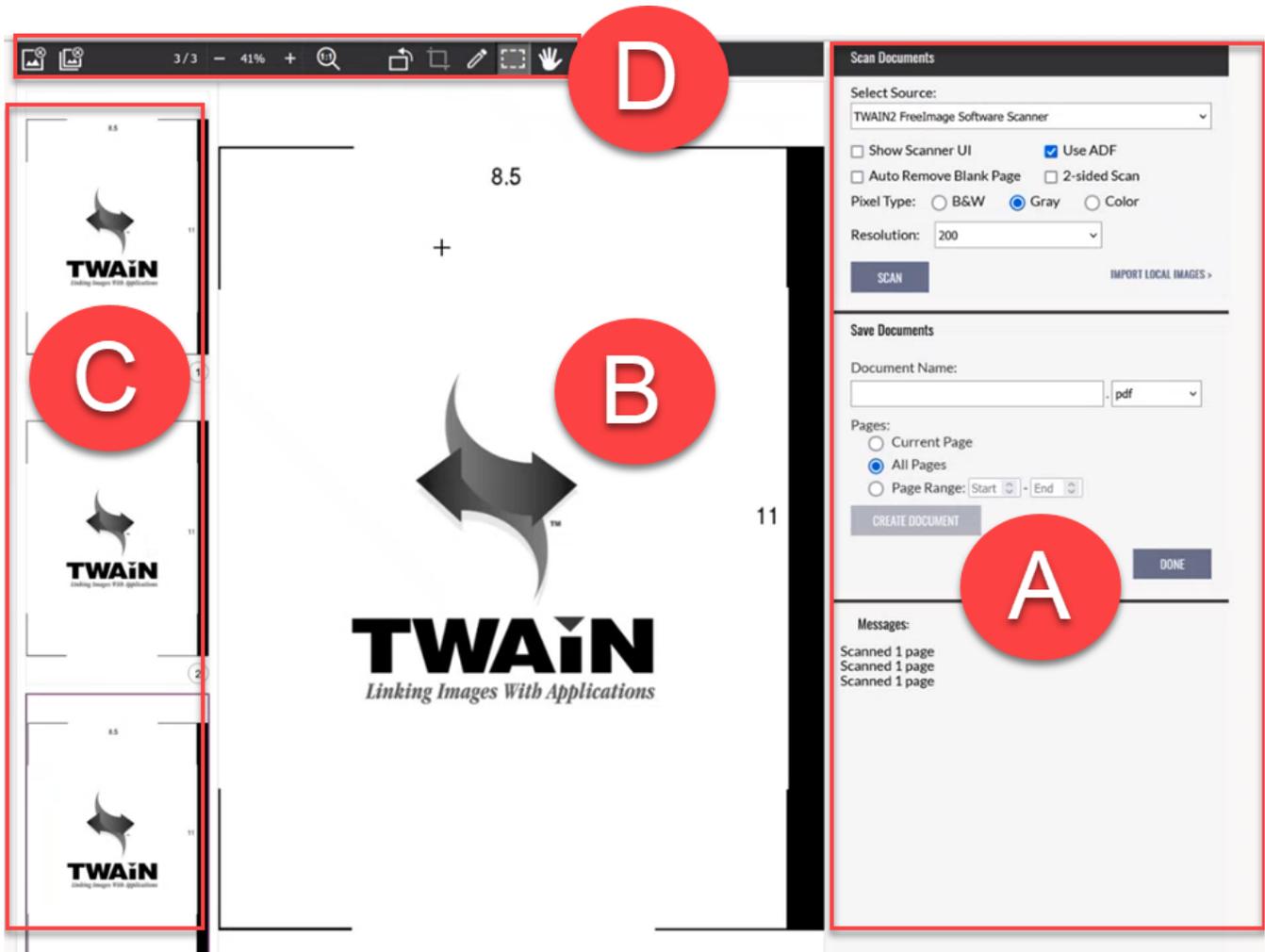
The screen will refresh, and you will be able to use the scanning tool on your machine.

### 3.3 Scanning Interface Overview

No matter where you access the scanning tool from, the interface and process will look the same. When you click **Scan files**, the scanning window appears as shown below.



## Using the Scanning Tool



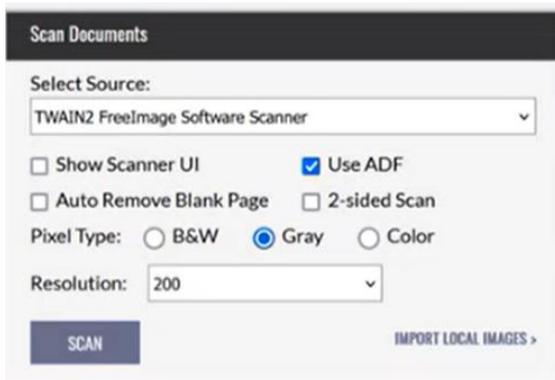
Ref	Description
A	From this panel, you can select a scanning source, scan and save documents, and view status messages/action confirmations.
B	The selected page appears here.
C	View the full list of scanned pages and reorder files by dragging and dropping a page.



Ref	Description
D	Use the image operations toolbar to customize the selected page. See section 3.5 for more information

## 3.4 Scanning Documents

Once the documents are prepared for scanning, locate the *Scan Documents* panel.

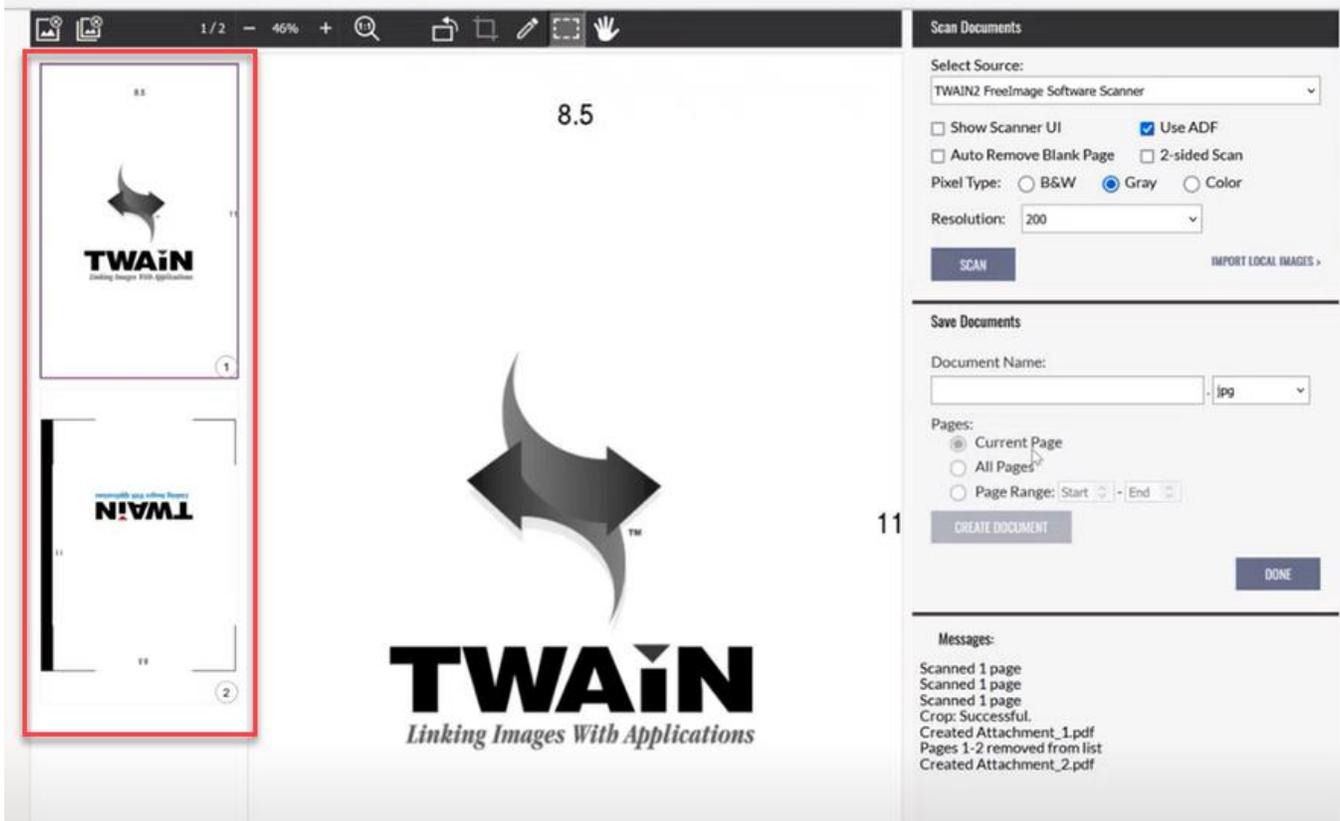


1. Select a source using the drop-down menu.
2. Configure the *Pixel Type* and *Resolution* as needed.
3. Click **Scan** to begin scanning.

As pages are added, they will appear in the left hand panel. Drag and drop pages in this panel to reorder them.



## Using the Scanning Tool



### 3.5 Modify Scanned Pages

If you need to make changes to the scanned pages, you can do so directly from the scanning tool.

#### 3.5.1 Scanned Page Toolbar

On the scanning tool interface, the top toolbar offers various functionality for editing the scanned page(s).

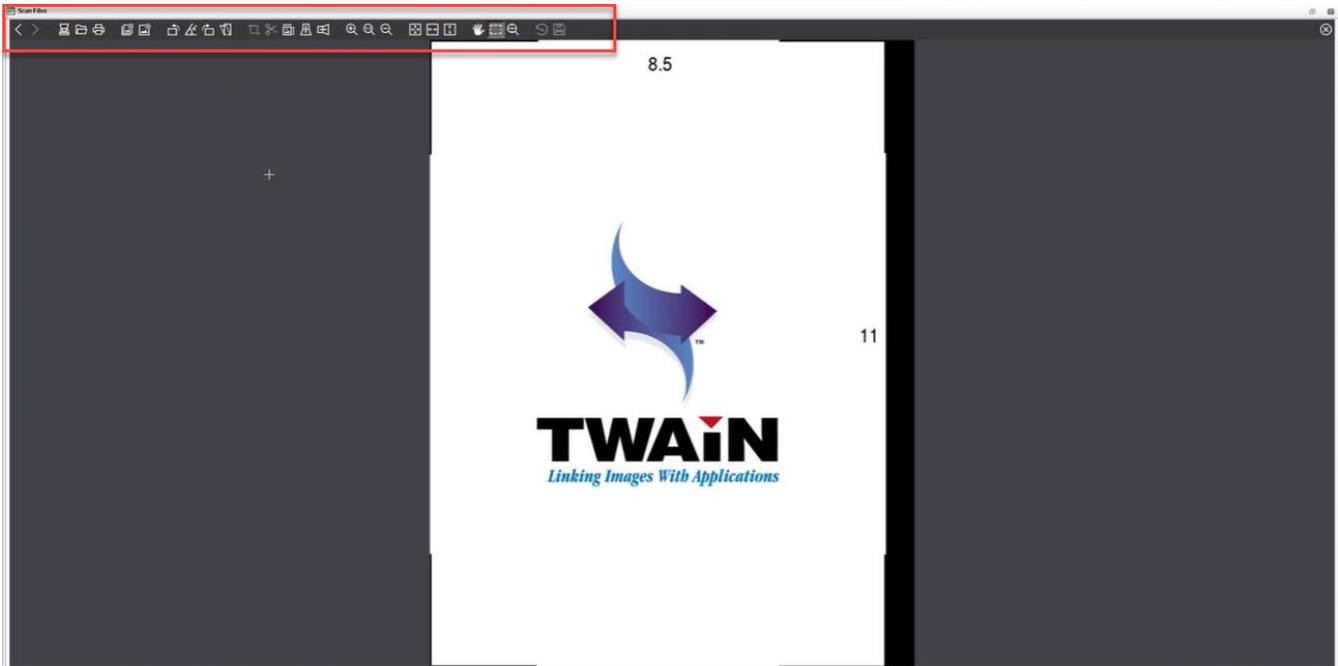


Ref	Tool	Description
A	Remove current page	Delete the selected page from the scanned pages list
B	Remove all pages	Delete all pages from the scanned pages list
C	Zoom	Adjust your page view
D	Rotate left	Rotate the page 90 degrees to the left
E	Crop	Crop the page
F	Show image editor	Opens the image editor window
G	Select	Select an area of the page to modify
H	Hand mode	Manually move the page to adjust your view

### 3.5.2 Image Editor Toolbar

If you'd like to make more edits to the scanned page(s), click the **Show image editor**  button from the Scanned Page Toolbar. A new window appears with the Image Editor toolbar.

## Using the Scanning Tool



To learn more about a toolbar option, hover over the icon to see the tooltip.

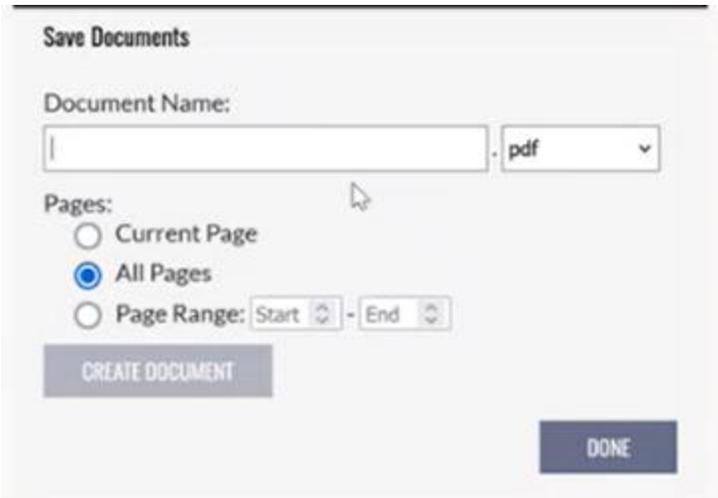
When you finish editing the scanned page(s), be sure to click the **Save** icon  to preserve your changes. Then, you can close the editor.

### 3.6 Create and Upload File(s)

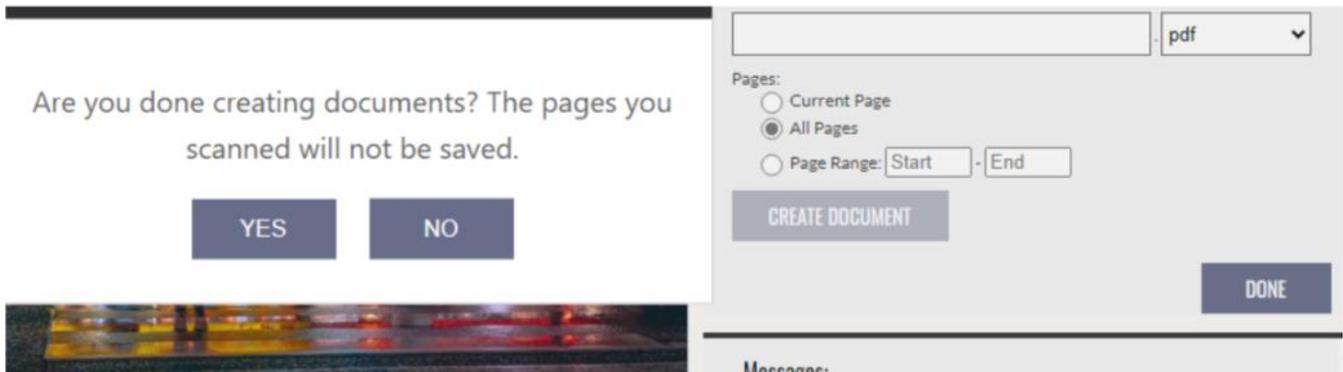
Once you're finished altering the pages, you can create a file output from the *Save Documents* section on the right side panel.

1. Provide a *Document Name*.





2. Select an output file type.
3. Choose a page option. By default, *All Pages* is selected. If you'd like to upload only the current page, select *Current Page*. Or, set a *Page Range*.
4. Click **Create Document** to upload the file. The file will be uploaded to the destination you accessed the scanning tool from.
5. Click **Done**. Click **Yes** on the confirmation window.



**Note: Unsaved scanned pages are not saved in the system after you leave the scanning tool. However, all documents you've created will be saved.**

The scanned documents will be added to the application area where you accessed the tool. You can then continue the workflow as you would with any attachment.



## Using the Scanning Tool

Attachments - Consultation Review

Task Id : 00000361

Task Attachments:

No.	Attachment	Size	Received Date	Sent Date	
1.	Attachment_1.pdf	154.8 KB	-	-	×
2.	Attachment_2.pdf	158.02 KB	-	-	×

Add Attachments:

