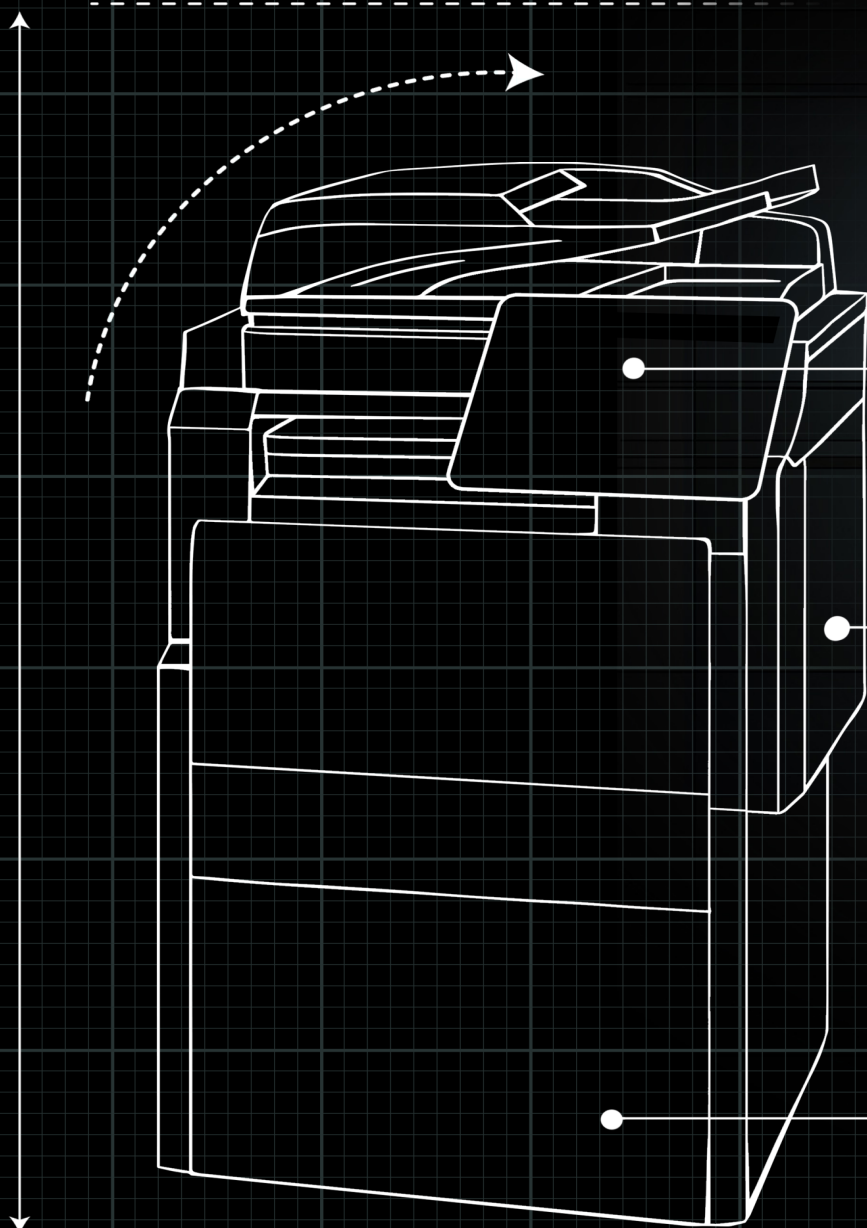




## MyQ OCR Server Installation Guide

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MyQ OCR Server 2.4

MyQ 8.0+

September 2020

Revision 4



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# 1. About this document

This document provides administrators with the information needed to configure and use the MyQ OCR Server.

The basic setup of MyQ and the general terms related to the MyQ Server, as well as the description of the OCR functionality are included in the MyQ Basic Installation Guide. To fully understand the content of this manual, we recommend you to read the *MyQ Basic Installation Guide* first.

## Typographical conventions

- Menu names, fields, tabs and other elements in a view are displayed **bold**.
- Field input is displayed *italic*.

## Alerts

- **Info:** the info box provides extra information about a feature, function, task or procedure.
- **Notice:** the notice box holds information with a higher urgency than the Info box.

## 1.1. Change History

Place in the document	Change

## 2. Introduction

### 2.1. About the MyQ OCR Server

Optical Character Recognition is a complementary service that converts scanned documents to a searchable and editable format, such as an MS Word document or a searchable PDF. To employ this functionality in MyQ, you can either use the MyQ Optical Character Recognition (OCR) server, which is a part of the MyQ solution, or you can use a third-party application.

Unlike the third-party OCR applications, the MyQ OCR Server is integrated with the MyQ system, which makes it simple to install and easy to use.

#### 2.1.1. OCR engines

Within the installation of the server, you can select from three OCR engines:

The **Tesseract** engine is free but it supports only the searchable PDF output format.

The **ABBYY** engine requires a paid license and supports multiple output formats.

The **AI Invoice Recognition** is an OCR service that extracts data from scanned invoices and saves them within the MyQ metadata XML file. The built-in key is provided to run a Rossum service.


#### 2.1.2. Licenses

For information on how to purchase the license for the ABBYY OCR engine, contact the MyQ Sales department.

For activation of the ABBY license, enter the key in MyQ OCR and click **Activate** or check [https://help.abbyy.com/en-us/flexcapture/12/admin\\_guide/license\\_activation\\_manager](https://help.abbyy.com/en-us/flexcapture/12/admin_guide/license_activation_manager). The used ports are hard-coded and cannot be changed.

#### 2.1.3. Requirements

- Operating system: Windows 7 and newer / Windows Server 2008 (SP1-2, R2) and newer
- Required level of privileges: user with Administrator rights
- Memory for processing multi-page documents: 1GB RAM minimum, 1,5GB recommended
- HDD space: 1.6 GB for installation
- If the ABBYY OCR engine is used, internet connection is required for activation
- If the AI Invoice Recognition engine is used, internet connection is required for both the activation and run of the OCR server

 **NOTICE:** We recommend to deploy the OCR on a dedicated server.


## 2.1.4. Properties and features of the OCR engines

This section discusses properties and features of the OCR engines.

### Tesseract engine

With the Tesseract OCR engine, only the *searchable pdf* format is supported.

Supported languages: Bosnian (Bosnia & Herzegovina), Bulgarian (Bulgaria), Croatian (Croatia), Czech (Czech Republic), Danish (Denmark), English (United Kingdom), English (United States), Estonian (Estonia), French (France), German (Germany), Hungarian (Hungary), Icelandic (Iceland), Italian (Italy), Japanese (Japan), Kazakh (Kazakhstan), Latvian (Latvia), Lithuanian (Lithuania), Norwegian (Norway), Polish (Poland), Portuguese (Brazil), Portuguese (Portugal), Russian (Russia), Serbian (Serbia), Slovak (Slovakia), Spanish (Spain), Spanish (United States), Turkish (Turkey).

 **INFO:** Selecting multiple languages will take much more time to process the files.

### ABBYY engine

Supported formats: *pdf, pdfa, docx, xls, xlsx, odt, pptx*.

Supported languages: Arabic (Saudi Arabia), Bulgarian (Bulgaria), Chinese (Simplified), Chinese (Traditional), Croatian (Croatia), Czech (Czech Republic), Danish (Denmark), English (United Kingdom), English (United States), Estonian (Estonia), French (France), German (Germany), Hungarian (Hungary), Icelandic (Iceland), Italian (Italy), Japanese (Japan), Korean (South Korea), Latvian (Latvia), Lithuanian (Lithuania), Norwegian (Norway), Polish (Poland), Portuguese (Brazil), Portuguese (Portugal), Russian (Russia), Serbian (Serbia), Slovak (Slovakia), Slovenian (Slovenia), Spanish (Spain), Spanish (United States), Swedish (Sweden), Turkish (Turkey).

 **INFO:** Requires a paid license.

## AI Invoice Recognition engine

The engine recognizes invoices in the *pdf* format, extracts their data and stores it in the MyQ metadata XML file.

Supported languages: Czech (Czech Republic), Slovak (Slovakia), English (United Kingdom), English (United States), German (Germany).

Supported currencies: Czech Koruna, Danish Krone, Norwegian Krone, Swedish krona, British Pound, Euro, US Dollar.

Supported types of invoices: Tax invoice, Credit note, Proforma.



**INFO:** For further information about any of the engines, see the dedicated documentation from their developer.

**INFO:** You can set the number of retries and the Rossum timeout in the Windows Registry.



`HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\MyQAbbyyOcr -  
Settings:maxRetryNumber - default 3:rossumTimeout -  
default is 300 (sec) (range: 5-600 sec)`



## 3. OCR feature setup in MyQ

The first section of this topic shows you how to enable and set up the OCR feature on the MyQ server. The setup steps are general and need to be taken with each of the OCR engine.

In the second section, you can find one additional setup steps, required only for the AI Invoice Recognition engine.

### 3.1. Setting up the OCR feature on the MyQ server

On the **Scanning & OCR** tab of the MyQ Web Interface (**MyQ, Settings, Scanning & OCR**), enable and set up the OCR feature and create profiles for scanning to different output formats, as shown in the rest of this section.

The screenshot shows the OCR settings configuration page. At the top, there is a toggle switch for 'Enabled' which is turned on. Below it, the 'OCR server type' is set to 'MyQ OCR Server' (selected with a radio button). A note explains that for a 'Custom OCR server', scans are stored in a folder named 'InSearchable PDF' and connect to the OCR software. The 'OCR working folder' is set to '%app%\OCR' with a folder icon on the right. A note states that the OCR server needs write permission to this folder and that '%app%' is the MyQ data folder. Below this, there are 'Profiles' with '+ Add', 'Edit', and 'X' icons. A table lists three profiles:

Name	Output format
OCRDOC	docx
OCRPDF	pdf
OCRXLS	pdf

At the bottom, there is a note: 'Profiles are available in the Easy Scan terminal action'. At the very bottom, there are 'Save' and 'Cancel' buttons.

FIGURE 2.1. The OCR settings on the **Scanning & OCR** tab of the MyQ Web Interface

#### 1. Enabling the OCR service

The OCR feature has to be enabled on the **Scanning & OCR** settings tab, under OCR.

The **MyQ OCR Server** option has to be selected.

On the **Scanning & OCR** settings tab, under OCR, you can change the folder where the scanned data is sent to. However, it is recommended to not change the default folder (C:\ProgramData\MyQ\OCR) unless there is a major reason for it. The same folder will

have to be set as the **Working folder** on the OCR server (see "*MyQ OCR Server Configuration*" on page 10).



**INFO:** Both the MyQ server and the OCR server must have full access (read/write) to the OCR working folder.

## 2. Creating and managing profiles for different output formats

To enable users to convert documents to a specific output format, you need to create a profile of that type. The users will be able to send scans to use this profile either via a special email command or by selecting the profile when scanning via the Easy Scan action on MyQ embedded terminals.

### To create a new profile:

1. Click **+Add**. A new item with the settings of the new profile appears in the list below.
2. Type the name of the profile, select the output format, and then click **OK**. The profile is saved.

### To edit a profile:

1. Select the profile in the list and click **Edit** (Or right-click the profile and click **Edit** in the shortcut menu).
2. In the profile editing options, you can change the name and the output format of the profile.

### To delete a profile:

- Select the profile and click .

## 3.2. Enabling the Attach metadata option on the MyQ server

If you want to use the **AI Invoice Recognition** engine, you need to enable the **Attach metadata** option on the properties panel of the terminal action that you will use for the OCR feature (either **Easy Scan**, or **Panel Scan**).

To enable the option, do the following:

Go to the **Terminal Actions** settings tab of the MyQ Web Interface (**MyQ, Settings, Terminal Actions**) and double-click the scanning action to open its properties panel. On the panel, depending on the type of the action, continue by one of the following steps:

- On the properties panel of an **Easy Scan** action, open the **Destination** tab, then double-click the destination of the OCR file, and lastly select the **Attach metadata file** option under **General**.
- On the properties panel of a **Panel Scan** action, select the **Attach metadata file** option under **Parameters for panel scan to emails**.



FIGURE 2.2. Selecting the **Attach metadata file** option



**INFO:** For more information on how to set up destinations of the **Easy Scan** action, see "Terminal Actions" in the MyQ Embedded Terminal manuals.

## 4. Installation

This topic describes the installation of the MyQ OCR Server. The installation is immediately followed by the setup of the server, which is described in "MyQ OCR Server Configuration " on page 10.

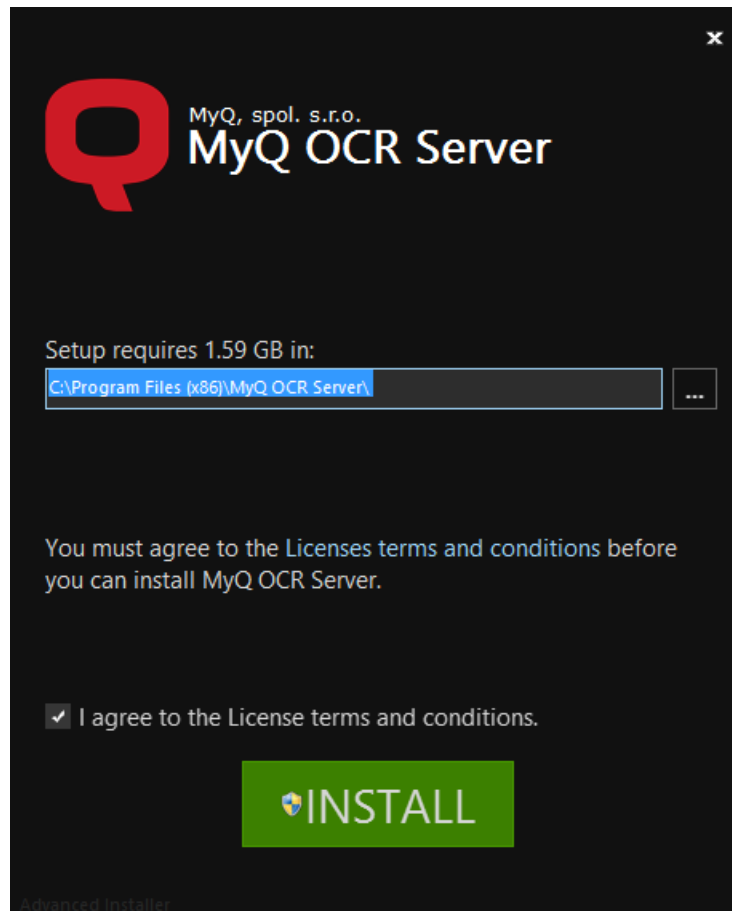


FIGURE 3.1. The Welcome screen of the installation wizard

### To install the MyQ OCR Server:

1. Download the latest available version of the MyQ OCR Server from the MyQ Community portal (*MyQ OCR Server X.X.X.X*).
2. Run the executable file. The **OCR Server** dialog box appears.
3. Select the folder where you want to install the OCR server. The default path is: C:\Program Files\MyQ OCR Server\ or C:\Program Files (x86)\MyQ OCR Server\.
4. After this, you need to accept the terms of the agreement to continue with the installation. Then click **INSTALL**. The OCR server is installed.

5. Click **Finish** to leave the installation wizard. The configuration dialog box of the OCR server appears. For information on how to configure the OCR server, see "*MyQ OCR Server Configuration* " on page 10.

## 5. MyQ OCR Server Configuration

The MyQ OCR Server can be set up in the **OCR Server** configuration dialog box. The dialog box is automatically opened within the installation of the server, otherwise it can be opened via **MyQ OCR Server Settings** in Windows apps.

In the configuration dialog box, you can also stop and start the Windows service of the OCR server and open logs.

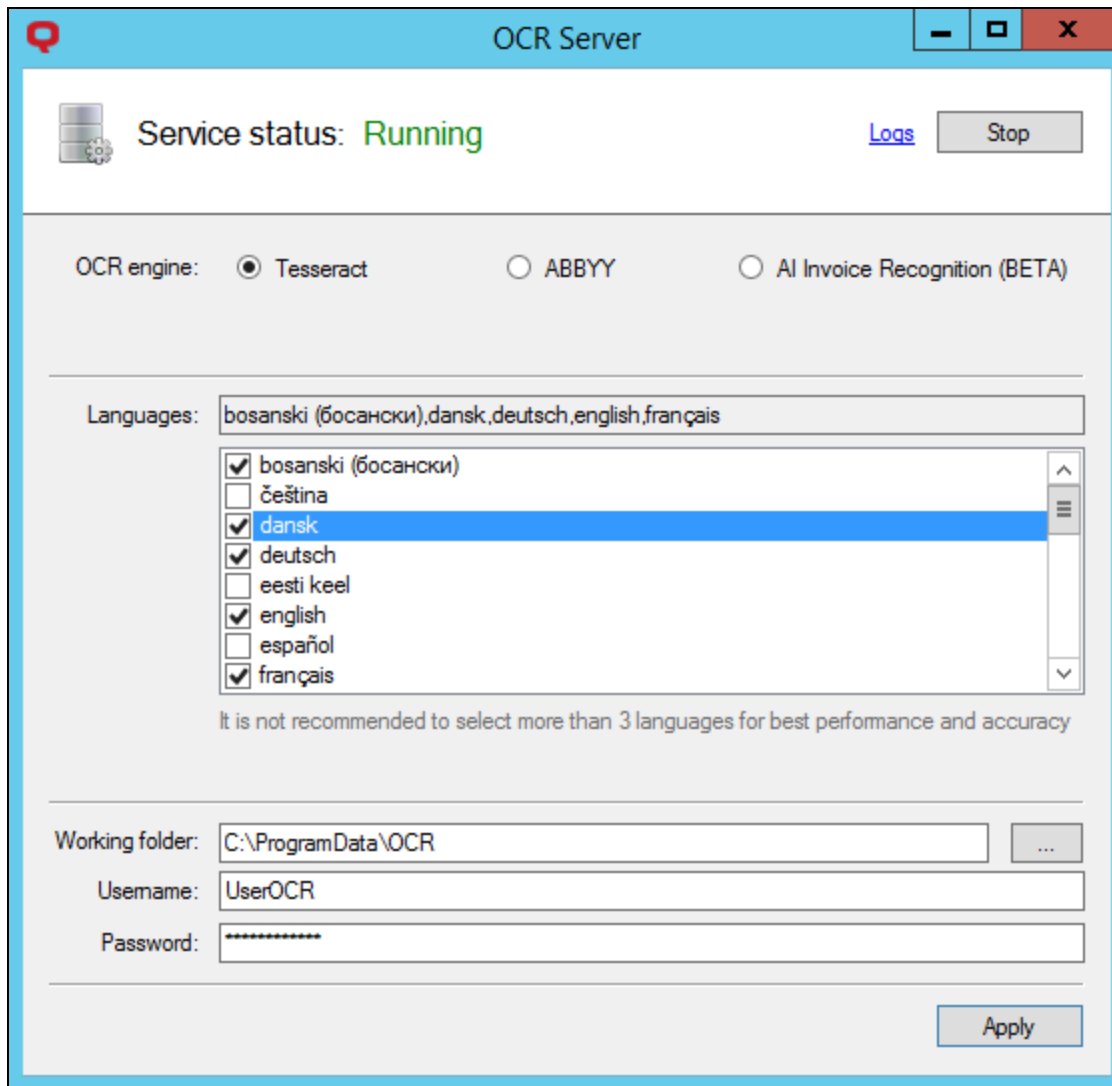


FIGURE 4.1. The dialog box with the configuration of the OCR server

## To set up the OCR Server:

### 1) Select the OCR engine

The default option is the **Tesseract** OCR engine. It is free and no licenses need to be provided for its run.

If you want to use the **ABBYY** OCR engine, you need to enter the license for the OCR server, and then click **Activate**. For information about the licenses for the ABBY OCR engine, contact the MyQ Sales department.

If you want to use the **AI Invoice Recognition** OCR engine, you need to enter the Secret Key for the public endpoint (<https://all.rir.rossum.ai/>). The built-in key is provided to run a Rossum service.

### 2) Select the languages of the scanned documents (only for the Tesseract and the ABBYY engines)

While you can select all languages, we recommend you to select only those that are likely to be used within the OCR process.



**INFO:** Selecting less languages increases the speed and accuracy of the OCR process.

### 3) Set the Working folder for processing the OCR documents

The **Working Folder** is the folder where the OCR server and the MyQ server exchange the OCR scanned files. The path entered here has to be the same as the path to the OCR working folder that is set on the **Scanning & OCR** settings tab in the MyQ Web Interface. (The default folder is C:\ProgramData\MyQ\OCR.)

In case you use a shared folder, enter the username and password for access to the folder.

### 4) Click *Apply* to submit the changes.

#### To open the log files:

- Click **Logs** near the top-right corner of the **OCR Server** configuration dialog box and open the log.

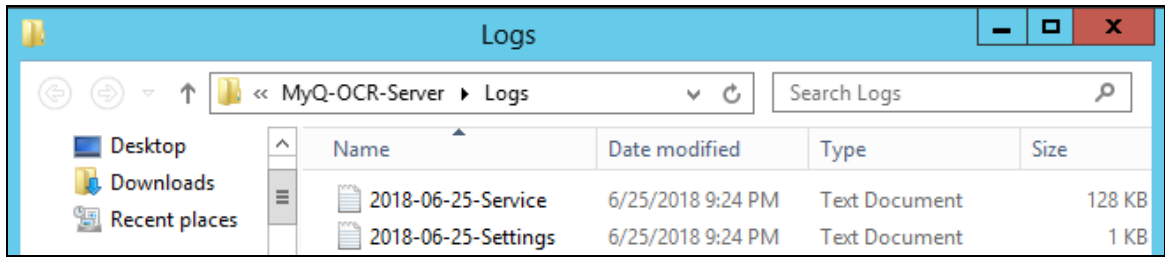


FIGURE 4.2. Opening the logs of the OCR server

### To stop or restart the OCR Server Windows service:

- Click **Stop** (or **Start**) near the top-right corner of the **OCR Server** configuration dialog box.

You can also manage the service in the Windows Task Manager, where it is called **OCRSERVICE**.

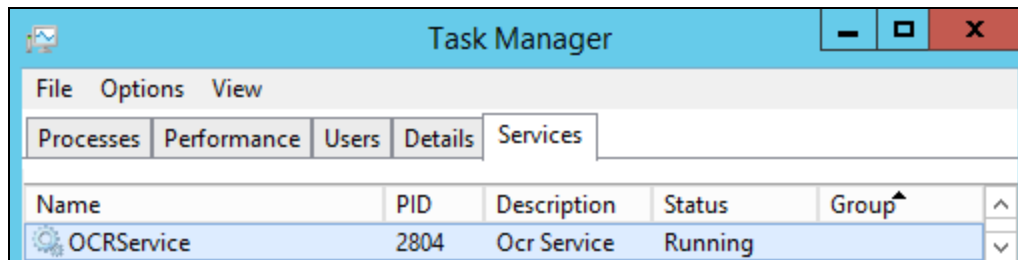


FIGURE 4.3. The current status of the OCR service shown in the Windows Task Manager



## 6. Scanning to OCR

### Scanning to OCR via Panel Scan

To send the scanned document to be processed by the OCR server, the user needs to type the receiver email address in the form: **myqocr.\*profilename\*@myq.local**, where **\*profilename\*** is the name of the profile for the requested output, for example **ocrdoc** or **ocrxls**.



**INFO:** OCR is case sensitive. If you use Panel Scan, the email address myqocr.\*folder\*@myq.local must be the same as the OCR profile name.

The document is converted by the MyQ OCR Server and sent to the folder or email address that is set in the **User's scan storage** text box on the user properties panel (see "Editing user accounts" in the *MyQ Basic Installation Guide*).

The screenshot shows a user properties panel with the following fields and values:

Full name: *	Eliot Kate
Email:	eliot.kate@myq-solution.com
Phone:	
Personal number:	
Default language:	English (United Kingdom) ▼
User's scan storage:	\\NB237\Scanned Documents\Eliot_Kate

Below the 'User's scan storage' field, there is a label: "Folder or email for storing scanned documents".

FIGURE 5.1. The destination of the scan is set on the user's properties panel

### Scanning to OCR via the Easy Scan action in MyQ Embedded terminals

The MyQ administrator can create any number of **Easy Scan** actions for scanning to OCR. They can either create one **Easy Scan** action for each output or let the scanning user select the format themselves.

To enable users to scan to a specific profile, select the profile (such as *ocrdoc* or *ocrxls* in our example) among the values of the **Format** parameter of the **Easy Scan** action. You can also enable users to select the profile themselves. For more information about how to set up the **Easy Scan** action on a MyQ Embedded terminal, see the "Easy Scan to OCR" section in the terminal's manual.

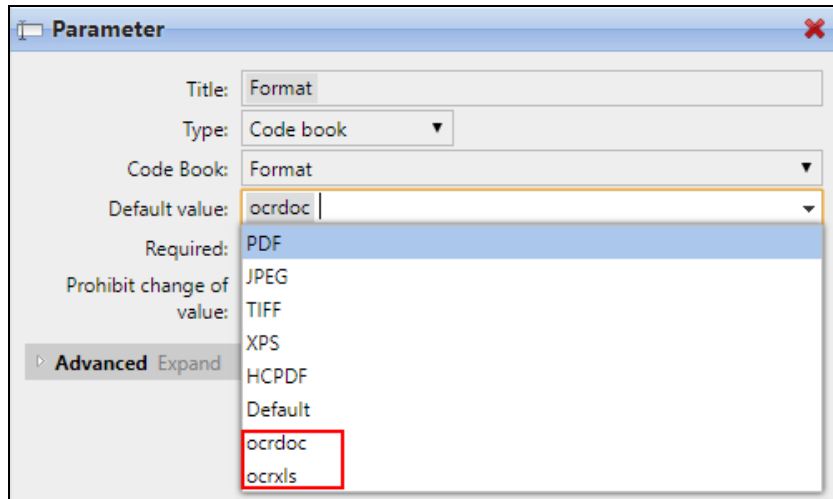


FIGURE 5.2. The OCR profiles can be selected within the setup of the Format parameter.

## 7. Version Update and Uninstallation

To upgrade or uninstall the MyQ OCR Server, see the following sections.

### Updating the OCR Server

Download and run the latest available version of the MyQ OCR Server from the MyQ Community portal. The update process in the update wizard is identical to the OCR Server installation.

### Uninstalling the OCR Server

The MyQ OCR Server can be uninstalled via the Windows Control Panel.

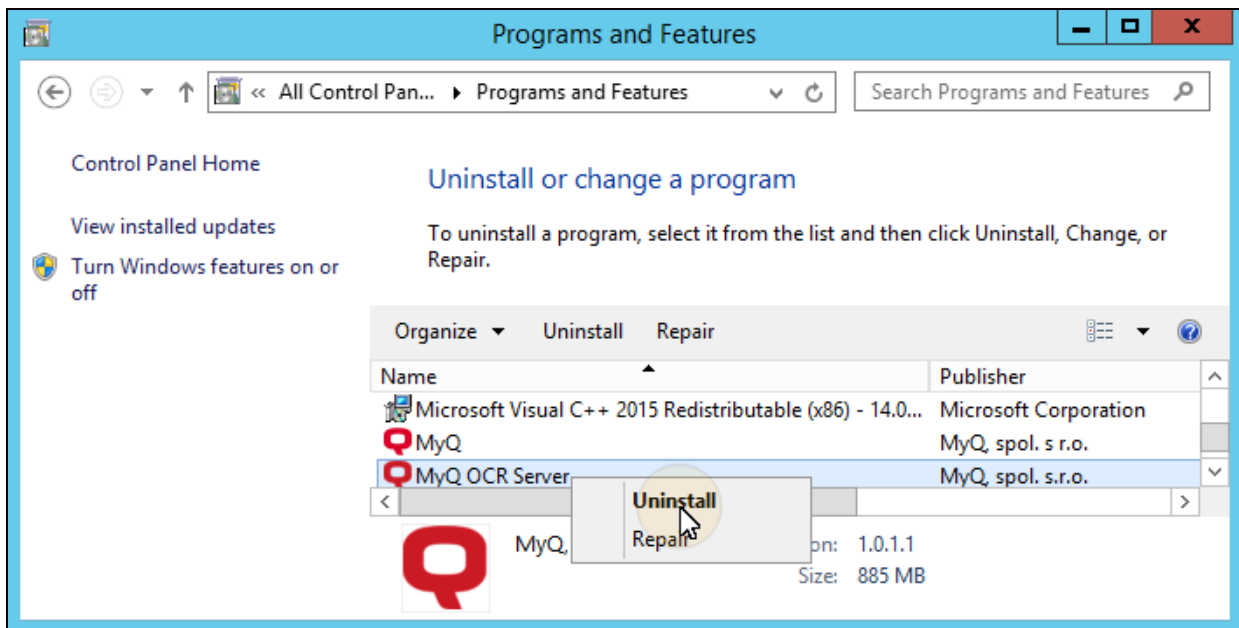


FIGURE 6.1. Uninstalling the OCR server application

## 8. Business contacts

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