3/20/2023

# OCRBot User Guide

For general information or technical issues, submit an incident through ServiceNow.



# **OCRBot User Instructions**

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# A. Introduction

This document describes how to download, install and use the OCRBot tool.

# **B. OCRBot Download & Installation**

## Minimum System Requirements

- Windows 10
- Internet connection
- Ability to download and install software locally
- Microsoft Azure Cognitive Service Endpoint and Key

### Steps to Download and Install OCRBot

Follow the instructions provided in the encrypted email to download the tool. Once downloaded to your personal computer (PC), follow these steps to install the tool.

1. Click on the "Install" button and the "setup.exe" file will download to your local PC.

Califo OCR I	rnia Department ( Bot	of Technology
Name: Version:	OCR Bot	The application will install the latest version
Publisher:	California Department of Techno	logy
The followin	g prerequisites are required:	
	<ul> <li>Microsoft .NET Framework 4.6.1</li> </ul>	(x86 and x64)
If these com button below	ponents are already installed, you v to install the prerequisites and ru	can <u>launch</u> the application now. Otherwise, click the in the application.
Install		
	ClickOnce and .N	ET Framework Resources

#### Your experience may differ depending on your security settings

- 2. Run the "setup.exe" you downloaded.
  - A Windows Defender security prompt may popup stating it is protecting your PC, select "More Info".





3. Select "Run Anyway".



4. You may receive a prompt for "Symantec Endpoint Protection", if present select "Allow this file".

ownload Insight		
Our information We recommend not using this	on this file is incon s file unless you know it is safe.	clusive.
🝺 setup (7).exe		
Remove this file from my com	puter	
Allow this file		
Allow this file		_
🔞 Unproven	* Very Few Users	i New
There is some evidence that this file is trustworthy.	This file has been seen by fewer than 50 Symantec users.	Symantec has known about this file approximately 2 weeks.
		More Details



- 5. A secondary prompt will display, select "OK" to continue.
  - a. Symantec will prompt a second time, please repeat the previous two steps.

Symantec Endpoin	t Protection	
Download	Insight	
Our We reco	Symantec Endpoint Protection	
setun	Permission	
in secure	If you press OK, an application exception will be created for this file.	l.,
Remove this		
Allow this fil	You should allow only files that you are sure are safe. Are you sure that you want to allow this file?	
There is some file is trustwor	1	wn about this 2 weeks.
	Symantec. Cancel OK	More Details
Symant	tec.	PIOLE D'Etalls

- 6. Once the installation is complete the OCRBot will start.
  - a. Your OCRBot view may be different depending on external dependencies, for example Adobe Acrobat Pro DC and EverMap AutoBatch Plug-in.

ttings Help											
Source Location											
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									Or	Choose File(s	)
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rarget Location			0000000								
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							L. Mada	C AttaT			
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Logs	0 Errors Log Levi	el O Ir	formational Source	Conve	Message		y mode		ag	Submit	
Logs ① Warnings TimeStamp	0 Errors Log Leve	el O Ir	formational	Conve	Message		y mode		ag	Submit	
Logs	0 Errors Log Leve	el	formational	Conve	Message		y node			Submit	
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Logs	Log Lev	el	formational		Message		y mode			Submit	
.ogs 1 0 Wamings TimeStamp	Log Leve	el	formational		Message		y mode		ag	Submit	

# **C. OCRBot Features**

#### **Basic**

Without the support tools (Adobe Acrobat Pro DC and EverMap AutoBatch Plug-in), OCRBot will run in basic mode. In basic mode, Auto Tag, Text Only Mode, ReOcr, and layering are not available.



1. A popup will display at startup:



2. If Adobe Acrobat Pro DC (2019.021.20058 or higher) is installed and EverMap is not installed, a popup displays at startup:

OCRBot	- Enhanced Functionality Availability	х
4	By installing the following 1 item: 1) Evermap AutoBatch	1
L	OCRBot will provide additional features:	
	* Autotag * Layering * ReOcr * TextOnly	
	OK	

- 3. If Adobe Acrobat Pro DC (version less than 2019.021.20058) and EverMap AutoBatch Plug-in are installed, Auto Tag will be available.
  - A popup will display at startup:





4. OCRBot will have "Text Only Mode" disabled and "Auto Tag" enabled:

See OCRBot			- 🗆 ×
Help			
Source Location			
Input Directory			Choose Folder
			Or Choose File(s)
Target Location			
Output Directory			Choose Folder
		$\tau - \tau$	
		Fext Only Mode 🔲 Auto	Tag Submit
logs			
LUGU			
1 Warning 1 Warning	irror 🕕 0 Informational	]	
1 Warning 1 0 E	Error 10 Informational	Source	Message
I Warning         0 I           Time Stamp         12/23/2019 10:12 AM	Fror 0 Informational Log Level Warning	Source Main	Message Advanced Features A
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1 Warning     1 Warning     1 Warning     12/23/2019 10:12 AM	Gror 0 Informational Log Level Warning	Source Main	Message Advanced Features A

## Settings Menu

If you do not have a Microsoft Azure Cognitive Service Endpoint and Service Key, submit an OCRBot Service Request.

- 1. Click the "Settings", then click the "OCR Service Endpoint"
- 2. On the "OCRBot Settings" window
  - a. Enter the Service EndPoint URL on the "Service EndPoint" text field.
  - b. Enter the CDT Cognitive Service Key or your own Microsoft Cognitive Service Key value on the "Service Key" text field.

OCRBot Settings Help				- 🗆 ×
Source Location	Real OCRBot Set	tings	- 0	Choose Folder X Or Choose File(s)
Target Location Output Directory	Service EndPoir	nt:		Choose Folder
Logs	Help me get an	Azure Key 0 Informational	Cancel OK	AutoTag Submit
TimeStamp		Log Level	Source	Message
TimeStamp		Log Level	Source	Message
TimeStamp		Log Level	Source	Message
TimeStamp		Log Level	Source	Message



## Help Menu

The OCRBot Help Menu will provide access to the latest User Guide, Data Flow, Release Notes, Privacy Policy, FAQs and About. The source code is available for download at the bottom left side under the "About".

## OCRBot File Processing

#### Input

1. Click either "Choose Folder" or "Choose File(s)" to select the input directory location to process the file(s).



#### Output

2. Click "Choose Folder" to select an output directory location for the file to be stored after they have been processed. The output folder should be a separate folder from the input folder. Any duplicate file names in the output folder will cause OCRBot to skip processing of that file.





#### **Processing Options**

- 3. Choose processing options then click Submit.
  - a. **Convert To Image** Convert the PDF to an image to prepare for OCR processing (useful if the document contains unnecessary information like tags that are causing problems)
  - b. **Text Only Mode** Output PDF will have all text visible and all images will be hidden.
  - c. Auto Tag Apply the Adobe Acrobat Pro DC Auto Tag to the output PDF.

💽 OCRBot						_	- 🗆	$\times$
Settings Help								
Source Location								
Input Directory	C:\Users\Tom\Desktop (1 file selected)	o\ODS\OCRBot\Temp\H0	5373SD_2112	31_P - Copy (3).p	odf	Or	Choose Fo Choose Fi	lder le(s)
Target Location								
Output Directory	C:\Users\Tom\Deskto	p\ODS\OCRBot\Temp\O	.tput\				Choose Fo	older
lass			Convert To Ima	ige 🗌 Text	Only Mode	Auto Tag	Subr	nit
Logs		Informational						
Time Stame		Source	Ma					
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<b>D</b>		CI D	0 0	D 1 0	51.5	0 T	Cied	0.00.00
Ready		Files Processed:	U Pages	s Processed: 0	File Error	s: U lime(	n:mm:ss):	0:00:00

The application will preserve all settings (Source Location, Target Location, Service Endpoint and Service Key, Text Only Mode and Auto-Tag check boxes).

#### User Experience

- 1. When the OCRBot is processing, the word "Processing" is displayed.
- 2. The "Submit" button changes to "Cancel", and the file and folder selection buttons are disabled.
  - a. At any time a batch can be cancelled and restarted.



🛐 OCRBot - Processing 🛛 🚽			- 🗆 X
Settings Help			
Source Location			
Input Directory P:\Area Files\CA	NET-Images		Choose Folder
			Or Choose Hie(s)
*			
larget Location			
Output Directory P:\Area Hies\CA	LNE I-Output \		Choose Folder
		Text Only Mode	AutoTag Cancel
Logs			
🔥 0 Warning 🛕 0 Error 🧃	6 Informational		
TimeStamp	Log Level	Source	Message
2/6/2020 10:46 AM	Informational	ProcessFolder	Begin Folder Processing: Session
2/6/2020 10:46 AM	Informational	P:\Area Files\CALNET-Images\0	Processing: P:\Area Files\CALN
2/6/2020 10:46 AM	Informational	P:\Area Files\CALNET-Images\0	Saved OCR metadata: P:\Area Fil
2/6/2020 10:46 AM	Informational	P:\Area Files\CALNET-Images\0	Saved OCR as plain-text: P:\Area
2/6/2020 10:46 AM	Informational	P:\Area Files\CALNET-Images\0	Image Only OCR fetched from Az
2/6/2020 10:46 AM	Informational	P:\Area Files\CALNET-Images\0	Created Merged PDF: P:\Area Fil
			Clear Log
Processing	Files Processed: 0	Pages Processed: 0 File Errors:	0 Time(HH:MM:SS): 0:00:25

- 3. Once processing is complete, a "Session Completed" popup window displays the process information.
  - The last entry in the log will be "Task Complete".
  - At the bottom of the screen the number of Files processed, number of Pages Processed, File Errors, and the Time (HH:MM:SS) to process the files is displayed.

Source Location				
nput Directory P:\Area Files\	CALNET Images\			Choose Folder Or Choose File(s)
Target Location				
utput Directory P:\Area Files	\CALNET-Output\			Choose Folder
Logs		Text Only Mo	ode 🗌 Auto	oTag Submit
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TimeStamp	Log Level	Source	Message	
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Logs

- 1. Warning Generated when a document is not fully processed.
- 2. Error Generated when a processing failure occurs.
- 3. Informational General process steps.
- 4. **Clear Log** Clears all log entries from the Log Window and starts a new log output file.



OCRBot			- 0
ettings Help			
Source Location			
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TimeStamp	Log Level	Source	Message
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2/6/2020 11:42 AM	Informational	P:\Area Files\CALNET Images\C	Saved OCR as plain-text: P:\Are
2/6/2020 11:42 AM	Informational	P:\Area Files\CALNET Images\C	Image Only OCR fetched from Az
2/6/2020 11:42 AM	Informational	P:\Area Files\CALNET Images\C	Created Merged PDF: P:\Area FI
2/6/2020 11:42 AM	Informational	P:\Area Files\CALNET-Output\C	Acrobat added layers PDF: P:\Ar
2/6/2020 11:42 AM	Informational	P:\Area Files\CALNET Images\I	Processing: P:\Area Files\CALN
2/6/2020 11:43 AM	Informational	P:\Area Files\CALNET Images\I	Saved OCR metadata: P:\Area F
2/6/2020 11:43 AM	Informational	P:\Area Files\CALNET Images\I	Saved OCR as plain-text: P:\Are
2/6/2020 11:43 AM	Informational	P:\Area Files\CALNET Images\I	Image Only OCR fetched from Az
2/6/2020 11:43 AM	Informational	P:\Area Files\CALNET Images\I	Created Merged PDF: P:\Area Fil
2/6/2020 11:43 AM	Informational	P:\Area Files\CALNET-Output\IF	Acrobat added layers PDF: P:\Ar
2/6/2020 11:43 AM	Informational	Process	Completed Session: Files Proces
2/6/2020 11:43 AM	Informational	ProcessAsync	Task Complete
			Clear Log

## Advanced

#### Technical Requirements

With Adobe Acrobat Pro DC (version >= 2019.021.20058) and

EverMap Autobatch Plug-in, OCRBot will provide additional options and features:

- Autotag
- TextOnly
- Convert to Image
- ReOCR
- Layering
- OCRBot Remediation Mode
- OCRBot Publish Mode
- CDT will provide the EverMap AutoBatch link via encrypted email to download the Plugin for advanced feature functionality.

#### Steps to Download and Install EverMap

Follow the instructions below after clicking the link to download the "SetUpAutoBatchsl.exe" file.

Contact your department technical support staff if you are unable to install software with your login credentials on your local PC.

1. Click "Allow this file" when prompted.



Our information	n on this file is incon	clusive.
setupautobatchsl (2).	.exe	
D		
Remove the netronning con	npucci	
Allow this file		
Allow this file		
Allow this file Unproven There is some evidence that this lie is trustworthy.	• Very Few Users This file has been seen by fewer than 5 Symantec users.	Very New Symartec has known about thi file approximately 5 days.



- 2. Click "OK" when prompted.
- 3. Click "Next" at the introduction screen to the setup wizard.



4. Click on the radio box "I accept the agreement", then click "Next" when prompted.



5. Click "Next" again.





6. Enter the Serial Number provided by CDT via encrypted email. Click "Next" when prompted.

🔊 Setup - AutoBatch Plug-In		-	
User Information Please enter your information.			PLUG-IN
User Name:			
State of California			
Organization:			
Department of Technology Services			
Serial Number:			
[	< Back	Next >	Cancel

7. Click "Install" when prompted.

🔊 Set	up - AutoBatch Plug-In	-		×
Re	<b>ady to Install</b> Setup is now ready to begin installing AutoBatch Plug-In c	n your computer.		PLUG-IN
	Click Install to continue with the installation, or click Back i change any settings.	f you want to revie	w or	
	User information: State of California Department of Technology Services			~
	<		>	
	< Back	Install	Ca	ncel

8. Click "Finish" when prompted.





9. Once the installation is complete, the program will present the following Quick Start Tips web page:



10. Once the OCRBot support tools (Acrobat Pro DC with EverMap AutoBatch Plug-in) are installed, the Advanced Options will be available; no further configuration necessary.

S OCRBot			- 🗆 ×
Settings Help			
Source Location			
Input Directory			Choose Folder
			Or Choose File(s)
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- 1008		Text Only Mode	AutoTag Submit
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Ready	Files Processed: 0	Pages Processed: 0 File Errors:	0 Time(HH:MM:SS): 00:00:00

#### ReOCR

Previous text processed through another OCR will be replaced with the new text from Azure Cognitive Services.



### Layering

The visibility of the three (3) layers can be toggled in Adobe Acrobat Pro DC:

- OCRBot Invisible Text Text that has been inserted into the PDF by OCRBot or other similar tools.
- **OCRBot Visible Text** Other document text.
- OCRBot Visible Page Content Visible content like Images.
- 1. Layering feature of Adobe Acrobat used by OCRBot.



## OCRBot Remediation and OCRBot Publish Mode Requirements: Adobe Acrobat Pro DC >= 2019

1. Select Tools tab, and Action Wizard:





2. Select "OCRBot Remediation Mode" from the Action Lists.



3. Click Start to begin document remediation.

← OCRBot Remediation M
Files to be processed:
👃 Pages from November Bo
Add Files
Start
Untitled

4. At the Save As Dialog, click Save to save the file.





5. To navigate to the Layers choose View → Hide/Show → Navigation Panes → Layers
a. Click on the "eye" icon to toggle each layer.

Act	tion Wizard	
Д)	Layers	×
	E ·	
	OCRBot Invisible Text	^
Ø	OCRBot Visible Page Content	
	OCRBot Visible Text	
[ <b>-</b> °]		

6. When remediation is complete, click the "OCRBot Publish Mode".



7. Click Start to save your updated file.





# **D.** Acronyms

ACCRONYM	DEFINITION
ADA	Americans with Disabilities Act
API	Application Programming Interface
CDT	California Department of Technology
OCR	Optical Character Recognition
PDF	Portable Document Format

# E. Glossary

TERM	DEFINITION
Autotag	A feature in Adobe Acrobat DC that attempts to automatically tag a PDF for accessibility.
Bot	An automated program.
Cognitive Service Endpoint & Key	The Cognitive Service Endpoint is the location of the service. The Cognitive Service Key is the credential to access the service.
EverMap Auto Batch Plug-in	A plug-in that can automatically run Adobe Acrobat features such as Autotag.
EverMap Serial Number	The serial number required to unlock and use EverMap AutoBatch Plug-in.
Layering	Information is stored on different layers in a PDF document to control what is visible and/or printable.
Microsoft Azure Cognitive Service	Azure suite of artificial intelligence tools such as character recognition, speech to text, etc.
OCRBot	A software tool that uses Azure Cognitive Services to perform optical character recognition and Autotag on a PDF document.
OCRBot Publish Mode	A special action wizard in Adobe Acrobat that makes the invisible layer of scanned OCR text invisible, which is the default output of OCRBot. You would use this to revert the changes caused by remediation mode.
OCRBot Remediation Mode	A special action wizard included in Adobe Acrobat that allows you to make the invisible layer of text visible.
PDF Tag	A PDF accessibility markup.
ReOCR	Any existing OCR text will be replaced with new OCR text.
Text Only	OCRBot will make the text data visible and hide images.