

## QuickScan Pro Integration

### Purchasing Information:

Customers can purchase and view documentation about EMC® Captiva® QuickScan™ Pro at:

<http://www.emc.com/products/detail/software/quickscan-pro.htm>

Licensing for QuickScan Pro is determined by Scanner Level which corresponds to the scanner model which the customer will be using with QuickScan Pro. To determine the Scanner Level, please visit [www.scannerdrivers.com](http://www.scannerdrivers.com) to find your particular scanner and the pricing level for that model scanner.

### Note:

ECi Spruce Computer Systems does not provide any support for the QuickScan Pro software. All support calls related to the installation, setup, use, or troubleshooting of the QuickScan Pro software will be billable based on our hourly rate.

### QuickScan Pro Setup:

1. There are 3 preconfigured QuickScan Pro scanning profiles (qsp) which will properly scan and save documents in the format required by Spruce for attaching to documents in the SpruceWare.NET software:

Binary TFF.qsp

The Binary Tiff profile will create black and white scans only similar to a fax.

Color JPEG.qsp

The Color JPEG profile will do color scans.

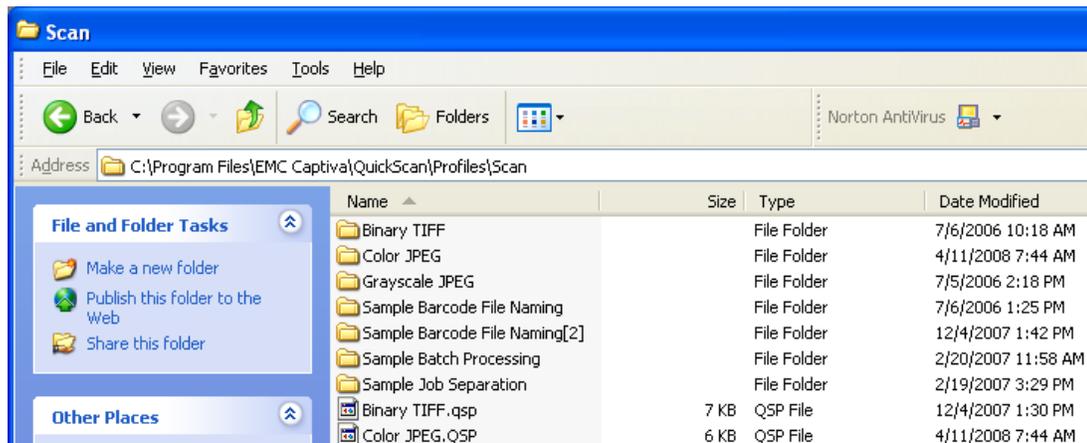
PDF.qsp

If your company scans purchase orders and receipts (or other landscape format documents), you might want to consider using the following profile which works well with all orientations and handles multi-page scanning better.

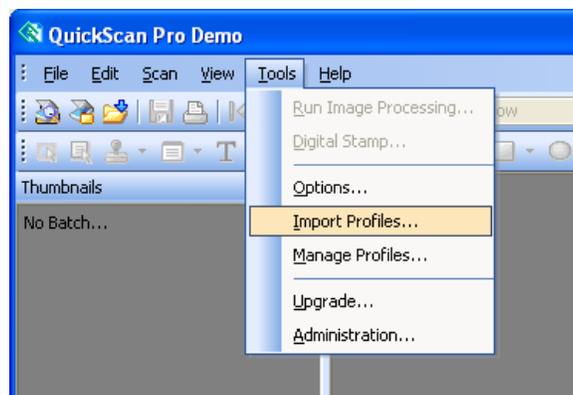
All of the profiles will do barcode recognition and file naming based on the barcode found on the scanned document.

2. Either or both profiles must be downloaded and saved to the PC that will be using QuickScan Pro. We recommend saving these profiles in the following directory:

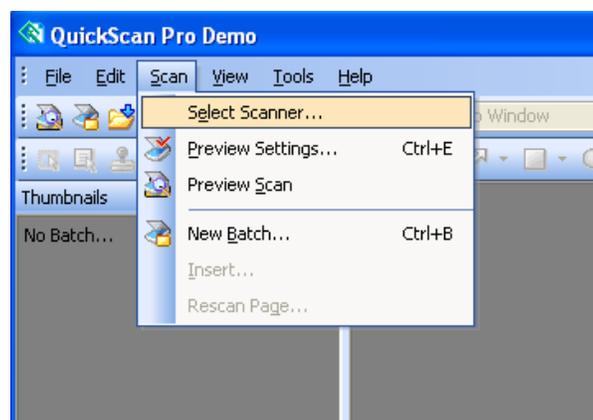
C:\Program Files\EMC Captiva\QuickScan\Profiles\Scan



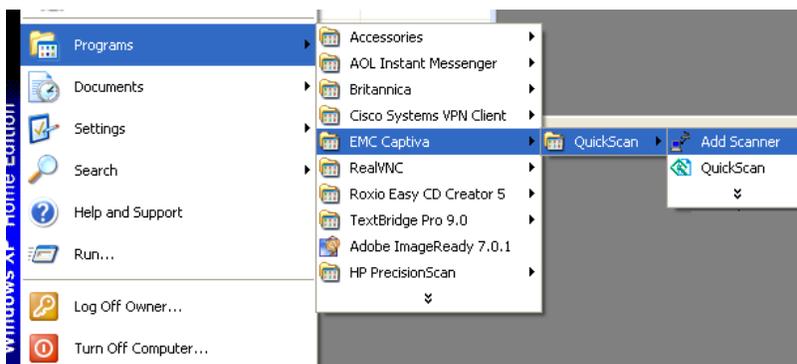
- Once the profile(s) are saved in the directory (above), they must be imported into the QuickScan Pro software. This is done by going to Tools – Import Profiles and selecting the Binary TIFF.QSP, Color JPEG.QSP, and/or PDF.QSP files.



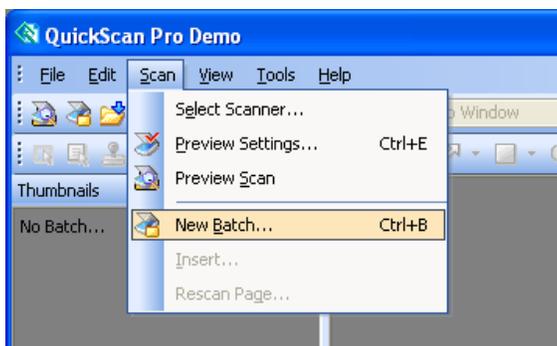
- The next step is to set QuickScan to use your scanner. This is done by going to Scan – Select Scanner. Select the proper scanner model.



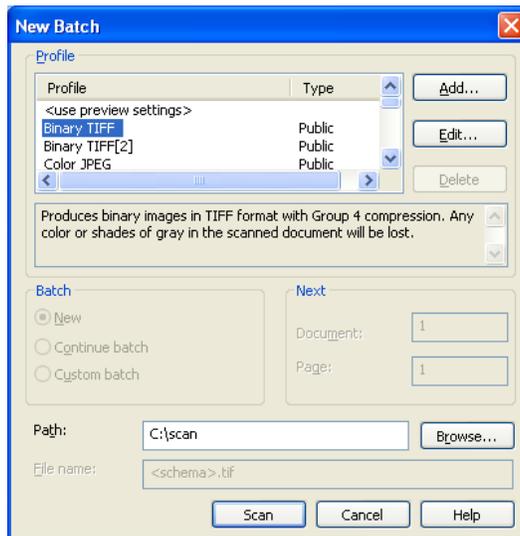
- Once QuickScan Pro is installed on a Windows PC, and if necessary (if the select scanner list doesn't display the proper model), add your scanner to the QuickScan Pro software. This can be done through the Add Scanner Utility. You will need to browse for the drivers for your scanner.



- Once a scanner is selected, users may begin scanning documents. To scan, select Scan – New Batch.



- Select the proper profile from the listing by choosing either PDF, Binary TIFF or Color JPEG. Users can change the path where scanned images save if desired.



- When scanning, documents with multiple pages must be grouped together in the proper order. QuickScan Pro software links pages together that have matching barcodes. Multi-page documents are saved as a single TIFF, JPEG, or PDF file with the filename format of **[barcode].TIF**, **[barcode].JPG**, or **[barcode].PDF**. If a document is scanned that either does not have a barcode or QuickScan is unable to find a barcode, QuickScan prompts the user to manually name the scanned file.

*Note: to associate an existing SpruceWare.NET document's barcode with any external documents you scan, you can (optionally) print a barcode label from the Process (F12) form and then stick the label to a document you plan on scanning and attaching later on. This requires a supported label printer as well as some setup in the SpruceWare.NET application before use.*

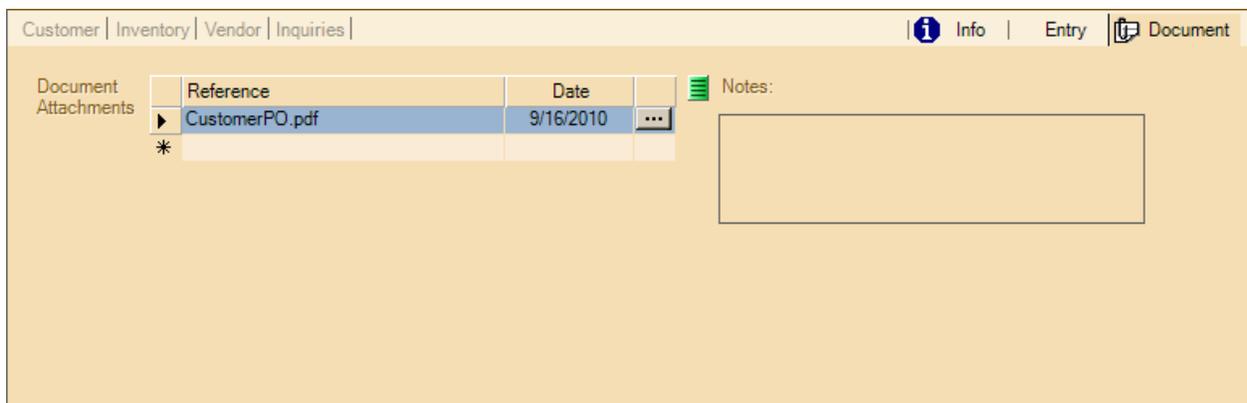
- Once all scanning is done, images are available to be attached. To attach the scanned files to an individual document, you can do so from the folders ("Document") tab of a transaction. Otherwise, if you want to attach many files at one time, use the **Maintenance – Utilities – Attachment Maintenance** form. Once files are attached through SpruceWare.NET application, the file data is added to a database table on the server, so the original scanned image files can then be deleted if desired.

### Attaching Scanned Images to SpruceWare.NET Documents

The following instructions can also be found in the SpruceWare.NET Help and apply to all types of attachments, not necessarily QuickScan Pro. As stated previously, scanned images of documents can be attached either from a transaction, using the Document tab in the Folders, or as a group using the Attachment Maintenance option available from the Maintenance area's Utilities menu.

#### Attaching a Document from a Transaction

The Document tab is used for document-based attachments and notes. With new transactions, there would **not** be any existing document attachments. This type of attachment is the only type that may be added from the folders while processing a transaction (other types must be associated with a customer, vendor, item, etc. in the corresponding maintenance forms). Possible uses for document attachments include a scanned copy a customer's purchase order for attachment to a Point of Sale document or a scanned copy of a written purchase order from a trade show on a new Purchase Order, for example.



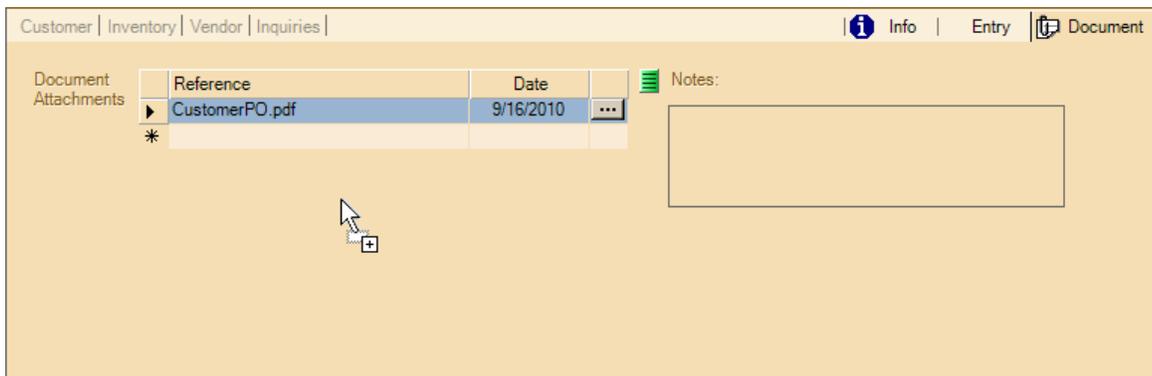
When a document has attachments, an icon (  ) appears on the tab. New document attachments may be added in two (2) ways: *drag & drop* or *file browsing*.

## Drag & Drop

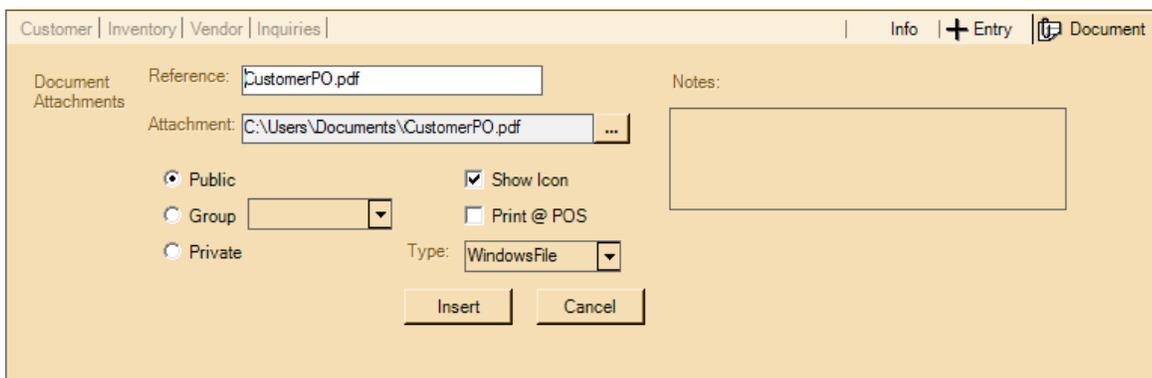
To use "Drag & Drop," both the file's location and the SpruceWare.NET document tab must be visible on your desktop **at the same time**. Files may be located either on a visible area of the desktop or with a visible area of an open folder. Drag the file from its location and drop it into the Document tab area.

### How to "Drag & Drop"

- Click on the desired file using your mouse's select button (this is the left-hand side button on a right-hand configured mouse).
- While holding the select button down, move the mouse from the file's location to the Document folder area on your desktop. *You should see a faint image of the file's icon move with the mouse as you do this (until you reach the folder area).*
- Once the file is over the folder area, the cursor changes and displays either the "no" icon or an arrow cursor with a "plus" image (see the next image).



- When the arrow cursor (with the "+") displays, release the mouse button. The form will change.



The "reference" will list the file's name and the "attachment" text box will list the file's current location on your station (PC, server, etc.). Drag & Drop can only be used to add file based attachments. Map Links, Web Address (URL) links, and SpruceWare.NET documents must be manually specified.

**Attachment via File Browsing**

To specify an attachment without using "drag & drop," type any character(s) under the reference column in the attachments grid (typing *enter* or *tab* won't activate the form). Once the form is redisplayed (see below), complete the form. Use the browse button to locate the file you want to attach to the document.

The screenshot shows a software window with a title bar containing "Customer | Inventory | Vendor | Inquiries" and "Info | + Entry | Document". The main area is titled "Document Attachments". It features a "Reference:" text box containing "CustomerPO.pdf" and an "Attachment:" text box containing "C:\Users\Documents\CustomerPO.pdf" with a browse button "...". Below these are radio buttons for "Public", "Group" (with a dropdown), and "Private". There are also checkboxes for "Show Icon" and "Print @ POS", and a "Type:" dropdown menu set to "WindowsFile". At the bottom are "Insert" and "Cancel" buttons. A "Notes:" text area is visible on the right side.

**Options when Adding or Modifying Attachments**

There are some choices that users can make when adding a new attachment. Here are some explanations.

This is a blurred version of the attachment form. The "Reference:" field contains "New Attachment". The "Attachment:" field is empty with a browse button "...". The "Public" radio button is selected. The "Show Icon" checkbox is checked. The "Print @ POS" checkbox is unchecked. The "Type:" dropdown is set to "WindowsFile". "Insert" and "Cancel" buttons are at the bottom. A checkbox labeled "Add Map Link" is located at the bottom right of the form area.

**Reference**

The Reference may be manually designated and is intended to be used as a description of the attachment. References are also used for identifying an attachment, so they should be unique. When using a "drag and drop" method to add attachments, the reference defaults to the file name and extension of a file based attachment. If the same reference already exists, a message window will ask you whether or not you want to associate the existing attachment with the document instead of creating a new one.

**Attachment and Doc #**

Attachment is the current pathname (directory location) of the file on the user's computer or the URL address of the map link or a web site. For file based attachments, a copy of the attachment file will be made in a database table that is maintained by the server. Files are not kept individually; they are saved as image data within a SQL table.

URL addresses are saved as text. The "Add Map Link" check box will automatically create the URL for a Google Maps™ link based upon the current customer, job, or vendor address. You need to manually copy any web site address into the Attachment text box, however.

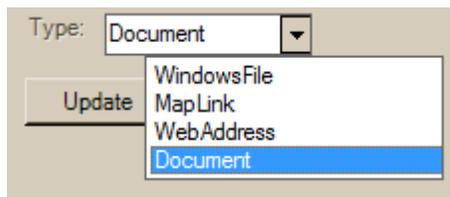
When choosing a type of "Document," the attachment field is replaced with a different control for selecting documents (labeled "Doc #").

**Public, Group, and Private Selection**

Attachments can be designated for access by all users (public), users in a specific user group, or just the current user (private). User groups may be created and maintained from the *Message* form available on the *Office* drop down menu. Attachments are visible to only those users who have permission to access the attachment.

**File Types**

Users can choose either *windows file*, *map link*, *web site address*, or *document* as the file type using the drop down:



"Windows File" refers to any Microsoft® Windows®-compatible file type. Usually, these types of files require some other software that may or may not be provided with your Microsoft Windows operating system. These types of attachments are stored in a separate SQL database and table as "image" data, not as individual files in a directory. The same attachment may be used with many different records.

"Map Link" refers to a URL (web site address) that initiates a Google Maps™ mapping service search for a specific address (<http://maps.google.com>). Users may use this site to generate a map to a specific address then click on "link

to this page" to create a link address which may then be copied and used as an attachment to a document. Internet access is required to view the Google Maps™ web site.

"Web Address" refers to a normal web site address which may be either typed in or copied from a web browser's address bar. This option requires Internet access.

"Document" refers to an existing SpruceWare.NET document ID. This allows you to enter/select any document ID and save it as an attachment. No data is saved with this attachment, just the document's identifier (1306-C12345, for example).

**Show Icon**

The "show icon" check box defaults to yes (checked) and determines whether or not the (document attachment), (customer, job, or vendor attachment), or + (item attachment) icon is to be shown when this particular attachment is present.

When multiple attachments are present, if any of the attachments are set to "show icon," the icon will display.

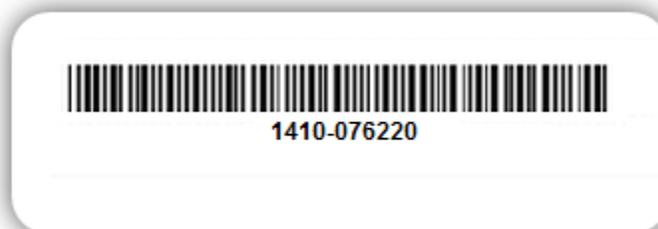
**Print @ POS**

This check box is intended to be used to set whether a particular attachment should be made available for printing from the Attachments tab on a transaction's Process (F12) form. It does **not** cause an attachment to automatically print during processing. In addition, this setting does **not** prevent a user from being able to open and subsequently print any attachments listed on the Info or Entry folders during a Point of Sale transaction.

As stated, even with this setting enabled, printing attachments remains a somewhat manual process. On process forms with an "attachment" tab, you can select one or more attachments and then click the **Print** button. Only those attachments designated as "Print @ POS" are included.

**Attaching Multiple Scanned Images to Documents**

This section explains how to associate a group of scanned images with their relevant documents. Typically, this would be done if you were using document labels (a separately available option). These labels are printed during processing (F12) from the "Print" tab from applicable transactions (see the example below).

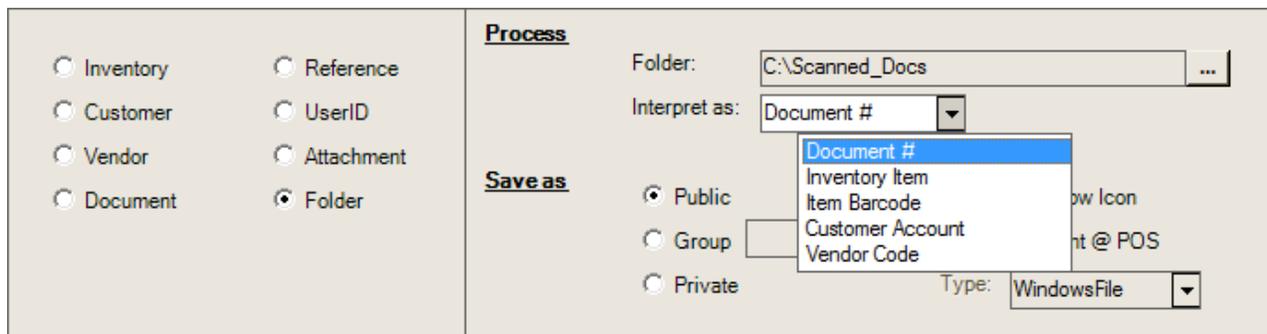


To print a barcode document label, you must have a supported label printer (DYMO LabelWriter) and there is some minimal software setup required. There are no additional support charges beyond the costs of purchasing the required hardware (unless you require support assistance, which would be billable in this case). Documentation is available on our web site and in the SpruceWare.NET Help file (TOC > Special Topics > Hardware & Peripherals > DYMO Label Printers).

Barcoded labels are affixed to each external document you plan on scanning. Documents are scanned using the QuickScan Pro software. The file names of the scanned documents are then set to match the SpruceWare.NET document (based on the barcode label you affixed to the original document prior to scanning). These file names are ultimately used to automatically associate the images with their corresponding documents.

Once documents have been scanned, go to the Maintenance area in the SpruceWare.NET application and choose "Attachment Maintenance" from the Utilities drop down menu. Click the "Folder" radio button.

The Folder radio button allows you to quickly add files as attachments using files that are all located in the same folder. The file names **must** match actual records for your selected record type (document, item, bar code, account, or vendor code). Processing adds the files as attachments if records matching the file names are located.



Here is a specific and step-by-step explanation of how you would add a group of scanned documents as attachments:

1. Create or designate an existing folder on the PC or a network share location for saving scanned documents.
2. Add scanned images of documents to the folder if they don't already exist. The file names must match with an existing SpruceWare.NET document ID (see the examples below):

1501-C40152.JPG  
 1412-015842.TIF  
 1506-P56221.PDF

File extensions can be any valid Windows® file type (images, documents, etc.).\*

*\*Remember, for a user to be able to access attachments locally (on their PC, station, etc.), their device must have the software required to open the particular file type. For example, users who do not have Microsoft® Excel® software installed on their PC may not be able to open an Excel spreadsheet.*

3. After adding some files to the folder, go to Maintenance, choose Utilities and select Attachment Maintenance.

4. Click the  **Folder** radio button.
5. Use the browse button (...) to choose the **Folder** on your PC or network share containing the scanned images.
6. Make sure that "Document #" appears in the "Interpret as" drop down control (document is the default).
7. Choose whether the attachments should be public, assigned to a group, or private (same user only).
8. If desired, modify the **Show Icon** or **Print @ POS** check boxes.
9. The "Type" should be left as **WindowsFile**.
10. Choose **Process (F12)** to populate the grid with any files that match an existing document.
11. To add the files as attachments, check the check boxes for each row you want to add as a new attachment. The menu marker may be used to "select all."
12. Press the **Insert** button.
13. The files should now appear as attachments for the related documents.

#### Some Points about Folder Attachments

- ✓ Attachments are maintained as image data in a separate SQL database... **not** the folder you designate. The folder location is neither saved nor is it used to retrieve the attachments once they've been added.
- ✓ Adding the same file as an attachment does **not** replace any prior attachment (even if the file name matches), it creates a **new** one. Any given document (or other record) may have an unlimited number of attachments... the folder option is not capable of distinguishing between new vs. existing attachments.
- ✓ Files are not removed from the designated folder location (you may want to either remove or move the files elsewhere after attaching to avoid future duplicates in case the folder location is used again).
- ✓ References (attachment descriptions) default to the reference associated with the document (or description of the item, customer, etc. when linking folder-based files to other types of records), but can be modified before adding the attachments.

#### *Trademarks*

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