

DocketSCAN User Guide

DocketSCAN

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Welcome

Thank you for your purchase of an DocketPORT scanner. DocketSCAN is designed as a convenient way to scan documents and manage your scanned files, including scanning business cards to Outlook, and uploading and saving scans to cloud storage services. This User Guide is an easy-to-use reference for all the features and functionality of the DocketSCAN software.

Installing Your Scanner

⚠ IMPORTANT: Users must have full administrative rights to install the drivers and software. If you are unsure of your user and/or installation privileges, please contact your local IT support. DocketPORT Support cannot change or edit your permission levels.

Before you can scan, you must install the appropriate driver. Please visit our [Drivers](#) page for easy installation.

Installing DocketSCAN

Our DocketSCAN software is an easy to use application for users who are not using third party software to integrate with their scanner.

⚠ *Before installing the software, be sure that your scanner driver is installed. To install your driver, please visit the [Drivers page](#) on www.docketport.com*

To install DocketSCAN, follow the below steps:

1. **Install** DocketSCAN software and follow the on-screen installation prompts.
2. Upon final installation, the **DocketSCAN icon** will be installed on your desktop.
3. **Double-click** the DocketSCAN icon to open the software.

Before Scanning

The following models require calibration prior to scanning:

- PS667
- DS687
- PS600
- DS490

Calibration

All -AS model scanners require initial calibration. The -IX series scanners are factory calibrated, so initial calibration is not required. For information on calibrating your scanner, please visit our [FAQ page](#).

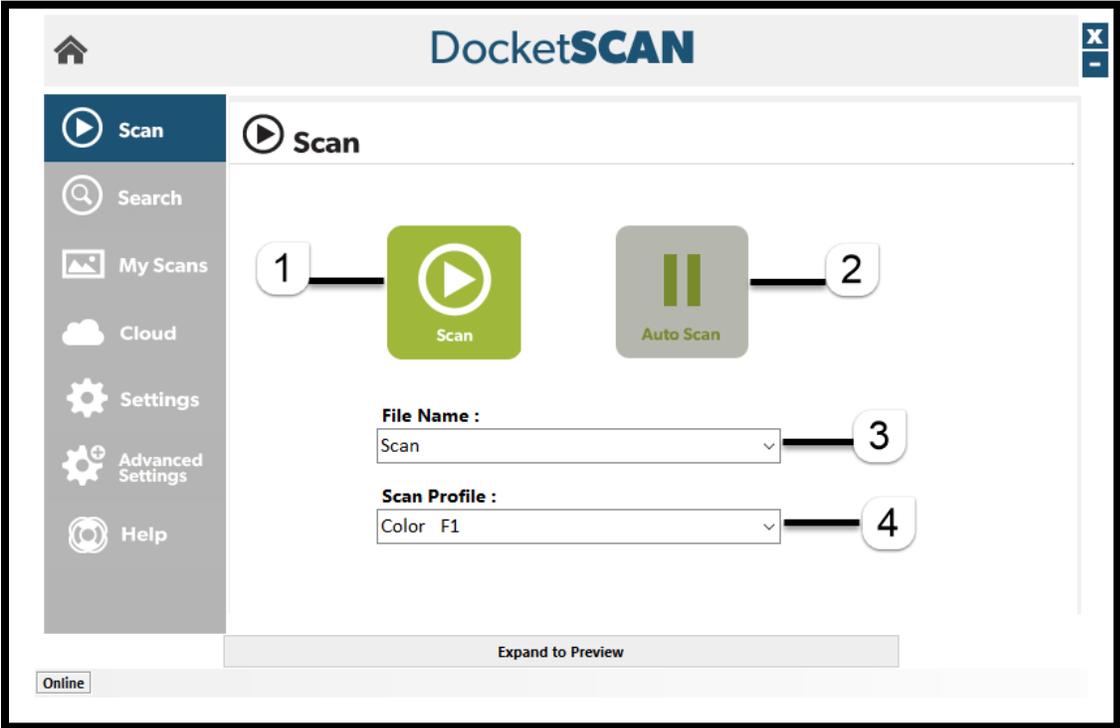
Cleaning

If you notice a deterioration in scanning quality over time, you may need to clean your scanner in addition to calibration. For instructions on how to clean your scanner, please visit our [FAQ page](#).

DocketSCAN Overview

DocketSCAN contains several adjustable settings which can be tailored to best suit your requirements. The sections below explain each setting and their locations and functions within the program.

Scan Interface



1. **Scan:** This button allows for manual scanning if Auto Scan is turned off. *Note: The side Menu bar will display the current selection in orange.*
2. **Auto Scan:** Default setting. When Auto Scan is on, any card or document inserted into the scanner will automatically begin scanning. Note the button will appear gray with the II symbol. For more information on Auto Scan, see the [Auto Scan and Continuous Behaviors section](#).
3. **File Name:** This is where you enter the name you want for the item you're scanning. The default file name is Scan. To change, simply delete the name and type your desired file name.
4. **Scan Profile:** There are 4 default scanning profiles. The default active profile is Color. The function buttons to the right of the profile name tell you which function key they are associated to. See below:
 - Color = F1 (scans all cards/documents in 300 DPI color, duplex.)
 - Grayscale = F2 (scans all cards/documents in 300 DPI grayscale, duplex.)
 - B&W = F3 (scans all cards/documents in 300 DPI black and white, duplex.)
 - Business Cards = F4 (scans all cards/documents in 300 DPI color, simplex.)
5. **Expand to Preview:** After your scan is completed and saved, you may expand the preview window to view your image.

Auto Scan and Continuous Scan Behaviors

The table below illustrates how DocketSCAN software will behave with certain features enabled or disabled.

Feature Name	Feature Enabled (Y/N)	Behavior	Best Use
Auto Scan	Y	<ul style="list-style-type: none"> Automatically scans documents when inserted. Multi-page scanning available. Add pages to scan until complete. File automatically saves to the designated save path chosen in Settings. File Created message displays above the Show Preview button. Scan is automatically saved. Prompt to add Tag to a file for sPDF, Word, and Excel files. You may enter a Tag or cancel to bypass. Preview/Switch Mode window does not have thumbnail view and you will only see the first page scanned in your document in the window. No editing options available in Preview window. 	<ul style="list-style-type: none"> Scanning multi-pages. No manipulation of images needed. Automatically save scans when completed. Using Tags to organize scans.
Continuous Scan	Y		
Auto Scan	Y	<ul style="list-style-type: none"> Automatically scans documents when inserted. Multi-page scanning available. Add pages to scan until complete. File must be manually saved using the Preview or Switch View window to complete. Use Save to save to the pre-selected save path in Settings or Save As to save to a different location. Prompt to add Tag to a file. You may enter a Tag or cancel to bypass. 	<ul style="list-style-type: none"> Multi-page scanning. Need to edit documents contrast/color/rotation. Manually save to another file location. Using Tags to organize scans.
Continuous Scan	N		

Feature Name	Feature Enabled (Y/N)	Behavior	Best Use
Auto Scan	N	<ul style="list-style-type: none"> Multi-page scanning available. Add pages to scan until complete. Prompt to continue scanning or finish after scanning (approximately 8-10 seconds after last scanned page). If Finish is selected, file is automatically saved to save path in Settings. Thumbnail view not available in Show Preview/Switch Mode. Prompt to add Tag to a file. You may enter a Tag or cancel to bypass. 	<ul style="list-style-type: none"> Multi-page scanning available. Manually save to another file location. Using Tags to organize scans.
Continuous Scan	Y		
Auto Scan	N	<ul style="list-style-type: none"> Multi-page scanning available. Add pages to scan until complete. Must view document in the Show Preview or Switch View window to complete the scan. File must be manually saved using the Preview or Switch View window to complete. Prompt to add Tag to a file. You may enter a Tag or cancel to bypass. Thumbnails of scanned images available in Preview/Switch Mode windows and can be edited. 	<ul style="list-style-type: none"> Manually scan and save documents. Manually save to another file location. Using Tags to organize scans.
Continuous Scan	N		

Show Preview

The **Show Preview** window can be expanded to view a document scanned. Clicking this option will expand a window that displays your scanned image.

⚠ Only sPDF, JPEG and TIFF files can be previewed. The scanned image may display very small in the window. Use the **Zoom In** feature to enlarge the image in the window or use **Switch View** to open a new window and adjust sizing.

Switch View

Located to the right of the **Show Preview** button, this will open a new window to display your scanned document for review, editing, and other functionalities.

Preview Window Menu Options

Below is a screenshot with descriptions of the various functionalities in the Preview and/or Switch Mode view.

Note: These options are only available when the Continuous Scan setting is off.



Icon	Name	Function
	Select All	Select all thumbnails in the Preview window.
	Delete Page	Delete a selected page from the Preview window.
	Delete All Pages	Delete all pages in the Preview window.
	Undo	Undo changes made to your scan.
	Zoom Out	Zoom out view.
	Zoom In	Zoom in view.
	Rotate	Rotate the page in the viewer.

Icon	Name	Function
	Brightness/Contrast	Adjust the brightness and contrast of a scan.
	Equalize	Automatic algorithm to adjust and equalize the contrast of an image. Recommended for text only.
	Save	Save scanned image. A new window will display showing the file save location. The default location is C:\Users\Public\Documents\DocketSCAN
	Save As	Save a scanned image. You may change the file name and save location in the new window that opens.
	Box	Saves images to Box. <i>Please note you must have a Box account to use this function.</i>
	Google Drive	Saves images to Google Drive. <i>Please note you must have a Google Drive account to use this function.</i>
	Evernote	Saves images to Evernote. <i>Please note you must have an Evernote account to use this function.</i>
	Dropbox	Saves images to Dropbox. <i>Please note you must have a Dropbox account to use this function.</i>
	Email	Allows you to email images using Outlook. Note: You must have Microsoft Outlook installed to use this function.
	ShareFile	Saves images to ShareFile. <i>Please note you must have a ShareFile account to use this function.</i>

Scan Profiles

DocketSCAN software comes with 4 default scanning profiles identified as the most commonly used. While they are default settings, they can be edited, renamed, and/or removed based on personal preference.

Users can add and delete profile settings based on their preferences by clicking the + or – buttons below the drop down. Click **Save** when completed.

Hotkeys are shortcuts to access the profiles. DocketSCAN has 4 default profile hot key settings:

- F1 – Color
- F2 – Grayscale
- F3 – Black and White
- F4 – Business Card

Business Card Scanning

DocketSCAN software's Business Card Profile allows users to scan business cards and will extract pertinent data from the card using Optical Character Recognition (OCR). The data on the card is read and can be exported to Outlook to create a contact or exported to a CSV file for easy reference.

Scan to Outlook

Scanning contacts into Outlook is simple and quick. Follow the steps below to complete:

1. Select **Business Card Profile F4** in DocketSCAN.
2. **Insert** the card into the scanner. The scanner will pull the card through automatically (*Auto Scan must be turned on.*)
3. After a few seconds, you may see a message of how many scans are left in Trial mode. Click **OK**.
4. A separate window will populate displaying the card image and information taken from the card.
 - a. Verify all information in the window. Incorrect data can be adjusted manually.
5. Click **OK**
6. A Windows notification in your system tray will alert you the contact has been created.

Viewing Contacts in Outlook

To view your contact information, open Outlook and navigate to your **Contacts**. Use the Search menu for quick find or scroll through your contact list.

Scanned contacts will have the contact information displayed as well as an image of the business card.

Exporting to CSV

You can also save your business contacts to a CSV file, either as a backup or to import into another system like Salesforce. This setting is on by default and will export a Contacts file to

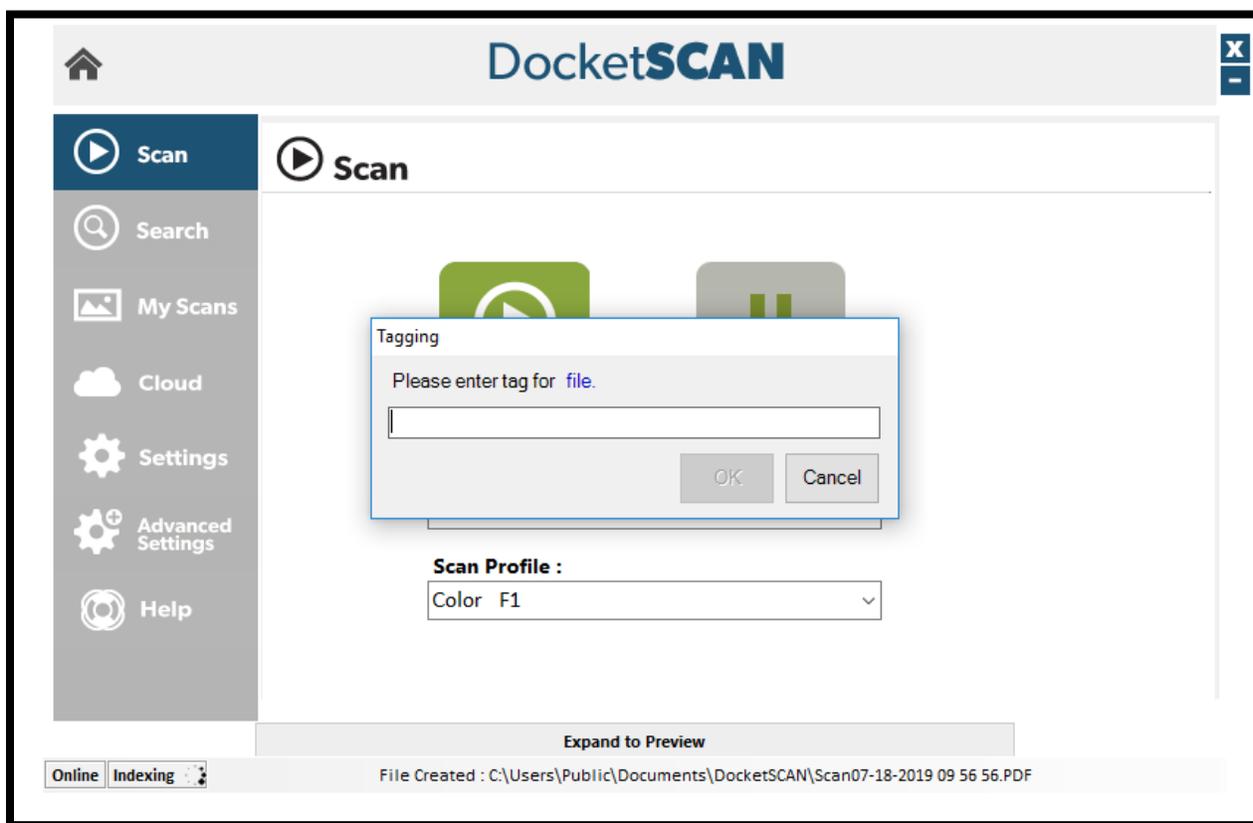
C:\Users\Public\Documents\DocketSCAN by default.

Tagging

Tagging your scans allows for quick and easy organization using words or terms which are applicable to how you wish to locate your files. This feature is on by default and can be used for sPDF, Word, and Excel file types. After completing a scan, a new pop-up window will display after the scan is saved as a file asking you to enter a tag.

For example, if you are scanning multiple documents which are all invoices, using *Invoice* as a tag will locate all documents with that tagged term in the Search feature.

After your scan, you will be prompted to enter a tag. See the screenshot below:



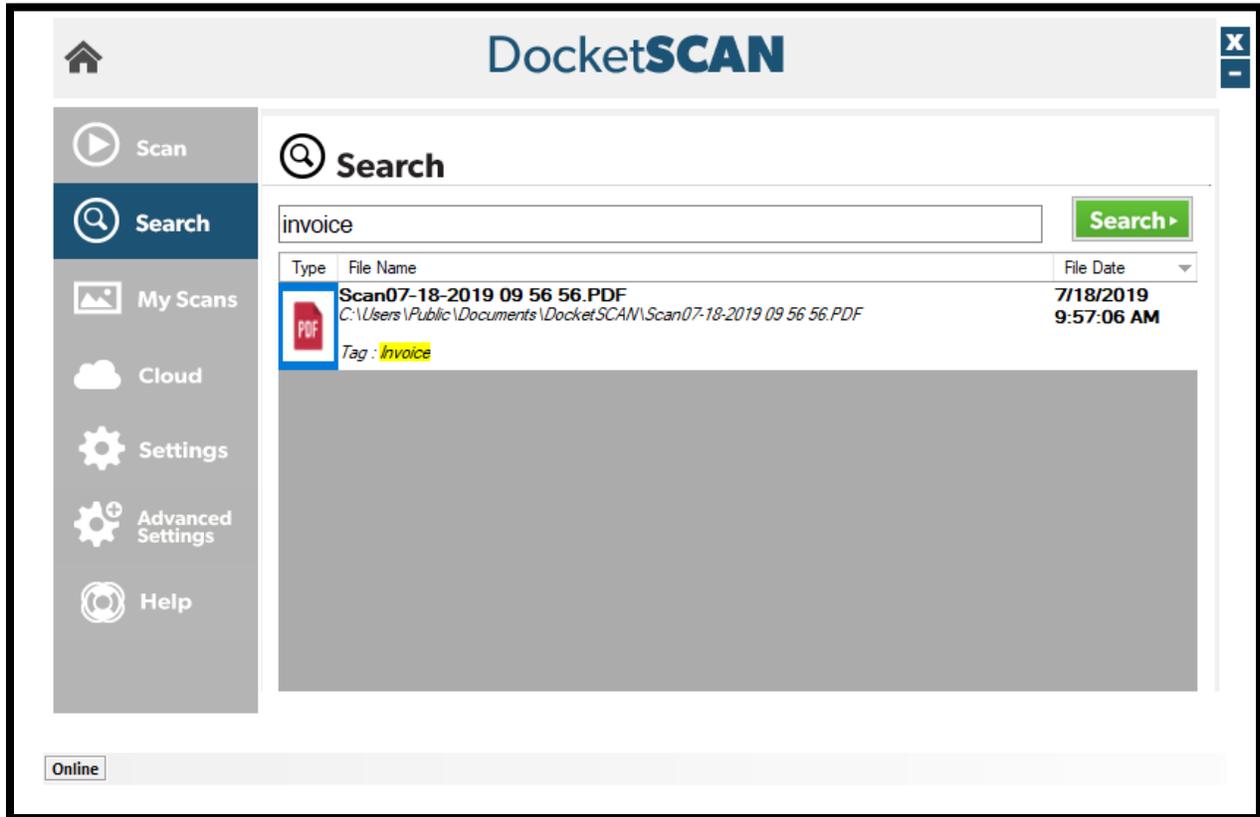
Enter the tag you wish to use and click **OK**. To add multiple tags to a file, separate each with a comma (example: Invoice, Test).

If you want to bypass tagging a file, click **Cancel**.

! *Tagging settings are located in the [Advanced Settings](#) section for the software. Tagging is set to **ON** as a default setting.*

Search

DocketSCAN allows users to search for words, keywords, and tags that are used within their scans. To locate a scan via keyword, simply type the word in the search box and click Search. Use commas to separate multiple keyword searches.



Located keywords will be highlighted in yellow. The file path name will be displayed under the scanned file name.

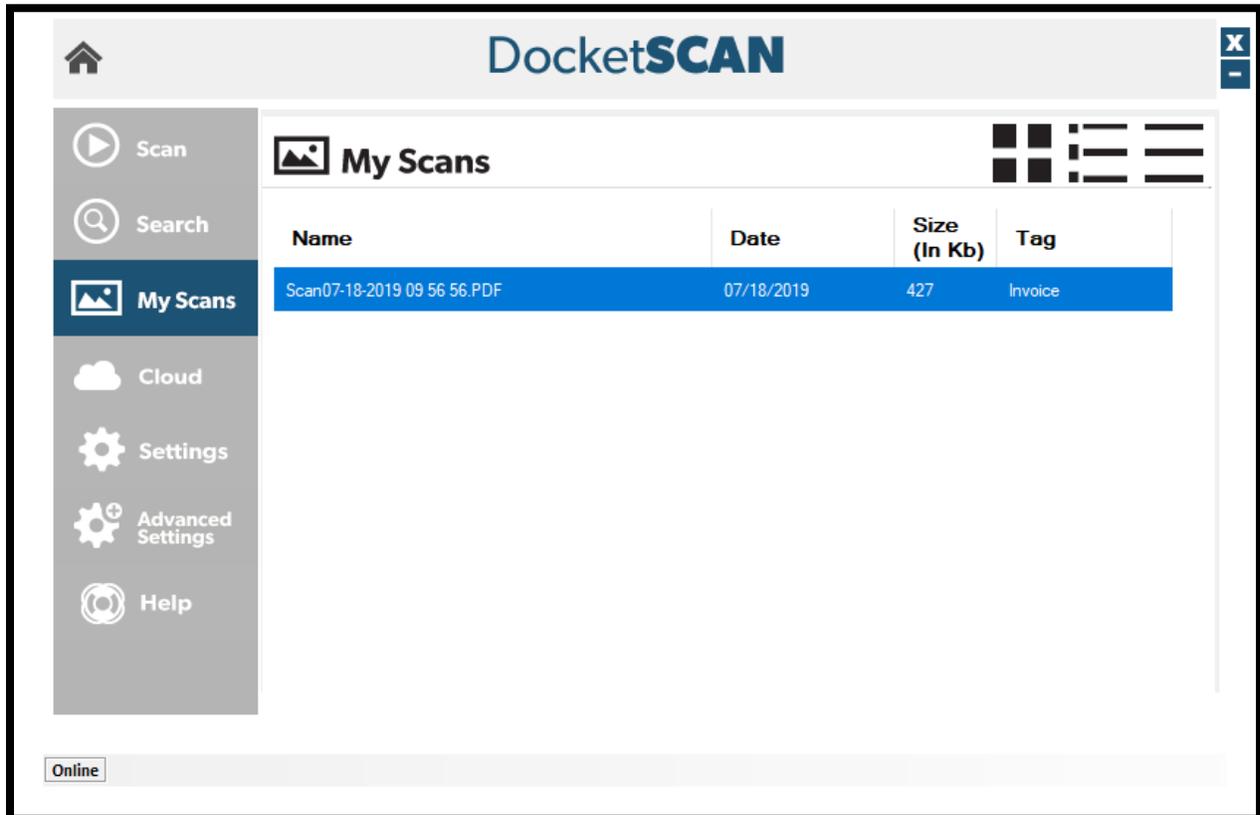
⚠ Search does **not** search for terms used in file names, only text within the media scanned.

My Scans

The My Scans section of DocketSCAN displays a list of all saved scans completed with DocketSCAN.

There are 3 ways to view the scans: Thumbnail, List, and Detailed List view. The default setting is Detailed List, but this can be changed at any time.

The screenshot below is Detailed List view:



Viewing

To view a scan in the list, simply double click on the scan.

Deleting

To delete a scan, right click on the item and select Delete.

Renaming

You can also rename the scan via the My Scans view. Right click on the scan and select Rename.

Add/Edit/Delete Tags

If you want to add, edit, or delete a tag, simply double click in Tag field and enter your tag information. For more details on how tagging works, see the [Tagging section](#) of this guide.

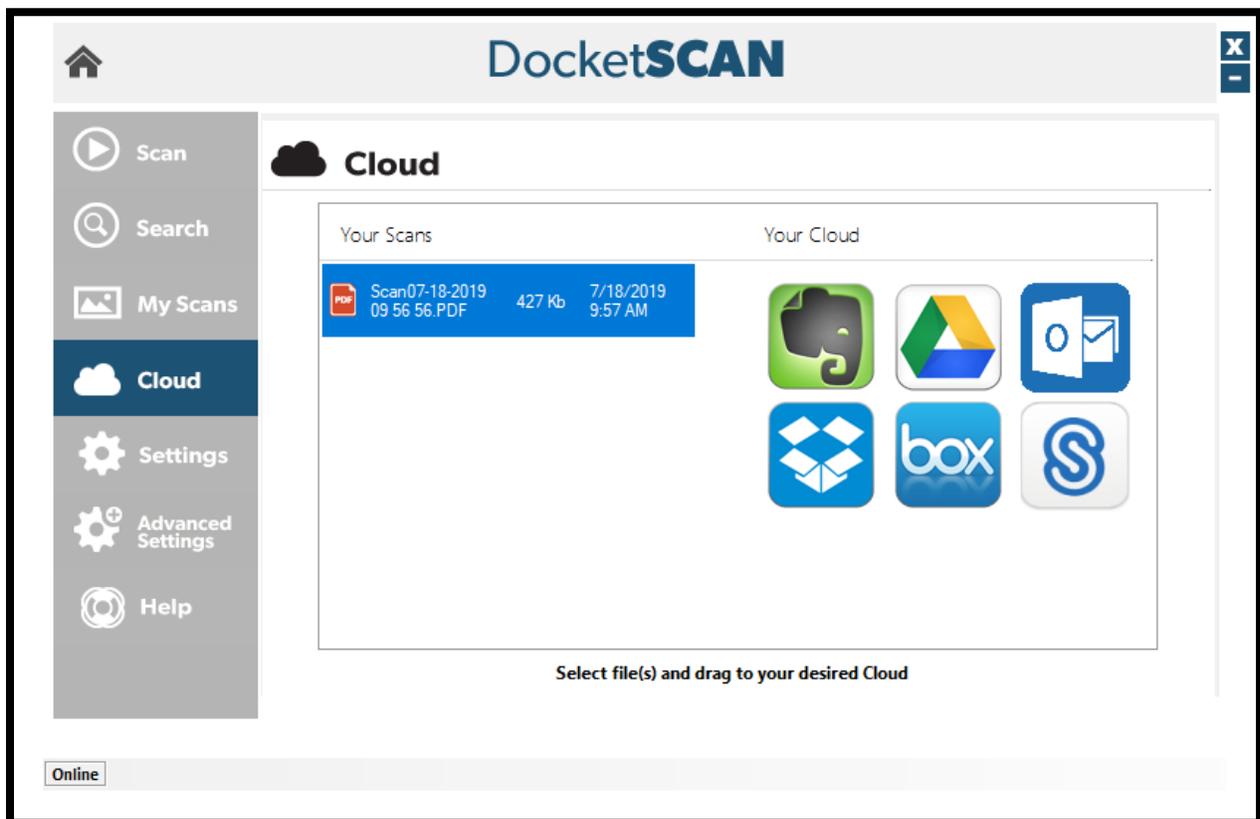
Cloud

DocketSCAN allows users to conveniently save scans to several popular cloud services. Simply drag and drop your file(s) into the appropriate cloud service. **Note:** *The files shown in the Cloud tab are also saved locally to the computer via the saved file path selected in Settings.*

The **Your Scans** column will display the files in the Save Path folder specified on the **Settings** menu.

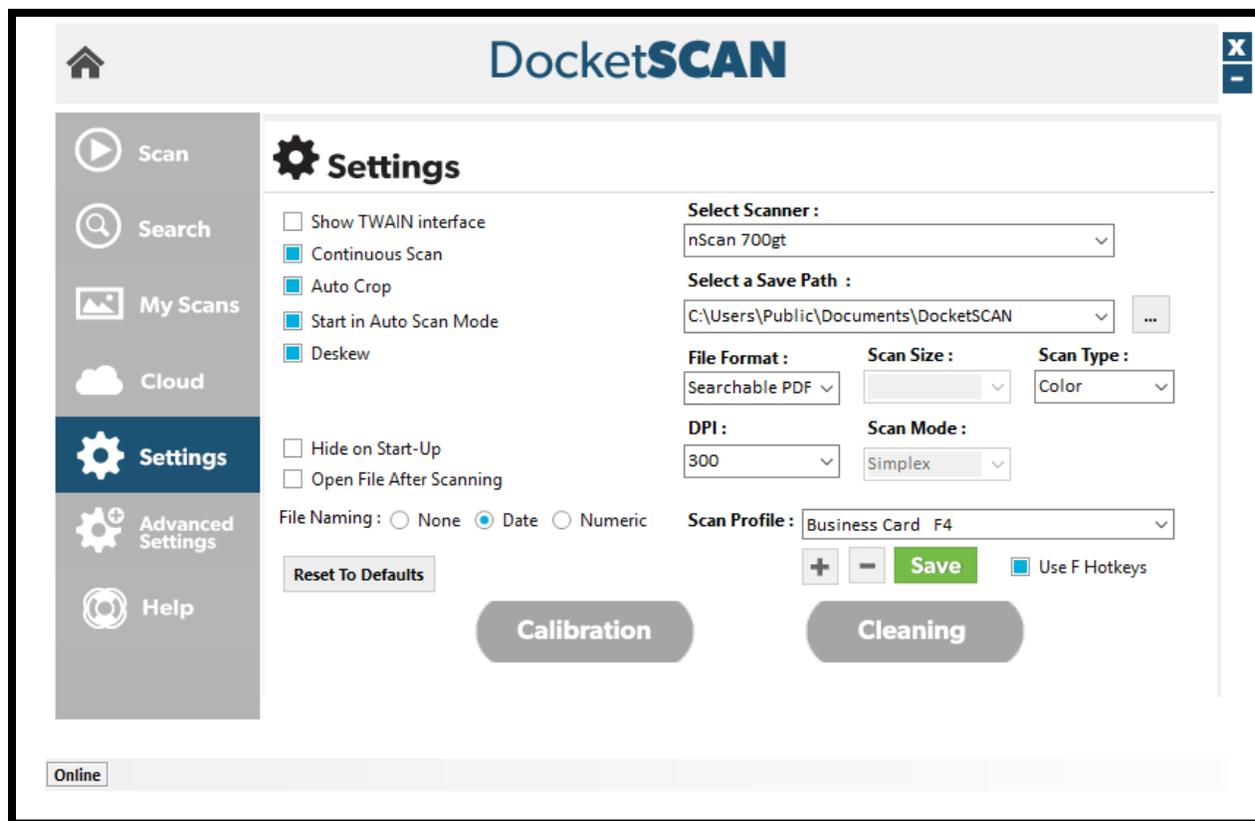
- To add a file to your cloud service, simply drag and drop the file from the **Your Scans** column on to the cloud location.
- To select multiple files, hold the **Ctrl** button and select the files, then drag to the cloud location.

The screenshot below displays the integrated cloud services available:



Settings Menu

The Settings menu is where users can make advanced adjustments to fit their needs. The below screenshot displays the default settings for options and functions.



See the table on the following pages for detailed information on these settings.

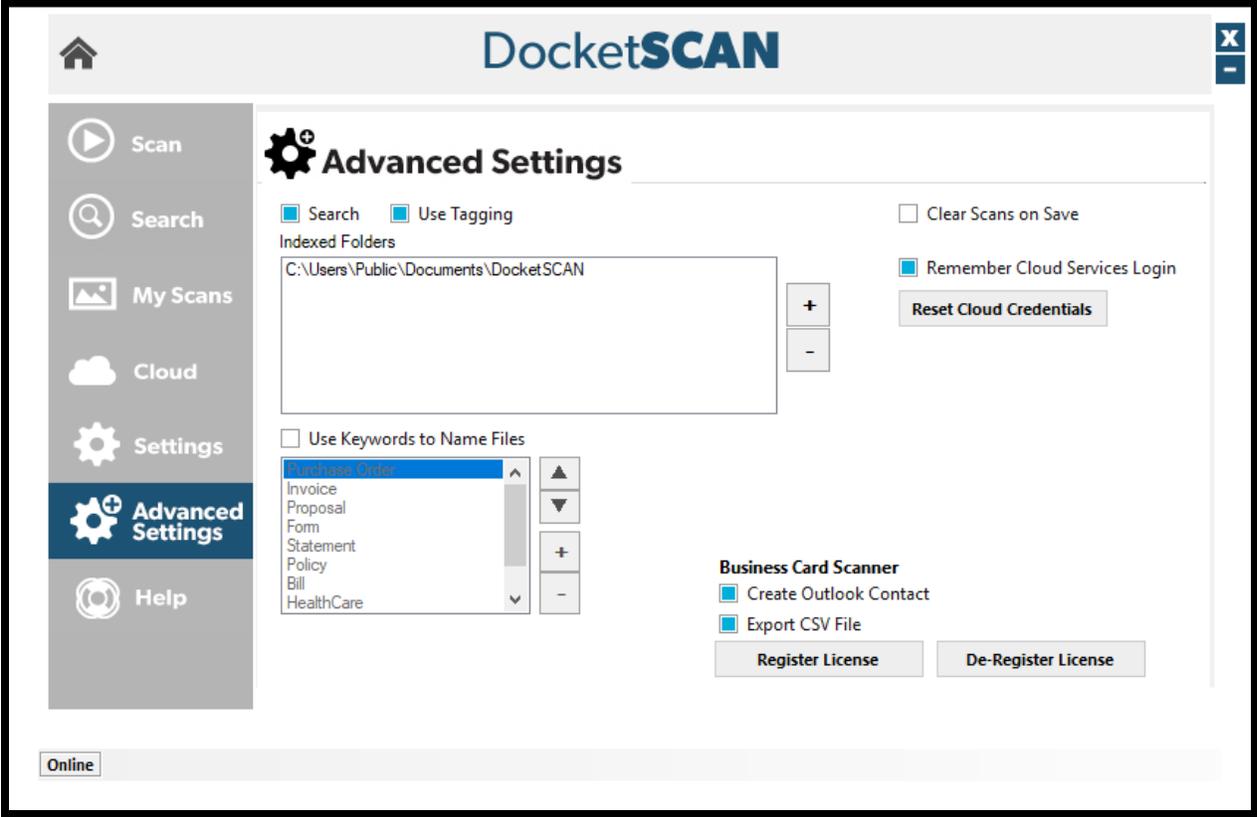
Settings Functions

Name	Default (On/Off)	Description
Show TWAIN interface	Off	Select this option to view more advanced TWAIN settings. You will see these additional settings once Scan is pressed
Continuous Scan	On	When turned on, you may add pages to the scanner to create multi-page documents. When using this function with Auto Scan ON the DocketSCAN software assumes you are scanning multiple pages and will wait up to 8 seconds before “completing” a scan job and creating a file. When using this function with Auto Scan OFF you will be asked if you have additional pages to scan before the DocketSCAN software “completes” a scan job and creates a file.
Continuous Scan	On	When turned off, scanned images are available for editing in the Preview window. Users can adjust brightness and/or contrast and rotation before saving. Each scanned item/page is available in the Preview window to manually select individual pages to be saved.
Auto Crop	On	When enabled, DocketSCAN crops the image around the scanned item, eliminating empty space.
Start in Auto Scan Mode	On	Allows users to insert card or documents and scan without clicking the Scan button. If deselected, users must manually click Scan to scan cards or documents.
Deskew	On	Corrects any sideways distortion of images resulting from improper scanning.
Auto Rotate	On	Detects improper rotation of documents and corrects. If turned off, images will not be rotated and must be manually adjusted.
Hide on Start-Up	Off	When enabled, DocketSCAN runs in the system tray, rather than displaying the user interface upon startup.
Open File After Scanning	Off	When selected, the scan will open in the designated format.

Name	Default (On/Off)	Description
File Naming	On – see description	<p>Options for naming your files once scans are completed.</p> <ul style="list-style-type: none"> • None: Each scan with the same prefix will be over-written by the subsequent scan. Users must change the file name prefix if they wish to preserve new scans. • Date (Default on): Adds a date stamp after the file name you choose. • Numeric: Adds sequential numbers after the file name. Note: <i>sequential numbers are specific to the prefix (examples: Scan1, Scan2, Scan3, Scan 4, etc. Test1, Test2, Test3, Test4, etc.)</i>
Select Scanner	NA	<p>Displays the scanner that is in use on your PC. The scanner should be automatically detected on startup.</p> <p>Note: <i>If the correct scanner is not displayed, click the drop down and select the appropriate scanner.</i></p>
Select a File Path	On*	<p>The default folder location for saved scans.</p> <p><i>*Default location: C:\Users\Public\Documents\DocketSCAN</i></p>
File Format	NA	<p>Select between Searchable PDF (sPDF), Word, Excel, PDF, and TIFF.</p>
Scan Size	On – Auto	<p>Default setting is Auto. Other options available depending on your needs.</p>
Scan Type	On – Color	<p>Color, Grayscale and Black & White scanning.</p>
DPI (dots per inch)	On	<p>Default is 300. Note that decreasing or increasing the DPI of an image may lead to image quality deterioration and/or effect speed of scanning.</p>
Scan Mode	See Description	<p>If a single-sided scanner is in use, this field will display ‘Simplex’ and will be greyed out.</p> <p>For double-sided (duplex) scanners, the drop-down menu will allow for either Simplex or Duplex scans.</p>
Scan Profile	On – Color F1	<p>Displays the current profile selected for scanning. The default profile for scanning on installation is Color F1.</p>

Advanced Settings

The **Advanced Settings** screen houses several other settings for the DocketSCAN software. Each of these settings shown are the defaults and may be changed at any time to cater to user preference. See details below for more information on each function.



See the table on the following pages for detailed information on these settings.

Advanced Settings Functions

Name	Default (On/Off)	Description
Search	On	Allows users to search for words in searchable PDF, Word or Excel files saved in the Indexed Folder locations specified. The default location is C:\Users\Public\Documents\DocketSCAN. This folder may be changed by clicking the + button and selecting a new folder for addition to the list. As new folders are being indexed the software will display an “Indexing” box in the bottom right of the status bar with moving circle as the files are scanned to be available for future Search actions. To remove a folder from indexing highlight the folder then click the – button and then confirm the action to remove the folder when prompted.
Use Tagging	On	Tagging allows for quick searching and organization of saved media. For more information on using tags, click here .
Use Keywords to Name Files:	Off	Available when creating sPDF, Word, or Excel files. If any of the keywords in this list are included in the file, the keyword will be included in the file name.
Remember Cloud Services Login	On	Remembers all cloud service credentials. Turn off if you do not wish to have this information saved.
Reset Cloud Credentials:	NA	Removes any saved cloud credentials input.

Technical Support

For assistance with your Ambir product(s), please visit [Support](#) on our website. DocketPORT Technical Support is available by phone and chat, Monday – Friday, 8 a.m. – 5 p.m. Central Time, excluding holidays.

Phone: (630) 530 – 5400, option 3