

Installing SolarSys DocScan

From Catalyst



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Summary

It is possible to Scan documents into Platinum and automatically attach them to Ticket records within Logistics Management. This is done by using a program called Docscan. This article outlines how to install and configure the Docscan program and set the parameters in Platinum to use it.

All files for the install can be found here



IMPORTANT NOTE: The Included Ticket format uses the new "Sequence" numbering format, as per new profile installs. If you are on an older system that's being updated and you would like to move the system to the "Sequence" numbering method the parameter for this is in *"Systems" -> "Logistics Management" -> "Maintenance Options" -> "Parameters" -> "General Parameters 2"* and change *"Information To Import Documents By"* to 'S'. If you do not wish to change this for whatever reason there is a ticket format in the All files download called **"STDSXTI007.EDL"** that includes the old barcode by ticket number method.

Installing Docscan

- Download Solarsys Docscan Pro from the following site

<http://www.docscanpro.com/php/download.php?type=1&go=1>

- Run the install program and simply make sure the install location remains at the default (**C:\DocScan**) to fit in with these instructions and then keep pressing [**Next**] to install the program using the rest of the defaults.

Once Docscan has been installed and configured, a Platinum Update must be ran for the new features of the scanning software to be used. This can be done via the Catalyst website.

Configuring Docscan

The Docscan software must then be configured for use with Platinum and POD scanning. This is by the following steps:

Setting up INBOX Folder

- Create a folder called "INBOX" in '?:\Sx\Sxco?\Pics'

To help the customer it is then helpful to create a windows shortcut on the desktop to the '?:\SX\SXCO1\PICS\INBOX' to allow them to check the scanned docs once done.

Input Docscan licence Key

Before install, the sales dept will have ordered a Docscan licence key for the site in question and should have forwarded it to the member of staff doing the installation. These details need to be entered as follows:

- Open Docscan
- Click "*Help*" -> "*Registration*" and enter the Licensee and License Keys provided by SolarSys
- click [**OK**].

Selecting the Scanner

When in Docscan, the scanner that has been installed needs to be selected as the default scanning device.



PLEASE NOTE: This will only need to be done once at Docscan install.

- To Choose Your Scanner Go "*Twain*" -> "*Select Source...*" and choose the device that you will be using for scanning.

Optimising Scanning Defaults

Adding Platinum Template files

To make scanning a more trouble free process for the customer, it is possible for Docscan to use a template file that includes all the required settings for successful scanning, these can be downloaded from here

These files need to be stored in the '**C:\Program Files\SolarSys\DocScan Pro\Templates**'.



Tip: If you Delete the original content of this folder and extract the above zip file here this will backup the originals and give you the platinum template file in one go.

Setting Default Scan Location



IMPORTANT INFO FOR WINDOWS 7 and above USERS: If Doc scan is installed on a windows 7 PC, as the explorer program seems a little more aggressive than that of other versions of windows when it comes to remembering the last folder viewed in explorer. This makes the following steps even more important.

As windows has a tendency to remember the last folder used in the save as browse screen Docscan then changes the **"Docscan.ini"** with the last viewed path and can also change the last used template file (This is a problem if the customer selects the wrong one by mistake.

The solution is to change a file stored in the docscan installation folder called **"Docscan.set"** This file overrides settings in the **"docscan.ini"** files regardless of whatever they may be.

Changing the DOCSCAN.SET file Automatically

You can download the original DOCSCAN.SET file (for backup) and the amended Platinum one [Here](#). Simply extract these files to the Docscan installation folder and overwrite the originals.



WARNING: These "automatic" files are set for the Default config of Platinum and as such the Inbox folder specified is **'P:\SX\SXCO1\PICS\INBOX'**.

Changing the DOCSCAN.SET file Manually

Open the **"DOCSCAN.SET"** file stored in **'C:\Program Files\SolarSys\DocScan Pro'** with Notepad and look for the the following lines



WARNING: The Semicolons at the start of each line in this file (;) work like a REM in a Batch file if the line has a ";" at the start that line is ignored in the Docscan.set and the relevant setting is used in the **"Docscan.ini"** instead

In the [FORM] Section look for

```
;BaseFolder=C:\My Documents\scans
;StartFolder=C:\My Documents\scans
```

and change this to (where P:Sx\ is the Platinum install folder)

```
BaseFolder=P:\sx\SXCO1\Pics
StartFolder=P:\sx\SXCO1\Pics\INBOX
```

in the [TEMPLATE] Section look for

```
;[Template]
;Name=MyTemplate.tem
;Folder=C:\MyScans\Templates
;UseTemplate=1
;NameF2=C:\MyScans\Templates\MyTemplate1.tem
;NameF9=C:\MyScans\Templates\MyTemplate2.tem
```

```
;NameF10=C:\MyScans\Templates\MyTemplate3.tem
```

and change this to (where 'P:Sx' is the Platinum install folder)

```
[Template]
Name=C:\DocScan\Templates
UseTemplate=1
Folder=C:\Docscan\Templates
UseTemplate=C:\Docscan\Templates\Platinum.tem
;NameF2=C:\MyScans\Templates\MyTemplate1.tem
;NameF9=C:\MyScans\Templates\MyTemplate2.tem
;NameF10=C:\MyScans\Templates\MyTemplate3.tem
```

Once this is changed, Docscan will always open in the 'P:\sx\SXCo1\Pics\INBOX' and will always remember which templates to use, this will be shown at the Top and Bottom left of the Docscan screen as it opens.

Setting Up the Docscan Screen for Best use with Platinum

To ensure Docscan runs as fast as possible when being used as a viewer in Platinum the view setup of the main screen needs to be setup as follows:

- Open Docscan
- Goto "View"
- Make sure there are **NO** ticks against the following options
 - Show Explorer Panel
 - Show Find Panel
 - Show Page Thumb Nails
 - Show Document Description
 - Show Document Thumb Nails
 - Show Word List

This will ensure Platinum runs as fast as is possible.

Configuring Platinum

Setting the Inbox Location

- Make sure you have created an INBOX folder in the relevant ?:\SX\SXCO?\Pics folder
- Log into Platinum and go to "Logistics Management" -> "Maintenance Options" -> "Parameters".

If the following message appears:

```
Other users are in this copy of the software.
Do you still want to enter this option?
```

- Click [Yes]
- Select "General Parameters 2".
- Set the "Scanned Document Path :" to ?:\SX\SXCO?\PICS\INBOX

Setting the Platinum Scanning Defaults

- Log into Platinum and go to Reports & Parameters -> Maintenance Options -> System Administrator.

If the following message appears:

```
Other users are in this copy of the software.
Do you still want to enter this option?
```

- Click **[Yes]**
- select "System Parameters"
- page down to the "Utilities" page (Page 6).

On the Utilities page there is also a Setting headed "Scan Program to Use", in which the default setting should read something like:

```
C:\Program Files\SolarSys\DocScan Pro\DocScan.exe
```

This needs to be amended to match the installation folder used in the Installing Docscan section above (e.g. **C:\Program Files\SolarSys\DocScan Pro**)

On the Utilities page there is also a Setting headed "Scan Parameters", in which the default setting should read something like:

```
/s=c:\SX\SXCOL\PICS\TI\~n.TIF /C
```

This needs to be amended to the following:

```
/s=c:\SX\SXCOL\PICS\~m\~n.JPG /Z /Q
```



PLEASE NOTE: Where c: is the drive containing your Platinum system and should be changed as appropriate



TIP: The /Z in the above parameter opens Docscan and then runs it minimized in the Startbar allowing to never be seen by the user but accessible should they need to view any scans and the \Q Provides quicker scanning to large network folders by processing everything locally before moving the scanned file to the network folder.

Configuring Platinum Documents

Depending on the age of the Platinum installation you may need to update the Logistics ticket document format download here you will then need to compile the format within "Systems" -> "Reports & Parameters" -> "Maintenance Options" -> "System Administrator" -> "Amend document formats" -> "Logistics Management."

APPENDIX - OLD SETUP INFO (History Purposes Only)

Make Docscan Default Viewer for .Tif/.Tiff Files



PLEASE NOTE: This is no longer used as we now scan to Jpeg files for faster viewing

All .Tif and .Tiff files will need to be associated to open in Docscan by default. This can be done by

following these steps:

Go to "*My Computer*" -> "*Tools*" -> "*File Types*" and find the ".Tif" and ".Tiff" files in the list and click **[Change]** in the **Details** section to use '**Docscan.exe**' stored in '**C:\Program Files\SolarSys\DocScan Pro**' to open any files scanned by Docscan.

Setting Default Scan Parameters



PLEASE NOTE: This is no longer used as we now use the templates to set all these settings

This will save the customer saving documents in the wrong format in no template file is used by mistake

- Click "*File*" -> "*Scan New Document*" to open the "**Document Title & Scan Options**" window.
- Click the "Scan Options" tab at the top and then ensure the following settings are set.

■ File Type

- Select '**Jpg**' in the file type list

■ Scanner Settings

- Uncheck "Use scanner's dialog"
 - Set Image = Colour
 - Set Resolution = 200
 - Set Page Size = A4
- Now click **[Cancel]**. (Your settings **will** be saved).



WARNING: This is required, else reprinting of the scanned images will not be A4.



Tip: These settings can be automatically setup by using a the supplied template files. This sets all the dpi, colour and and size settings for you. These also allows docscan to read a barcode from a page and name the file using the wording specified by said barcode.

- Once all these options are set the DocScan Pro setup will be complete.
- Close DocScan via "File -> Exit".

See also

- Guidelines on Scanning POD's to Logistics Management Ticket

Retrieved from "http://thrash.catalyst/mediawiki/index.php?title=Installing_SolarSys_DocScan"

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