



ScanSnap Setup for QCDocs Desktop

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QC Docs Desktop *ScanSnap Setup*

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About the User Guide

Welcome to QCDocs Desktop Scansnap Setup. Combined with QCDocs Process Control Portal and Desktop software, the Fujitsu Scansnap becomes a truly amazing device for enabling a comprehensive paperless office. This guide provides the setup instructions for ensuring that you get the most out of your Scansnap software and to ensure that it works seamlessly with the QCDocs Desktop.



Conventions and Symbols

This guide uses several basic conventions, formatting changes and symbols to highlight information and illustrate processes with QCDocs Desktop.

Notes



Notes are used to highlight information or point the reader to other resources.

Shortcuts



Shortcuts offer ways to save time by speeding up regular processes.

Best Practices



Best Practices highlight proven methodologies for regular tasks.

Menus Entries, Buttons and Interface Elements

Menus, buttons and other Interface Elements are bolded. For example:

Click the **File** menu, then select **Save**.

Scan Snap Setup Guide for QC Docs:

This guide should be read in conjunction with the standard installation software provided with the Fujitsu ScanSnap. Once you've installed the software that comes with your ScanSnap use this setup guide to optimize your settings for use with the QC Docs System. We recommend pre-setting three different QC Docs specific ScanSnap Profiles but only the single page image profile is essential.

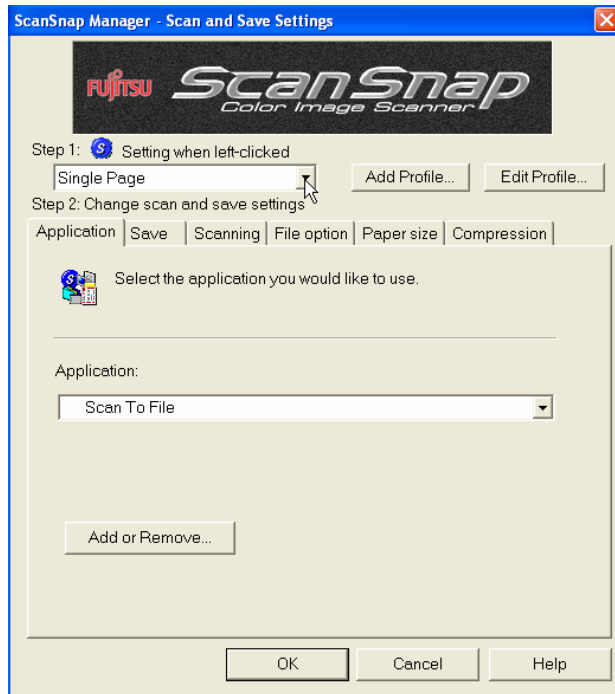
Custom QC Docs Scansnap Profiles:	Format	Benefits/Disadvantages
Single Page Image	JPEG	<ul style="list-style-type: none"> • Extremely fast for volume transaction entry • Fast viewing over the web using the Corporate Portal • Full document stamping features available • Can still be exported from QC Docs to PDF but not optimal PDF settings • Image files are definitely easier to manage, faster to view and enable more functionality within the QC Docs System.
Multipage	PDF	<ul style="list-style-type: none"> • Maximizes multipage document resolution and minimizes PDF file size • Simple, easy access to cleared cheque records for audit

Single Page Image Profile (“Single Page”)

This setting allows you to just plug and play with this scanner and QC Docs. You simply put your documents into the scanner and press the scanner button. This can be done with QC Docs operating or not. Next time you log into QC Docs or if you've got it open go to Acquire (or press refresh if your there all ready) and you will find all the documents in the QC Docs Acquire section. You then just follow the QC Docs Acquire instructions and you're done!



Items **bolded** are **not default** settings so pay particular attention to these items.



- A. Double right click on the ScanSnap Manager in the System tray or open through Programs.
- B. Select **Add Profile** – Type in “Single Page” or “Single QC Docs”
- C. Tab Application: Change Application to **Save to File**
- D. Tab Save:
 - a. Change image saving folder to **C:\Programs\QC Docs Desktop\ScanInbox** (You may need to modify if you installed your QC Docs Desktop elsewhere)
 - b. Leave default name and don't click rename file after scanning
- E. Tab Scanning:
 - a. Image Quality: Normal
 - b. Color Mode: **Color**
- c. Scanning side: Duplex (double-sided).
- d. Do not check “Continue scanning after current scan is finished”
- e. Options:
 - i. Normal
 - ii. Select allow automatic blank page removal and allow automatic image rotation.
 - iii. You may or may not want to set the document with its face up... whatever your preference
- F. Tab File Option: **JPEG**
- G. Tab Paper Size:
 - a. Select Automatic detection,
 - b. Select Scan mixed paper size**
- H. Tab Compression:

Default is just fine but higher compression will result in QC Docs operating a bit faster but resolution of images degrades but not significantly so up to your preference (default recommended).
- I. Select Okay

Multipage PDF Profile (“Multipage PDF”)

This setting allows you to save documents into PDF format before they go into QC Docs. This is effective if you’ve got a longer document that you want to get into PDF format anyway (ie. A legal contract). Note that QC Docs images once uploaded as multiple file documents can be exported into PDF however the resolution and file size may not be as optimal as if you scan directly into PDF initially (ie. Why you may want to use this function)

- J. Double right click on the ScanSnap Manager in the System tray or open through Programs.
- K. Select **Add Profile** – Type in “Multipage” or “Multipage QC Docs”
- L. Tab Application: Change Application to **Save to File**
- M. Tab Save:
 - a. Change image saving folder to **C:\Programs\QC Docs Desktop\ScanInbox** (You may need to modify if you installed your QC Docs Desktop elsewhere)
 - b. Leave default name and don’t click rename file after scanning
- N. Tab Scanning:
 - a. Image Quality: Normal
 - b. Color Mode: Auto Color Detection
 - c. Scanning side: Duplex (double-sided).
 - d. Do not check “Continue scanning after current scan is finished”
 - e. Options:
 - i. Normal
 - ii. Select allow automatic blank page removal and allow automatic image rotation.
 - iii. You may or may not want to set the document with its face up... whatever your preference
- O. Tab File Option: PDF
- P. Tab Paper Size:
 - a. Select Automatic detection,
 - b. Select Scan mixed paper size**
- Q. Tab Compression:

Default is just fine but higher compression will result in QC Docs operating a bit faster but resolution of images degrades but not significantly so up to your preference (default recommended).
- R. Select Okay



A fantastic benefit of the Scansnap is how easily it handles smaller/duplex scanning such as cleared cheques. You can have a 100 cleared cheques and using the scansnap you can have them conveniently into a nice PDF file and achieved in QC Docs in a few minutes.

Tips on Using the ScanSnap

Going paperless is easy if you don't cut corners with scanning. Ensuring that documents are accurately and completely scanned into QCDOCS will minimize any hassles at a later stage. In this regard the QCDOCS Desktop Acquire function has been designed to ensure that documents are scanned accurately and completely.

Hand Feed Documents:

The ScanSnap is a remarkably fast scanner for its size and as such the time that it takes to hand feed the scanner is minimal. Hand feeding the scanner minimizes the possibility of two pages sticking together or partial page scans.

Setup a Good System for opening mail and scanning routinely

Best practice would have an orderly system of ensuring all back office correspondence and documents for filing get routed to a single in basket for processing. Having designated authorized personnel open and scan documents into QCDOCS in a timely manner is ideal to ensure the process becomes second nature.



We'd suggest scanning all mail other than marketing materials and use the privilege Recycling Bin function in QCDOCS. This allows management to be able to see everything that comes through the mail and even items that users have deleted from the system (a strong fraud prevention control).

Get a Scanned Stamp or a System for marking Scanned Documents

Accidentally scanning documents multiple times can be a waste of time so we recommend that you get a scanned stamp (inquire with QCDOCS Systems Customer Service to order a \$75 scanned stamp www.qcdocs.com/Support).

Document Count Check

The ScanSnap is undoubtedly one of the best scanners on the market for minimizing snags and multiple page feed problems nevertheless these problems are inherent. As such

you should either hand feed pages as suggested above or do a quick count such as scan in smaller groups of ten documents at a time to make sure they're all in the system properly before carrying on.



Be careful with Multipage PDF scanning as sometimes suppliers/vendors/lawyers will send multiple bills in a single package which at first look appear to be a multipage bill. If you choose to scan it as a single PDF QCDocs does not easily manage the multiple bills included in the file. The System is designed to have one file per invoice #. As such be careful to look out for this problem, or better, yet use the **singlepage profile** and use QCDocs **Desktop Acquire** to properly group multipage invoices to prevent this problem from occurring.