# Getting Started with ccScan®

Thank you for your interest in ccScan. This document is designed to help you get started and answer the common questions that hundreds of customers have asked us when learning about our ccScan document capture products. Please take the time to read through all of this information and save it for future reference.

Please Note: ccScan is Windows-based software and installs only on a Windows computer. It will not install on a Window server and will run on a Macintosh computer only if running in a Virtual Machine like Parallels or Fusion hosting Windows.

ccScan's Help file is very extensive. I would encourage you to use it when you have a question. Select "Help" from the ccScan menu bar shown above and then "Show Help" which displays the opening Help screen.
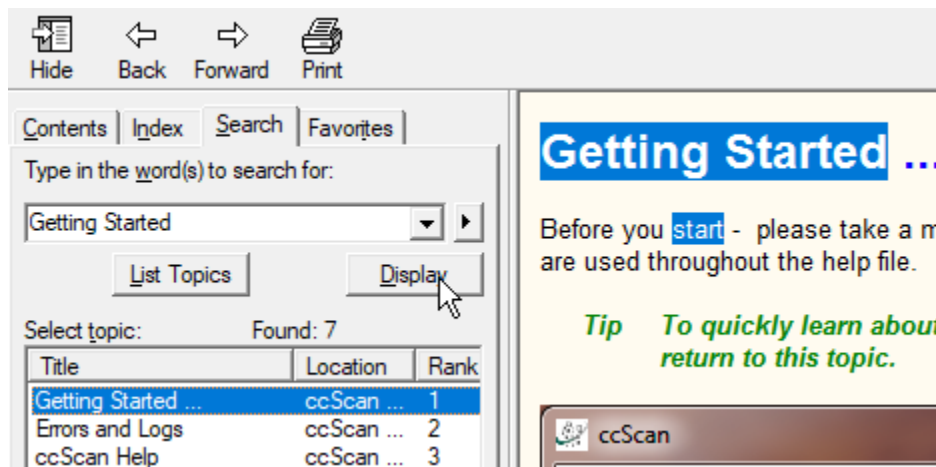

Click on the "Search" tab. Enter a word or phrase to search, for example 'Getting Started'. Press "List Topics", double-click an item or select an item and press "Display." Review the full topic in the right window.

Scan or Import Directly to Salesforce™, Box, SharePoint™, Google Docs™, Dropbox, Amazon S3 and local or network File Systems.

ccScan
Scan Directly to the Cloud

How do I Get Started?

You know that you have a problem moving paper or files to the cloud and you're looking for an easy, efficient way to save time and automatically process your documents for transfer.

If you haven't downloaded a free, 30-day fully-functional Trial of ccScan, I encourage you to click Get Trial. Once you've completed the trial request form you'll receive an email with a download link and an activation key. Download and run the ccScan Setup file, and follow instructions in the email and Setup Wizard.
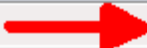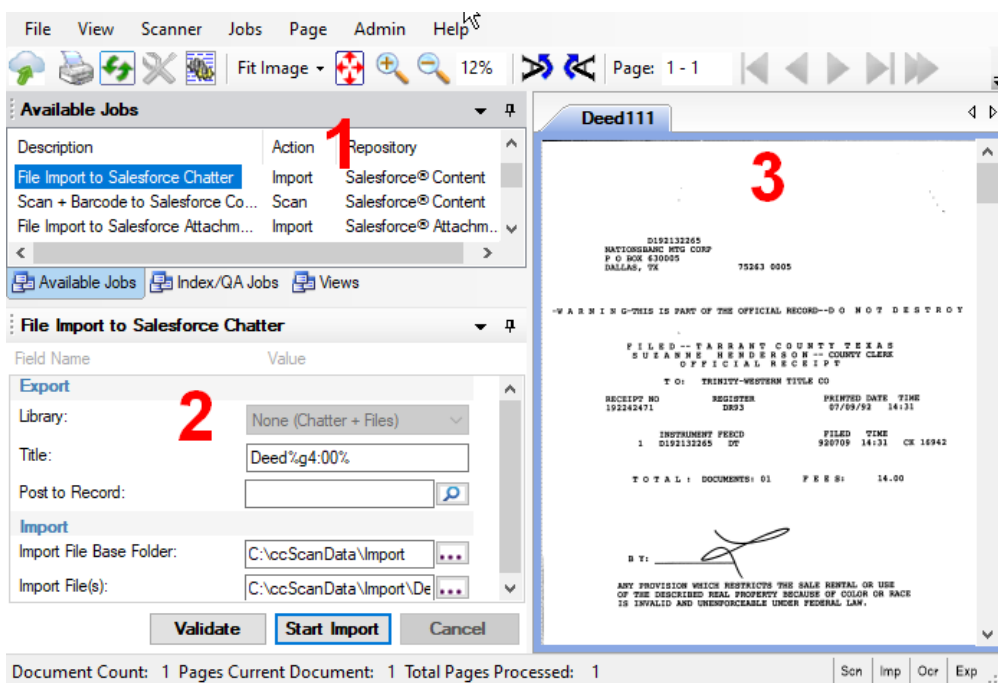

Some Quick Housekeeping …

Once you've added the activation key and processed through the Setup Wizard you will see a window like the above graphic Notice where the big red numbers are stamped:

Window One: This is the **Available Jobs** window. We've given you a number of the sample jobs. The intent is that you modify these jobs so they make sense for your workflow.

Window Two: This is the **Current Job** window showing the current job with job fields visible to help identify or classify the new document. When you create or customize a job you have the ability to display a field allowing the user in real time to enter data. There are many job fields representing properties of the job or provider. But you can see that this job is setup to show only a few fields starting with the Salesforce Library and ending with the Import File to be imported.

Window Three: This is the **Document Window** where you can preview the document immediately after being scanned or imported prior but prior to exporting it to the Cloud.

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The big red arrow in the bottom right-hand corner of the ccScan window, shown above, points to four icons:

SCN= scanning   IMP = importing   OCR = optical character recognition   Exp = exporting

Each icon spins as that task is performed. The blue icon shows that ccScan is exporting a document to the Cloud or a local or network file folder. Watch for these activities as ccScan is running. Also note the Document Count, Page Count and Total Pages Processed.
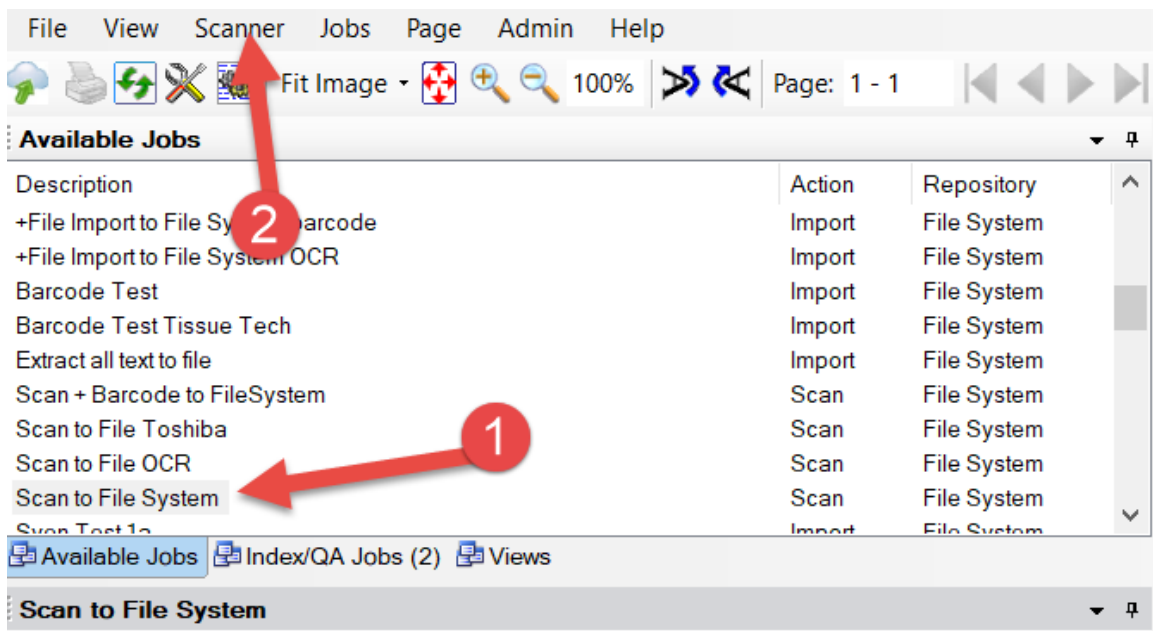
Now let's set up your scanner to communicate with ccScan.

First, in the Available Jobs window double-click on 'Scan to File System'.

Second, pull down the Scanner menu item and click on Select Scanner. This displays a small dialog box named "Select Source" which is imaging lingo for the document scanner, camera or other imaging device.

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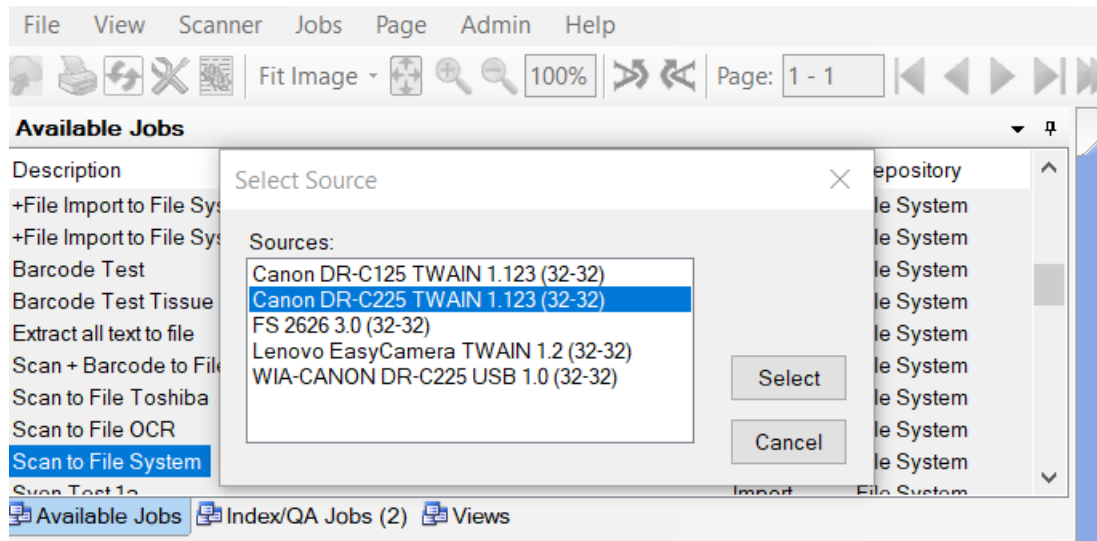
The Select Source dialog looks something like the above. If your scanner is powered on and properly connected to your computer, you should see its name in the Sources list. The names represent all of the TWAIN scanner drivers that are installed on this computer. If the window is blank or does not show your scanner it is probably not connected to your computer. Work with your IT department and properly install the scanner and drivers.

Very important! 'WIA' drivers are not compatible. Select only drivers containing 'TWAIN'

Once you have selected the driver and press OK, you have connected that scanner to every scanning job in ccScan.

Let's test it. But first I'd like to explain the basics of ccScan jobs.

- Every job is either for scaning or importing. You can also view documents in Amazon S3 or local/network files and folders. More of that in the next document.

- Default jobs are provided to help get you started. But you can easily edit these jobs and save them as jobs with different names.

- And you can easily create new jobs from scratch. There is no limit to the number of jobs you create or use.

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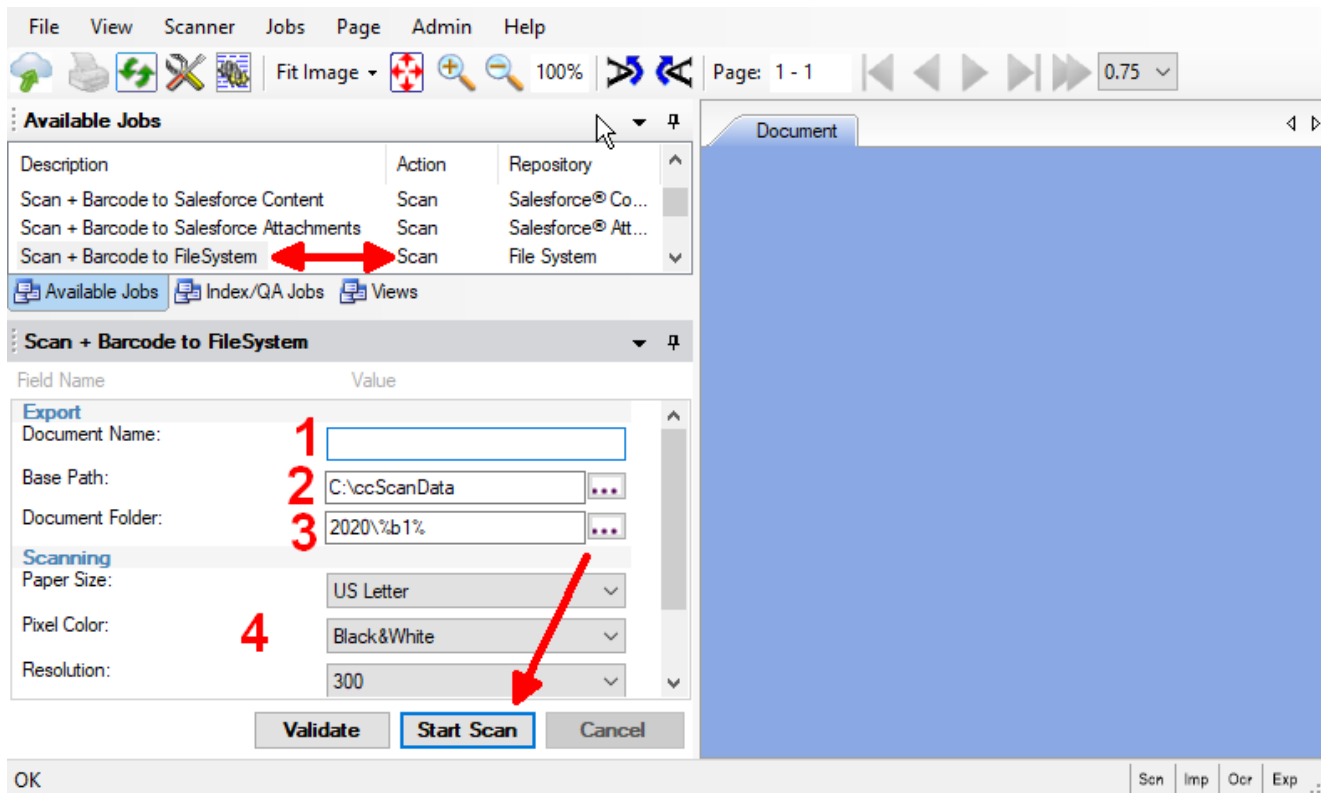
Notice that we selected the **Job Description**: "Scan + Barcode to File System", the **Action** is "Scan" and the **Repository** is "File System."   Jobs are quite similar among other providers.

1 - Document Name – This could be prefilled automatically by the barcode, a incrementing counter or other 'macro' or manually by the user. If using a counter like %g1:00%, part of the document name would be 1, 2, 3 etc. Counter and other macros start and end with %. (More on macros later)

2 - Base Path -- This is a pre-filled path or folder which is the parent folder where document for this job are stored. We have chosen the folder C:\ccScanData which is created by ccScan Setup.

3 - Document Folder – Here is a lower level folder that you might create. It could by the year the document was created or sent. A second folder could be named by a barcode. The barcode value is represented by another macro. This could represents the Month folder. So the final destination of that file would be C:\ccScanData\2020\April and its name could be Order from Roberts Company.

4 – Scanning Settings – These fields can be shown and changed by the user provided in case documents change size, color or resolution in dots per inch. Many additional scanner properties can be set so you don't need to go into the scanner manufacturer's settings dialog, which is often confusing.

Finally, load a document into the scanner and click the "Start Scan" button at the end of the large red arrow. The paper should move quickly through the scanner and create a file in that export folder. You will see the pages as they are scanned. Don't forget to take a peek at the bottom right-hand corner and watched those icons spin as they are working.

Congratulations – you now have ccScan up and running!

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Now it's time to connect the job to the Cloud and start to really save time, money and effort. The idea is to modify an existing job so it works for your particular documents or files. These job changes are done in what we call "Job Setup."
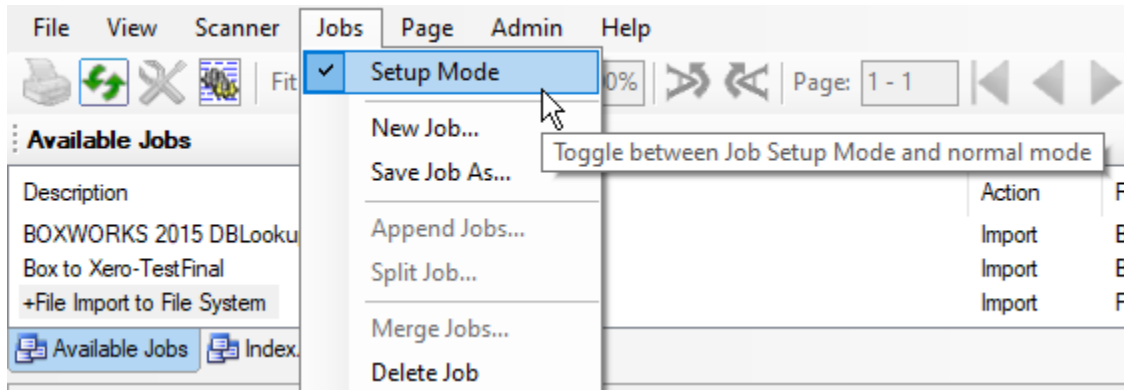
By selecting "Setup Mode" from the drop-down Jobs menu you are able to view every available attribuute. Then adjust those attributes or properties to leverage any automation techniques that your documents or files lend themselves to.

There are three tools for creating automation. OCR for searchable PDF, OCR Regular Expressions (Regex) and Barcodes. Please go to the help file now and read briefly about those tools.

Now review the help file for term "Field Macros".

To begin setting up your jobs to use the structure of your documents or files and select the correct macro for data extraction.

Please assemble some document samples. You will need five of each sample to compare them for consistency. If there are three document types that you will be importing or scanning then you will need 15 samples.

Last task. How many different types of documents will you want to scan or import?

What is the projected volume of scans or imports weekly?

After you have reviewed this information and have your document samples ready and know the different number of types of documents as well as volumes, our team will help you with the next steps.

Please contact Monte Jensen at support@capturecomponents.com or 415-286-1127 to schedule a meeting or call.

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