Scan2Us Help

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Welcome to Scan2Us!

"Connecting your Business to your Business Documents"

Version 2.1.4

Remote Scanner

The Scan2Us Remote Scanner is a standalone software package that enables the user to scan documents, label it for future reference and upload it to the Web based Remote Filing Cabinet.

This process requires a PC workstation with a standard scanning device, internet access and the Scan2Us Remote Scanning software.

A complete Remote Scanning training video is available at the following internet location:
[Scan2Us Remote Scanning Training](#)

Once you have installed the software, updated the FTP information and uploaded your computer ID, User information and Pass Code, you can begin scanning.

Activating the Scan2Us Remote Scanning Software:
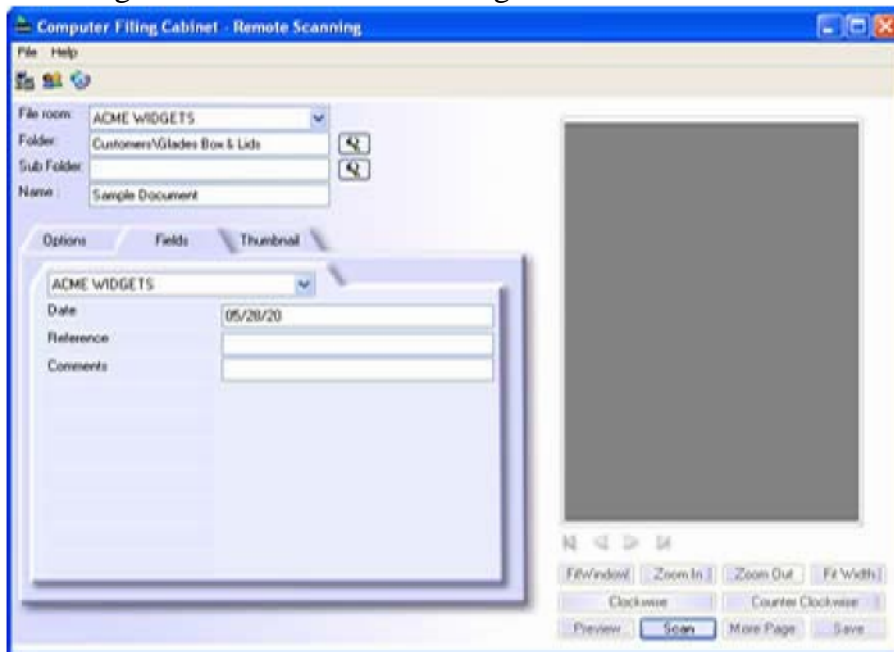
1. From your desktop, select the **CFCRe mote Scan.exe** icon

    or

    select **Start/Programs/CFCRe mote Scan.exe.**

2. Select File/Preferences from the **Menu** bar. (Alternatively, select the **Preferences Icon)**

3. Select the **Communications Tab** and enter:

- Login User Name
- Password

- FTP Port No (21)
- FTP Address (ftp.scan2us.net)

5. Now select the **Registration Tab** and enter:
- Account Name
- User Name
- User Password

- Web server address (httpsi/secure.scan2us.net/WebServices/)

6. Click the **Activate** button.

> (Note: If all the information has been correctly entered, your Activation Key number will be downloaded into your software and automatically displayed.)

7. Click **SAVE.** Your Scan2Us and Print2Us software is activated.
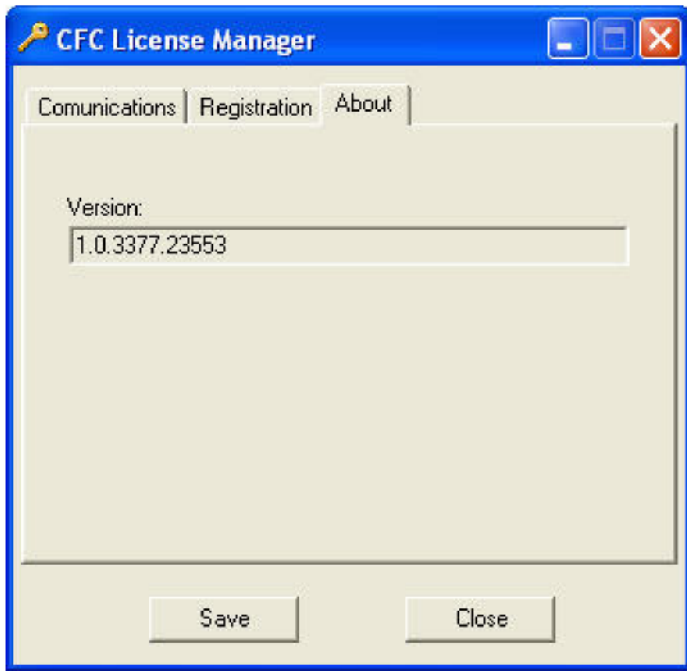
8. This window displays the current version of Scan2Us software.

Print2Us Driver
Print2Us - Standalone
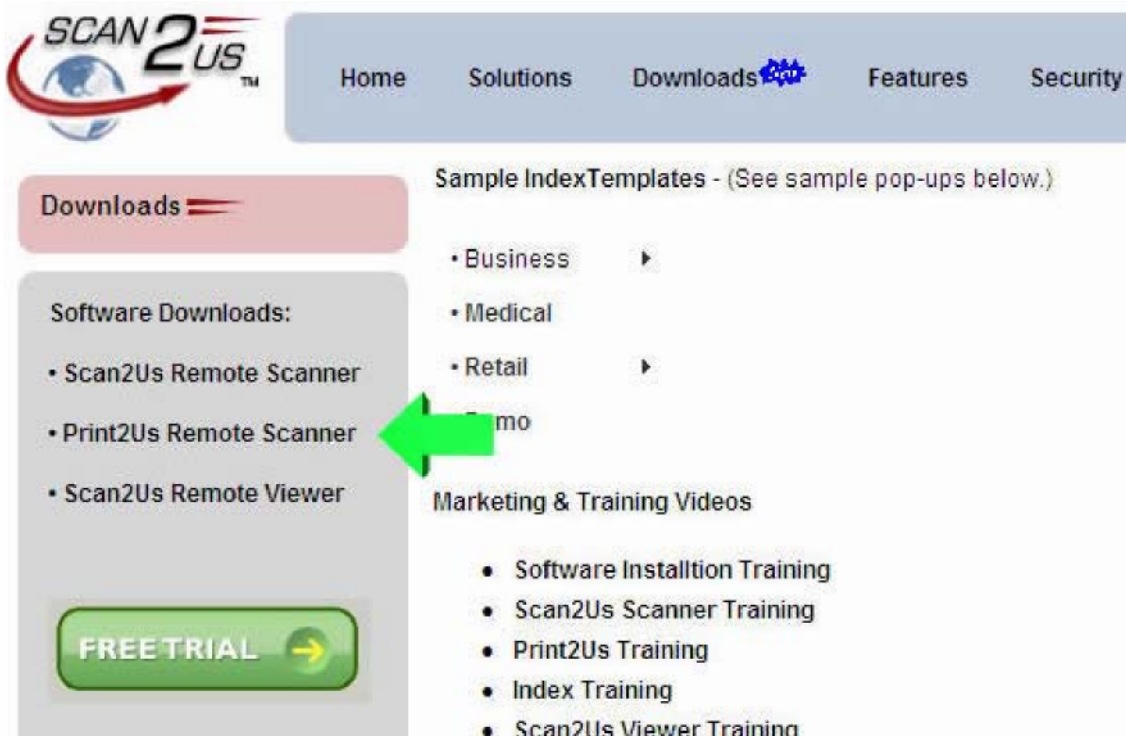
To download a standalone copy of Print to us, go to Scan2Us.com/downloads, select Print2Us download. Follow the directions to load the software onto your system.
A complete Print2Us training video is available at the following internet location:
Print2Us Training Video

Using Print2Us Software
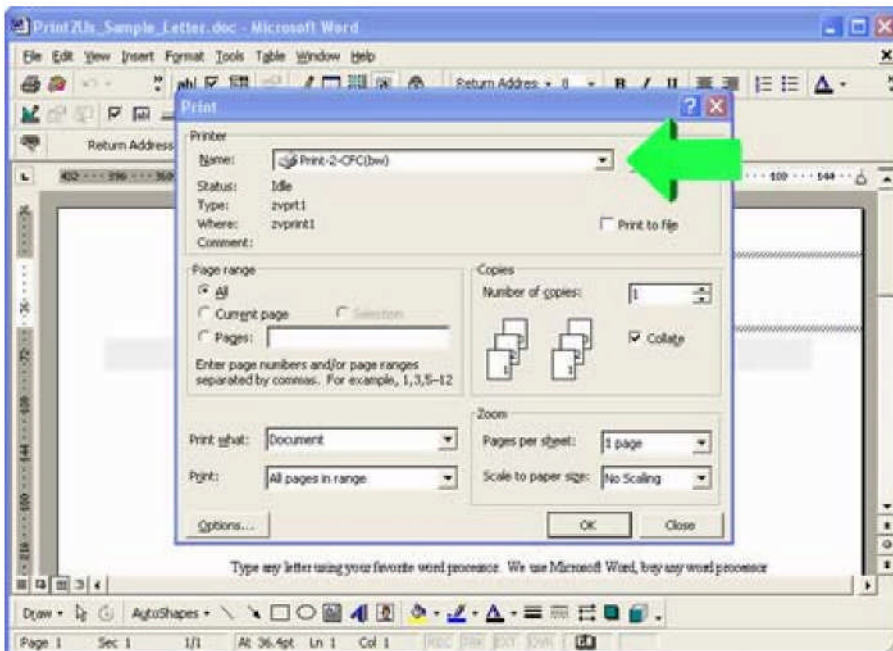
From any document editor, Word, Word Perfect, Excel, Adobe Acrobat, any editor with a print function:
1. Create New Document or Open an existing Document in your editor.
2. Select File/Print
3. Scroll down under Printer Name, to Print-2-CFC (bw). for black and white or Print-2-CFC (color) for color.
   Note: Do not use color setting above 125t DPI . See Scan Screen Control
4. Select Ok.
   Note: If you make Print2Us your default printer, any document from any editor can be uploaded to your Remote Filing System by just clicking on the **Print Icon** from the Editor's menu bar.
5. The Solomon Institute Security Logo appears, click OK. It checks your system ID and opens your Remote Filing Cabinet Uploading software.

Activating your Print2Us Driver - One Time Only
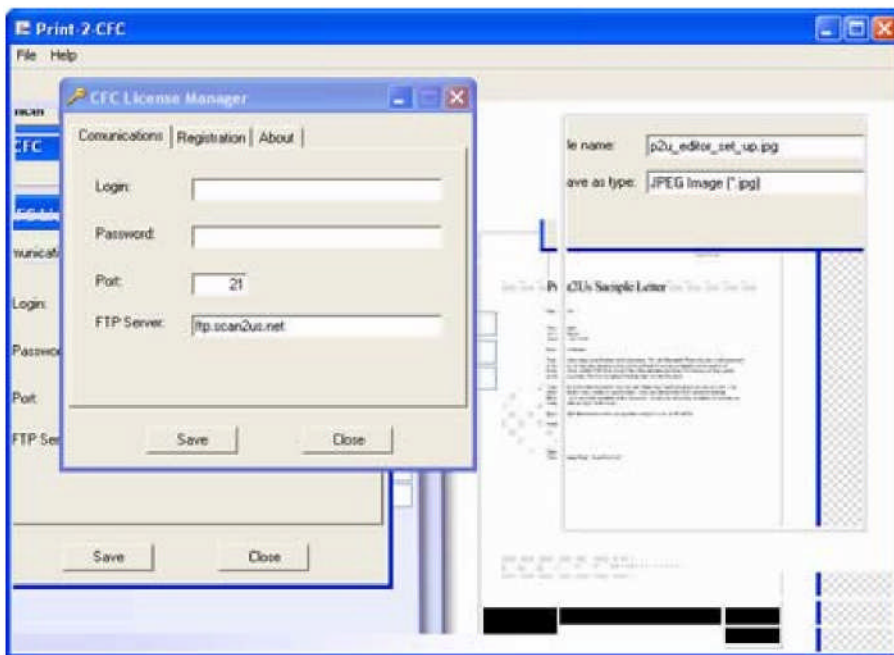
1. Select File/Preferences from the menu bar, Select the Communications Tab.
2. Enter the User Name and Password.
   (If this is the original set up, we will have sent you the Login and Password Information which you can change.)
3. The FTP Port No should be 21 and the FTP address should be ftp.scan2us.net.
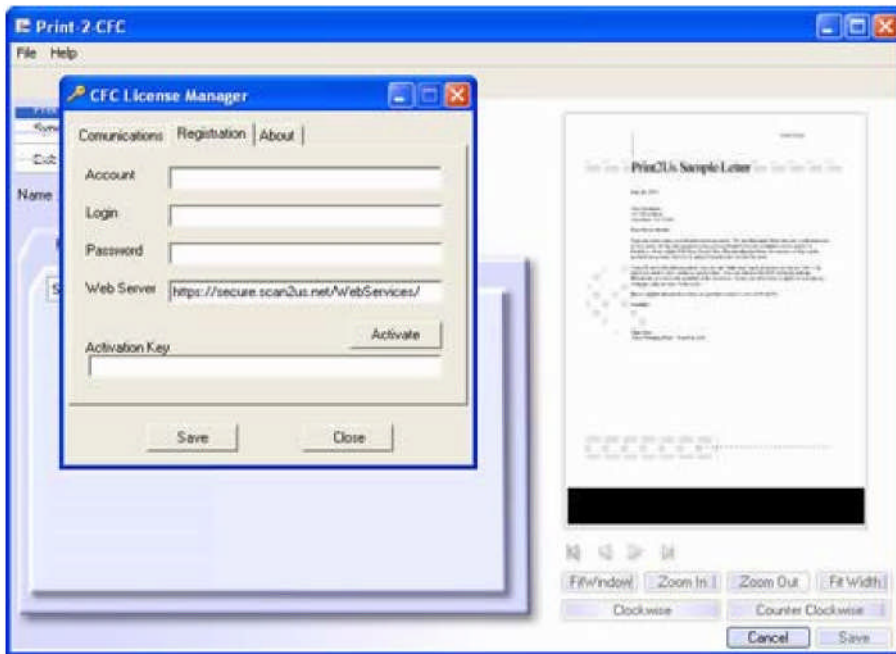
4. Next select the Registration Tab.
5. Enter you Account Name, User Name and Password. The web server entry should be:
   https ://secure .scan2us.net/WebService s/
6. Click on the Activate Key.

   (Note: If all the information has been correctly entered, your Activation Key number will be downloaded into your software and automatically displayed.)

7, Click SAVE to save the changed options. The Scan2Us software is activated.

   You are now ready to upload documents to your Remote Filing Cabinet.

Scan2Us Remote Viewer
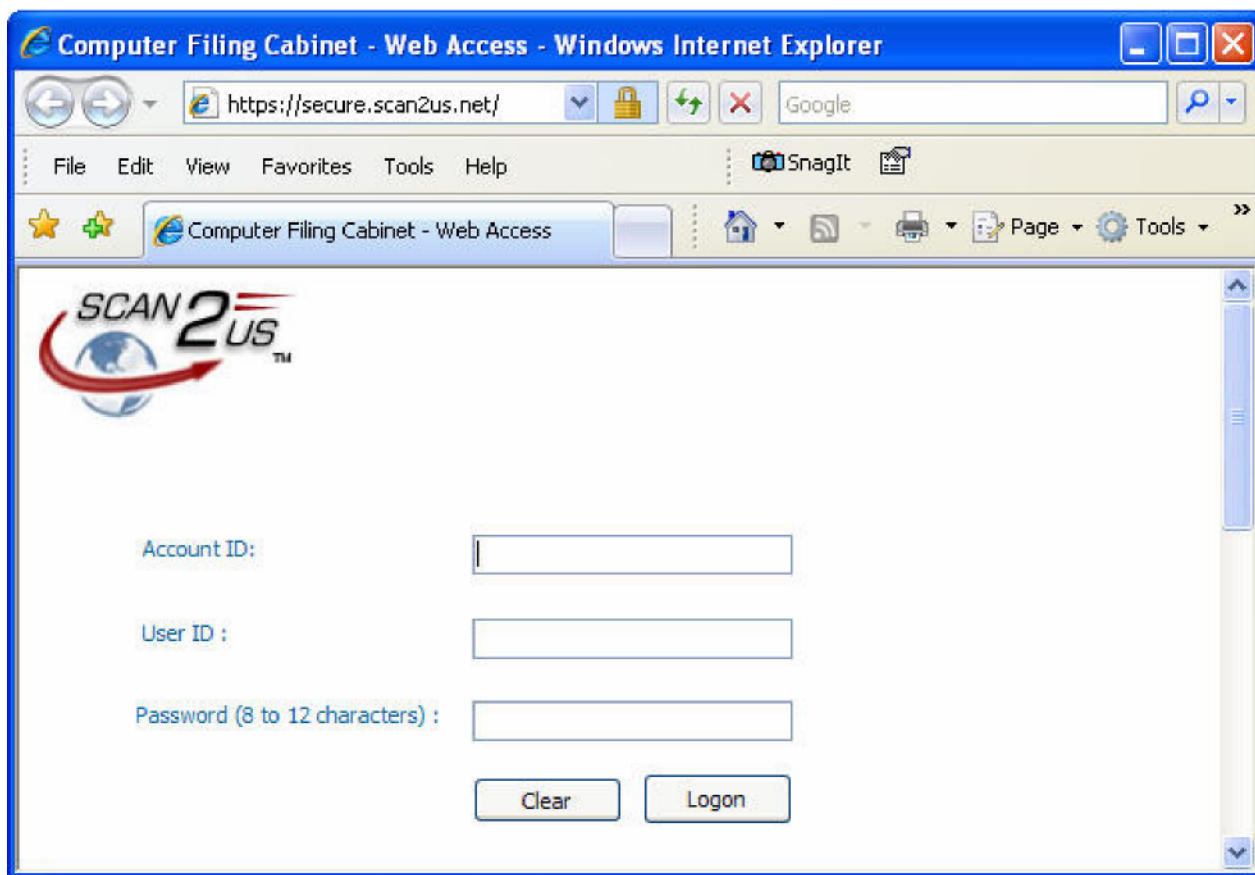
The Scan2Us Remote Viewer allows users to access files and documents from your Remote Filing Cabinet. Each time the Viewer is opened, security is checked. The viewer may be left running idle, but it will be available to anyone who has access to your PC work station.

The Remote Filing Cabinet can be accessed by multiple Scan2Us Viewers, each with individual security parameters.

If you have not placed the Scan2Us Viewer Icon on your Desk top, please go to **Create a Scan2Us Viewer Icon** from the Scan2Us Remote Viewer, How from the Helps Menu.

Gaining Access to your Remote Viewer

1. From the desktop, click on the Scan2Us Remote Site icon.
2. The following screen will be displayed.
3. Enter your Account ID Name, User Name and Password
4. Select Logon.

5. The Scan2Us viewer will be displayed.

End-User License Agreement for Scan2Us

Scan2Us is a "try-before-you-buy" software product. This means:
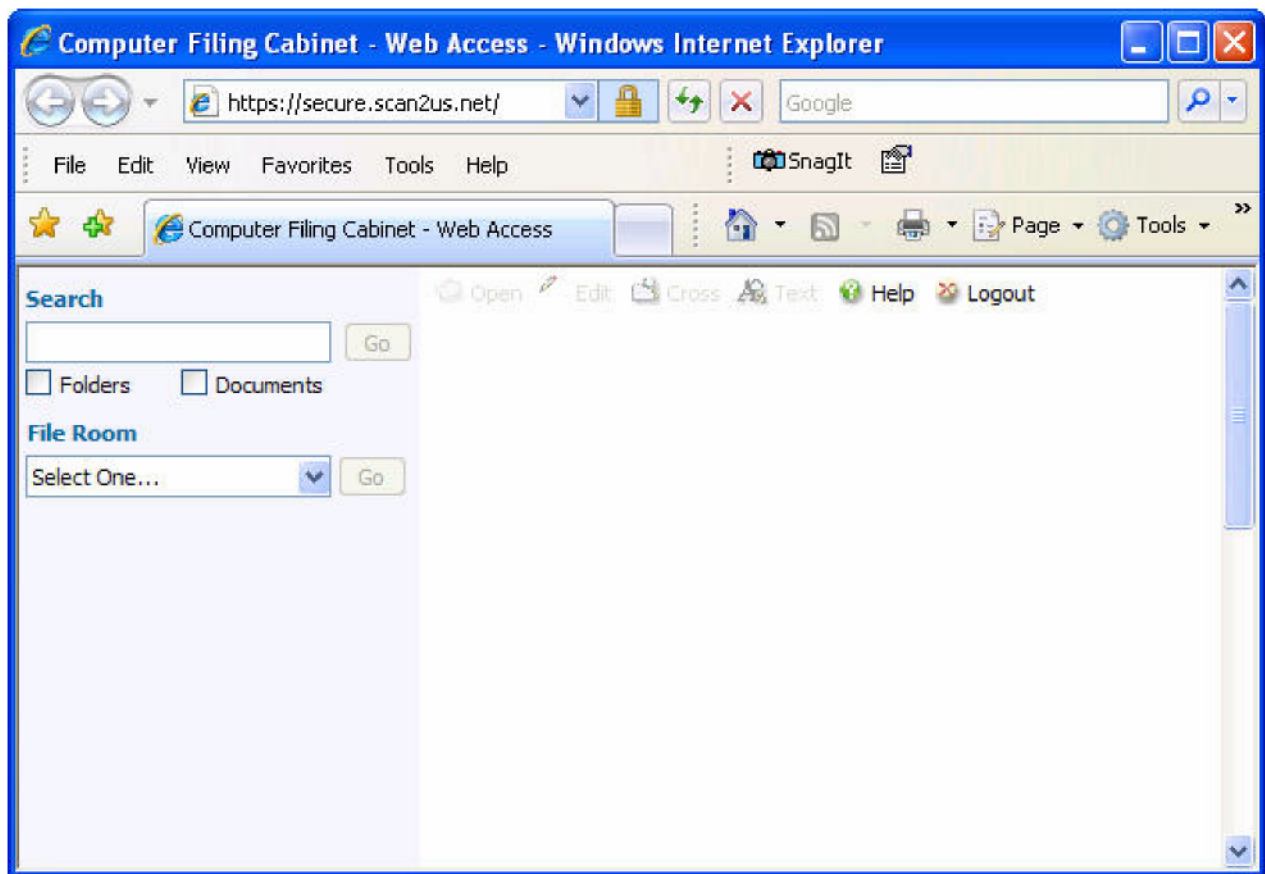
1. All copyrights to Scan2Us are exclusively owned by Scan2Us.LLC.

2. Anyone registered may use this software during an evaluation period of 30 days. If you wish to continue to use Scan2Us after this period, you must register.

3. There are 2 basic types of licenses issued for Scan2Us, these are:

     a. A single computer USAGE license. The user purchases ONE license to USE Scan2Us on ONE computer.

     b. A Multiple USAGE license. The user purchases a number of USAGE licenses for use, by the purchaser, the purchaser's employees or accredited agents, on the same number of computers.

Once registered, the user is granted a non-exclusive license to use Scan2Us on as many computers as defined by the licensing terms above according to the number of licenses purchased, for any legal purpose. The registered Scan2Us software may not be rented or leased, but may be permanently transferred, in it's entirety, if the person receiving it agrees to the terms of this license. If the software is an update, the transfer must include the update and all previous versions.

4. The license key received after registration of Scan2Us may not be distributed. If your license key is found to be published anywhere, your license for using Scan2Us will be terminated.

5. The Scan2Us unregistered copy, may be freely distributed, with exceptions noted below, provided the distribution package is not modified.

     a. No person or company may charge a fee for the distribution of Scan2Us without written permission from the copyright holder.

     b. The Scan2Us unregistered copy may not be bundled or distributed with any other package without written permission of the copyright holder.

     c. Hacks/crack, keys or key generators may not be included on the same distribution.

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7. You may not use, copy, emulate, clone, lease, sell, modify, decompile, disassemble, otherwise reverse engineer, or transfer the licensed program, or any subset of the licensed program, except as provided for in this agreement. Any such unauthorized use will result in immediate and automatic termination of this license and may result in criminal and/or civil prosecution.

8. There are NO additional license fees, except for options that are purchased by the user. Legally registered users may use their copies of Scan2Us to manage documents in any supported format and to distribute those documents free of any additional royalties related to Scan2Us.

9. Installing and using Scan2Us signifies acceptance of these terms and conditions of the license.

10. If you do not agree with terms of this license you must remove the files of the product from your storage devices and cease to use it.

<u>All rights not expressly granted here are reserved by the copyright holder.</u>

How To Order

Three ways to do business with Scan2Us, LLC.

- Download a fully functional copy of Scan2Us online directly from our web site, Scan2Us.com.
- From and authorized Scan2Us dealer.
- Call our offices in Miami, Florida at 1-305-267-4888 ext 2.

The latest pricing information is available on our Web site.

Initial Start-Up Costs	**Remote Scanning Software $495** - Unlimited Viewer Stations (software) - Training Videos Included - E-Support Included - User Blog Included - Index Templates Included - User Security Included - Single User Print2Us Included

Monthly Fees	**Initial File Room - $75 per month**
	
	(500 pages/month & cumulate storage included)
	
	- HIPPA File Room - $80 per month
	- Additional File Rooms - $25 per month
	  (Plus Storage Fees)
	- Additional HIPPA File Rooms - $30/month
	  (Plus storage Fees)

Processing Fees	- Additional pages at 4.5 cents per page - HIPPA Additional Pages 5 cents/page

Options:	**Stand-alone Print2Us $295.**
	
	- Personal Trainer $60/hr
	- In-House Training $495
	- Stand-A-Lone Inhouse Mirror $595
	- Additional Scan Stations (software)
	  ($295/station)
	  (Includes Single User Print2Us)
	- Stand-A-Lone Print2Us User Software
	  ($295/station)

(For Corporate Bulk Terminal Pricing (larger than 5 stations) please call our home office for special pricing)

To download a trial version of Scan2Us, Print2Us or Scan2Us Remote Viewer, go to Scan2Us.com/Downloads. Fill out the short order form, no credit card information is required. We only ask for the information we need to set up your account and File room security. Anytime during your trial period you may purchase the license and activate your software registration. Storage and usage fees are billed monthly.

Upgrades

Legally registered users of Scan2Us, have the right for free upgrades to any newer minor version (for example, from 1.0 to any 1 .x version). Or, have the right for free upgrades to any newer major version (for example, from 1 .x to 2.x, 3.x, 4.x, and so on) if the period is one year since your order date has not yet elapsed or if the period is one year since your last paid major version upgrade has not yet elapsed.

In other cases, you have the right to receive a 50% discount from our current retail price for an upgrade to any newer major version of Scan2Us.

For more information about recent releases, please visit our Web site at:
Scan2Us downloads

File Room

The File Room can also be thought of as the File Cabinet. It is the container of all your documents in your Remote Filing System.

- · You can have more than one File Room/Cabinet
- · Each File Room/Cabinet has an independent Security System
- · Each File Room can contain "n" number of File Drawers and Folders.
- · Each Folder can contain "n" number of Documents

If you have a Single File Room system, that File Room will displayed automatically. If you have multiple File Rooms, Scroll down to the selected File Room.
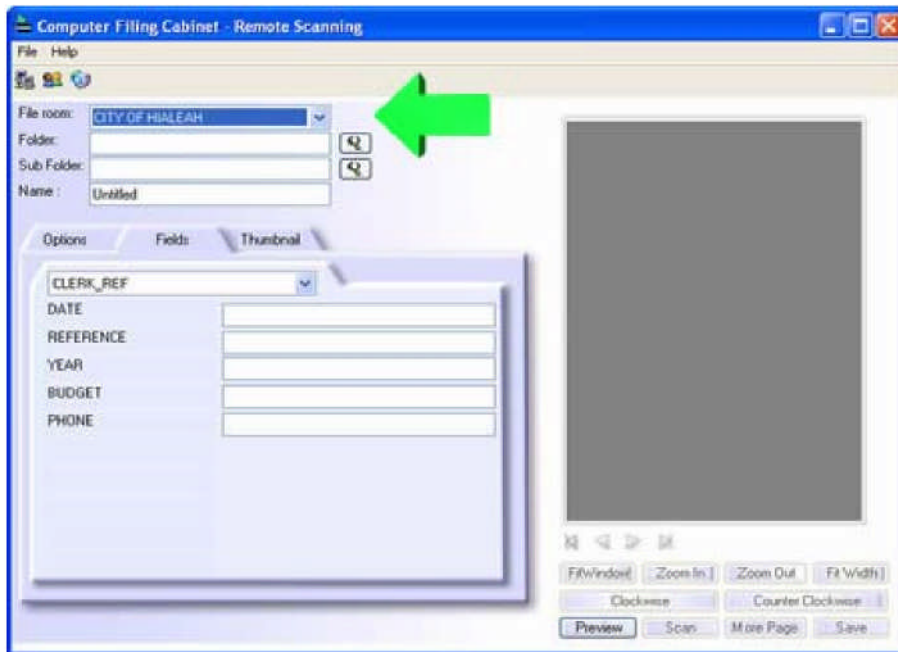
Notice how the File Room Name appears within your Remote Filing Cabinet, file folder. It is the first identification of the document and is totally searchable.
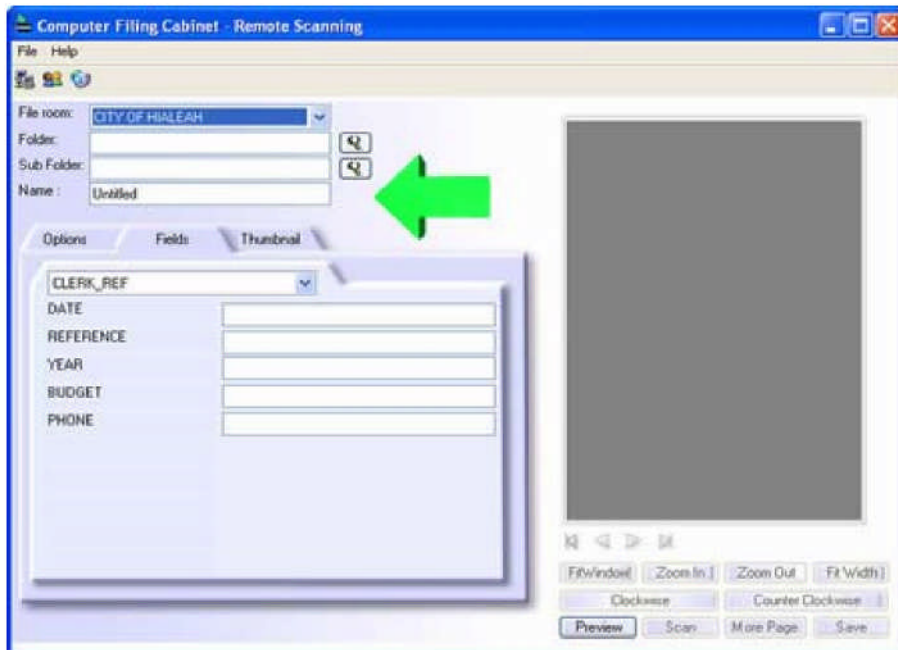
See also:

[File Room Security](#)

Document Name

Enter the name of the Document

Use a name which is the most specific description of the document

Notice how the document name appears within your Remote Filing Cabinet. The file folder, or file drawer contains the Sub-folder or folders in the file drawer. It is the primary identification of the document and is totally searchable.
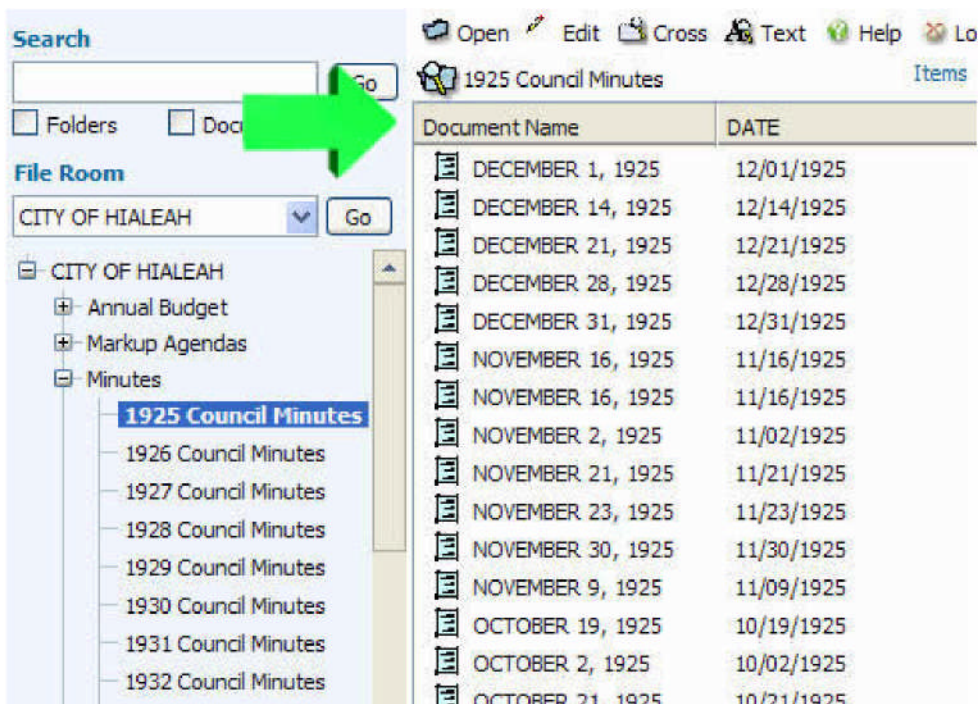
Folder/Drawer

The Remote Scanner

This is the name of your File Cabinet/Drawer within your File Room if you have a single File Room. If you have multiple File Rooms, then think of this as the File Cabinet. It might be labeled, Invoices, Payroll, Account Payables, Sales, etc. Once you become familiar with the file structure of your filing cabinet you will have no trouble placing documents in the proper folders.
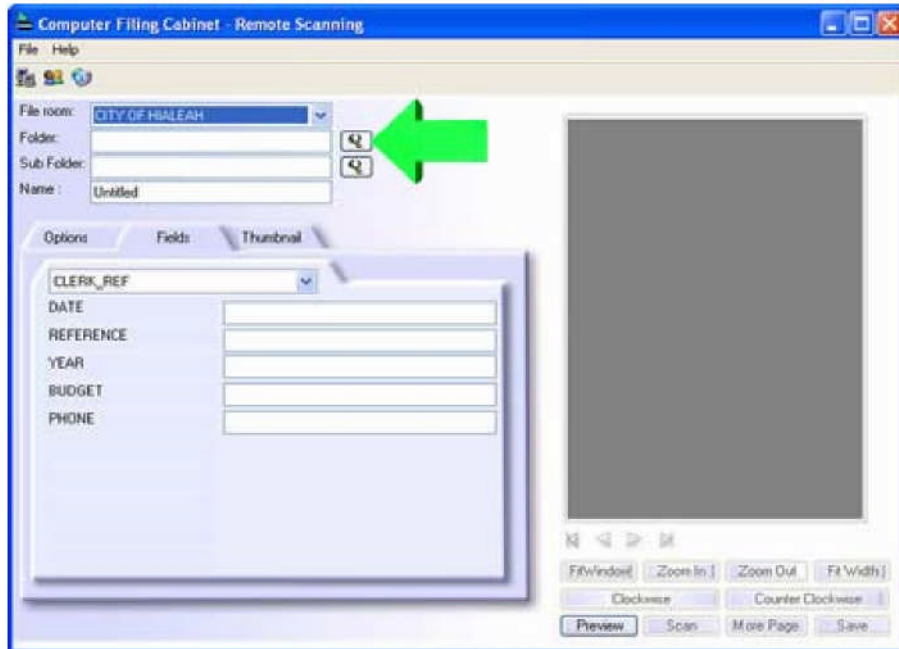
Remote Viewer

Within the Remote Viewer the information you place in Parent in the Scanner shows up here in the Viewer.
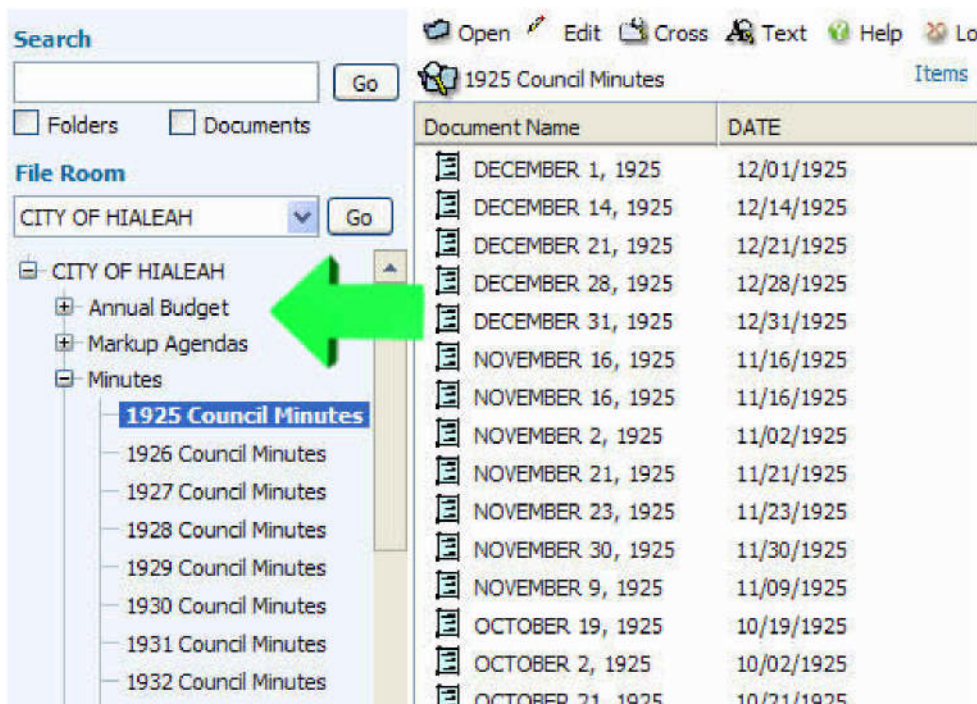
Sub Folder/Folder

In the Remote Scanner

You will place your documents, which may be a single page or multiple pages within the Cabinet, Drawer or File Folder. You might label the Sub/Folder with the name of an Employee, to be placed in the Payroll Drawer, or a Vendor placed in your Payables Drawer, or a Customer placed in your Sales Drawer.
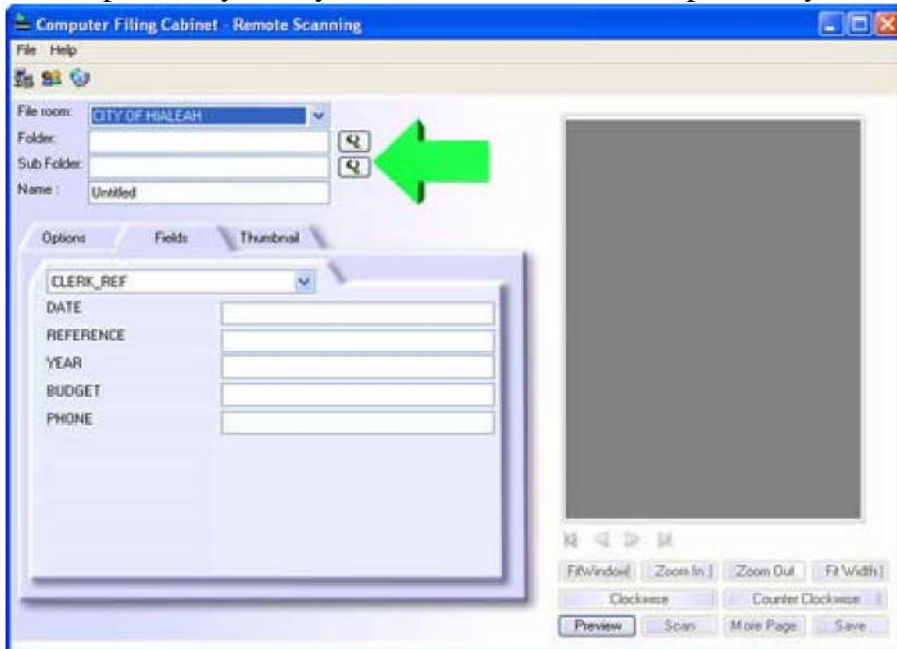
In the Remote Viewer

And in the Viewer this would be the document within a sub folder.

File Naming and Structure:
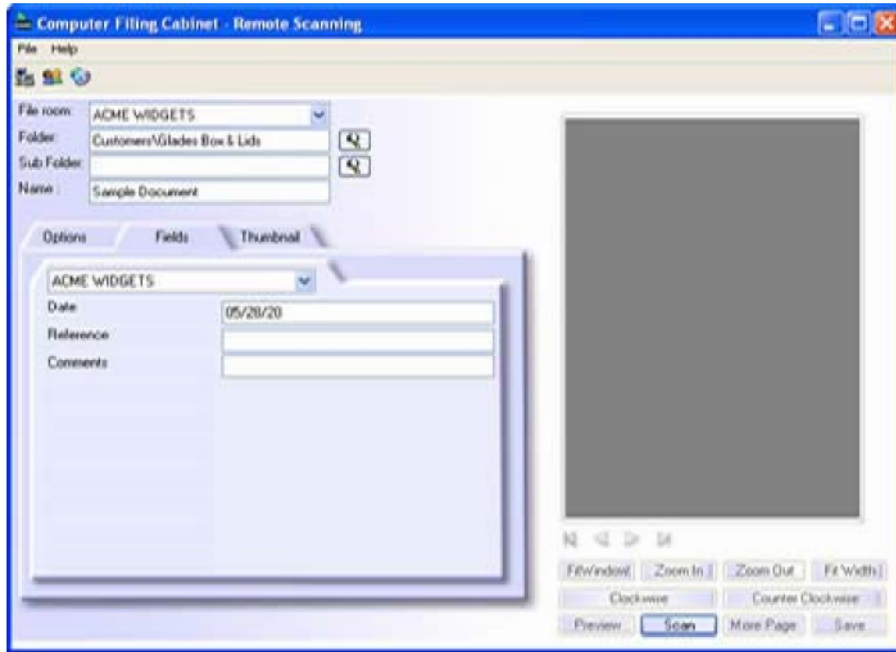
Notice the File Structure Naming Conventions used on the Scanner Window.

1. File Room
2. Folder
3. Sub Folder
4. Name
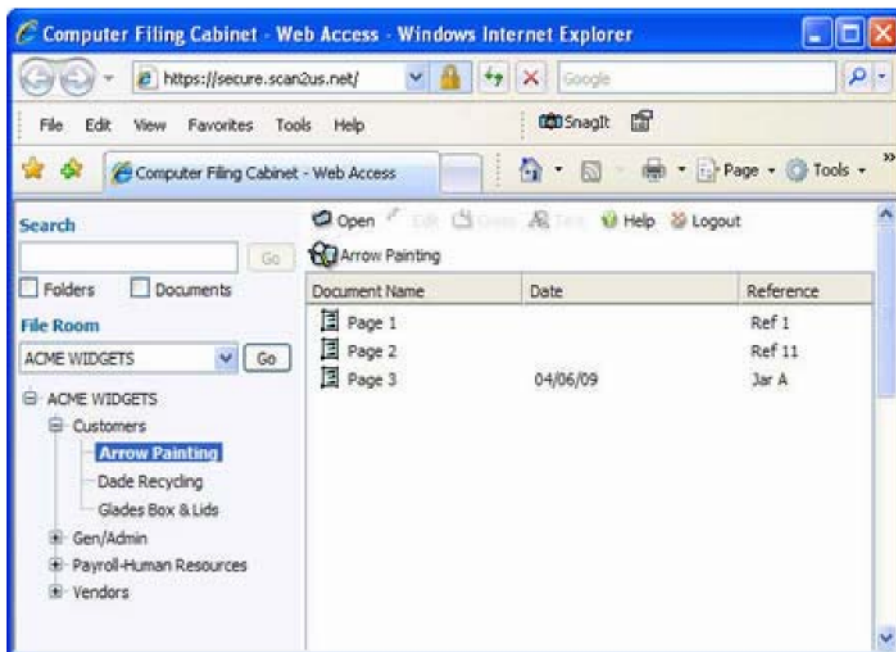
That translates in the Viewer as follows:

1. File Room - The root of the file structure. Shown here as Acme Widgets.
2. Folder - Here we have four main folders, Customers, Gen/Admin, Payroll-Human Resources and Vendors.
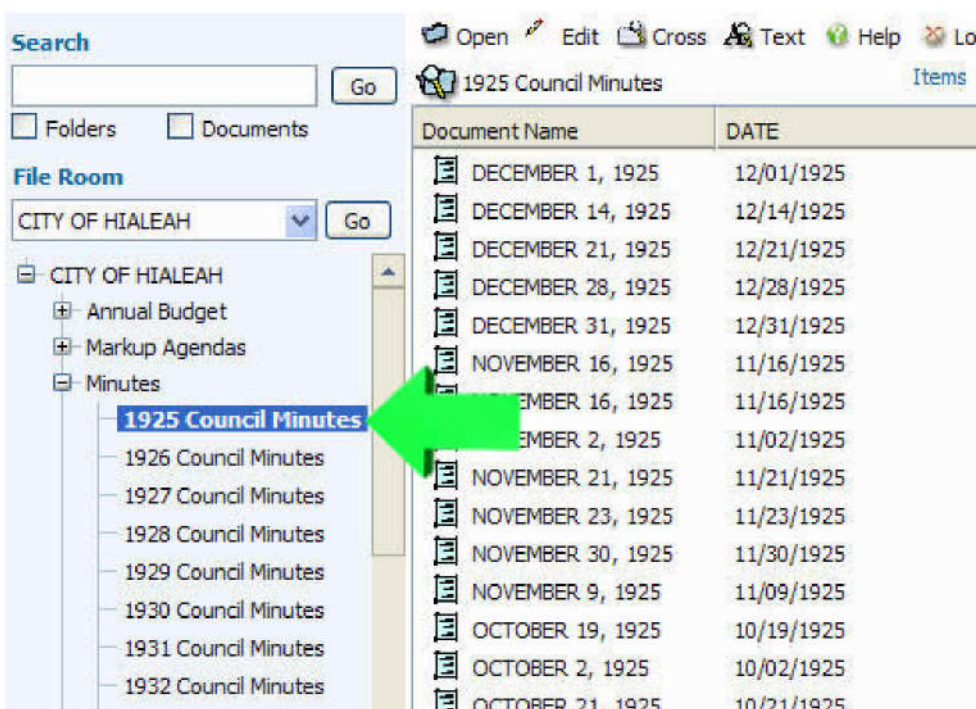3. Sub folder - Within the folders are sub folders. In this example, under the folder labeled Customers, we have Arrow Printing, Dade Recycling and Glades Box & Lids.
4. Name - Within the Sub folder Customers are the documents, in this example there are three single documents Page

1, Page 2 and Page 3.

Note: You can create sub folders under a previous sub-folder, but it is highly discouraged. This feature is permitted because there may be some limited situations when that type of file structure is needed. For most applications you need only three levels of file structure above the actual document. If you need additional help is the area, please visit support.scan2us.com and we will do our best to help you.

Options Tab

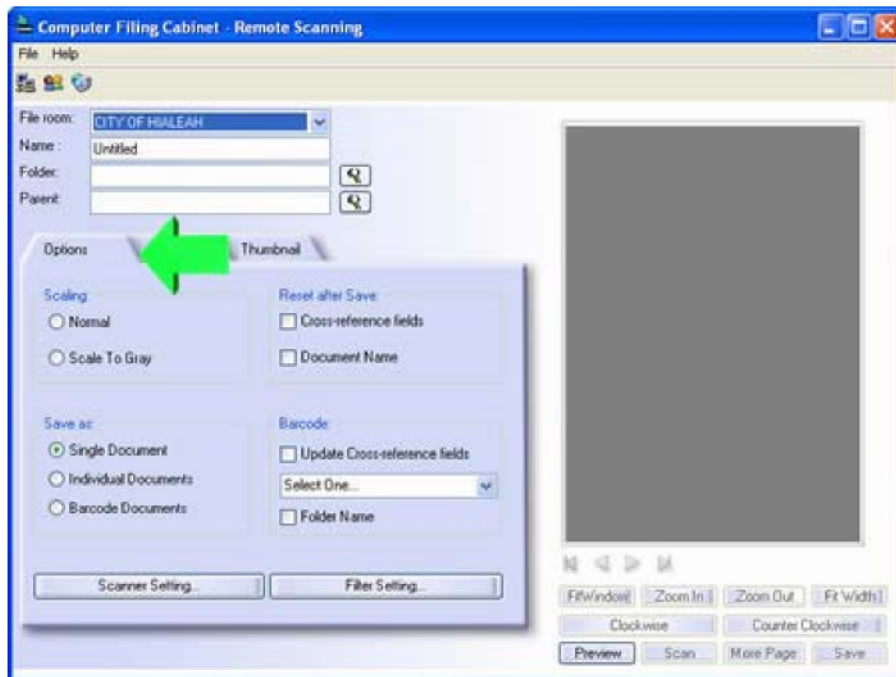The Options Tab contains a variety of utility features which differ from scanner to scanner. The features described here are available with the Fujitsu line of scanners.

There are four Option categories containing Scanner specific features:

·   Scaling
·   Save As
·   Reset after Save
·   Barcode

Scaling

·   Normal - We do not use any features in this category.
·   Scale to Gray - The system is set to default for these features. We suggest that you keep the default settings.

Save As

·   Single Document - This is the default setting and places multiple pages within a single document label with the document name.,
·   Individual Documents - You can scan multiple pages within a document and the system will automatically give each page the document name and the page number.
·   Barcode Documents - Using our optional Bar Code Software, Barcode2Us, you can create a cover sheet for your document which has the name and indexing information and when you place that cover page on top of your documents and into the scanner, the software will automatically label the documents and place them in the proper folders.

Reset after Save

·   Cross Reference Fields - There will be occasions when you want to reset the cross reference fields after each document is scanned. If you choose this feature, when you complete the scan and press save, the cross reference fields will be cleared.
·   Document Name - If you select this feature, after each scan and save the document name entry will be cleared for your next scan.

Barcode

· Update Cross Reference fields - Withe optional Barcode2Us software, you can use bar codes either on cover sheets or embedded in the documents to route your scanned pages into the proper folders with the proper name and index information.

· Folder Name - Works with the above Barcode2us software to create folder names using bar codes.

Fields (Index)

The Fields (index) Tab contains the labels entries you will use as search criteria. It is important to use them wisely. Failing to remember how you labeled a document can be minimized if you have a plan before you start. Remember when you have thousands of documents, your searches allow you to "drill down" to find the document. Think of your index labels as a way to categorize and group documents.

Note: Bar codes can be used to insert information into Field blanks.

Note: Google searches through millions of documents using similar indexes. Your efforts will be improved if you plan your indexes and make sure everyone enters documents using indexes properly.

Note: You can change Document Labels after they have been uploaded into your Remote Filing System. So, do not get frustrated if you decide to make changes as you familiarize yourself with the system. If you need to change the index later as your indexing skills improves you can go back and make changes as necessary.

- **You can have as many as 10 Index Field Labels.**
- **You choose the label names.**
- **You can use one Index for Filing Cabinets**
- **You do not have to use every index label for every type of scan. Depending on what you are scanning, you can use only those index labels that fit those documents. Some universal index fields like Date and Subject may apply across a variety of documents, place them at the top of your Index list.**
- **You can change index label anytime before you press the Save button, before or after each scan, as long as you do it before you press Save. Note: If you want to change the index labels after the document is saved or uploaded, you can make that change with your Scan2Us Viewer if you have security permissions for that feature.**
- **You can choose to clear these fields after each scan, or keep them populated using the Options Tab/Clear Reference Fields functions.**

Thumbnail

Each time you scan a document it appears in the thumbnail viewer window as a thumbnail. If you need to move a page within a document, or view a single page within a document, you can access it thru the thumbnail window.

You can also:

·   View the page (s) order within the document
·   Append or add additional page(s) into the document
·   Move page (s) within the document. If you would like to change the order of the pages withing the document, you can.

·   Delete page (s) within the document. This is helpful when you have chosen the Duplex Function under Options/Scanner Settings. In this case you might find that only half of your documents have information on the backs of the pages, and those appears as blank pages in the thumbnail window. You can delete those documents before saving and uploading them.
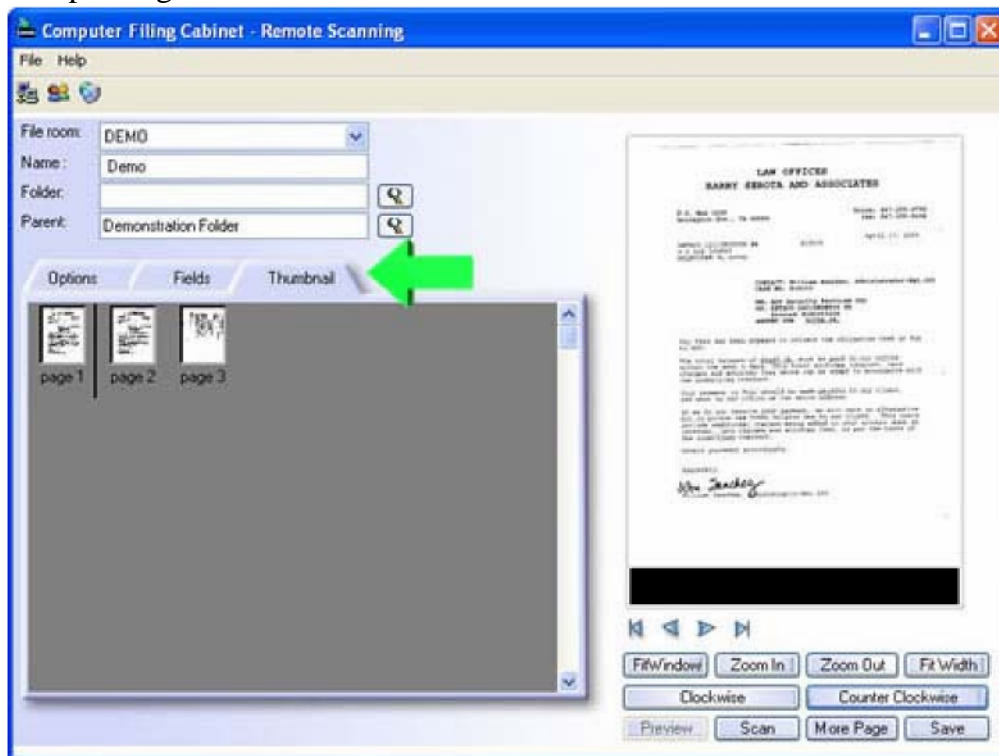
Shortcut Definitions:

- **Viewing Pages:** Click on any thumbnail to display it in the viewing window on the left side of the page.

- **Appending Pages:** After selecting the More Pages at the bottom of the screen, scan additional pages and you can append them into the document and move them into the correct order.

- **Moving Pages:** Left click and drag over the thumbnail document, it turns black. Left click and hold the cursor on the thumbnail and drag it to the new position. Release and you will be asked if you want to make that move.

- **Deleting Pages:** Left click and drag over the thumbnail document, it turns black. Press the delete key. You will be asked if you want to delete the page or pages.