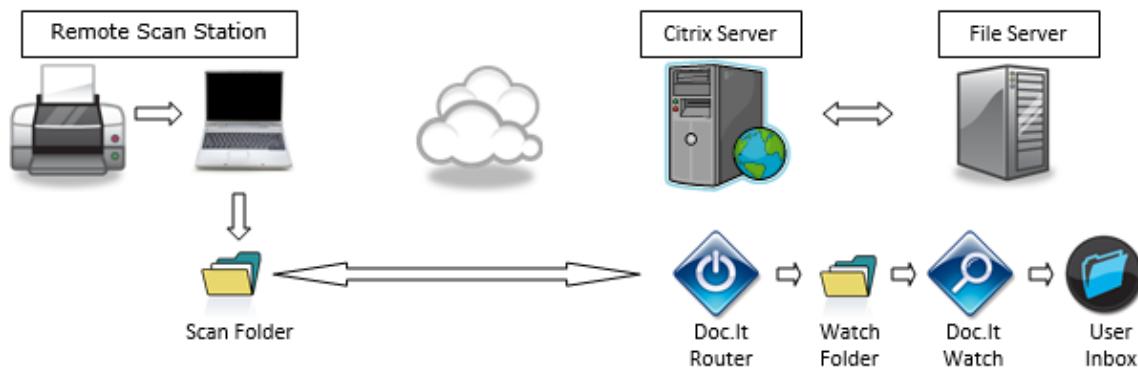


Doc.It Suite v4 Remote Scanning Manual

Overview

The following documentation will guide you through setting up Doc.It Scan in a Citrix or Remote Desktop Services environment. This new functionality will work with USB scanners as well as photo-copier scanners located at a remote site.

“RDS” will be used to abbreviate “Remote Desktop Services” throughout this document.



How it Works

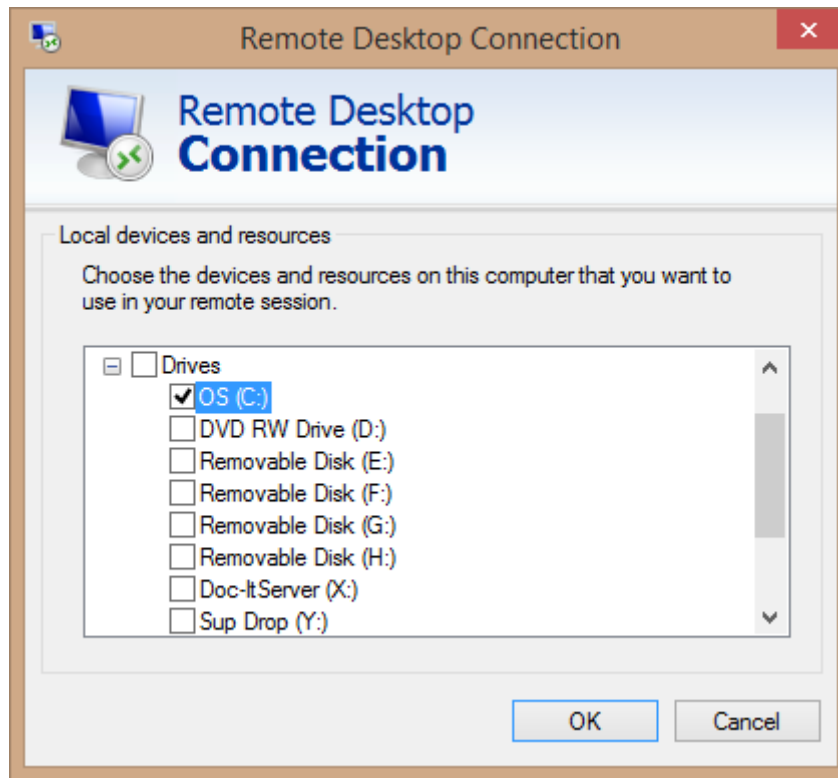
Prerequisites

- Doc.It Watch must be monitoring the UserFolders share.
- UserFolders share should be visible inside a Citrix/RDS session.

a. Setup

1. At the remote site there will be at least one computer with a scanner attached locally. This/these computer(s) will have the Doc.It Scan program installed and setup for remote operation as per the installation instructions below (section Installation – Remote Site).
2. When Doc.It Scan is setup for remote scanning, there will need to be a “Doc-ItScan” folder on the local C: drive of the scanning computer(s).
3. The scanning computer(s) will then log into a Citrix or RDS Host session. The Doc.It Router program will have been activated and will be running within the session. Doc.It Router acts as a bridge between the local drive of the remote scanning computer and the Doc.It Watch computer. It uses the mapped drive that the Citrix or RDS client creates at logon in order to accept local scans and send them over the network to Doc.It Watch.
 - a. In Citrix XenApp 6 or later, you must apply the following registry fix to enable legacy drive mapping: <http://support.citrix.com/article/CTX127968/> in order for Doc.It Router to be able to locate the Doc-ItScan folder on the local C: drive.

- b. Please see the screenshot below on where to configure this in RDS:



4. The Doc.It Router will find the mapped drive, which is mapped back to the local C: drive of the remote scanning computer, and look for a folder called "Doc-ItScan". If it finds the Doc-ItScan folder it will create "user" subfolders inside which correspond to each of the user subfolders listed in the "UserFolders" share accessible in the remote session. It knows where to find the path to the UserFolders share because Doc.It Router reads from a file (WatchPath.txt, which is created when Watch initializes) located on the Doc-ItServer\Manager folder on the Doc.It server.
5. The UserFolders share is being monitored by the Doc.It Watch program. It is the Doc.It Router's job to monitor for scans in the local Doc-ItScan folders on the remote scanning computer (via the mapped drive) and move the files over the network to the corresponding folders in the UserFolders share.

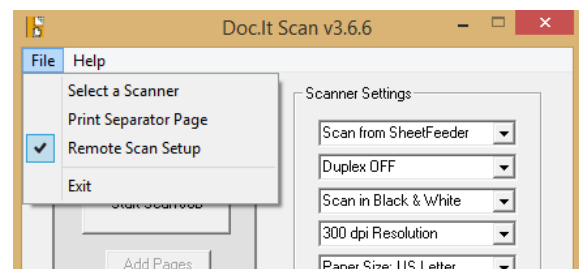
b. Operation

1. When a scan job is run on the Doc.It Scan remote computer, the operator selects a recipient with the "Forward to User" button.
2. The scan job TIFF file goes into that user's subfolder under the Doc-ItScan folder on the local machine.

3. The Doc.It Router (running inside the remote session) detects that the TIFF file has arrived (remember: it is monitoring for TIFFs in Doc-ItScan via the mapped local C: drive) and forwards the TIFF file to the matching subfolder under the “UserFolders” shared directory on the Host.
4. At this point, Doc.It Router has done its job and the normal process of getting the file into your inbox takes over: Doc.It Watch then detects the TIFF file in the “UserFolders” subfolder, runs it through the Doc.It OCR program and forwards the resulting PDF file to the same user’s Doc.It Inbox folder.
5. The user is then notified of the new file in their Doc.It Inbox.

Installation – Remote Sites

1. Locate and install the RemoteScanSetup3.x.exe program on the remote scanning computer(s). It is usually located in the Doc-ItServer\Client Setup folder on the Doc.It server or it can be downloaded from the support site. The user must either be logged in as a local administrator or use the “Run as Administrator” option that Windows provides.
 - a. If you are unable to locate the executable file, please contact Doc.It Support requesting they send it to you.
2. The Doc.It Suite Client is not required and should not be installed locally on the remote scanning computer, nor should the Doc.It OCR be installed.
 - a. *IMPORTANT: Be sure that the OCR is not installed locally. It will prevent the scanned files from being properly routed. To check if the OCR is installed, open the Doc.It Scan program. Just above the white OCR list box if the label says “Text Recognition is ON/Local” then the OCR is installed and must be removed. There are two ways to remove the OCR. The preferred method is to remove the “Doc-It RTK OCR Engine” from the “Add/Remove Programs” screen. If it is not listed there then proceed to delete all files that begin with “RTK” from the local “Program Files\Doc-It” folder. Then re-start Doc.It Scan. When the remote scan setup has been completed the OCR label should read “Text Recognition is ON/Remote”. This verified that the Doc.It Scan program has detected the remote OCR engine.*
3. After the installation has completed, start the Doc.It Scan program from the icon on your desktop. A TWAIN-compliant scanner must be installed using the TWAIN driver from the manufacturer’s website, otherwise the Doc.It Scan program will display an error and then close.
4. In Doc.It Scan, by selecting the “Scan with Options” button, set the scanner for 300 DPI resolution and black & white. Most advanced scanners have other options that should be set as well (eg. Scan ahead, de-skew, de-speckle etc.). After the setup has been completed close the Doc.It Scan program and re-start it.
5. Select the “Set Remote Setup” option from the File menu in Doc.It Scan (screenshot to the right). Upon selecting a folder a dialog box will open. Select the “Doc-ItScan” folder that should be auto-created



on the local C: drive, and click “OK”. The Doc.It Scan program will close in order to save the settings.

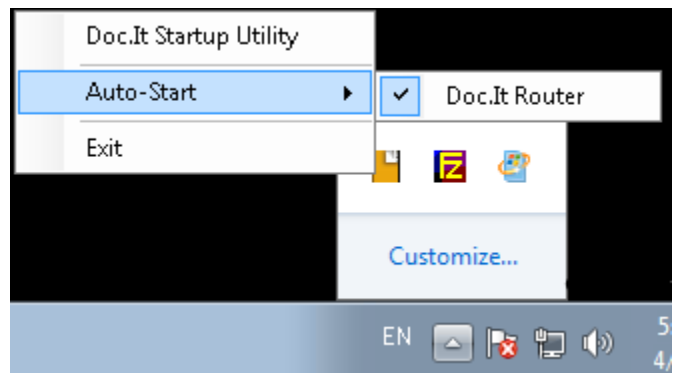
Installation – Host Site

a. Doc.It Watch Setup

1. Doc.It Watch and Doc.It OCR must be installed and running on the Host network.
2. Doc.It Watch must be monitoring the “UserFolders” share which must be visible to the Doc.It Router program that must be running on a Citrix or RDS client as in section “b” below.
3. See the Doc.It Scan, Watch and OCR Manual for instructions on setting up the Doc.It Watch program.

b. Doc.It Router Setup

1. Logon to either a Citrix or RDS session on the remote computer that is running Doc.It Scan.
2. Start Doc.It Suite. It should have already been installed. The Doc.It Watch program must also be configured and running on the network (from section “a”, above).
3. Right-click on the Doc.It Startup Utility icon located in the Windows System Tray. A screenshot of the menu is on the right. Select the “Doc.It Router” menu item located in Auto-Start. A check mark will then appear beside this menu setting every time Doc.It Suite is started to indicate that the Doc.It Router is running.
4. If the Doc.It Router starts successfully it will display “Waiting for scan jobs...” in its display window. Otherwise, an error message will be displayed if the Doc.It Router program cannot detect that Doc.It Watch program is running on the Host network or if it cannot locate the “Doc-ItScan” folder that should exist on the Remote client computer and should have been automatically mapped from the Citrix or RDS client upon logon.



Trouble-Shooting Checklist

a. Host Network

1. Verify that Doc.It Watch and Doc.It OCR programs are both installed and running on the network.
2. Verify that the Doc.It Watch program is configured to monitor the “UserFolders” folder.
3. Verify that the folder “UserFolders” that is being monitored is a shared folder that is set for FULL permissions for all users/groups that will be scanning. The folder “UserFolders” is case sensitive.
4. Verify that there are sub-folders under “UserFolders” that mirror the sub-folders of the “Doc-ItServer\FilesToArchive” folders. If these sub-folders do not exist or there are sub-folders missing, then check that the “ServerPath.txt” file on the Doc.It Watch computer is configured to point to the “Doc-ItServer” share path.

b. Citrix/RDS Client Session

1. Logon from the remote scanning computer to a Citrix or RDS session.
2. Verify that Doc.It Suite has been started and that Doc.It Router is running.
3. Verify that the Doc.It Router displays “Waiting for scan jobs...”. Doc.It Router looks specifically for the “UserFolders” share as well as the “Doc-ItScan” folder on the local drive.
4. If Doc.It Router displays an error that it cannot locate the “Doc-ItScan” folder, then make sure that the option to map a folder for each user as a local resource is turned on in Citrix or RDS.

c. Remote Scanning Computer

1. Verify that Doc.It Scan has been installed locally on the remote scanning computer.
2. Verify that Doc.It OCR has *not* been installed locally on the remote scanning computer. Please refer to step 2 of the Installation – Remote Site section of this document for an important note on how and why you need to uninstall Doc.It OCR.