

Administrator Guide

# WebDocs

# Tray Capture



## Administrating Tray Capture for WebDocs

This short guide shows you how to download, install, and configure WebDocs Tray Capture on the computer of a WebDocs user who needs to add documents to WebDocs.

This guide is divided into the following topics:

[Installing Tray Capture](#)

[Configuring Tray Capture](#)

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## Installing Tray Capture

To install Tray Capture, see: <http://support.rjssoftware.com/product/webdocs-tray-capture#install-upgrade>.

## Configuring Tray Capture

This topic shows you how to find and configure Tray Capture's settings, and configure and choose a scanner to use.

This topic is divided into the following:

[Opening the Tray Capture Settings](#)

[Configuring General Settings](#)

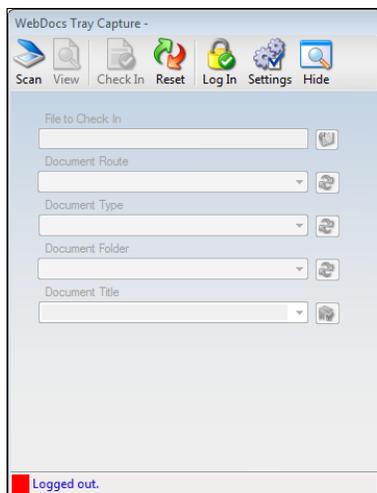
[Configuring Scanning Settings](#)

[Using Custom Lists](#)

[Choosing a Scanner](#)

## Opening the Tray Capture Settings

This topic shows you how to access Tray Capture's settings.



To open the Tray Capture settings:

1. Click **Start > All Programs > RJS Software > WebDocs Tray Capture >**  **WebDocs Tray Capture.**

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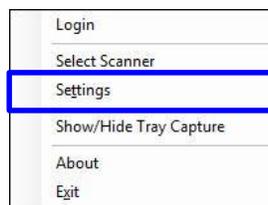
**Note:** This assumes you have installed Tray Capture with the default settings.

The Tray Capture icon displays on the taskbar.



2. Access the settings in one of two ways:

- Right-click the Tray Capture icon and click **Settings**.



- Or click **Settings** on the Tray Capture toolbar.



## Configuring General Settings

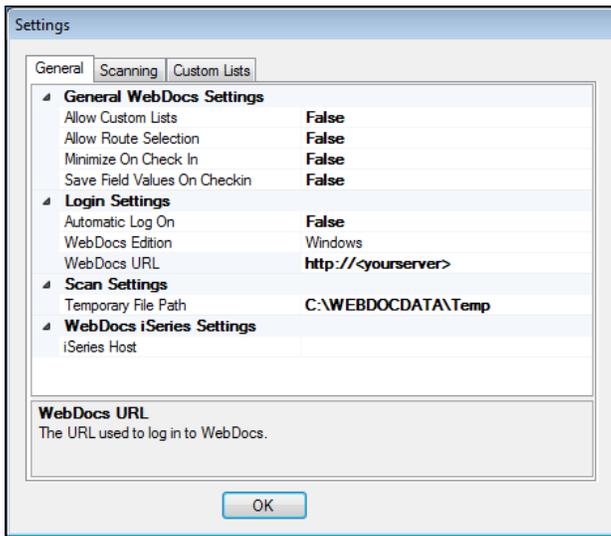
This topic shows you how to:

- Choose your general settings.
- Connect to WebDocs.
- Choose your scanning settings.

To choose the general settings in Tray Capture:

1. [Open the Tray Capture settings.](#)

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2. On the **General** tab, choose your **General WebDocs Settings**:

Setting	Value
<b>Allow Custom Lists</b>	Whether this user can use custom lists. <ul style="list-style-type: none"> <li>• <b>False</b> - Do not allow custom lists.</li> <li>• <b>True</b> – Allow custom lists.</li> </ul>
<b>Allow Route Selection</b>	Whether to assign the document to a WebDocs route after check in. <ul style="list-style-type: none"> <li>• <b>False</b> - Do not assign route.</li> <li>• <b>True</b> - Assign route.</li> </ul>
<b>Minimize On Check In</b>	Whether to minimize Tray Capture after a user checks in a document. <ul style="list-style-type: none"> <li>• <b>False</b> - Leave Tray Capture open.</li> <li>• <b>True</b> - Minimize Tray Capture.</li> </ul>

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Setting	Value
<b>Save Field Value On Checkin</b>	Whether to clear or save field values after a user checks in a document. <ul style="list-style-type: none"><li>• <b>False</b> - Clear field values after check-in.</li><li>• <b>True</b> - Save field values after check-in.</li></ul>

### 3. Choose your **Login Settings**:

Setting	Value
<b>Automatic Log On</b>	Whether to automatically log in the user when Tray Capture opens. <ul style="list-style-type: none"><li>• <b>True</b> - Automatically log in.</li><li>• <b>False</b> - The user must click <b>Log In</b> from the toolbar and is prompted for a username, password, and web service URL.</li></ul>
<b>WebDocs Edition</b>	<ul style="list-style-type: none"><li>• For WebDocs Windows Edition, choose <b>Windows</b>.</li><li>• For WebDocs iSeries, choose <b>iSeries</b>.</li></ul>
<b>WebDocs URL</b>	The address of the WebDocs server. For example, <b>http://&lt;yourserver&gt;</b> , where <b>&lt;yourserver&gt;</b> is the IP address or host name of the WebDocs server.

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4. Choose your **Scan Settings**.

Setting	Value
<b>Temporary File Path</b>	The directory to temporarily store documents scanned with Tray Capture.

5. (WebDocs iSeries only) Under **WebDocs iSeries Settings** enter the **iSeries Host** address.

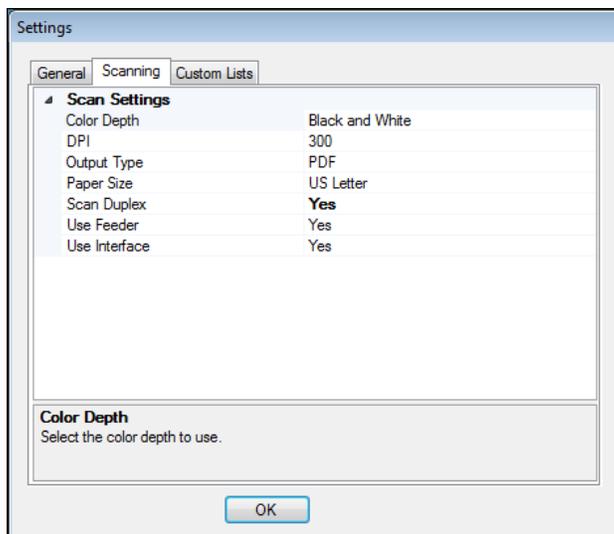
Setting	Value
<b>iSeries Host</b>	The IP address or host name of your WebDocs iSeries server.

6. Click **OK**.

Tray Capture is now configured to connect to WebDocs.

## Configuring Scanning Settings

This topic shows you how to choose Tray Capture scanning settings.



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1. [Open the Tray Capture settings.](#)
2. Click the **Scanning** tab, and choose your **Scan Settings** based on the following:

**Best Practice:** The default values for the scan settings may already meet your needs. Before you edit the scan settings, read through the descriptions below. Only change a setting's default value if you need to.

**Note:** The **Temporary File Path** setting to choose where Tray Capture temporarily stores scanned documents is located under the **General Tab**, not the **Scanning Settings** tab.

Setting	Value
<b>Color Depth</b>	Whether the scanned image is in black-and-white, greyscale, or color.  <b>Note:</b> To reduce file size, choose black-and-white. Greyscale and color images have larger file sizes.
<b>DPI</b>	The number of dots per inch (DPI) in scanned images. With a higher DPI, the quality of the scanned image is better and the file size larger.
<b>Output Type</b>	Whether the scanned images are PDF files or TIFF files.
<b>Paper Size</b>	The paper size of the documents being scanned.

Setting	Value
<b>Scan Duplex</b>	Whether to scan images as duplex, or double-sided, images: <ul style="list-style-type: none"><li>• <b>Yes</b> - the scanner can scan duplex and your documents are duplex.</li><li>• <b>No</b> - either the scanner cannot scan duplex or you do not want images scanned as duplex.</li></ul>
<b>Use Feeder</b>	Whether the scanner will use a document feeder or a flatbed scanner: <ul style="list-style-type: none"><li>• <b>Yes</b> - the scanner has a document feeder and that you want to use the feeder.</li><li>• <b>No</b> - the scanner is either a flatbed scanner or it has a document feeder but you do not want to use it.</li></ul>
<b>Use Interface</b>	Whether the scanner driver interface displays when a user scans with Tray Capture: <ul style="list-style-type: none"><li>• <b>Yes</b> - display the scanner driver interface. The user uses that interface to scan.</li><li>• <b>No</b> - do not display the scanner driver interface. The user uses Tray Capture's interface to scan. This is often faster and easier for users.</li></ul>

3. Click **OK**.

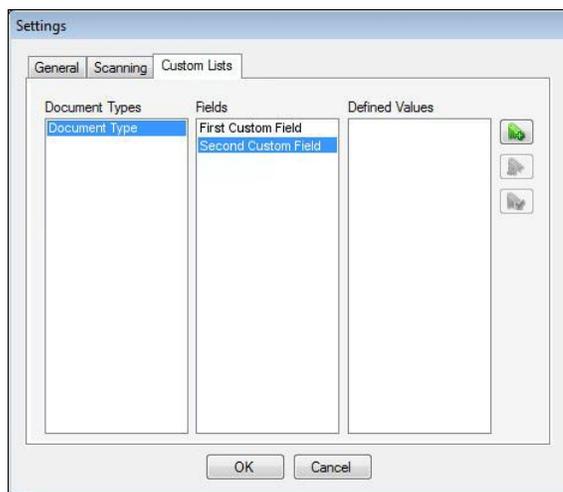
Tray Capture scan settings are configured.

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## Using Custom Lists

This topic introduces Custom Lists: predefined search key values stored on a user's local machine, allowing them to choose from a list of commonly used search key values when checking in a document instead of having to type them.



1. [Open the Tray Capture settings.](#)
2. On the **General** tab, under General WebDocs Settings enable Allow Custom Lists. (See [Configuring General Settings](#)).
3. Click the **Custom Lists** tab. Click in the Document Types text field; the available Document Types display in the **Document Types** list.

**Note:** When this user logs in, the Document Type drop-down menu contains all Document Types from this user's WebDocs. In order for document types to display under custom lists, they first need to be chosen from the drop-down menu by the user.

4. Click on a document type; any search keys associated with the chosen document type display in the **Fields** list.
5. Choose a field. To customize a list of defined values for this user:

 - Add a new value.

 - Remove a value.

 - Edit a value.

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6. Click **Save**. The value is now available to this user.

**Note:** Custom lists are stored on the local computer, so these settings will not follow a user to another computer and need to be reconfigured on each computer.

## Choosing a Scanner

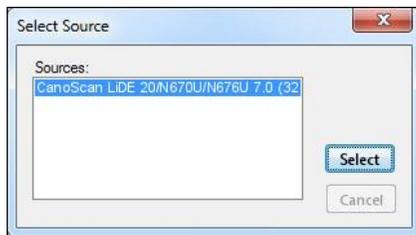
This topic shows you how to choose which scanner to use with Tray Capture.

**Note:** To choose a scanner, you must first connect a scanner and install its driver on the user's computer.

To choose a scanner:

1. Right-click the **Tray Capture** icon and click **Select Scanner**.

Select Source displays.



2. Click the scanner to use.
3. Click **Select**.

Select Source closes, and the scanner is chosen.

## Best Practices

- Tell every user Tray Capture is installed and encourage them to use it.
- Make sure every user who will use Tray Capture knows where it is installed on their computer.
- Direct users to the *WebDocs Tray Capture User Guide*:  
<http://support.rjssoftware.com/product/webdocs-tray-capture#documentation>.