



WebDocs

Tray Capture

Using WebDocs Tray Capture

This short guide shows you how to use WebDocs Tray Capture (hereafter referred to as *Tray Capture*). With Tray Capture you can:

- Scan paper documents and add them to WebDocs.
- Quickly and easily add document files on your computer to WebDocs.

Note: Confirm with your WebDocs administrator that Tray Capture and a scanner are installed and configured on your computer.

This guide is divided into the following sections:

[Opening Tray Capture and Connecting to WebDocs](#)

[Adding Documents to WebDocs with Tray Capture](#)

[Closing Tray Capture](#)

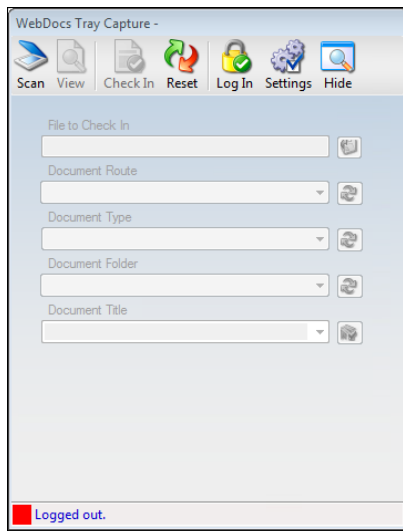
WebDocs Tray Capture User Guide




Opening Tray Capture and Connecting to WebDocs

This topic shows you how to open Tray Capture and connect to WebDocs. You must connect to WebDocs from Tray Capture to add the documents you capture to WebDocs.

These instructions assume that Tray Capture was installed in the default location. If you do not know where Tray Capture was installed on your computer, contact your WebDocs administrator.



To open Tray Capture and connect to WebDocs:

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

The Tray Capture icon  displays on your taskbar.



WebDocs Tray Capture User Guide



2. From the toolbar, click **Log In**.

WebDocs Login displays.

A screenshot of the 'WebDocs Login' dialog box. It contains three text input fields labeled 'WebDocs User Name', 'WebDocs Password', and 'Web Service URL'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

3. Type your WebDocs User Name, Password, and Web Service URL. Click **OK**.

Note: The small green box in the lower-right corner of the Tray Capture window displays when you are successfully connected to WebDocs. If the box is red, you are not connected to WebDocs.



Adding Documents to WebDocs with Tray Capture

This topic shows how to quickly and easily add documents to WebDocs using Tray Capture. There are two ways to add documents: by scanning paper documents or by dragging and dropping documents from your computer's desktop.

This topic is divided into the following:

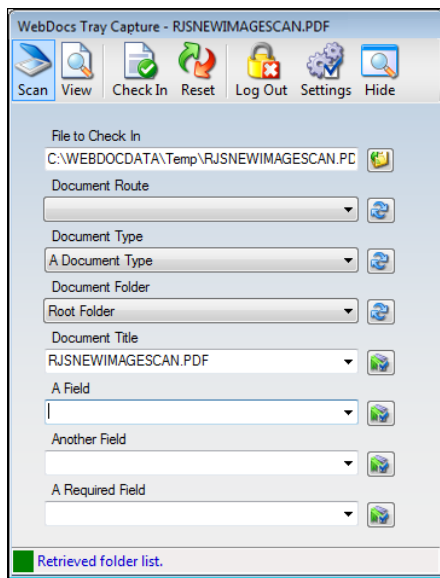
[Scanning a Document and Adding It to WebDocs](#)

[Dropping a Document into Tray Capture and Adding It to WebDocs](#)

Scanning a Document and Adding It to WebDocs

This topic shows you how to scan a document using Tray Capture and add an electronic version of that document to WebDocs.

WebDocs Tray Capture User Guide



To scan a document:

1. [Open Tray Capture and connect to WebDocs.](#)
2. Place a document in the scanner. Click **Scan**.

The document is scanned. The path to the scanned document is highlighted in **File to Check In**.

Note: Depending upon how Tray Capture was configured, the document may not be scanned when you click Scan and instead your scanner driver's interface displays. Use that interface to scan the document.

3. (Optional) Click **View** to open the document in its native file program, like a PDF viewer or Microsoft Word.
4. (Optional) In **Document Route**, choose a pre-designed WebDocs Document Route to assign the document to.
5. In **Document Type**, choose the Document Type to assign to the document.

Note: Choosing a Document Type displays any associated search keys.

6. In **Document Folder**, choose the WebDocs folder to save the document to.
7. In **Document Title**, type the document's title.

Note: The default document title is RJSNEWIMAGESCAN.

WebDocs Tray Capture User Guide



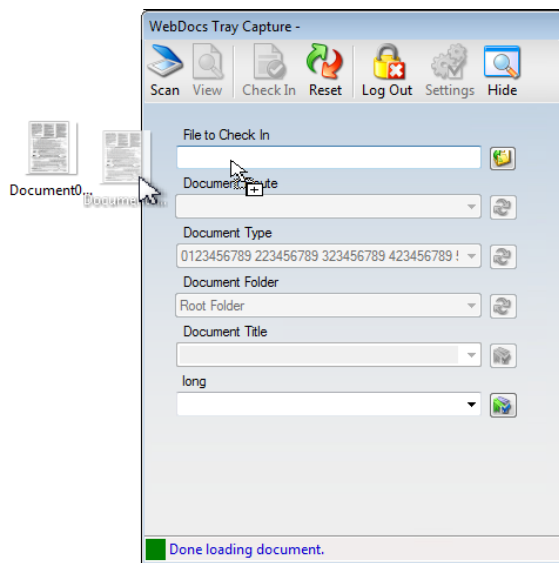
8. In the **Search Key** fields, choose or type search-key values for this document.
9. Click **Check In**.

The message *Saved to WebDocs* displays at the bottom of the Tray Capture window, and the document is added to WebDocs.

10. (Optional) Return to [step 2](#) to scan and add another document to WebDocs.

Dropping a Document into Tray Capture and Adding It to WebDocs

This topic shows you how to drag and drop a document from your computer's desktop into Tray Capture. After you have dropped a document into Tray Capture, you can then check it in to WebDocs.



To drop a document into Tray Capture and add it to WebDocs:

1. [Open Tray Capture and connect to WebDocs.](#)
2. Drag and drop the document from your desktop into Tray Capture, as in the example above. The document location displays in **File to Check In**.
3. (Optional) Click **View** to open the document in its native file program, like a PDF viewer or Microsoft Word.
4. (Optional) In **Document Route**, choose the pre-designed WebDocs Document Route to assign the document to.
5. In **Document Type**, choose the Document Type to assign to the document.

WebDocs Tray Capture User Guide



Note: Choosing a Document Type displays any associated search keys.

6. In **Document Folder**, choose the WebDocs folder to save the document to.
7. (Optional) In **Document Title**, change the document's title.

Note: The default document title is the file name including the file extension.


8. In the **Search Key** fields, choose or type search-key values for this document.
9. Click **Check In**.

The message *Saved to WebDocs* displays at the bottom of Tray Capture, and the document is added to WebDocs.

10. (Optional) Return to [step 2](#) to add another dropped document to WebDocs.

Closing Tray Capture

When you are finished using Tray Capture, close it by right-clicking the Tray Capture icon

 and choosing **Exit**.

