SUMMIT SOFTWARE SOLUTIONS

ACHIEVE PEAK PERFORMANCE
IN YOUR BUSINESS!

Digital Plug-Ins

TRAINING AND REFERENCE MANUAL

SUMMIT
Technical Support

Contents

This Guide will detail the digital Plug-ins available to the Summit Program.

Digital Media Packaging (DMP)

Digital Packaging makes it possible to choose a 'list' of documents, combine them together and then zip/send them to a desired location.

To access Digital Packaging, choose the desired RO and right click on the Images link (**1**). Choose the Digital Packaging option (**2**).

Highlight the items you'd like to add to your package (**3**). You can add more than one item in a category by holding down the 'Ctrl' button on your keyboard and clicking an additional item (**4**).

Once you have selected all the items for your package click on the 'Copy Files' button (**5**), and then 'Create Package' (**6**).

The systems will then save/zip your package and attach the RO number to that package (**7**).

You can now 'right click' on the zip file for send options.
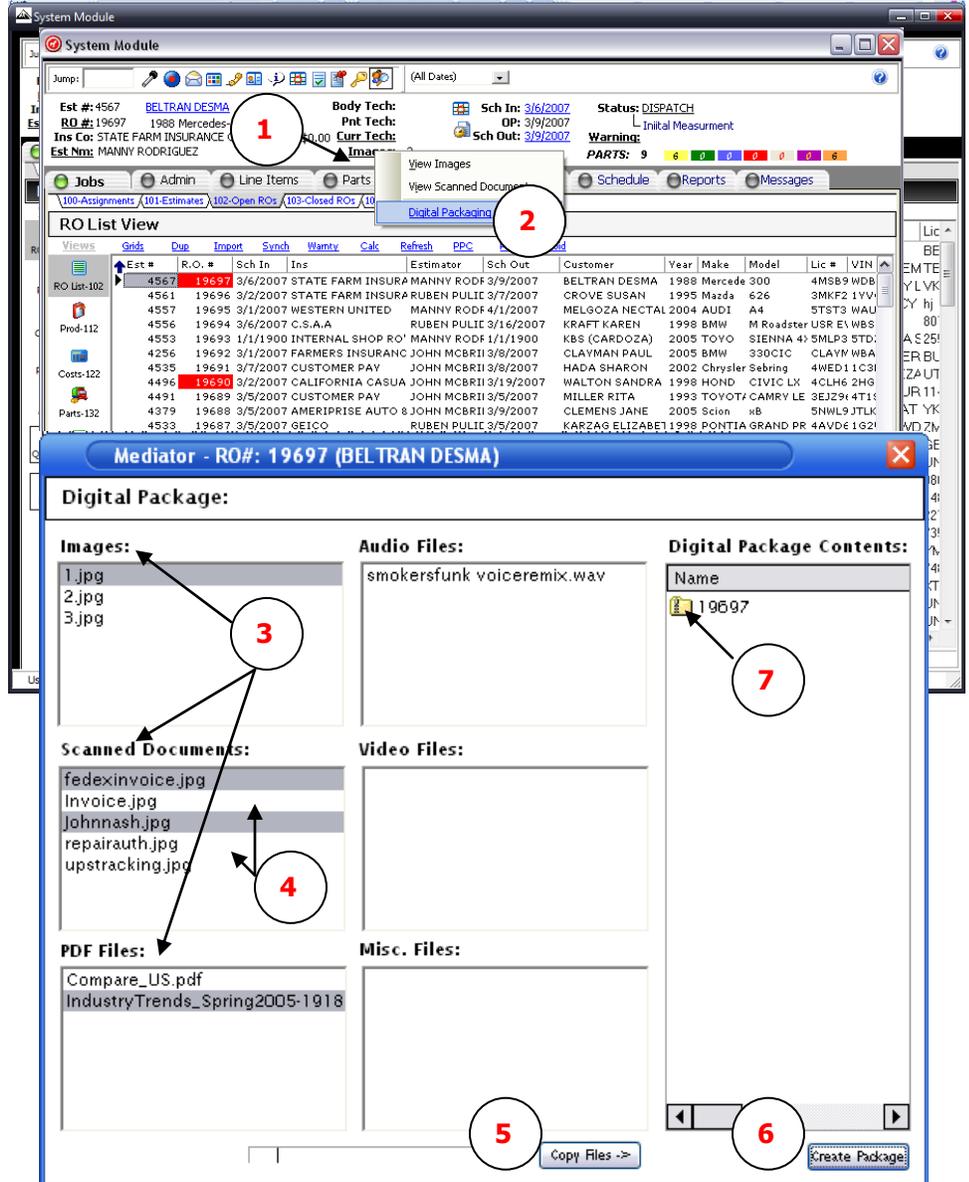
Note 1: If/when you create a second package for the same RO it will 'REPLACE' the previous zip file automatically.

Note 2: These packages are stored in your local c:/Summit folder inside a new file titled, 'Package' with the RO number as the file name.

Digital Document Viewer (DDV)

Image Viewer

To access the Image Viewer, choose the desired RO and right click on the <u>Images</u> link (**1**). Choose the <u>View Images</u> option (**2**).

This will allow you to view the images in a pop-up window (**3**). This window can be moved and sized to meet your needs. Once you have moved this window to your desired location click 'save' (**4**) and the next time you open the window it will reopen in the space and sized as you previously indicated.

You now have options to size (**5**) setup (**6**) and print (**7**) from this screen.
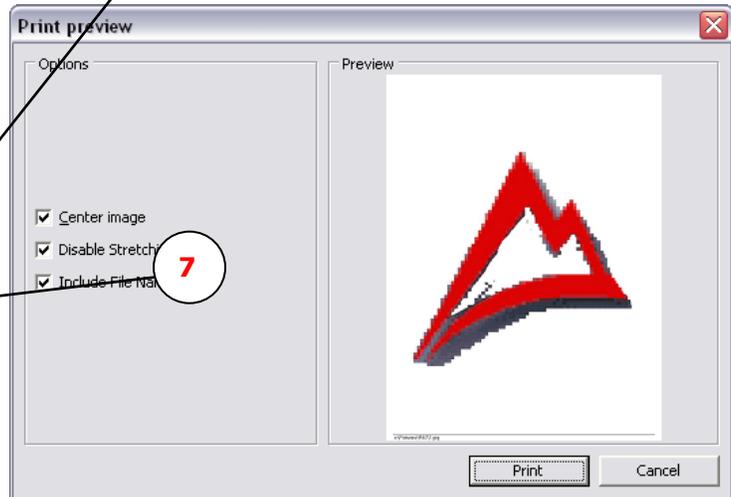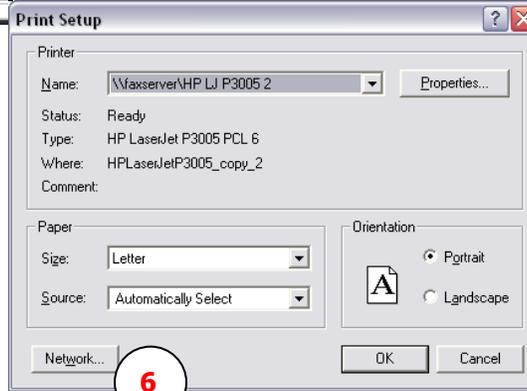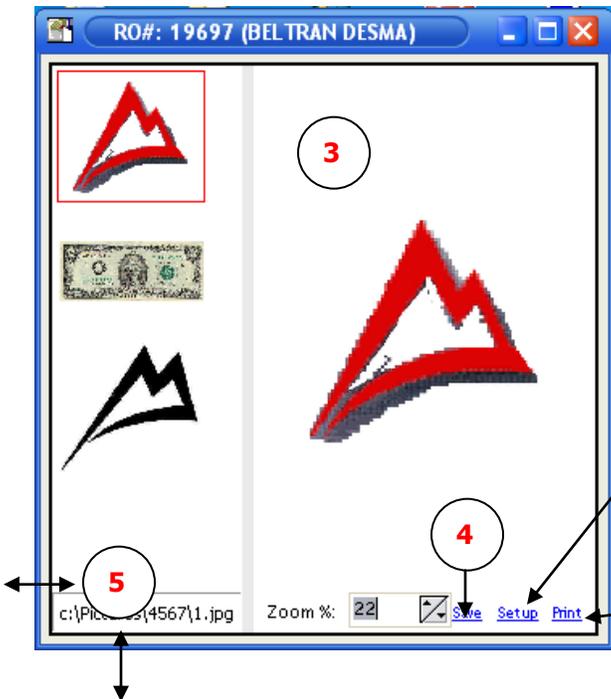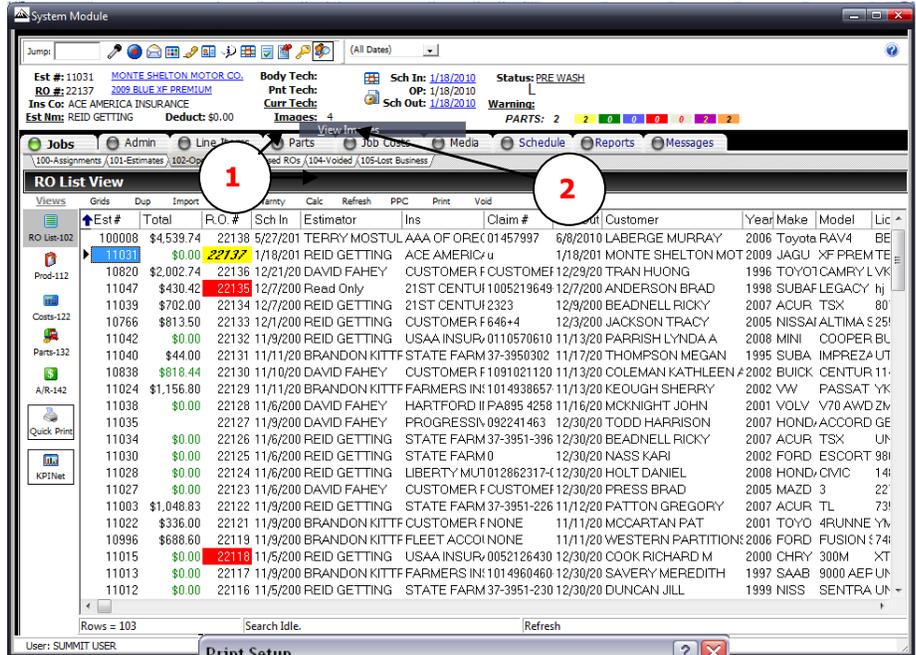
Scan Viewer

To access the Scan Viewer, choose the desired RO and right click on the Images link (**1**). Choose the View Scanned Documents option (**2**).

This will allow you to view the images in a pop-up window (**3**). This window can be moved and sized to meet your needs.

Once you have moved this window to your desired location click 'save' (**4**) and the next time you open the window it will reopen with the space and size you previously chose.

As previously indicated, you now have options to size, setup and print from this screen.

**Note: You can open the 'Image Viewer' and the 'Scan Viewer' simultaneously and still work in the Summit program**
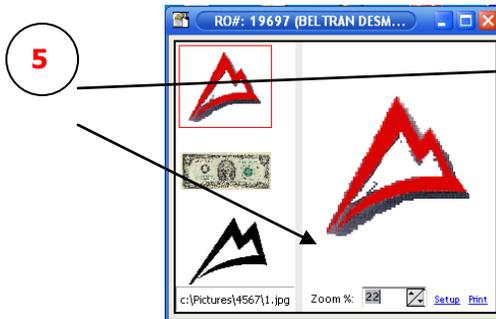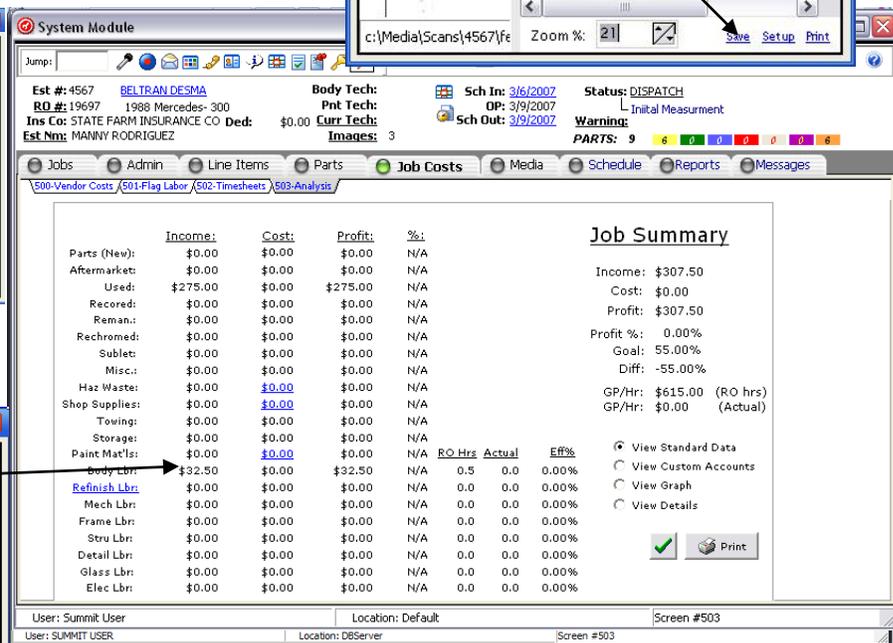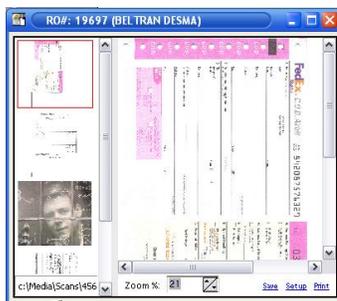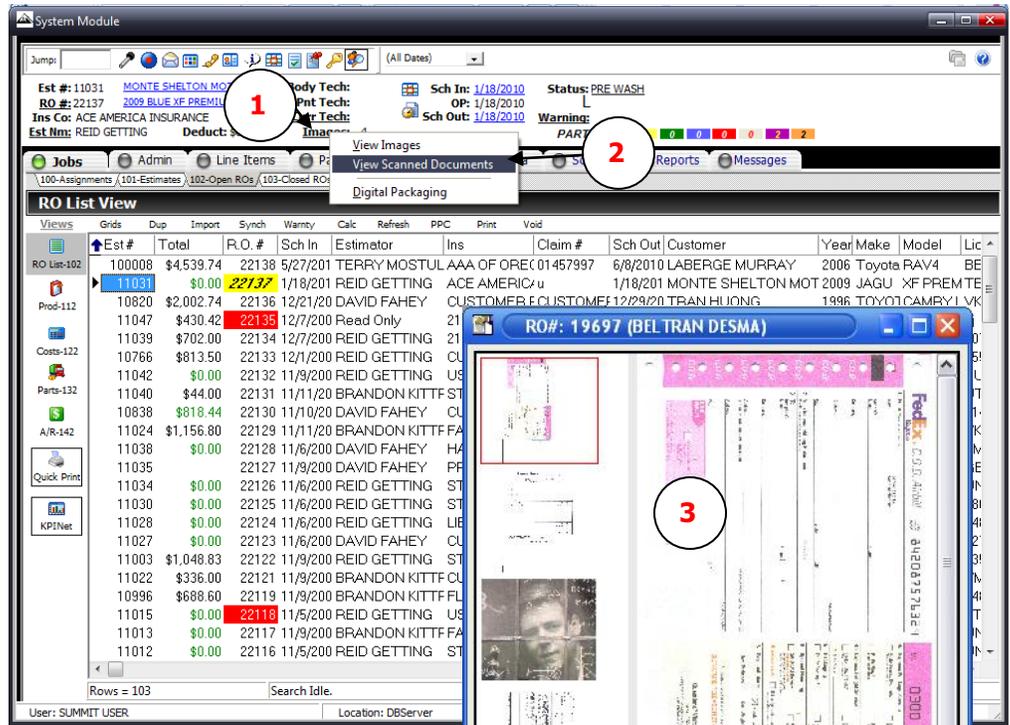
Digital Advanced Scanning (DAS)

This plug-in was designed for those who would like to be able to configure their scanners to their desire and give you more options and a more robust scanning interface.

Choose your RO, click on the Media tab and choose the 601-Scan Documents tab.

To configure your scanner, simply right click on the scan button (**1**) and choose Configure Scanner (**2**).

This will launch your Scanner Configuration window (**3**).

Now you can choose/set/change your Default Scanner (**4**) and you Scanner options.

NOTE: If you check the 'Prompt for location prior to scan.' Option (**5**) the following pop-up (**6**) will occur every time you scan. If unchecked it will not pop-up.

Click 'Save' to go back to the scan screen.

Insert you paper in to your Document Feeder and left click the 'Scan' button (**7**) and your document will scan (**8**) into the RO and show in the field on the left side (**9**).

To view the document in a larger size, left click on the document (**9**).

NOTE: If it appears you have 2 scanner choices – in the drop down area – for the same scanner, you will need to test BOTH options to see which one works best. (This is an idiosyncrasy unique to some scanner interfaces.)

6
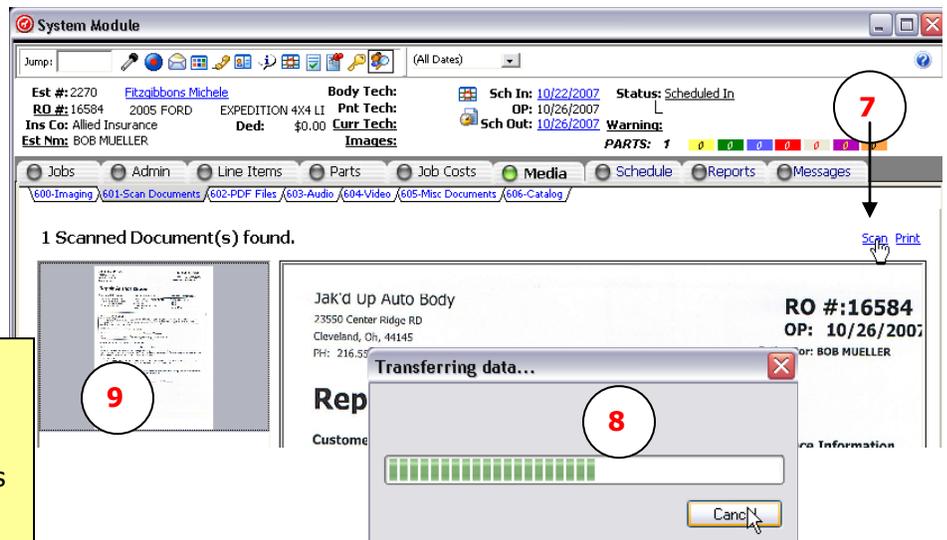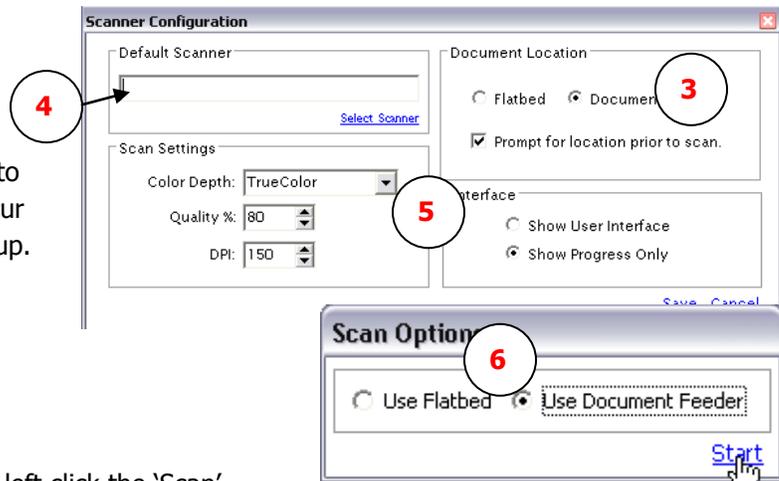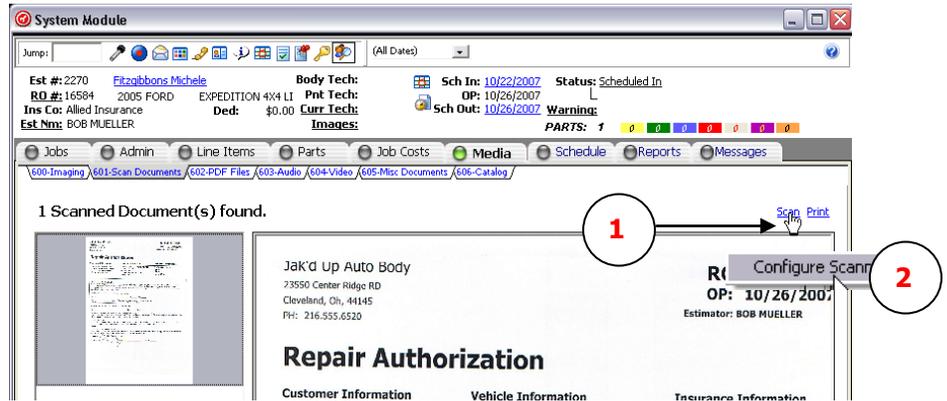
Digital Document Authorization (DDA)

The DDA allows you to 'write' on any document you can print from Summit.

Simply click on Document Authorization (**1**) in the Print Preview screen and summit will launch a digital document that can be signed by using a mouse or a digital writing tool or pen (**2**).

If you or the customer is not happy with the signature (**3**), simply click on the 'clear' link (**4**) and try again.

When completed, simply click 'save' (**5**) and name the document (**6**) and click OK. It will then be saved to the appropriate RO in the Media tab.

Note: Digital Pens (**2**) (Graphic Tablets) are available at most Electronics Stores for less than $100.

You may also want to consider a tablet PC (**7**) for more mobility and the fact that you can sign directly on the 'touch' screen.