

## Scan to Summation (Scan Indexer)

### OverView

The Scantrak ScanIndexer creates a DII file which is a control file used to load image files into Summation. Very often firms send imaging jobs to third part vendors to create the DII and corresponding image files because the task is so time consuming and complicated. The Copitrak ScanIndexer workflow allows firms to automate the creation of basic DII files saving the firm both time and money.

#### **Eclipse Terminal Work Flow:**

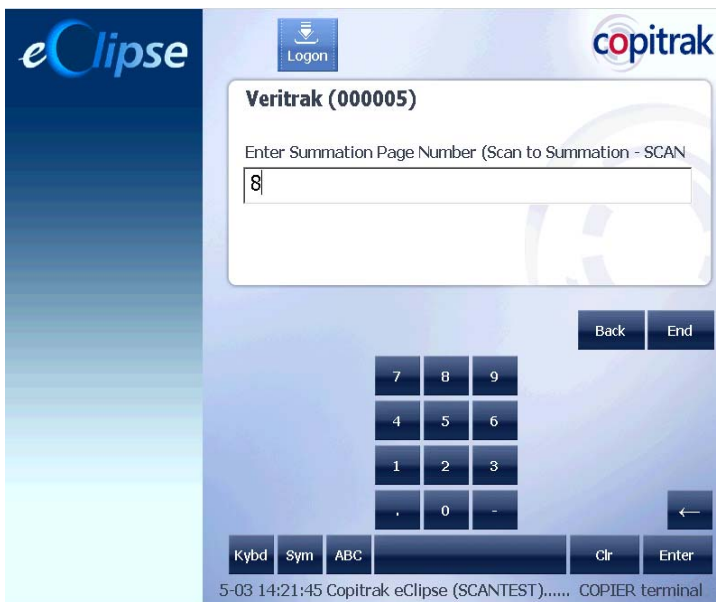
- 1.) Enter user, account as normal
- 2.) Select Scan Route

The screenshot shows the Copitrak Eclipse terminal interface. On the left is a sidebar with a dropdown menu labeled 'Route (1 - 6)' and several options: Copy, Scan to Folder, Scan to Email, Scan to Worldox, Scan to Summation, and Scan to FaxPress. The main area features a 'Logon' button with a download icon, the Copitrak logo, and the user name 'Veritrak (000005)'. Below this is a 'Select Route' label and an empty text input field. At the bottom right are three buttons: 'Ovrd', 'Back', and 'End'. A numeric keypad is displayed below these buttons, with rows for numbers 1-0, letters Q-P, letters A-@, letters Z-←, and function keys 'Kybd', 'Sym', 'abc', 'Clr', and 'Enter'. The status bar at the bottom reads '2010-05-03 14:18:14 Copitrak eClipse (SCANTEST)..... COPIER'.

3.) Prompt for the case data folder with a General Field



4.) Prompt for the Document number with a general mask. The user must know the next Doc number before coming to the Eclipse. The General Field mask should be set to numeric.

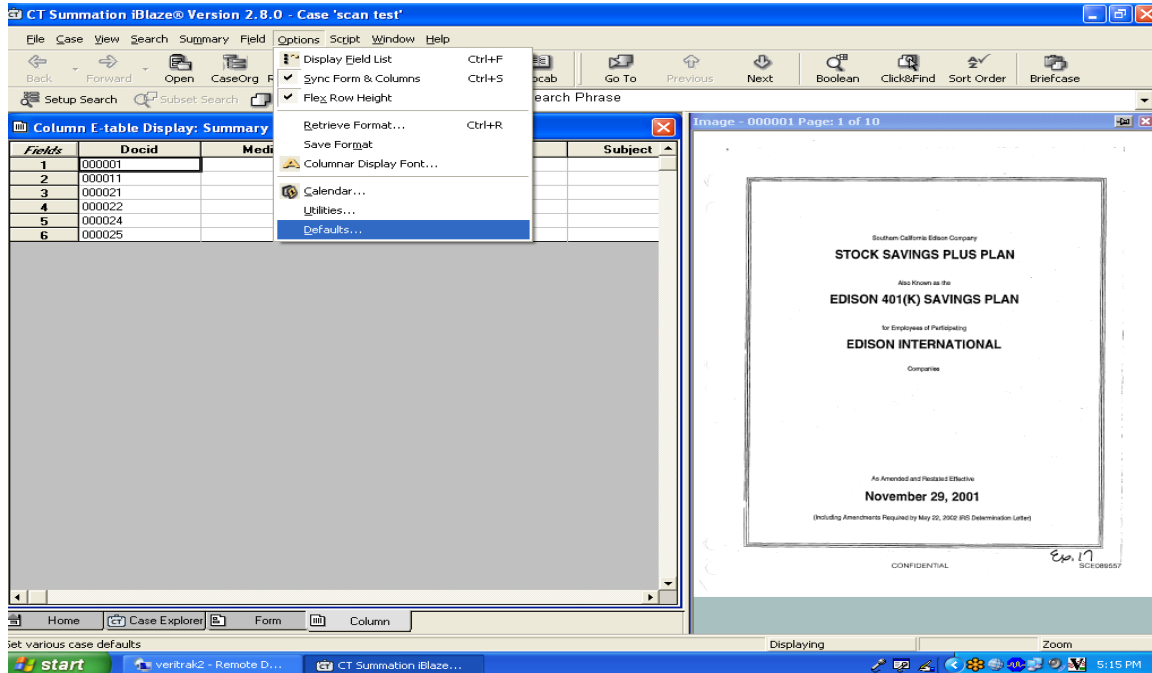


5.) Scan as normal.

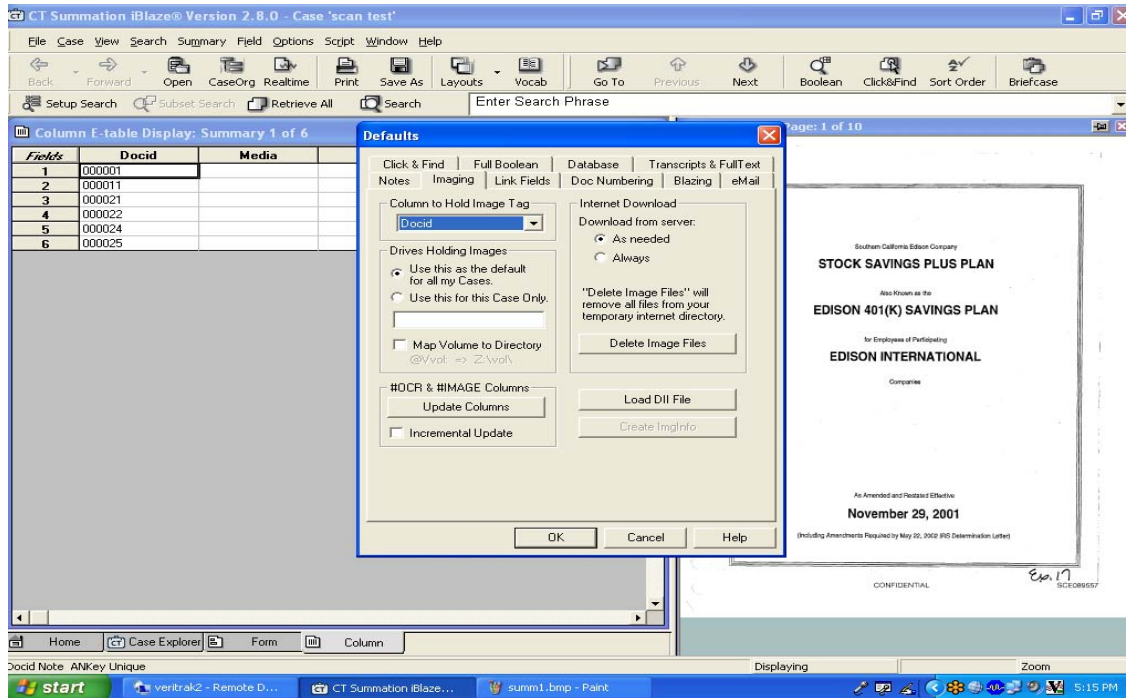
## Loading the File into Summation

In Summation:

- 1.) Select Options
- 2.) Select Defaults



- 3.) select Load DII file



- 4.) Browse to DII Location and click OK