WebScan PRO™ User Guide
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>4</td>
</tr>
<tr>
<td>Welcome to WebScan PRO™</td>
<td>4</td>
</tr>
<tr>
<td>About this Document</td>
<td>4</td>
</tr>
<tr>
<td>WebScan PRO “Best Practices”</td>
<td>4</td>
</tr>
<tr>
<td>Uploading Documents</td>
<td>5</td>
</tr>
<tr>
<td>DoRA</td>
<td>5</td>
</tr>
<tr>
<td>VIPER</td>
<td>8</td>
</tr>
<tr>
<td>Document Upload</td>
<td>12</td>
</tr>
<tr>
<td>Folder Upload</td>
<td>13</td>
</tr>
<tr>
<td>Filing Documents</td>
<td>14</td>
</tr>
<tr>
<td>Import Manager</td>
<td>14</td>
</tr>
<tr>
<td>Document Edit</td>
<td>18</td>
</tr>
<tr>
<td>Folder Maintenance</td>
<td>25</td>
</tr>
<tr>
<td>Retrieving Documents</td>
<td>25</td>
</tr>
<tr>
<td>WebScan Explorer</td>
<td>25</td>
</tr>
<tr>
<td>Batch Search</td>
<td>27</td>
</tr>
<tr>
<td>EOB Cabinet</td>
<td>28</td>
</tr>
<tr>
<td>Advanced Search</td>
<td>29</td>
</tr>
<tr>
<td>Optional Buttons</td>
<td>29</td>
</tr>
<tr>
<td>Installation/Maintenance</td>
<td>30</td>
</tr>
<tr>
<td>DoRA Installation</td>
<td>30</td>
</tr>
<tr>
<td>User Maintenance</td>
<td>30</td>
</tr>
<tr>
<td>VIPER</td>
<td>31</td>
</tr>
</tbody>
</table>
Introduction

Welcome to WebScan PRO™

WebScan PRO™ improves office operations and increases profitability by reducing time spent on document management. Compatible with all practice management systems and designed for ease of use through web browsers, WebScan PRO™ identifies, indexes and files all documents from EOBs, patient records, clinical notes and more for immediate online use.

About this Document

This document is intended to provide detailed descriptions and procedures that are recommended when using WebScan PRO™. This document may be used as a reference for clients who have already completed their product implementation and training sessions.

WebScan PRO “Best Practices”

- Create a WebScan folder
- Scan documents into folder
- Upload documents via DoRA
- Import Manager
Uploading Documents

DoRA

About DoRA

DoRA (Document Retrieval Application) is an application that uploads copies of electronic documents from the client’s workstation into WebScan.

DoRA can be configured to send documents into WebScan automatically as they are scanned through or it may be programmed to send documents at a specified time throughout the day.

Using DoRA

Once DoRA is setup and configured correctly (see DoRA Installation section), the first step in sending documents to WebScan is to scan the desired documents with a scanner. After the documents have been scanned, open DoRA using the desktop shortcut.

Scan Tab Options:

User: Select the owner of the batch to be sent with the User dropdown. The transmitted batch will appear in the selected user’s Import Manager within WebScan.
Description: This is an open text field that can be used to help the user selected in the User dropdown identify the nature of the documents within that batch.

Application: The location of where the documents are to be sent.

Cabinet: The cabinet where the documents within the batch are to be sent. Keep in mind that only certain folders are available within certain cabinets. For instance, patient folders will only be found within the Patient Files cabinet.

Uploading into the EOB Cabinet:

Uploading into the Patient Files Cabinet:
Create OCR: The OCR (Optical Character Recognition) reads all pages sent through DoRA before it gets to WebScan. This is the step where any template, known document or barcode auto-filing occurs. It is highly recommended that Now always be the selection in this step. Selecting Later will delay the OCR process until after 5pm CST.

NOTE: A transmitted batch will not appear in WebScan until after passing through the OCR.

Start Scan

Select Start Scan to begin the upload of the documents.

The Start Scan button will gray-out and the number of files to be sent will stack in Pending.

NOTES:

- The pending number will not be reflective of the number of pages within the batch, but rather the number of PDF or TIF files (one PDF or TIF file could contain multiple pages).
- As the files are sent, the number in Pending will decrease and the number in Complete will increase.
Stop Scan

When all documents have reached a Complete Status, the Start Scan button will change to Stop Scan. Select “Stop Scan”.

<table>
<thead>
<tr>
<th>Status</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>0</td>
<td>Errors</td>
<td>0</td>
</tr>
<tr>
<td>Complete</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NOTES:

- It is important to hit “Stop Scan” after all of your documents have moved from Pending to Complete. This tells DoRA that the user is through sending documents at this time, to close the batch and send the closed batch through the OCR.
- The DoRA transmission time as well as the OCR processing time will vary upon the size of the batch to be sent.

Once the OCR has processed the batch, it have the “Awaiting Appoval” status in the selected user’s WebScan Import Manager.

ViPER

About ViPER

ViPER (Virtual Print Driver) converts single electronic documents (E-mail, e-Fax, Word Document) to PDF format and uploads it into WebScan PRO for filing.
Using ViPER

ViPER executes on the following document file types: .txt, .pdf, .xls(x), .tif, .tiff or .doc(x) as well as entire web pages (see ViPER installation section).

ViPER exists within the Print function and can be accessed by choosing WebScan ViPER from the printer name selection drop down.

![Print menu with WebScan ViPER highlighted](image)

**Basic Tab**

Select the Basic tab and confirm that the proper Application and Cabinet for the document are selected in the dropdowns. Also check the box of Add Additional Document Settings.
Uploading into the Patient Files Cabinet:

![Diagram of VIPER interface showing selection of Patient Files and other options]

Uploading into the EOB Cabinet:

![Diagram of VIPER interface showing selection of EOB and other options]
Additional Tab

Choose the appropriate Document Group and Document Type.

Type the Folder name or Patient ID and hit Search.
Select the desired folder from the search results and then Select Folder.

Return to the Basic Tab and select Print.

After selecting Print, the document will be sent into WebScan and the message “successfully uploaded” will appear.

**Document Upload**

**About Document Upload**

Document Upload allows the user to upload one document at a time to either an existing batch in the Import Manager, or by creating a new batch directly through the website. The Document Upload tool can be used to manually create and upload batches.

NOTE: Document Upload is located under the Support tab on the WebScan PRO home screen.
Folder Upload

About Folder Upload

The Folder Upload feature allows users to upload an unlimited number of folders into any cabinet(s).

NOTE: Folder Upload ( ) is located under the Support tab on the WebScan PRO home screen.

Uploading and Adding Folders

RemitDATA can load an unlimited number of folders into any cabinet(s).

To manage folders uploaded into the cabinet, you can:

- Provide customer support with a Microsoft Excel file, the name of the folder and any attributes that you would like on the folder. An example illustrates a patient folder file below:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Patient Last</td>
<td>Patient First</td>
<td>Patient ID</td>
<td>SSN</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Smith</td>
<td>Bob</td>
<td>12345</td>
<td>999-99-9999</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Doe</td>
<td>Jane</td>
<td>65432</td>
<td>222-22-2222</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Scott</td>
<td>Carl</td>
<td>87956</td>
<td>111-11-1111</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Walker</td>
<td>Dorothy</td>
<td>45879</td>
<td>555-55-5555</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Jones</td>
<td>William</td>
<td>78458</td>
<td>777-77-7777</td>
<td></td>
</tr>
</tbody>
</table>

- Upload folders using the Folder Upload icon.

NOTES:

- File must have 3 fields: ID, First and Last name.
- If user is loading something other than patient files, then all fields can be the same.

1. Select the Cabinet
2. Click the Browse button to locate and select the desired *.csv file on the PC
3. Click the Upload button to upload the file. NOTE: The folders should immediately upload into the desired cabinet.

2. Select the File to Upload: 

   [Browse...]

For a CSV upload, please organize your information in the following columns: Patient ID, Patient First Name, Patient Last Name.

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Adding a Single Folder

1. Click the *Folders* link which is located in the *WebScan* toolbar at the bottom of the page when logged in.
2. Click the *Create New Folder* link that appears.

![Create New Folder](image)

NOTE: To select an application and cabinet, click on blue link to the right of the title and start typing in the first few letters of the application/cabinet. When it appears in drop down, select it.

3. Select *Application, Cabinet*, enter the *Unique Key (Patient ID or Account Number)*, *Name of the folder (Last Name, First Name)*, and provide the *New Folder Properties*.

![New Folder Properties](image)

4. Click the *OK* button to add the new folder to the cabinet.

Filing Documents

Import Manager

About Import Manager

Import Manager is where the batches are housed once they are scanned in and uploaded to WebScan. Import manager is a staging area for unfiled and recently approved batches.

Import Manager serves several important functions:

- Stores batches until they are ready to be filed
- Provides the user with a workspace to edit, file, and keep track of batches
- Gives account administrators the ability to monitor what batches have not been filed
From the WebScan Home tab, select the Import Manager icon and the Import Manager tab will open.

Using Import Manager

The following buttons appear on the main toolbar of the Import Manager tab and depending on the functional state, the buttons may be active or inactive:

- ![Move Cabinet](image)
  - Moves selected batches from one Cabinet to another

The Move Cabinet tool allows the user to change the cabinet the batch(es) were scanned into.

Steps:

1. Select the batches that need moving by checking the box(es) next to the batch(es).
2. Next, select the Move Cabinet button and then the new Application and Cabinet.
3. Lastly, select the Move button and the batch(es) will go into the new cabinet immediately. To cancel the move, select the Cancel button.

NOTES:

- To prevent rescanning, if the user accidently scans the batch into the wrong cabinet, it provides a quick and easy way to move the batch(es) to the correct cabinet.
- The user can move up to ten (10) batches at one time.

- ![Approve](image)
  - Finalizes filing process of selected batch(es)

Batches with a green status light while in the Awaiting Approval state allow the user to approve the batch(es) without going into Document Edit to do so.
1. To approve a batch, select the batch(es) that need approved by checking the box(es) next to each batch.
2. Select the OK button to approve batch(es).

NOTE: To cancel the approval of batches, select the Cancel button.

- **Delete**

Delete currently selected batch(es).

Batch(es) can be deleted from Import Manager by checking the box(es) next to the batch and selecting Delete from the toolbar.

- **Merge**

Combines selected batches into a single batch.

A window will open that requests the user to select a Master Batch.

1. Select the radio button beside the Master Batch
2. Select Merge

NOTE: The Master Batch will become the batch by which all others will merge into.

- **Transfer Ownership**

Grants or takes control of selected batch(es).

1. Users can transfer batches and take batches from other users.
2. Select the desired batch(es)
3. Select the Transfer Ownership button in the toolbar. NOTE: A pop-up window will request that the user enter a name to transfer the batches to.
4. The batches to be transferred will be listed in the window.

To take batches from other users, select the View All Batches button (shown below), select the batch(es) to transfer and select the Transfer Ownership button.

- **View All Batches**

Displays batches belonging to any users.

- **View My Batches**

Displays batches belonging only to current user.

- **Search**

Performs query using multiple criteria to find batches.
Users can search for batches by Batch Number, Created Date, Description, or Owner. Once the criteria are entered, select the Search button. Results will be generated underneath.

- Saves batch description changes.
- Selects all batches on current page.
- Opens Batch Detail view to display filing status of each document within the batch.
- Checkbox to select individual batch(es).

Displays batches by filing status.

The status of batches is maintained in this dropdown box, located in the upper-right portion of the screen. The status will display all corresponding documents based upon the state (the number beside the status indicates the quantity of batches in that state):

- **Open** - The state by which documents are being sent into the batch. Open batches can be moved to a Pending state by clicking on the green arrow icon.
- **Pending** - The state by which the documents are being processed and read by the OCR (Optical Character Recognition) engine. The engine will recognize templates and file them in this state.
- **Awaiting Approval** - The state by which documents are being held for the user to index.
  - **Editing an Awaiting Approval** - To edit documents in a batch with an awaiting approval status, select the Edit icon. The Document Edit tab will open and the Edit icon will turn yellow as batches are visited.
  - **View an Awaiting Approval** - To view documents in a batch with an awaiting approval status, click the View icon, located beside the Edit icon in the leftmost column. The Batch Detail tab will open and provide details about the documents within the selected batch. Select the Edit icon. The Document Edit tab will open and the Edit icon will turn yellow as batches are visited.

- **Approve** – The state by which the batches have been filed and user can view recent batch approvals.
  - **Edit Approved Batches**
    1. To edit documents in a batch with an approved status, select the Edit icon.
    2. The Document Edit tab will open and the Edit icon will turn yellow as batches are visited.
  - **View Approved Batches**
    1. To view documents in a batch with an approved status, select the View icon, located beside the Edit icon in the leftmost column.
    2. The Batch Detail tab will open and provide details about documents within the selected batch.
Navigation for multiple pages of batches.

Refreshes page to display most up-to-date status of batches.

Document Edit

About Document Edit

Document Edit is a workspace for filing each document within a batch. When the Edit button is selected it will open up the batch for the user to edit.

Document Edit is accessible from the following statuses:

- **Pending**– To view documents in a batch with a Pending status, select the magnifying glass icon located beside the batch and the Document Edit tab will open.

  NOTE: Batches in pending status can only be viewed.

- **Awaiting Approval**– To edit documents in a batch with an Awaiting Approval status, select the Edit icon. The Document Edit tab will open and the Edit icon will turn yellow as batches are visited.

- **Approved**– To edit documents in a batch with an Approved status, select the Edit icon. The Document Edit tab will open and the Edit icon will turn yellow as batches are visited.
Document Edit Toolbar

The Document Edit tab has a toolbar to navigate functionality, and depending on the state of the selected document, the buttons may be active or inactive:

- **Navigate forward or backwards through documents in a batch.**

  NOTE: When the Previous or Next buttons are accessed, a pop-up window will request to save the document if editing has occurred.

- **Attach current page to previous document in the batch— a “virtual staple”. If there were two pages were apart on one document, you would use this button.**

- **Save any changes made to documents.**

- **Save any changes made to batch documents and move forward to the next page. If you’re filing a multi-page document, using this button will save time by saving your changes and shifting you to the next page.**

- **Delete current document from batch.**

- **Approve batch after all documents have been filed.**

- **Create a PDF containing all pages of current batch or patient folder. This will create a Job that can be accessed in the toolbar at the bottom of the screen. This button would be helpful if you wanted to print off all pages in a patient’s folder at once.**

### Document Edit— Filing and Approving

#### Filing Process Steps

1. In Import Manager, select the Edit button (next to the desired batch to be filed.

2. Document Edit tab will open. Specify a folder and document type for each document in the batch.

### Filing into a Patient Folder

- Choose a Patient Folder
  - a) Select WebScan Inbox to open a search box.
  - b) Begin typing folder name or patient ID.
  - c) Select the desired folder from the list.
Filing into the EOB Cabinet

- Choose an EOB Folder
  a) Select WebScan Inbox to open a search box.
  b) Begin typing folder name.
  c) Select the desired folder from the list.

3. Choose a Document Type
   - Select Document Type drop-down box.
   - Select the Document Type from the list.
Optional attributes may be selected to enhance the retrieval process.

- Examples of optional attributes include but are not limited to:
  - Order Date
  - Order Number

Other optional features:

- **Copy from Previous**—Select the icon to copy the folder and document attributes from the previous document and save it to the current document.
- **Merge**—The Merge function allows the user to “staple” documents, much like the Append to Previous button. However the Merge function allows multiple pages to be “stapled” at once.
NOTE: The buttons located on the right side of the boxes allow the user to select a document number and move it to the desired location within the document ordering pattern.

- A list in the left side box displays the number of pages available in the current selected document.
- As the user selects a desired page(s), it can be moved to the right side box by using the directional arrows to send one or all pages to be merged.
- The Document Type dropdown box allows the user to update the currently selected document with different information based upon the selected document type.

The Merge function can also update the attributes of a selected document that is contained in multi-page documents within a batch.

NOTE: A new document will be created in the batch as a result.

- **Burst**- The Burst function allows the user to break up multi-page documents into single-page documents within a batch. The Burst function also can update the attributes of a selected document that is contained in multi-page documents within a batch. A new document will be created in the batch as a result.
  - As the user selects a desired page(s), it can be moved to the right side box by using the directional arrows to send one or all pages to be burst.
Mass Updates - The Mass Updates function allows the user to update the attributes of selected documents within a batch. These documents will share the same attributes as those selected under the Mass Updates screen.

- A list in the left side box displays the number of pages available in the current selected document.
- As the user selects a desired page(s), it can be moved to the right side box by using the directional arrows to send one or all pages to be mass filed.
- Check the boxes corresponding with the attributes to be updated.
4. Save changes by selecting Save & Next.
   - Saves filing progress and displays the next document in the batch.
   - Repeat the filing process for each unfiled document.

5. Approve the batch.
   - Select Approve to complete the batch filing process.
   - Select OK on the approval confirmation pop-up box.
Folder Maintenance

About Folder Maintenance

The Folder Maintenance feature allows users to merge duplicate patient folders.

NOTE: Folder Maintenance ( ) is located under the Support tab on the WebScan PRO home screen

To merge folders, perform the following steps:

1. First, select the cabinet in which the patient is located. Next, type in a patient attribute in one of the fields, and then click Search.

2. Next, put a check in the boxes to the left of the patient’s name under Folder Search results.

3. Click “Add to Merge Folders”

4. Next, select the patient ID that you want the duplicate patient to be merged into

5. Next, click “Merge Folders”

Retrieving Documents

WebScan Explorer

About Webscan Explorer

The Webscan Explorer function contains a listing of Applications available to the user by which the documents within them can be explored.

NOTE: Webscan Explorer ( ) is located under the Basic tab on the WebScan PRO home screen
Navigating Webscan Explorer

Each Application name can be double-clicked or the arrowhead icon can be single-clicked to expand or collapse a listing of Cabinets for that Application. In addition, each Cabinet can be clicked in either fashion to expand or collapse the Folder(s) for that Cabinet.

Searching for a Patient Folder

To search for a folder:

1. Select Application
2. Select Cabinet.
3. Enter search criteria in the Folder Search field

NOTES:
- As the user begins entering characters, a dropdown will provide the most likely folders to choose from based upon the current string typed.
- The user can enter a partial field and append the wildcard “*” character (The wildcard “*” character, by itself, will display all available options).

Editing Folders

1. Select the desired folder from the list or highlight the desired folder with the arrow keys.

NOTES:
- The right pane will be populated with the selected folder’s information.
- The user can modify any of the naming fields given for the selected folder as needed.
2. Once all modifications are satisfactory, click the Save Changes button to save the current state. NOTE: The user may also click the Delete Folder button to delete the current folder.
Retrieving Documents from Folders

Each Folder contains tabs in the right pane that represents document groups and sections displayed under each tab are document types. Documents can be opened/edited by selecting the Edit (Edit) icon.

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### Batch Search

**About Batch Search**

The Batch Search feature allows users to search for and find batches by multiple search options. Users can search for batches by Batch Number, Created Date, Description, Owner, or Status.

**NOTE:** Batch Search (Batch Search) is located under the Basic tab on the WebScan PRO home screen.
Searching for a Batch

- **Batch Number** - Enter a *Batch Number* to search for or utilize the wildcard “*” character with partial search strings to perform a search. (The wildcard “*” character, by itself, will display all available options).
- **Created Date** - Enter a date to search for by creation date of the batch. The date must be input in (MM/DD/YYYY) format.
- **Description** - Enter descriptive information to search for batches by description. The wildcard “*” character can be used to assist in searches.
- **Owner** - Enter an owner’s name to search for batches by owner. The wildcard “*” character can be used to assist in searches.
- **Status** - Enter the batches status (Open, Pending, Awaiting Approval, Approved) to search for batches by status.

NOTE: Select the **Search** button to execute the search based on the current selected search options.

**EOB Cabinet**

About EOB Cabinet

The EOB Cabinet feature allows users to search for EOBS that have been saved previously to an EOB Folder. The Batch Search feature is accessible by clicking the Batch Search icon (🔍) on the Webscan Homepage.

Retrieving an EOB

The *EOB Cabinet* consists of search option functions that allow the user to filter searches for EOB based on the following:

- **Application** - The *Application* field lists all accessible applications available to the current logged in user. Select the *Application* dropdown box to access the list of all available *Applications* for the current user.
- **Type** - The *Type* field provides a list of all document types available for selected *Application* of the current logged in user. Select the *Type* dropdown box to access the list of available search *Types* for the current user.
- **Start Date** - The *Start Date* field requires the user to input a valid date to start searching for all relevant EOBS. Select the *Start Date* field and enter a valid start date to filter search results. The date must be input in (MM/DD/YYYY) format. If the user fails to enter a *Start Date*, an error message will pop-up.
- **End Date** - The *End Date* field requires the user to input a valid date to end searching for all relevant EOBS. Select the *End Date* field and enter a valid end date to filter search results. The date must be input in (MM/DD/YYYY) format.
- **Search Criteria** - The *Search Criteria* field allows the user to enter freeform text as supplemental search requirements to aid in narrowing down the EOB results. Select the *Search Criteria* field and enter text to filter search results. If the user fails to enter *Search Criteria*, an error message will pop-up.

NOTE: Select the **Search** button to execute the search based on the current selected search options.
Advanced Search

About Advanced Search

Advanced Search feature allows users to search for documents by document attribute, which is any index information that is saved on the document.

NOTE: Advanced Search (ramid) is located under the Support tab on the WebScan PRO home screen

Using Advanced Search

1. Select the filter and logic by clicking on the dropdown arrow.
2. Once attributes are selected, fill in the data that you are searching for in the Data field. (i.e. if the Filter was Order Number, and logic was “is”, then the data would be the order number). NOTE: Users can add as many filters as they would like to their search by selecting the Add button.
3. Once complete, select Search. Search results will be generated below.

Optional Buttons

- Opens an advanced editor for adding highlights, drawings and other annotations to current document.
- Displays current document in a new window.
- Deselects all batches on current page.
- Save PDF copy of current document to a destination outside of WebScan.
Installation/Maintenance

DoRA Installation

Before installing DoRA, make a Webscan folder for your Scanned images:

1. Go to “Computer”
2. Double-click on the C drive – Local Disk (C:)
3. Right click towards the bottom in the white space, and select “New” → “Folder”
4. Name it “WebScan”

1. Copy and paste the link below into an Internet address bar: https://www.remitdata.net/support/webscan/Dora.exe
2. Select Run or Open
3. Double Click on the Dora Setup-32 bit icon and click on Run
4. It will prompt you to give access to Everyone or only that computer. Select “Everyone”.
5. Click “Next” until you receive a message that says “Installation is complete”
6. A DoRA icon will be on the desktop of the computer.

After installation, open DoRA and click on the Setup tab and fill out the following information:

- Username
- Password
- Directory: browse for the folder location that the scanned documents will be saved into (C:\WEBSCAN)
- Click on the circle next to “recycle bin”
- Click Save

After saving that information, you can click on the Scan tab and start uploading batches.

NOTE: Make sure that you always select “Now” under the Create OCR section.

User Maintenance

The User Maintenance feature enables the management of user accounts (i.e. adding new users, resetting passwords, editing the security group).

NOTE: User Maintenance ( imageData ) is located under the Advanced tab on the WebScan PRO home screen
Adding Users

To add a user, complete the following steps:

1. Click the Add User button
   NOTE: Skip the first line as the username is auto-generated
2. Type password, then confirm password
3. Type the Full Name and email
4. Make sure the Security group turns blue when you click it, then click OK. After doing so, scroll through the list and find the username that was auto-generated for your new user.

Security Groups

There are three different security groups that a user can be assigned to:

*Read Only* - This security setting will only allow the user to view documents; they will not be able to edit, file or delete the documents.

*Read and Write* - This security setting will allow the user to edit and file documents; they will not have access to delete documents.

*Full Access* - This security setting will allow the user to edit, file and delete documents.

NOTES:
- Webscan SuperUsers have access to delete, edit and re-file documents that have already been saved into a folder.
- To customize your security group permissions beyond the basic levels or provision any user to be a SuperUser, please contact customer service.

VIPER

VIPER Installation

1. Select the appropriate version for your computer’s operating system.
2. Next, copy and paste the appropriate link below into an Internet address bar:
   Windows (64-bit): [https://www.remitdata.net/support/viper/viper64-setup.exe](https://www.remitdata.net/support/viper/viper64-setup.exe)
4. Select “Setup”
5. You will be prompted you to give everyone or only you. Select “Everyone”.
6. Click “Next” until you receive a message that says “Installation is complete”
To access Viper:

1. Open any document on your computer
2. Go to File and Print (Control + P).
3. Select “ViPER from the printer list drop down
4. Click “Print”.
5. When Viper comes up, click on the Security tab and fill out the following information:
   - Username
   - Password
6. Click “Save”

General Requirements

Scanner Requirements

- Ensure that it is possible to scan to a network folder with the scanner.
- Ensure that the scanner uses TWAIN or ISIS drivers.
- The scanner must have a minimum of 300 DPI (dots per square inch).

The following is not required, but is recommended:

- The scanner has a 50 Sheet, Automatic Document Feeder Tray.
- The scanner has a minimum speed of approximately twenty (20) sheets per minute.

PC Requirements

- Windows 2000 (or higher) with a high speed internet connection (recommended 256K per congruent user)
- 512 MB RAM
- 1 GHz or Higher Processor
- Latest version of Internet Explorer 7.0
- Latest version of Adobe Acrobat Reader
- Latest version of Java
Browser Requirements

Internet Explorer is the recommended browser for WebScan PRO.

Internet Explorer Settings

- Disable any unneeded browser plugins/add-ons
  
  NOTE: Leave Java-related plugins/add-ons in place.

- Disable Phishing Filter in Internet Explorer browser settings as follows:
  1. Navigate: Tools → Phishing Filter → Phishing Filter Settings
  2. Scroll down in the Advanced (Tab) window and click the radio button labeled Disable Phishing Filter.
  3. Click the OK button.

Adjusting the browser cache settings

  1. Navigate: Tools → Internet Options → General (Tab)
  2. Within the Browsing History section, click on the Settings button
3. Under the Check for newer versions of stored pages link, click on the radio button labeled Every time I visit the webpage.

4. Modify the Disk space to use box to be set at 100 (MB).

5. Click the OK button.

Adding RemitDATA as a Trusted Site

The RemitDATA website must be added as a Trusted Site:

1. Navigate: Tools → Internet Options → Security (Tab)
2. Click on the Trusted Sites option and move the slider to low security.
3. Click the Sites button.
4. Add the following URL in the field provided: https://www.remitdata.net
5. Click the Add button. The website will appear in the Websites field.
6. Click the Close button.

Expunging all Temporary Internet Files stored in the Internet Explorer:

1. Navigate: Tools → Delete Browsing History
2. Click the Delete Files button within the Temporary Internet Files section. NOTE: A confirmation window will open to ensure that the delete function occurs.
3. Click the Close button after confirming the deletion.
Frequently Asked Questions

1. How can I find my WebScan PRO Username?

The Username for the account can be retrieved from another User with “User Access” permissions. You may also contact clientservices@remitdata.com for assistance.

2. How can I get my password reset?

The password for a Login to WebScan PRO can be reset by a User with “User Access” permissions. If you cannot contact a User with the necessary permissions, you may also use the “Forgot Password” link on the login page. Once you click on the link, you will need to put in the user’s email address and then click on “Submit”. If it is successful, it will send you an email that will contain your temporary password. If it is unsuccessful, you will have to contact Client Services to have the password reset. You may also email clientservices@remitdata.com for assistance.

3. How do I add a user to WebScan PRO?

Adding users in WebScan PRO is only possible within an Administrator’s account. From the Homepage you can access the “Advanced” tab by clicking on the red “Advanced” bar. Then, you can access the “User Maintenance” section by clicking on the icon. In the center of the page, click the “Add User” button to bring up the new user window. Put in the user’s password in to the “Password” field and confirm it in the next field. Then, put in the user’s full name into the “Full Name” field and user’s email address in the “Email” field. Select at least one of the security groups listed. Finally, you may give the user “Super User” status by selecting the check box. Once finished, you can click “OK” to save the user. If you receive an error, please confirm all the fields have been completed. After saving the user, confirm the username given in the list.

4. How can a Username be changed in WebScan PRO?

Unfortunately, you cannot change the Username from user account maintenance within WebScan PRO. You will have to request the change by contacting clientservices@remitdata.com

5. What is the recommended scanner setting for documents?

The Scanner must have a minimum resolution of 300 DPI Black and White.

6. How can a Single Folder be added in WebScan PRO?

You can add a folder from any section of WebScan PRO by selecting the “Folders” link at the bottom of the page. Then the “Create New Folder” link will appear. Then you will enter the unique key information in the “Unique Key” line, the folder name in the “Folder Name” line, and any other relevant information into the appropriate fields. Finally, select “OK” to create the folder. You may also add a folder while filing a document in “Document Edit” by selecting the “+” icon to the right of the Folder Search textbox.
7. How do you install DoRA?

First, select the link https://www.RemitDATA.net/support/WebScan/2010-04-14/dorafiles.zip and open the file. Then double-click on New DoRA and run the application. Continue following prompts by selecting “Next” until DoRA is installed. Open up DoRA after the installation is complete, click on the “Setup” tab and enter the WebScan PRO username and password for the account. Finally, select the “Browse” button next to “Directory” to choose the folder that is where the scanned files are kept.

8. What do the Green, Yellow, and Red lights indicate in a batch status?

These three lights are called status lights. They are assigned to each batch to help the user to know which batch needs to be filed. The Green light indicates that there are no documents that are in the folder WebScan inbox or with a Document Type of “Other”. The Yellow light indicates that at least one document is in the WebScan inbox. The Red light indicates that at least one document is in the WebScan PRO inbox and also has the Document Type of “Other”.

9. What is a Super User?

WebScan PRO Super Users have access to delete, edit, and re-file documents that belong to another user or have already been saved into a folder and approved. Please contact customer support to provision any users to be a Super User.