

DocAdmin™



500 Gordon Baker Road, Toronto, Ontario, M2H 3B4, Canada
www.Keystroke.ca

DocAdmin™ by Keystroke

User's Guide

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Welcome to DocAdmin™

DocAdmin™ by Keystroke

Scan and attach documents right from within ACT! – with only one click!

DocAdmin is the perfect tool to keep you organized with the touch of your finger. Simply place any document in your scanner, hit the DocAdmin “One-Click” button on the ACT! toolbar, and your document is scanned and attached to that contact.

System Requirements

ACT! Minimum System Requirements

Client Installation:

DocAdmin adheres to the minimum system requirements published by Act! for your version.

ASDS Requirements

- ◆ ACT! Pro or Premium locally installed
- ◆ TWAIN Compatible scanner or WIA Compatible scanner locally installed

How To...

Acquire a Document

To initiate a scan from within ACT!:

1. Lookup the contact in ACT! that you want the document attached to.

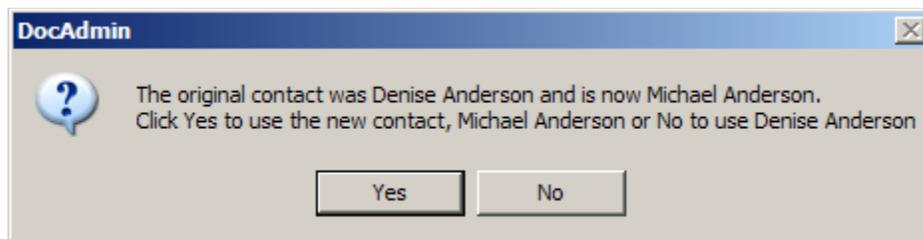


3. To initiate the scan, select **File > Acquire Document** or click the **Acquire Document** icon on the Toolbar. This will initiate your resident TWAIN driver software. Scan using the software's tools to achieve the best image.
4. Select **File > Attach Document** or choose the **Attach Document** icon on the Toolbar to attach your document to the ACT! contact record. See the **Attach A Document To ACT!** section for more information.

Attach A Document To ACT!



If the ACT! contact record has changed since you launched DocAdmin, you'll be prompted with a dialog similar to the following:



In this case, if you click Yes, your attachment will be with Michael Anderson. Selecting no will revert the attachment back to Denise Anderson.

In the Documents tab of your ACT! contact, you'll see your PDF document icon. Double-click the shortcut icon to view your document in your default PDF reader.

Open an Image

To open an image from a local drive, select **File > Open** from the menu or click the **Open** icon from the toolbar. Once your document or image is open, you can Attach the document to your ACT! contact record.

If you already have one or more images loaded, the next image opened will be appended to the end of your current series of images. If you do not want to append an image and instead want to open an image as part of a new series, close the current image series by selecting **File > Close** from the menu or select the **Close** icon from the toolbar.

Copy and Paste

To copy an image from DocAdmin to another application, select **Edit > Copy** from the menu or click the **Copy** icon from the toolbar. The image from DocAdmin is copied to the Windows clipboard. Open the application you wish to copy to, then follow the Paste instructions for that application.

To paste an image from another application, copy the image from the other application using its copy instructions. The image will be placed onto the Windows clipboard. Open DocAdmin and select **Edit > Paste** from the menu or click the **Paste** icon from the toolbar.

OneClick Scanning

OneClick Scanning



OneClick scanning is the process of scanning, auto naming your document and attaching it to the current contact, all with one click of a mouse button. In order to be truly a OneClick operation, the following options need to be set as follows.

Auto naming - Select a naming option other than None

Show Scanner User Interface - Unchecked

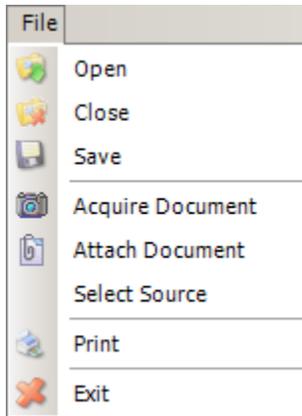
Prompt for Subject - Unchecked

Prompt for Title - Unchecked

Please note: Not all scanners support turning their User Interface off. In these cases, a true one click operation is not possible, but you'll come pretty close.

Menu Options

DocAdmin File Menu



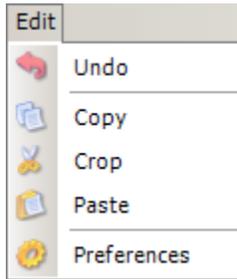
- **Open** - Opens an image from a local drive.
- **Close** - Closes the currently open image (all pages).
- **Save** - Saves the currently open image to PDF format.

- **Acquire Document** - Acquires images from your TWAIN device.
- **Attach Document** - Attaches your current image to ACT! in the form of a PDF document.
- **Select Source** - Selects your current TWAIN source.

- **Print** - Prints the currently open image.

- **Exit** - Exits DocAdmin, returning you back to ACT!.

DocAdmin Edit Menu



- **Undo** - Reverts any image changes back to the previous state.

- **Copy** - Copies the current image to your Windows clipboard.
- **Crop** - Crops the current image to the selection you have made.
- **Paste** - Pastes an image copied from the Windows clipboard.

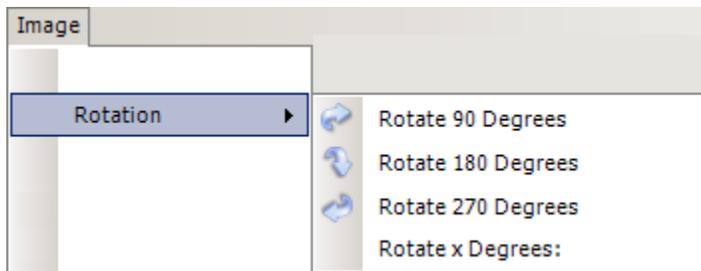
- **Preferences** - Sets your preferences for DocAdmin and other ASDS products. This can also be accomplished by going to Tools > ASDS Preferences in ACT!.

DocAdmin Image Menu

- **Scale > 1:1** -

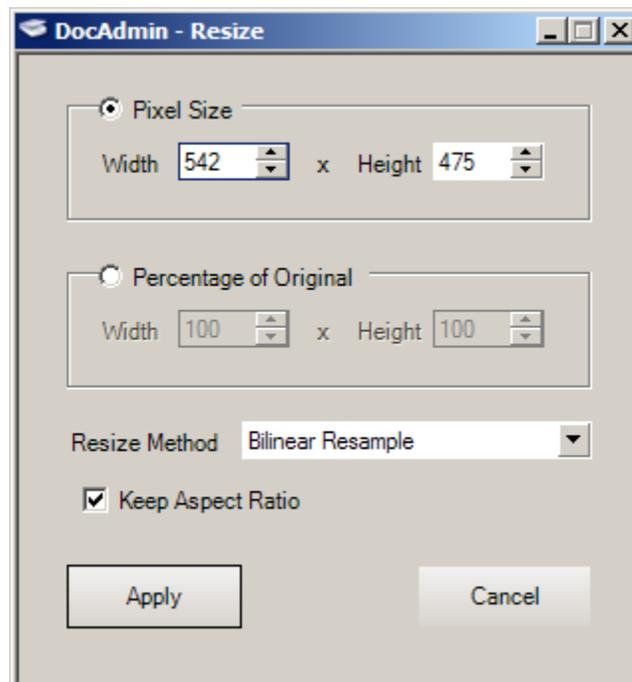


-
- **Rotation > Rotate 90** - Rotate your image 90 degrees right.
 - **Rotation > Rotate 180** - Rotate your image 180 degrees right.





- **Flip** - Produces a mirror image vertically.
- **Mirror** - Produces a mirror image horizontally.
- **Resize** - Resizes the current image. See the below dialog box for its functions.



- **Pixel Size** - Selecting Pixel Size allows you to specify the new image size in pixels. Percentage of Original values will change as you change the Pixel Sizes.
- **Percentage of Original** - Selecting Percentage of Original allows you to specify the new image size in percentages. If you specify 200%, the image will be twice as large as the original. The Pixel Size values will change as you change the Percentage of Original values.
- **Resize Method > Bilinear Resample** - Bilinear resample, uses a process called interpolation to minimize the raggedness normally associated with changing the size of an image. Use it when reducing photo-realistic images and images that are irregular or complex.
- **Resize Method > Pixel Resize** - Pixel Resize duplicates or removes pixels as necessary to achieve the selected width and height of an image. It produces better results than Bilinear Resampling when used with hard-edged images.
- **Keep Aspect Ratio** - Aspect ratio is the relationship of the image's width to height. Checking this option will insure that your image doesn't look too narrow/wide or short/tall.

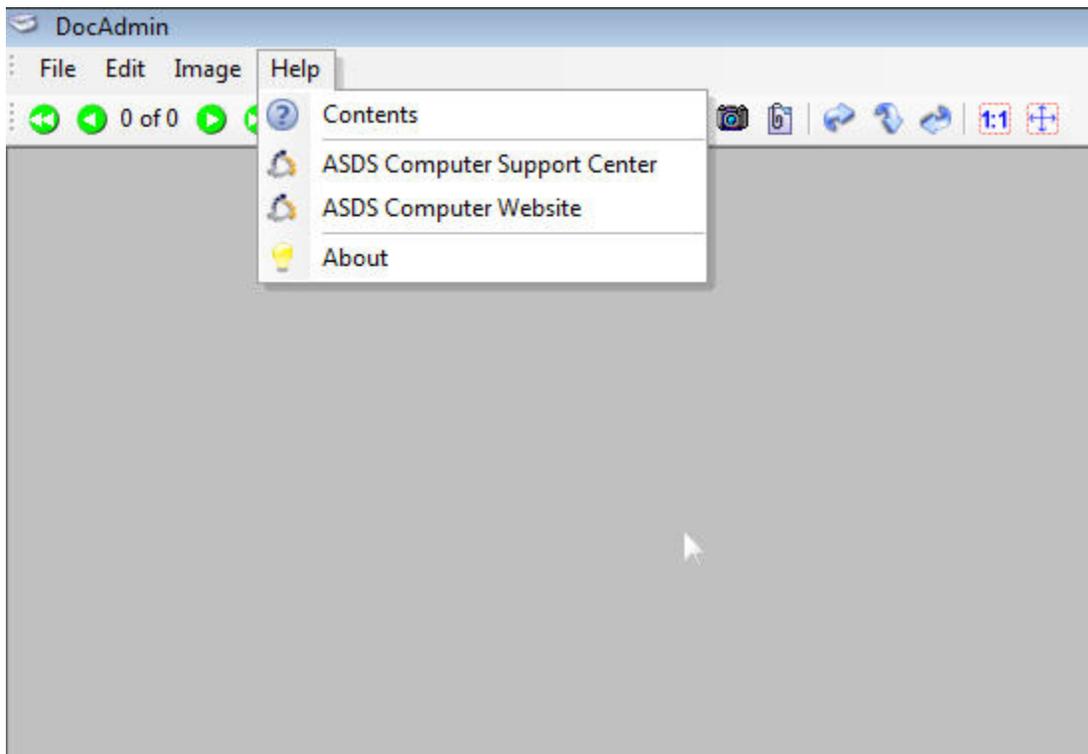
Brightness, Contrast, Gamma Correction, Sharpness and **Softness** menu options all use a dialog box similar to the following.



- **Brightness** - The setting that determines the overall whiteness of the image. **Apply** will set the main image with the new setting, while **Cancel** will revert back. The test image will change as the slider bar is moved. Valid ranges are from -100 to 100.
- **Contrast** - A comparison between the lightest and darkest part of an image. Low contrast indicates a very gray image, while high contrast represents highly defined differences between light and dark. **Apply** will set the main image with the new setting, while **Cancel** will revert back. The test image will change as the slider bar is moved. Valid ranges are from -100 to 100.

- **Gamma Correction** - Gamma correction increases or decreases the intensity of the image using the gamma function by raising or lowering the brightness midpoint. **Apply** will set the main image with the new setting, while **Cancel** will revert back. The test image will change as the slider bar is moved. Valid ranges are from .1 to 10.
 - **Sharpen** - Sharpen increases the contrast at the interface between light and dark areas in an image. Valid ranges are from 1 to 10. Note that the process can be repeated.
 - **Soften** - Soften decreases the contrast at the interface between light and dark areas in an image. Valid ranges are from 1 to 10. Note that the process can be repeated.
-
- **Despeckle** - The most typical use of the Despeckle method is to eliminate noise or small black areas in a document image. These areas are typically caused when the image is printed on a fax machine or as noise when the image is scanned. This algorithm has been highly tuned and optimized to work best with 1-bit (black and white) document images. Color images will show very little difference after using the Despeckle function.
 - **Emboss** - Embossing gives the image a raised metallic-like look.
 - **Equalize** - A frequency histogram of the colors in the image is computed and adjusted to equalize the colors across the full spectrum of intensity values.
 - **Gray Scale** - Gray scale will remove any color from an image using up to 256 shades of grey to represent brightness.
 - **Negative Image** - Creates a negative, color or gray scale, of the current image.
 - **Outline** - Outlining has the effect of creating enhanced edges.

DocAdmin Help Menu



- **Contents** - This help file.
- **Keystroke Support Forum** - Launches the Support for all Keystroke products, <http://www.Keystroke.ca/support>
- **Keystroke Website** - Launches the main company website, <http://www.Keystroke.ca>
- **About** - Displays information about DocAdmin and other Keystroke products that may be installed.

Preferences

General Options

Default Image Scale

There are two options for viewing your images. **1:1** (one-to-one) views the image in its actual size. If it is larger than your screen, you'll have scrollbars for each direction that is over the size of your DocAdmin window. The **Best Fit** option will shrink or enlarge your picture to fit either the width or height of your DocAdmin window, depending on which one displays the image better.

Auto Naming

Auto Naming will create your PDF documents with one of three **date/time stamp options**, or you may select None to have DocAdmin prompt you for the filename. Each naming convention has the following letters:

- yyyy - year
- mm - month
- dd - day
- hh - hours
- mm - minutes
- ss - seconds

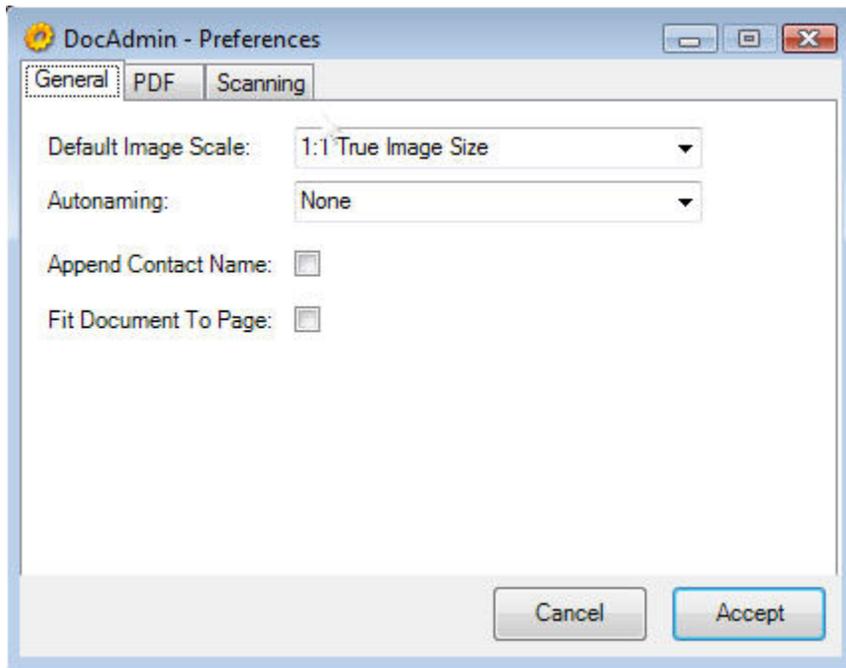
Auto Naming - Append contact name

If Auto Naming is being used, you may optionally **append** the name of your contact to your auto named document.

Fit document to page when printing

This option will **enlarge** small images to fit the page size that you are printing to.

Here is an example of the General tab in preferences:



PDF Options

PDF Document Author Name

Enter the name of the person you wish to have embedded into your PDF document as the **Author**.

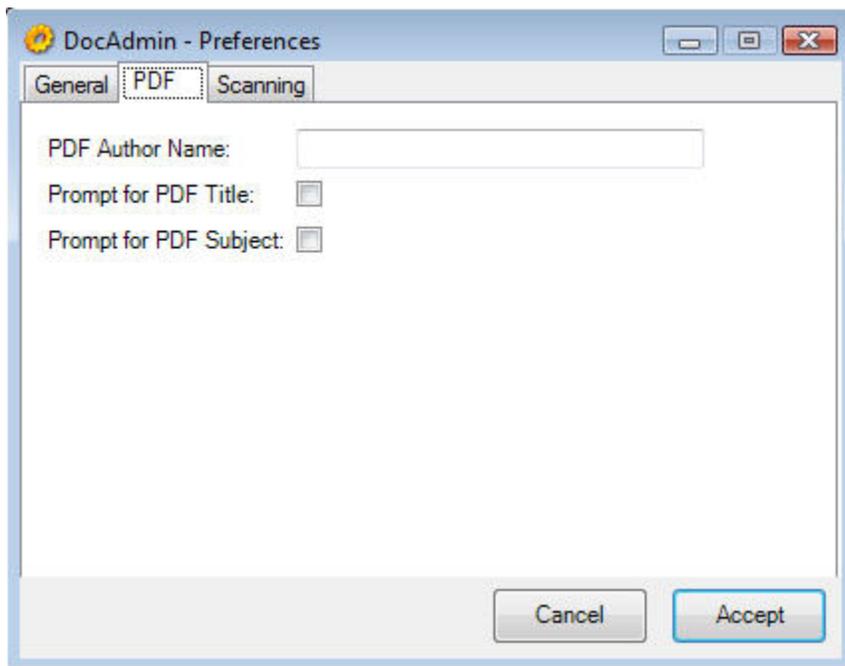
Prompt for Title

Select this option if you wish to be prompted for the **Title** of the document to be embedded within it.

Prompt for Subject

Select this option if you wish to be prompted for the **Subject** of the document to be embedded within it.

Here is an example of the PDF tab in preferences:



Scanning Options

Auto Negate When Scanning

Use this option only for those scanners that return an image that is a **negative** of your scanned document.

Show Scanner User Interface

Select this option to either show the scanner's **User Interface** or to hide it. Hiding it forces the scanner to scan the entire platen. Note that some scanners cannot have this option turned off.

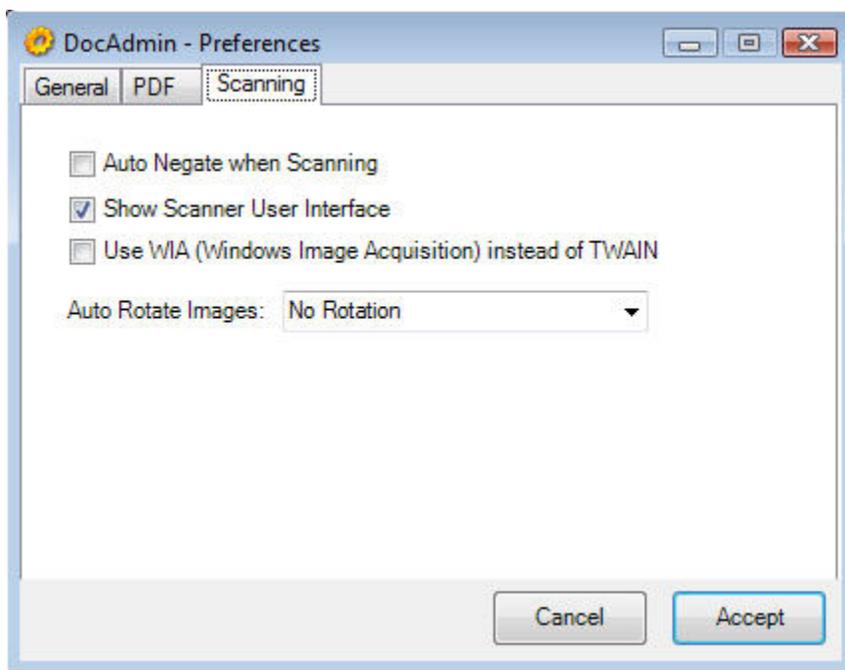
Use WIA (Windows Image Acquisition) instead of TWAIN

Select this option if your scanner does NOT use a 'TWAIN' driver and the driver name you choose under **FILE > SELECT SOURCE** has a 'WIA' in front of it.

Auto Rotate Scanned Images

This option will **rotate** documents automatically for you after being scanned.

Here is an example of the 'Scanning' tab in preferences:



Toolbars

Main Toolbar



1. **Open** - Opens an image from a local drive.
2. **Close** - Closes the currently open image (all pages).
3. **Save** - Saves the currently open image(s) to PDF format.
4. **Print** - Prints the currently open image.

5. **Undo** - Reverts any image changes back to the previous state.
6. **Copy** - Copies the current image to your Windows clipboard.
7. **Crop** - Crops the current image to the selection you have made.
8. **Paste** - Pastes an image copied from the Windows clipboard.

9. **Acquire** - Acquires an image from your scanner or other TWAIN device.
10. **Attach** - Attaches the current document to your ACT! contact.

11. **Rotate 90** - Rotate your image 90 degrees right.
12. **Rotate 180** - Rotate your image 180 degrees right.
13. **Rotate 270** - Rotate your image 270 degrees right.

14. **1:1** - Scale image display 1 to 1.
15. **Best Fit** - Scale image display to Best Fit.

Navigation Toolbar



The **double left arrows** button goes to the first image in the series.

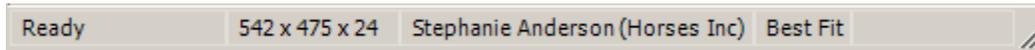
The **single left arrow** button, goes to the previous image in the series.

The **Current Counter** is displayed in the middle and displays the current image number of the total images in the series.

The **single right arrow** button goes to the next image in the series.

The **double right arrow** button goes to the last image in the series.

Status Bar



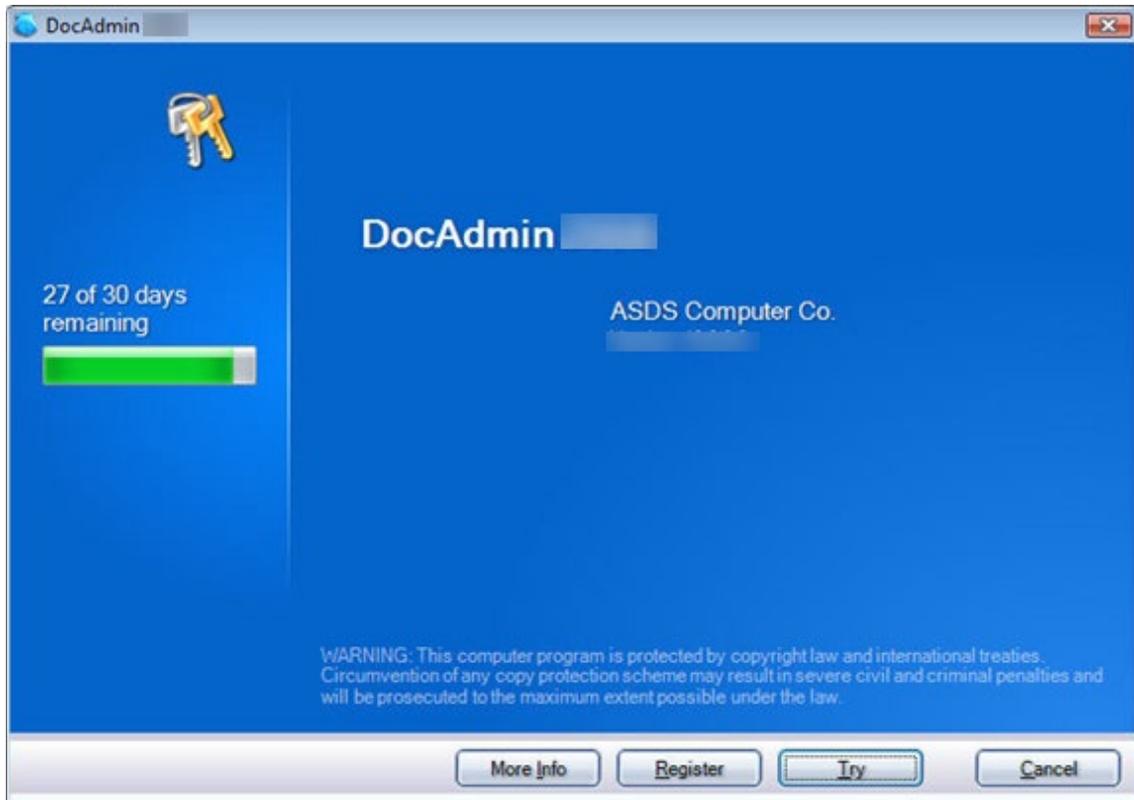
The Status Bar gives you four pieces of information.

1. The **current function** of DocAdmin, current in **Ready** mode.
2. The **image dimensions**, width x height x color bits.
3. The **current contact name** with company in ().
4. The **current scale**, either Best Fit or 1:1

Trial Ware

Trial Ware

DocAdmin comes with a 30 day fully functional trial. When you launch DocAdmin you will be prompted to try the program or register. You can utilize your 30 day trial by simply clicking the 'Try' button. If you have purchased the software, you can choose the 'Register' button and continue through the process by activating your software. See the example below:



Registration

Registration

When you choose to register your product, you will be prompted to input your information as shown below. You must fill out the fields marked with a red circle. Upon entering this information, you will choose the 'Register' button to continue on to activation. See the example below:

Register Your Software

To unlock the full capabilities of DocAdmin you must register, otherwise you can continue in trial mode to evaluate the software.

Name •

Organization

Serial Number •

Email Address •

During registration the license server will be notified. An active internet connection is required.

• Indicates that you must fill in the field.

Register Try

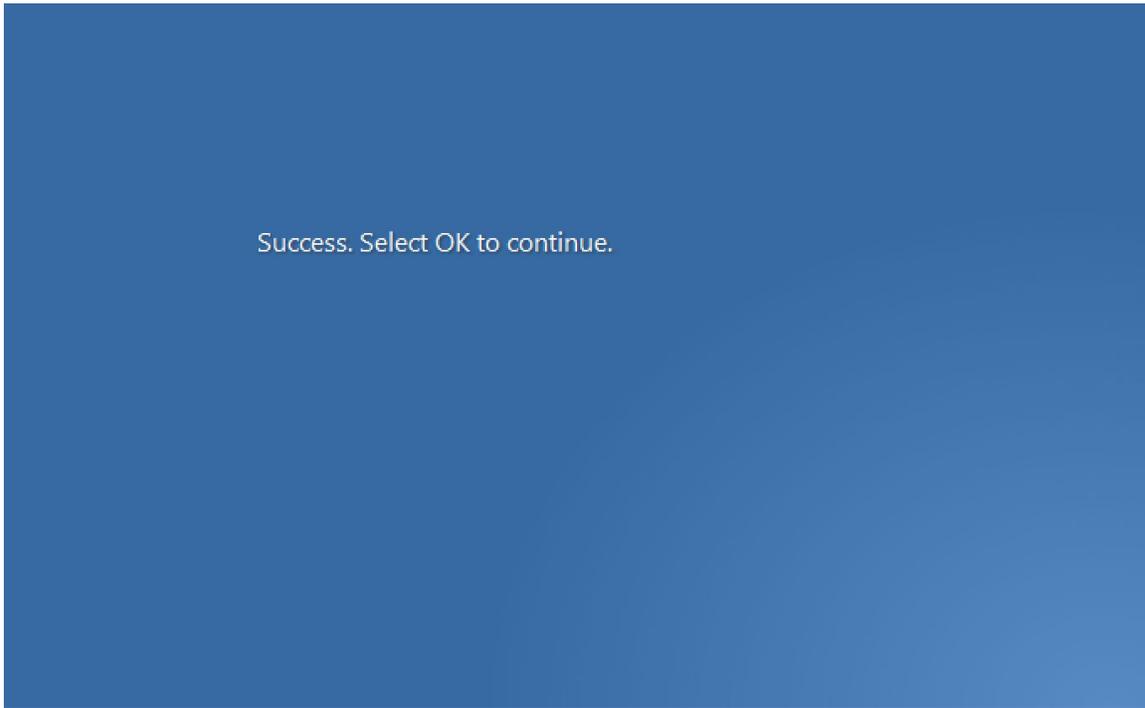
Activation

Activation

Once you have entered your information on the 'Register Your Software' window, you will be prompted to Activate Your Software. See the example below:



Once you choose 'Activate online now', you will see the following box to show it was successful.



Note: When you activate your software, it can **ONLY** be used on the machine in which it was activated on. If you choose to install it on another machine you **MUST** 'Deactivate' the software first and then 'Activate' it on the new machine.

Deactivation

Deactivation

Open DocAdmin by going to **TOOLS** menu and choosing **DocAdmin**.

Go to the **Help** menu and choose **About**.

Click the "Deactivate" button in order to deactivate the DocAdmin software.

Now you can install the DocAdmin software on the new computer and re-use the original serial number you were given and then you can activate the software online.

Technical Support

Contact Us

Technical support is available by visiting the Keystroke support site. We offer several services to meet your technical support needs. Please visit us today @ www.Keystroke.ca/support to see if there are any known issues for your product.