

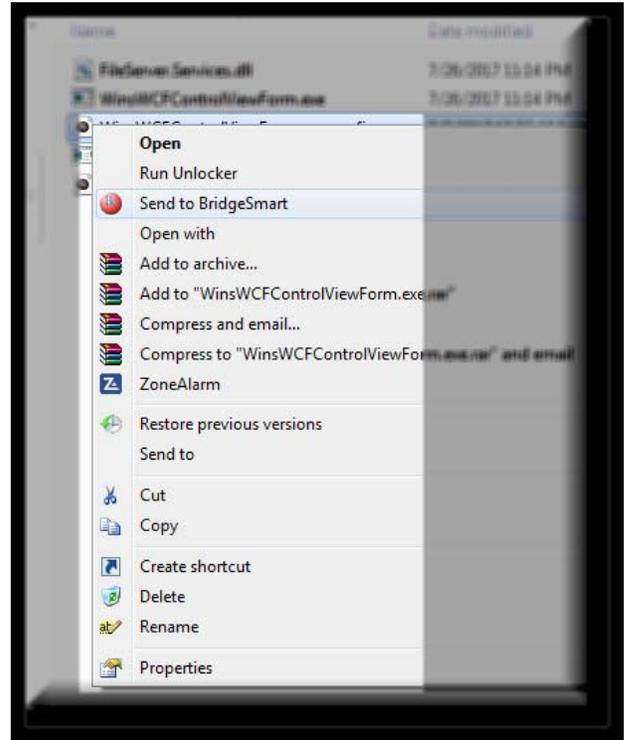
Using BridgeSmart BSAutoCapture

Now, that you have installed the BridgeSmart BSAutoCapture (BSAC) Program, you will need to perform the following steps to register, configure and use.

A. Registration

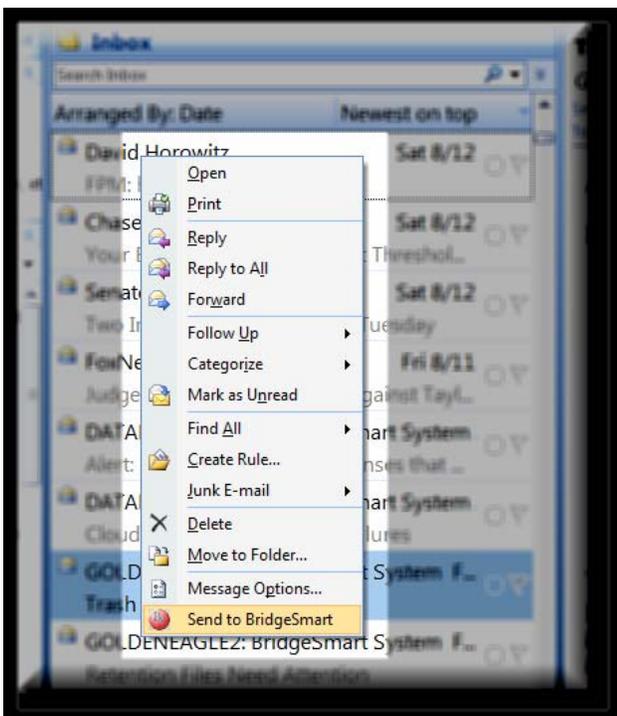
First, 'right-click' on a file on the Desktop.

Where you will see the one of the new "Send to BridgeSmart" Context Menu entries.



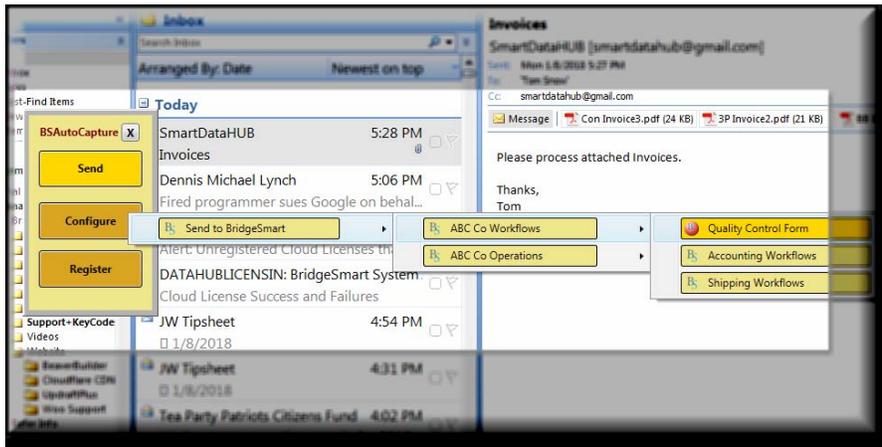
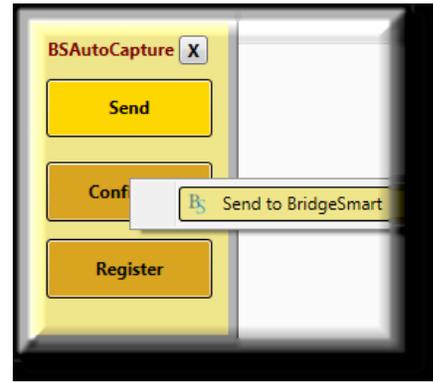
Or 'right-click' on an email in Outlook.

Where you will see the other new "Send to BridgeSmart" Context Menu entries.



Now 'left-click' (or, hereafter, just called 'click') on the "Send to BridgeSmart" entry.

The BSAutoCapture app may popup, without the BSAC Menu, as shown in the example to the right. Or with the BSAC Menu, as shown in the example below.



Note: BSAC Menu will only be seen, if and when:

1. Registered.
2. Configured correctly.
3. In 30-Day Trial or Fully Licensed*.
4. Not in "Locked Out" mode*.

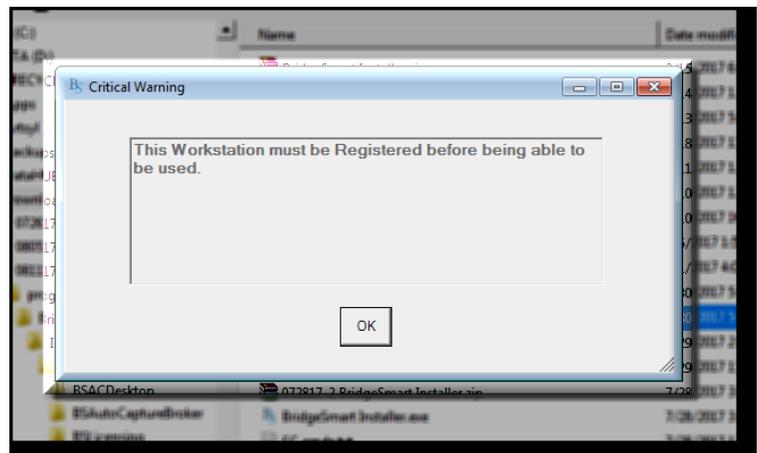
* These will be expanded upon later in this Document.

The first time using BSAC, start by 'right-clicking' on a file on the Desktop*. You will get the following message that this workstation or server must be Registered.

Click 'Ok'.

Now click 'Register' on the BSAutoCapture app and the Register Form will popup.

* **Note:** If it's the first time using BSAC and you try starting in Outlook, you may see an error; since BSAC hadn't been Registered or Configured, yet. Therefore, on the first use, start on the Desktop.



You can Request Cloud Licenses for the base [default/required] BSAC Stand-Alone [on each machine] and the optional BSAC Forms, if needed on that machine.

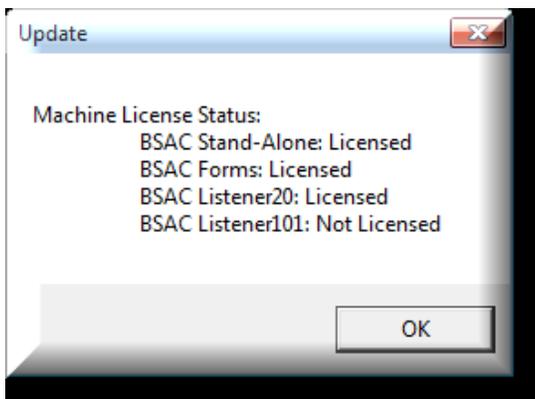
You can optionally Request for BSAC Listener20 or BSAC Listener101 for a Server that you want to install BSAC Listeners on.

You will not have the 'Cloud License ID' until you purchase the appropriate Licenses, so there's no need to fill in that space at this time.

Note: If you do not have Licenses, in advance, you will need to go back to each workstation and server after purchasing Licenses and enter (copy & paste) two pieces of information: the 'Cloud License ID' and 'Company ID'; that will be given to the Contact and Email provided here.

The 'Mac address' and 'Machine Name' are filled in automatically, as each workstation or server is Registered to the hardware and software of that machine.

Then fill in the remainder of the fields and press 'Register New or Update Workstation Info'. If in 30-Day Trial, you will receive the conformation message 'Complete'.



When you Register or Update a machine with the Company Cloud License ID, you will receive the conformation message 'Machine is Licensed' for each type of License requested, assuming you still have Licenses available.

Note: Registration Settings are based upon and local to each machine.

If you receive any other return message, you need to correct the error or follow instructions, accordingly.

Note: Until you get the email with purchased Licenses and the two pieces of information, the 'Cloud License ID' and 'Company ID', to copy & paste into each Registration form, it will be incumbent upon you to fill in the EXACT information into all of the Company and Contact fields. Otherwise it may create

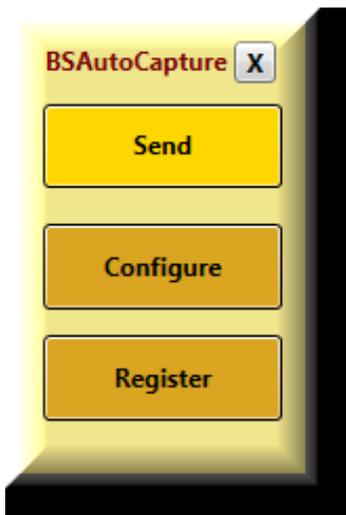
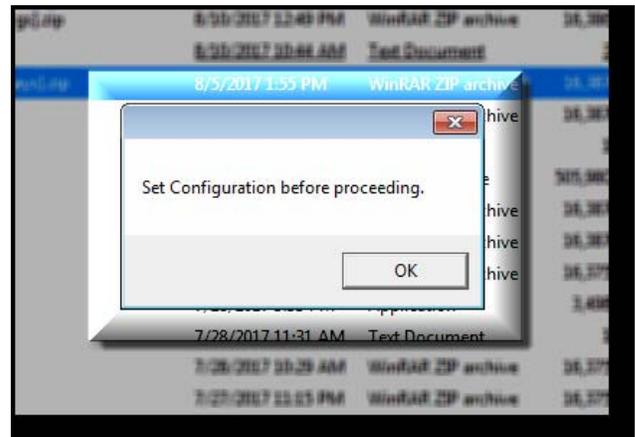
multiple Company records which may become harder for you to reconcile later [which can be accomplished through the Admin Interface].

Once you've purchased Licenses and received the email with the two pieces of information to Register and License each machine, you will be able to copy & paste them into their appropriate fields. At which time you can click the 'Load by Company ID' and it will load all other fields based on what it believes is the primary Company data you setup.

Warning: If on the first machine that you try to 'Load by Company ID' and it does **NOT** show the correct (default) Company information you want seen on **ALL** machines, **STOP** here and fix your primary Company profile as shown in "Using myBridgeSmart Admin", before updating all other machines.

B. Configuration

If not already configured, the 'Set Configuration before proceeding' message will appear.



At which time, click on 'Configure' and the Configuration Settings form will appear.

Note: Configuration Settings are local to each machine. This was done on purpose, so that each workstation can maintain its own setting from others in your network.

Hint: If you desire to copy the initial Configuration Settings from the first machine you completed setup to a group of machines or all machines in your network, you can copy the "ContextMenusClient2Server.manifest" file from the "C:\ProgramData\BridgeSmart" folder to the same folder on the other machines.

In the Configuration Settings form you will have Required and Optional Settings.

Required: You **MUST** set the IP or DNS name of the primary Host Communication Server in your network.

Hint: You are allowed to set any Test or Trial environment and, also, the Host Communication Server to 'localhost', to "Send to BridgeSmart" to itself.

See more about the Host Communication Server setup and use in "Configuring Menus for the Host

Communication Server" Document.

Note: The BSAC form shows BSAC's Required communications port: 27127 that must be opened through all of your network firewalls on all machines that are to be used with BSAC.

Optional: Outlook Mail Settings are optionally set and changeable at anytime by the user of each machine (without need of Administrator assistance). The user can quickly do this anytime when they deem the need to do so.

This provision allows each User to choose what portions of emails, attachments and images that are included in each 'right-click' menu they're sending to.

The default Mail Settings are shown.

These settings would send both the HTML portion of the email; and any and all attachments; and

any and all images (minus TIFF's) as separate documents being sent to the 'right-click' menu Hotfolder/Work Queue selected.

The user has all rights to:

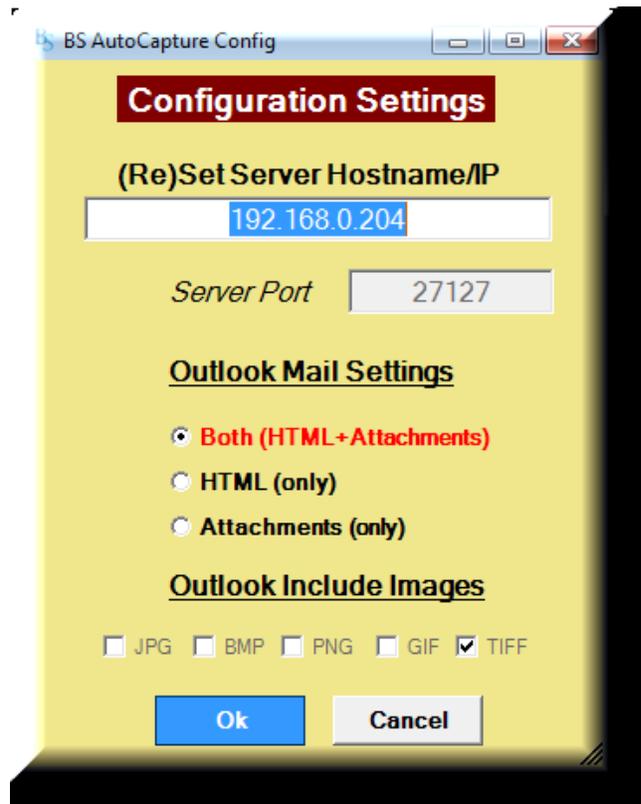
1. Select the HTML correspondence.
2. Or just Attachments.
3. Or Both.
4. And 'check' On or Off any and/or all Image types they want sent.

Note: Each item selected will be sent as individual documents to the selected menu area.

In some cases or requirements (per Business workflows) they may only want the HTML correspondence sent to one area. While the attachments sent to a different area. To do this they would change the Configuration Settings for the first requirement and then click 'Send' to the first Hotfolder/Work Queue Menu area. Then change the Configuration Settings for the second requirement and then click 'Send' to the second Hotfolder/Work Queue Menu area. While done in multiple steps, this gives the user the granularity to accomplish the particular requirements of multiple workflows and/or sending to multiple areas.

Note: File Types:

1. The main message section (correspondence) will be retained as HTML.
2. Attachments will retain their original file types: such as, DOCX, XLSX, PDF, etc.
3. Images will retain their original file types: such as noted in form, above.



C. Using BSAutoCapture

I. Purpose

1. BSAutoCapture is an Enterprise-wide Intelligent Document Capture, Transport and Communication System.
2. BSAutoCapture transports 'right-clicked' documents to Hotfolders/Work Queues, as defined in your Menus and detailed in "Configuring Menus for the Host Communication Server".
3. **Note:** It is incumbent upon you to have, create or utilize 'Listener' applications watching each Hotfolder/Work Queue for each type system you want users to transport or communicate documents; such as, Operations, Accounting, ERP, ECM, HR, Engineering, Customer Service, Ordering, Purchasing, BI, Internal Systems and/or whatever type Systems you utilize to operate your Business.

II. Requirements

1. **First:** Every workstation and server MUST be Registered and Configured.
 - a. Registration locks each machine's hardware and software for BSAC's DRM (Digital Rights Management), as described in the EULA you agreed to and is available on the website, to be able to use any portion of BSAutoCapture.
2. **Second:** As mentioned, previously, you MUST set the IP or DNS name of the primary Host Communication Server in your network.
 - a. The Host Communication Server is "Hub Central" for all processing and communications. It can be setup to transport and communicate to all other Servers in your Enterprise, as needed and detailed in "Configuring Menus for the Host Communication Server".
3. **Third:** As mentioned, previously, you MUST open port 27127 and allow it to remain open on all machines used in your network and/or Enterprise for internal BSAC communications.
4. **Forth:** All three BridgeSmart Services, on each machine, must be running for continued health of your system and communications. Otherwise communications and system function will eventually terminate; in some cases, sooner than later.
5. **Fifth:** Every workstation and server MUST be allowed to remain in communications with the BridgeSmart Cloud Licensing Servers, per the EULA. BSAC's DRM sends an hourly 'heartbeat' from each machine to our Cloud Licensing Servers.
 - a. After a while, if communications cease, the users will start receiving (potentially annoying) popup messages alerting them of such issues. Which if not resolved will eventually terminate functions.
 - 1) Reference "Locked Out" mode, below.

III. Document Sources – How to access them

1. **Emailed Documents:** Including HTML Content, Attachments, and Images in Emails.
 - a. **Access:** Through the "Send to BridgeSmart" Context Menu in Outlook.
 - b. **Note:** If using Office 365, Google Mail, Yahoo Mail or other Web-based Email platforms, be sure to setup access to these platforms via your desktop Outlook's "Account Settings" feature which will direct them into your desktop Outlook's Inbox. At which time, you can then 'right-click' on those incoming Emails and access through the "Send to BridgeSmart" Context Menu.
2. **Faxed Documents:**
 - a. First: Set your Faxes to be captured electronically and sent to Email.

- b. **Access:** Through the "Send to BridgeSmart" Context Menu in Outlook.
- 3. **Desktop or Network Folder Documents:**
 - a. **Access:** Through the "Send to BridgeSmart" Context Menu on the Desktop.
- 4. **Cloud Documents:**
 - a. Download to Desktop or Network folders.
 - b. **Access:** Through the "Send to BridgeSmart" Context Menu on the Desktop.
- 5. **Web Documents:**
 - a. Download to Desktop or Network folders.
 - b. **Access:** Through the "Send to BridgeSmart" Context Menu on the Desktop.
- 6. **Other Downloads:**
 - a. Download to Desktop or Network folders.
 - b. **Access:** Through the "Send to BridgeSmart" Context Menu on the Desktop.
- 7. **FTP Documents:**
 - a. Direct FTP Incoming folders to Desktop or Network folders.
 - b. **Access:** Through the "Send to BridgeSmart" Context Menu on the Desktop.
- 8. **Paper Documents, Scanned into Images:**
 - a. **First option:**
 - 1) Scan to Email:
 - a) **Access:** Through the "Send to BridgeSmart" Context Menu in Outlook.
 - b. **Second option:**
 - 1) Scan to Desktop or Network folders:
 - a) **Access:** Through the "Send to BridgeSmart" Context Menu on the Desktop.

IV. File Types

- 1. BSAutoCapture retains all the original file types from both Outlook and the Desktop interfaces.
- 2. Number one, this is done for integrity.
- 3. Number two, this is done so that you can design your Listeners, so that each Hotfolder/Work Queue designated for different Servers, Systems and workflows, can distinguish:
 - a. HTML as correspondence.
 - b. XLSX as a spreadsheet.
 - c. Etc., etc., etc.

V. "30-Day Trial" versus "Fully Licensed"

- 1. The "30-Day Trial":
 - a. Is a Fully Functional BSAC System.
 - b. It is completely FREE to run on each machine you want to test with.
 - 1) If for some reason you cannot complete your testing in 30 days and would want a 60-Day Trial to test with your Listeners:
 - a) You can do so by just running two different machines or two sets of machines.
 - b) **Note:** By just clearing-out or rebuilding a machine or machines, will NOT renew the 30-Day Trial on that machine or machines. The Trial and/or Licensing is tied to the hardware and software of each machine and Registration to our Cloud Servers. Therefore rebuilding machines may just waste your time.

- c. The Trial will ALWAYS include popup messages about being in the Trial and how many days are left.
 - 1) This will happen whenever BSAutoCapture is opened on "Send to BridgeSmart" or when the user clicks the 'Send' button.
 - 2) These messages cannot be turned off.
- d. At the end of 30 days, BSAC will go into "Locked Out" mode (see below).
 - 1) BSAC will respond with corresponding popup messages whenever BSAutoCapture is opened on "Send to BridgeSmart" or when the user clicks the 'Send' button.
 - 2) BSAC will become unusable on that machine until you License it.
- 2. **"Fully Licensed" Machines:**
 - a. Operates beyond 30 days.
 - b. Ends (potentially annoying) popup messages.
 - 1) Except, if machine gets into "Locked Out" mode, via services or communication issues, as described, below.

VI. "Locked Out" mode

- 1. Each machine can get into "Locked Out" mode in any of three ways:
 - a. **First:** At the end of the "30-Day Trial".
 - b. **Second:** The three BridgeSmart services are not running on a machine.
 - c. **Third:** No communications with or interrupted communications to the BridgeSmart Cloud License Servers.
 - d. When any of these happen, it will ALWAYS include (potentially annoying) popup messages about being "Locked Out" every time BSAutoCapture is opened on "Send to BridgeSmart" or when the user clicks the 'Send' button.
 - 1) These messages cannot be turned off.
- 2. To resolve and get out of "Locked Out" mode:
 - a. Fully License the machine(s) to get beyond the "30-Day Trial".
 - b. Be sure services are running with "Log On As" a permitted user, per Install Document for your type environment and with current password for that user.
 - c. Be sure communications are open and available to the BridgeSmart Cloud License Servers.
- 3. You will have seven (7) days to resolve such issues, before "Locked Out" takes full affect.
 - a. If a machine enters "Locked Out" mode for services or communications issues:
 - 1) That machine's BSAutoCapture will continue to work, per normal, for up to 7 days.
 - 2) Even though adding (potentially annoying) messages, on top of any other messages you might normally receive, such as "In 30-Day Trial".
 - 3) Resolution time is not true, nor available, if and when in the case, that a machine is beyond the "30-Day Trial". You will not get 7 additional days to resolve. In that case, Fully Licensing is the only way to end "Locked Out" mode.