

Bates Numbering Program Installation Instructions

Note: Before installing your Bates Program check to make sure you have the newest printer driver available for your printer. This is a must if you have a new computer and you have not replaced your printer. If you are installing on a computer with XP Pro make sure you have “administrative permissions” to install software.

Bates Single User Version – Download the Bates Single User Demo Version from <http://www.bates-stamp.com/demo.htm> or your Bates Demo Programs CD. Install the Bates Single User Demo as per instructions on the website. When you start the demo program you will see the “**Registration**” button. Press this Button and replace “**Demo User**” with your firm name exactly as shown on your email with the key info, which is case sensitive. Next type in the key exactly as shown on your email, press Save. If you have a problem check the I & 1’s and O & 0’s in your key. You will now go the main page, your firm name should be at the top, demo in red and the Registration Button will be gone, and your program is completely functional. You can take all the guesswork out of putting the key in by using copy and paste of each section.

Bates Network Versions – The network versions may be installed on the server or workstations. It is installed in the same manner as above. Download the Bates Network Program Purchased Demo Version from <http://www.bates-stamp.com/demo.htm> or your Bates Demo Programs CD. The default for the number of users is 5. If you have purchased additional seat licenses add the amount purchased to the default. Change the number to the new total. To access the "Registration Screen" after the first Registration of the program type *** (shift 8 for *) into the user initials entry box and press enter. Keep your Activation Key in a safe place for future use.

Bates Upgrade - If you use Bates 98 thru Bates 2004 and you would like to retain your client database, then change the install folder for the new Bates program to the folder your existing Bates program is in. The new Bates program will automatically convert your existing client database and configuration when it is started for the first time. Depending on version upgraded all clients are stored in the database under user "ZZZ" - Bates House Account and under the user who created them.

Bates Professional 2006 - Main Page

Registered to Demo User

- Registered To -

Demo User

Licensed Users: 5

DEMO

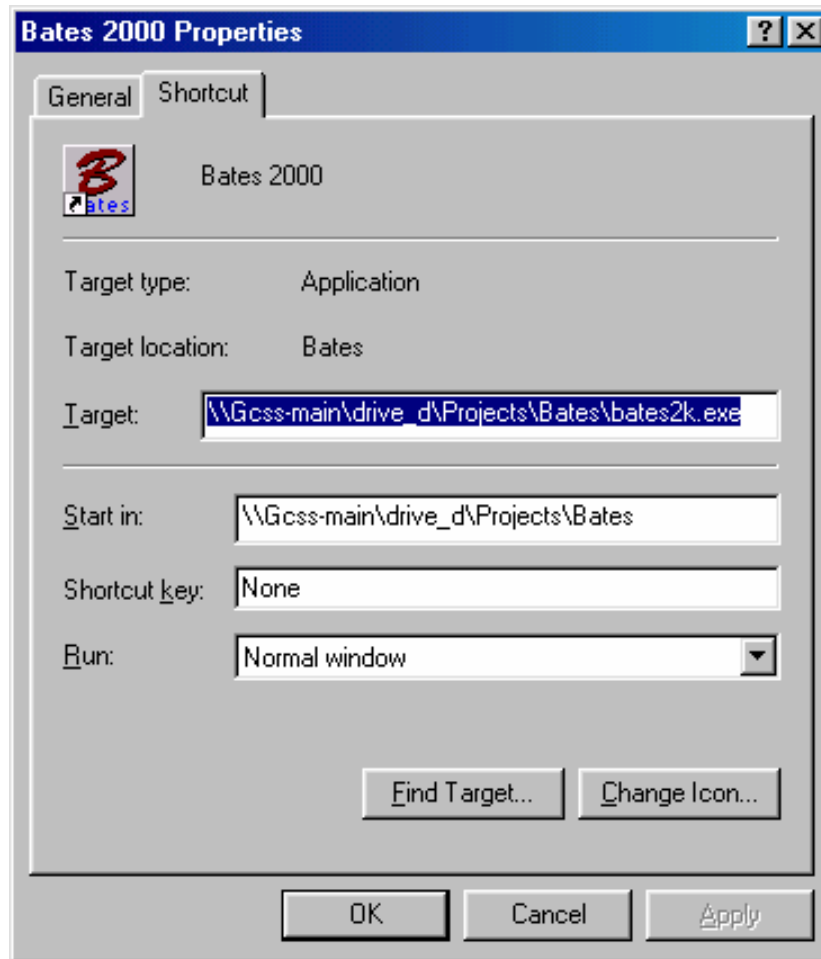
Save Cancel Help

Registered to information

Shortcuts to the server or main computer - network version.

The important thing for the shortcuts to work is the “Start in:” field. It should be similar to above. You will notice that the “Target” and “Start in” fields are the same with the exception that the “Start in” field **DOES NOT** have the “bates.exe” Run the Shortcut Wizard in windows and copy the “Target” line to the “Start in” line, delete the bates.exe from the “Start in” line and you should be good to go.

This is what the Shortcut should look like this in Windows 98.

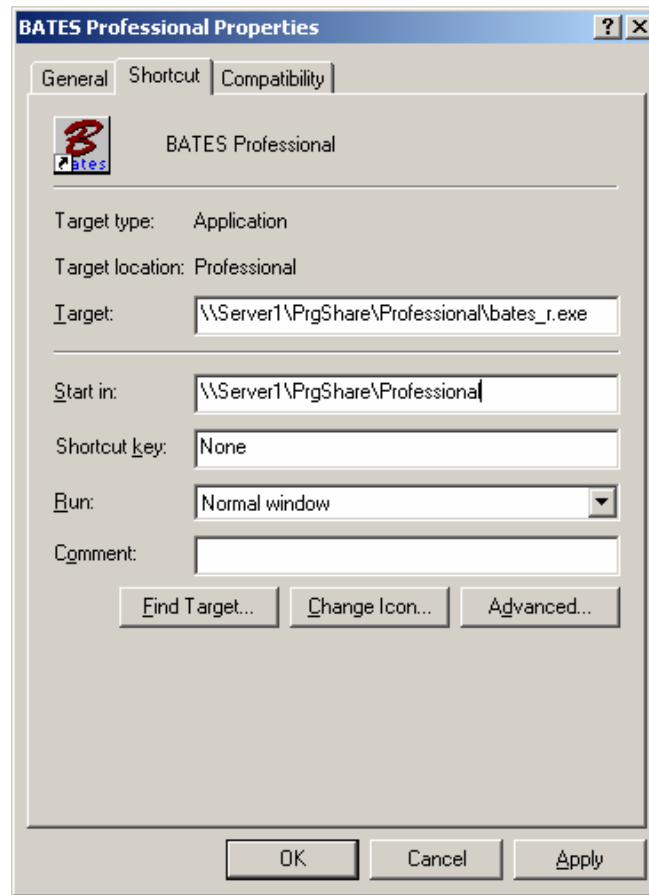


In the directory where you have installed bates the user must have rights to modify files with the extension of DAT. These files hold along with the BATES.INI file are all that are accessed. Bates itself does not use any Registry Keys.

In order to stamp Word, Excel, and Word Perfect documents the user must have the PDF-XChange 3.0 Printer installed. This printer is installed automatically. This version requires access to HKEY_CURRENT_USER.

When running from the network Bates uses the directory of where the EXE is started from for its data files. Make sure that the SHORTCUT has the proper Start-In directory.

The Windows 2000 and/or Windows XP shortcut should be like this. Make sure that the user has read/write access to this share.



The application will run across a network share based on this.

The Target Location:

[\\<ServerName>\<Share>\<Directory>\bates_x.exe](#)

The start in directory must also be in this format

[\\<ServerName>\<Share>\<Directory>](#)

If you have difficulties you can install the application on the local drive of each workstation and then edit the "Start in" portion of the shortcut properties to point to the server share.

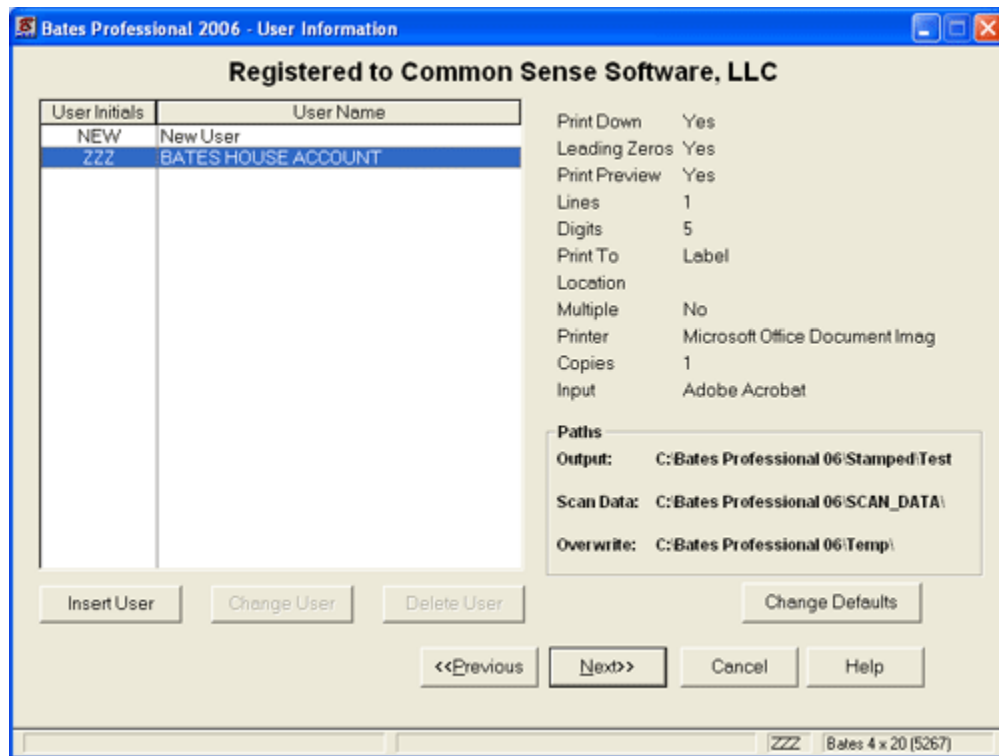
The user should have read-write access to this and any other directory processed files are stored in.

Note: Processing files across the network will slow the program speed to the speed of the network. It may even appear to be stopped if the network is busy. Much better performance will be attained if the user saves files to the local drive and then moves them to the final destination when finished.

Adding Users and Settings

Note: Common Sense Software Programs have Context Sensitive Help. This feature displays help for the screen you are presently on. For additional Help Topics press the Contents Button on the top left of the Help screen. Also, if you place your cursor on any data entry field and hold it there for a few seconds you will see a pop up help bubble that contains addition information about that field.

To add a user, from the Main Page, click on the Next Button. The User Information Page is shown below.



To add a new user, click the Insert User on the bottom left of the screen. Fill in the required information and click OK.

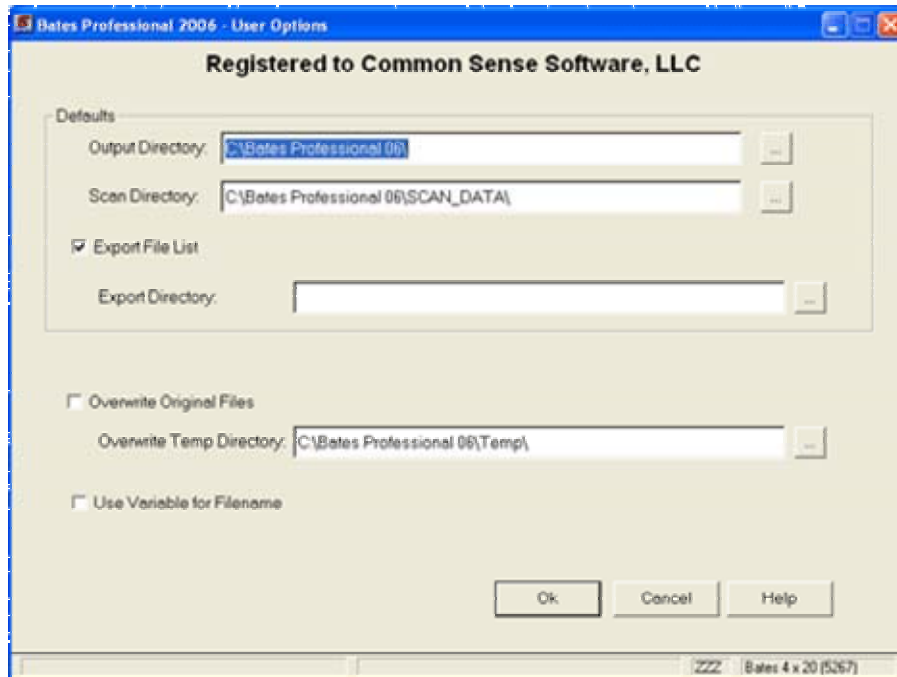


In **Bates Gold** which handles paper only press the Next Button to continue.

Changing User Options for Electronic Document Production

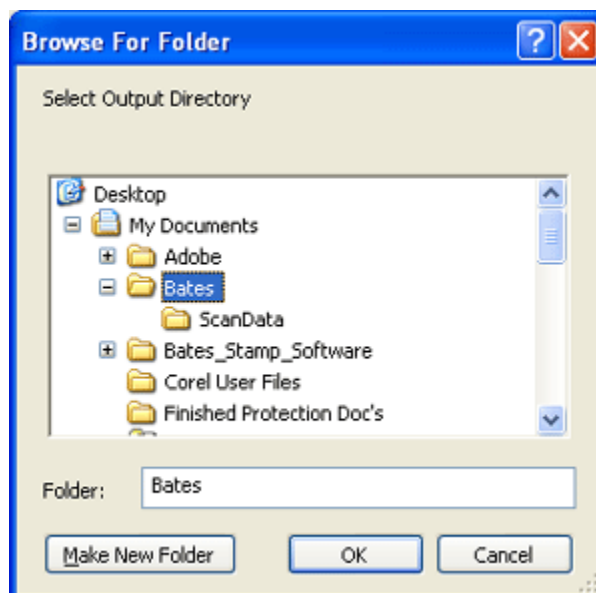
For **Network Versions** of the Bates Programs which handle Electronic Documents follow the instructions below to set output.

To change the **Output Defaults** for the user you just added with your cursor click on your user name. Next click the Change Defaults Button to go to User Options page.



Defaults are changed by pressing the Lookup Button [...] or by checking or un-checking the boxes.

Output Directory: Press the Lookup Button and select the path to the output file you want to use for your production from Electronic Document selection. As mentioned earlier placing this output on your local hard drive will give the best performance.



Changing User Options for Electronic Document Production

Scan Directory: Press the Lookup Button and select the path to the output file you want to use for your production from Scanned Document selection. As mentioned earlier placing this output on your local hard drive will give the best performance.

Export Directory: Press the Lookup Button and select the path to the output file you want to use for your File List which is generated from the production of Multiple Electronic Documents. The default placement of this list is the As mentioned earlier placing this output on your local hard drive will give the best performance.

Note: you may turn off this feature by un-checking the checkbox.

Overwrite Original Files: Use this feature with caution. It is much easier to delete that recreate. If you do use this feature it is best to move files to the local drive and set the Overwrite Temp Directory to the local drive.

Use Variable for Filename: Checking this option when processing multiple Electronic Files will rename each file the first page Variable of that document, as an example, if the Variable for this production is “Jones 001” the first file of 10 pages is named “Jones 001”. File number 2 is 20 pages and is renamed “Jones 011”, etc.

Press the OK Button to save your changes. Each User may have separate Options.

At the User Information Page select the Next Button to continue.

Bates Professional 2006 - User Information
Registered to Common Sense Software, LLC

User Initials	User Name
NEW	New User
ZZZ	BATES HOUSE ACCOUNT

Print Down Yes
Leading Zeros Yes
Print Preview Yes
Lines 1
Digits 5
Print To Label
Location
Multiple No
Printer Microsoft Office Document Imag
Copies 1
Input Adobe Acrobat

Paths
Output: C:\Bates Professional 06\Stamped Test
Scan Data: C:\Bates Professional 06\SCAN_DATA\
Overwrite: C:\Bates Professional 06\Temp\

Insert User Change User Delete User Change Defaults

<<Previous Next>> Cancel Help

ZZZ Bates 4 x 20 [5267]