

eCopy™ ShareScan® 4.5

Installation and Setup Guide

for Canon® ScanFront™ devices



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Getting Started

This guide is intended for administrators responsible for installing and configuring eCopy™ ShareScan®. It provides a product overview and describes system requirements and installation and configuration procedures.

In this chapter

- Further information2
- Customer support services3

Further information

The documentation set consists of the following documents:

- **ShareScan Installation and Setup Guide:** The Quick Start section of this document guides you through the initial installation and setup process. The Reference section provides more detailed information about configuring the system and the eCopy Connectors. It also describes how to manage the Client and use the eCopy™ Connectors.
- **ShareScan Help:** The Help files contain information about configuring the system, connectors, and devices. You can easily access the Help from the Administration console.



To access the Administration console help, in the console tree, select a node, such as “ShareScan” and then click the Help button. The Help opens in the Microsoft Management Console.



To access help for a specific connector, in the console tree, select the connector and then click the Connector Help button, or right-click the connector name and then select Connector Help from the menu.

Customer support services

Customer Support services include the following components:

- Customer support for licensing, registration, and other non-technical issues
- Technical support

eCopy does not provide hardware repair and RMA (Return Merchandise Authorization) services for this product. Contact your dealer/distributor or system integrator for more information.

eCopy-provided services are available to registered users of eCopy software during the warranty period or for the duration of your software maintenance and support agreement. Contact your supplier for details.

As described in the maintenance and support agreement, your dealer or distributor will provide you with Level 1 support (Help-line telephone or other assistance) for operating the covered products during the hours established by your dealer or distributor. If you require technical support after your dealer or distributor has provided Level 1 support, the dealer or distributor will escalate the support issue to eCopy for resolution and will manage all related communications with you.

In addition to support provided by your dealer or distributor, the Ask eCopy online resource—www.askecopy.com—provides 24x7 access to a knowledge base that includes Frequently Asked Questions (FAQs), product service packs, product support matrices, product information, and other information.

Contact information

US/North America

Please visit the Ask eCopy Web site—www.askecopy.com—for Customer Support hours of operation, contact information, policies, and process descriptions.

eCopy Corporate Headquarters Telephone: +1.603.881.4450

Outside North America

Please contact your local dealer or national sales organization.

Quick Start: Installing and setting up ShareScan

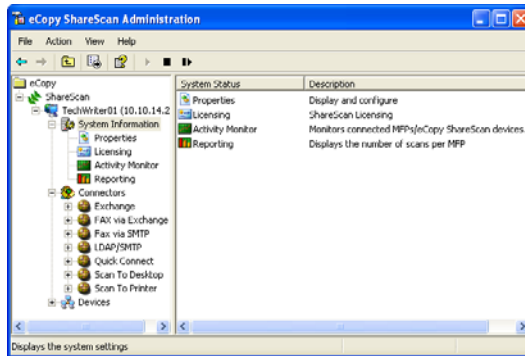
ShareScan extends the capabilities of digital copiers and scanners. When installing and setting up the software, you need to understand the product components and the installation tasks.

In this chapter

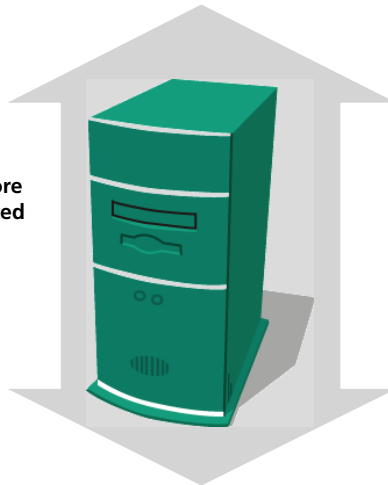
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Product components

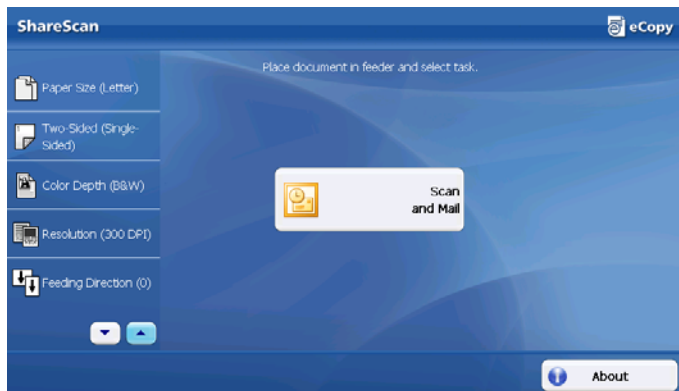
Administration console



Network computer running the Services Manager and one or more connectors (applications connected to enterprise applications, such as e-mail and fax).



Client (running on a Canon ScanFront device)



The **ShareScan Client** is installed on a Canon® ScanFront™ device. It displays the user interface on the device's control panel and handles user input. It passes all information, including the raw scanned image file, to the Services Manager for processing.

The **ShareScan Services Manager** resides on a network computer running Windows 2003 Server, Windows 2008 Server, Windows XP Professional (Service Pack 3), or Microsoft Vista (Business and Enterprise, Service Pack 1). ShareScan does not require any special server hardware. The Services Manager handles requests from the client, returns user interface screens and preview images to the client, and creates the master image file according to the selected options (file type, searchable text, encryption, etc.). It also manages all connected devices; a single Services Manager can support multiple clients.

Apache Tomcat, which provides the Web client, resides on the PC running the ShareScan Services Manager. It handles communications between the ScanFront device and the Services Manager. It also keeps track of the hosted ScanFront devices, manages scanner settings, and initiates scanning on the ScanFront device.

The **Connectors**, which reside on the same computer as the Services Manager, provide connectivity to back-end applications. For example, the eCopy Connector for Microsoft Exchange enables users to scan documents and e-mail them using Microsoft Exchange. The eCopy Connector for Fax via Lotus Notes enables users to scan documents and fax them using Lotus Notes.

The **Administration console** is a Microsoft Management Console (MMC) snap-in that enables system administrators to configure and administer Services Managers, eCopy Connectors, eCopy Services, and devices.

Installation tasks

Before installing the product, see page 165 for information about hardware, software, and network requirements.

To install and configure ShareScan, you perform the following tasks:

- Install the ShareScan software (Services Manager, Administration console, and the eCopy Connectors supplied with the installation program) on a network computer.
- License the devices.
- Configure one or more connector profiles.
- Set up the ScanFront device on the network and then connect it to the PC running the ShareScan Services Manager.
- Activate the connector profiles on the device.

Installing eCopy ShareScan

Use the ShareScan installation program to install the following components on a network computer:

- Client
- Services Manager
- Administration console
- One or more eCopy Connectors supplied with the installation program.

Installing connectors is not the same as activating them. You can install all the connectors suitable to your environment now and activate them when you need to use them. For example, if you are in a Windows environment, you do not need to install the Lotus Notes Mail and Fax connectors. (If you want to install a connector later, you must go through the installation process again.)

To install the software:

- 1 Insert the eCopy ShareScan CD (Disk 1) in the drive.

The **Launch** window opens.

- 2 Click **Install ShareScan**.

The InstallShield Wizard determines the locale on the computer where you are installing ShareScan; the locale determines the language for the installation.

Note: If you need to install ShareScan in a different language, browse to the ShareScan.exe file on the CD and then double-click the file. The installation program will prompt you to select a language for the installation.

The InstallShield Wizard displays a screen that identifies software that must be installed on your system before you install ShareScan, including MSXML6.0-SP1, Microsoft Visual Studio C++ Redistributables, Java 2 Standard Edition Runtime Environment 5.0 UPDATE 14, and Apache TomCat 5.5.

- 3 Click **Install** to install the required software and then follow the prompts, accepting the Apache Tomcat default settings.

When installation of the required software is complete, the **Welcome** window for the ShareScan installation opens.

- 4 Click **Next**.

The **Destination Folder** window opens, where you can accept the default folder (recommended) or select a different folder.

5 Click **Next**.

The **Connector Selection** window opens.

6 Select the connectors that you want to install. A red “X” next to a connector indicates that it is not available for installation.

If you plan to install the Lotus Notes Mail and Fax via Lotus Notes Connectors, you must first install the Lotus Notes client on the computer running the Services Manager. If you attempt to install these connectors without first installing the Lotus Notes client, the Setup program will display an error message indicating that it cannot register the connector.

Note: If the Lotus Notes client installation program prompts you to choose between the Multi-User Install option and the Single User Install option, make sure that you select the Single User Install option.

7 Click **Next**.

The **Ready to Install the Program** window opens.

8 Click **Install**.

9 When the installation is complete, click **Finish**.

If you select an e-mail or fax connector and you want to use the product’s Internet Address Book function to store manually entered addresses and fax numbers in a database, you must install Microsoft SQL Server Express 2005 (SQL Express). You must install the version of SQL Express provided on the ShareScan CD (see page 74).

Licensing devices

You license the product from the Administration console. To do this, you perform the following tasks:

- Connect to a Services Manager (see page 12).

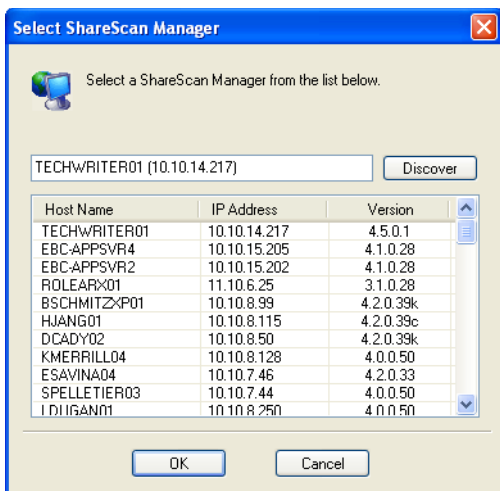
Note: The first time that you open the Administration console, ShareScan automatically connects to the local Services Manager. The next section describes how to select a different Services Manager.

- Add the product key to the local license database (see page 14).
- Configure one or more connector profiles (see page 15).
- Set up the Canon ScanFront device (see page 26).
- Add the Canon ScanFront device to the Services Manager (see page 29).
- Activate the license and generate a license report (see page 30).

To select a different Services Manager:

- 1 Select **Start > Programs > eCopy Applications > ShareScan Administration**.
- 2 Right-click **ShareScan** and then select **Discover Managers** or click the **Discover ShareScan Managers** button on the toolbar.

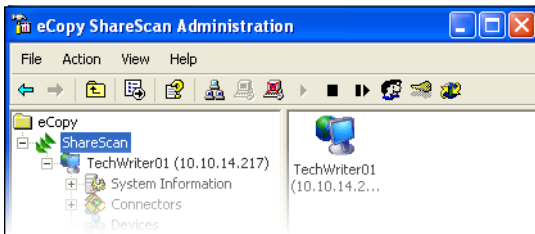
The **Select ShareScan Manager** window opens. The first Services Manager in the list is most often the local computer, the one that you typically want to administer.



- 3 In the list, select the Services Manager that you want to use.
 - If the Services Manager that you want to use is not listed, click **Discover** to refresh the list.
 - If the Services Manager is still not listed, enter the machine name and IP address in the edit field, for example, enter **ECOPY1 (10.10.10.10)**.

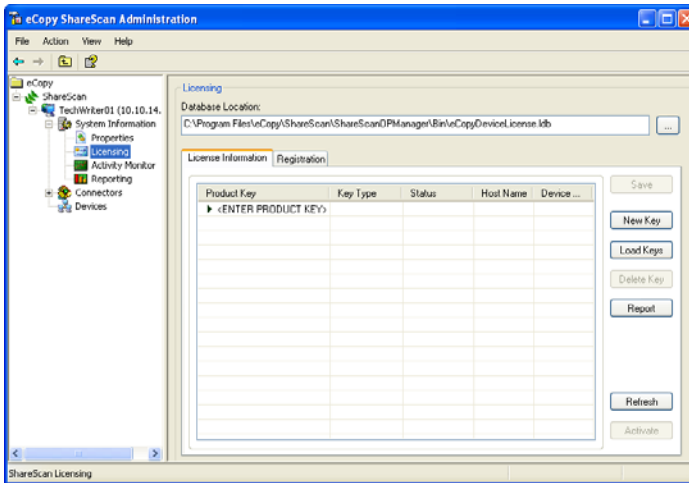
4 Click **OK**.

The Administration console opens.



To add the product key to the local license database:

- 1 In the console tree, select **System Information** and then select **Licensing**.



Note: If you received your keys in electronic form, you may want to copy and paste them from a text file (TXT).

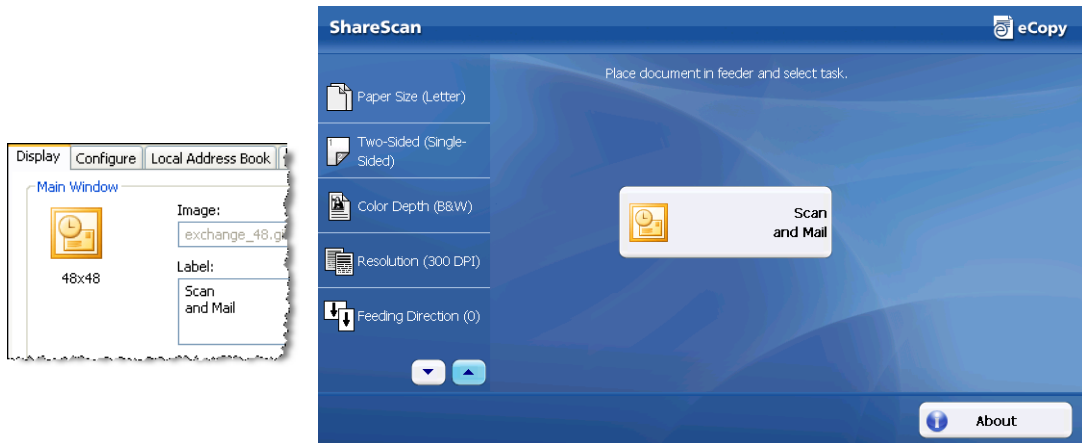
- 2 Use any of the following methods:
 - Click **New Key**, enter the key (manually or by pasting a copied key), and then click **OK**.
 - Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press **ENTER**.
 - Click **Load Keys**, select the text file containing the product keys, and then click **Open**.

The **License Information** tab displays the product key or keys that you entered.

Configuring and activating connector profiles

After licensing a device, you configure one or more profiles for each connector that you want to use and then activate the profiles on a device.

When you configure a connector profile, you associate it with a button that appears on the main ShareScan Client screen. When a user presses a button, the connector uses the properties and services specified in the connector profile associated with the button. For example, the following screens illustrate the relationship between the Display properties for an Exchange connector profile and the Scan and Mail button on the Client screen.



You can configure multiple profiles for each connector.

This section describes the basic process of configuring and activating a connector profile, using the eCopy Connector for Microsoft Exchange as an example. It does not provide any information about configuring a local address book, which is a more advanced function. For detailed information about configuring a profile for this connector, see page 92.

Before configuring this profile, you should create a generic Microsoft Exchange account for ShareScan to use. The profile uses the ShareScan User Account information to log on to the Exchange server and retrieve the Global Address List.

Specifying properties for a connector profile

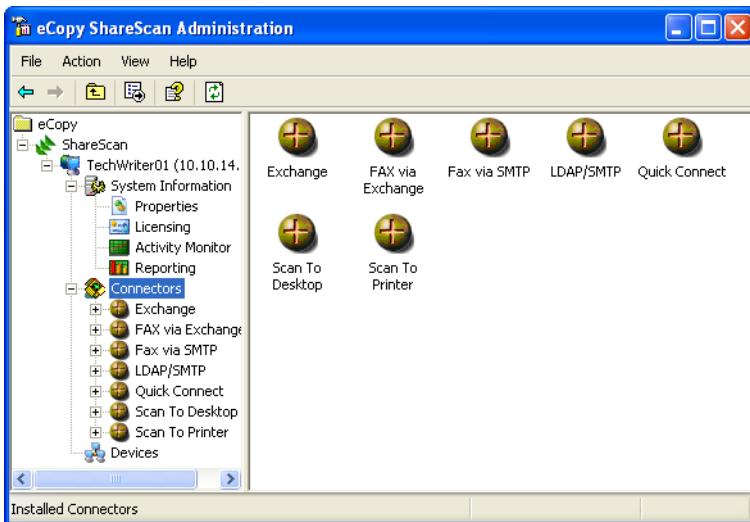
This section describes the basic process of configuring the following properties:

- Display
- ShareScan user (on the Configure tab)
- Content
- Express mode

To access the Properties tab for a connector:

- 1 In the console tree, select **Connectors**.

The console displays all the installed connectors. (To change the view, right-click in the right pane, click **View**, and then select the view you want to use.)

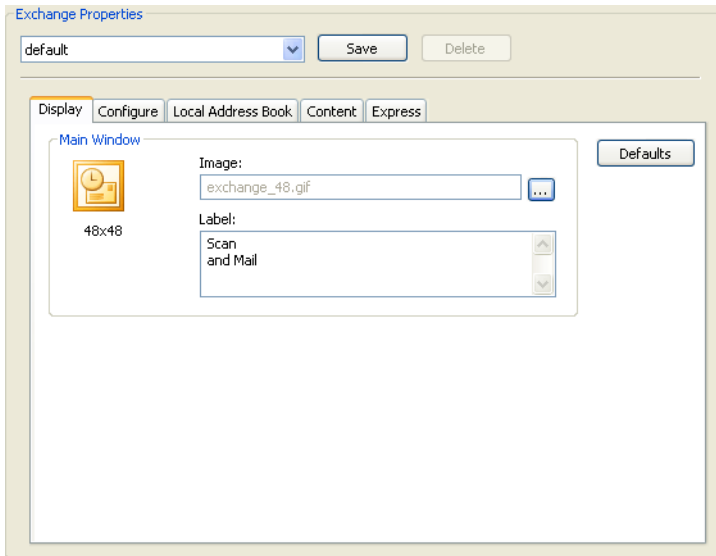


- 2 Double-click **Exchange**.

The console displays the **Properties** and **Services** icons.

3 Double-click **Properties**.

The **Exchange Properties** pane appears.



To configure the Display properties:

- 1 Select the **Display** tab.
- 2 To modify the image associated with the connector profile's button, click the Browse button next to the **Image** field, locate the image that you want to use, and then click **Open**.
- 3 To modify the button label, click in the **Label** field and enter the new text.
- 4 Click **Save**.

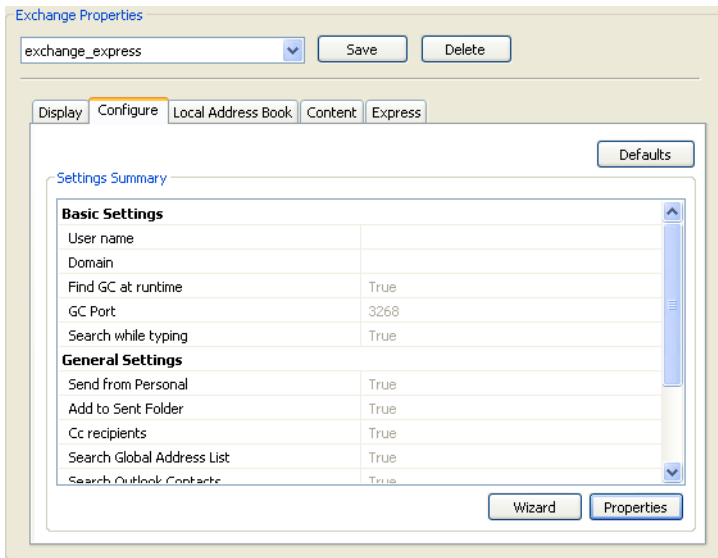
The **Save Profile** window opens.

- 5 Enter **exchange_express** as the name of the profile, or leave "default" as the name, and then click **Save**.

To configure the ShareScan User properties:

- 1 Select the **Configure** tab. This tab looks a little different for each connector, but most of the connectors, especially the e-mail and fax connectors, contain similar types of settings.

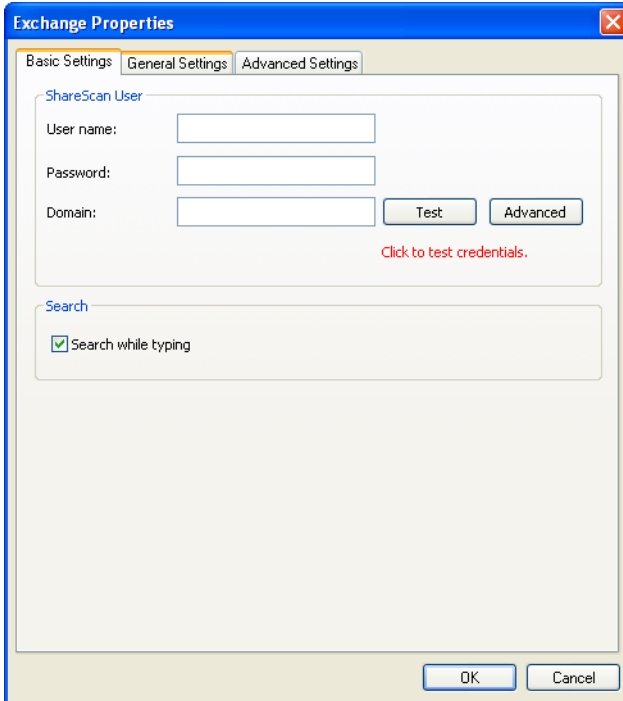
Note: Some connectors, such as the Exchange Connector, include a Wizard that walks you through the standard environment settings. For information about using the Wizard to initially configure an Exchange Connector profile, see page 94.



- 2 Click **Properties**.

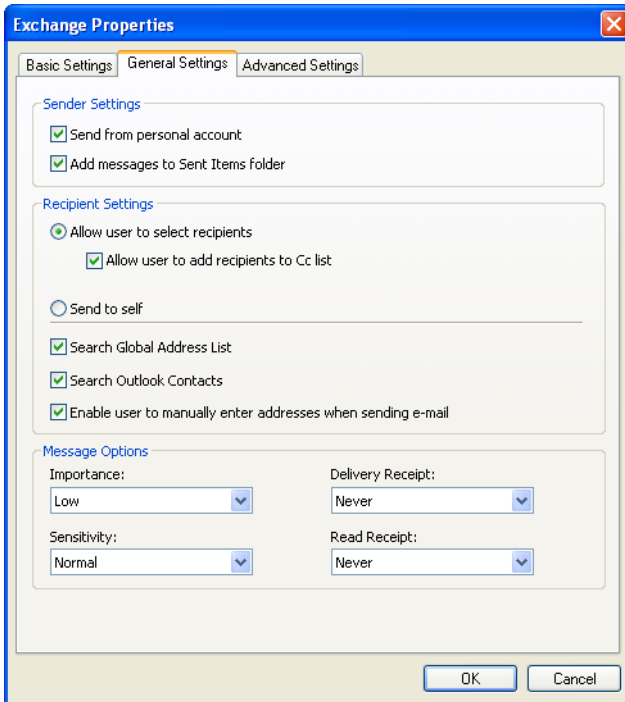
The **Exchange Properties** window opens.

- 3 Select the **Basic Settings** tab.



- 4 Enter the ShareScan User information and then click **Test**.

5 When the “Test successful” message appears, select the **General Settings** tab.



- To configure the profile to enable users to send scanned documents as e-mail attachments from their personal Microsoft Exchange account, select the **Send from personal account** option.
 - If you do not want to configure the profile to enable users to send scanned documents as e-mail attachments from their personal Microsoft Exchange account, clear the **Send from personal account** option. The connector will send the scanned documents from the ShareScan User Account.
 - To configure the profile to enable users to send scanned documents only to the logged on user, select the **Send to self** option. The Send screen will not appear on the Client screen at the device.
- 6 When you have specified the basic and general settings, click **OK**. The **Settings Summary** displays the current settings.
- 7 Click **Save** to save changes to the profile.

To configure the Content properties:

- 1 Select the **Content** tab.

The **Content** tab enables you to specify the default subject or note information that will be available to a user at an eCopy-enabled device.

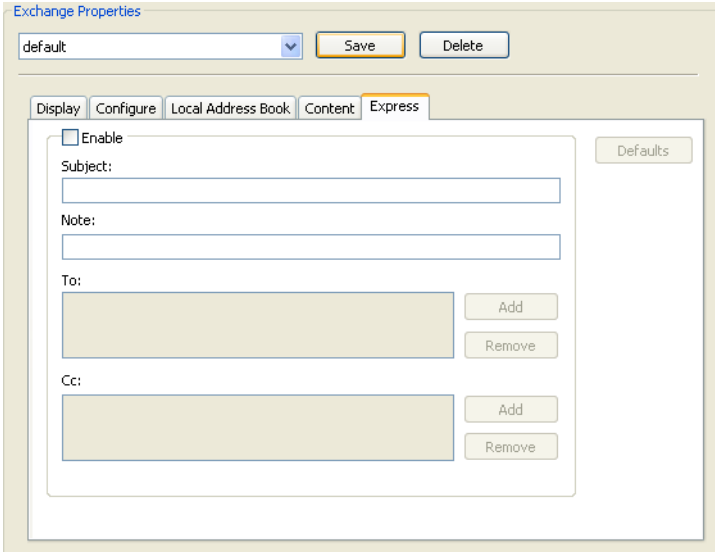
The screenshot shows the 'Exchange Properties' dialog box with the 'Content' tab selected. At the top, there is a dropdown menu set to 'default', a 'Save' button, and a 'Delete' button. Below this are tabs for 'Display', 'Configure', 'Local Address Book', 'Content', and 'Express'. The 'Content' tab is active, showing a 'Message:' section with a 'Subjects' dropdown menu. The selected subject is: 'Scanned document from \$\$USER_NAME\$\$
\$\$USER_NAME\$\$ has sent you a scanned document - File Name:\$\$FILENAME\$...
Please review the attached scanned document from: \$\$USER_NAME\$\$'. Below the subject list are buttons for 'Move Up', 'Move Down', 'Add', 'Edit', and 'Delete'. A 'Defaults' button is also present. The 'Byline:' section has a checkbox for 'Custom:' with an empty text field, and another checkbox for 'Enable .cpy file format byline'.

- 2 To specify the default subject that will be available to the user at the device, select it in the **Subjects** list. The user can accept the default subject or enter a new subject.
- 3 To specify the default note, select **Notes** in the **Message** area and then select a note.
- 4 Click **Save** to save changes to the profile.

To configure Express properties:

- 1 Select the **Express** tab.

This feature enables you to create a profile that minimizes user interaction at the device; the Send screen will not appear on the Client screen at the device.



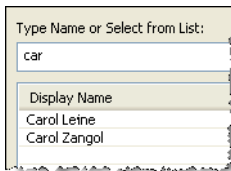
The screenshot shows the 'Exchange Properties' dialog box with the 'Express' tab selected. At the top, there is a dropdown menu set to 'default', a 'Save' button, and a 'Delete' button. Below this are tabs for 'Display', 'Configure', 'Local Address Book', 'Content', and 'Express'. The 'Express' tab contains an 'Enable' checkbox, which is currently unchecked. Below the checkbox are three text input fields labeled 'Subject:', 'Note:', and 'To:'. The 'To:' field has an 'Add' button and a 'Remove' button. Below the 'To:' field is a 'Cc:' field, also with 'Add' and 'Remove' buttons. A 'Defaults' button is located on the right side of the dialog box.

- 2 Select the **Enable** check box.
- 3 Enter information in the **Subject** and **Note** fields.

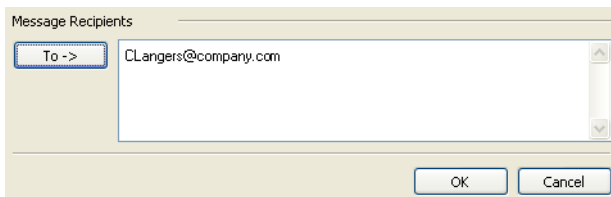
The user at the device will not have to specify a subject line or a note.

Note: When you enable Express, the connector profile will not use the default subject line or notes that you may have already specified on the Content tab.

- To specify one or more recipients, click the **Add** button associated with the **To:** field. The **Add Recipients** window opens.
- With the **Search while typing** option selected, enter the first few characters of a recipient's name. As you type, the system displays names that match the characters you entered.



- Select each recipient that you want to include on the **To:** list and then click **To ->** in the **Message Recipients** area.



- Click **OK**.
The console displays the recipients in the **To:** list. The user at the device will not have to select any recipients.
- Click **Save** to save changes to the profile.

Specifying services for a connector profile

There are three core services available to connector profiles:

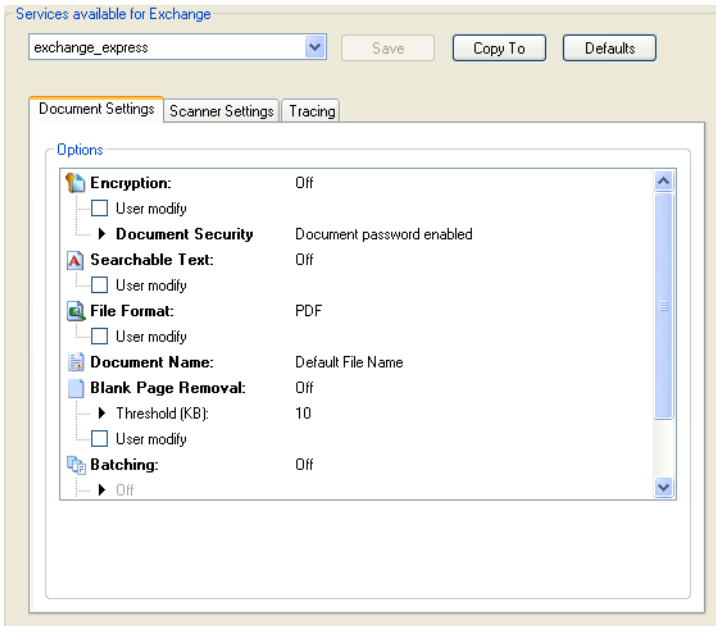
- Document Settings
- Scanner Settings
- Tracing Settings

This section describes the basic process of configuring the Document Settings and Scanner Setting services. For information about configuring Tracing Settings, see page 89.

To access the Services pane for a connector:

- 1 In the console tree, select **Connectors**.
- 2 Double-click **Exchange**.
- 3 Double-click **Services**.

The **Services available for Exchange** pane appears.



To configure the Document Settings service:

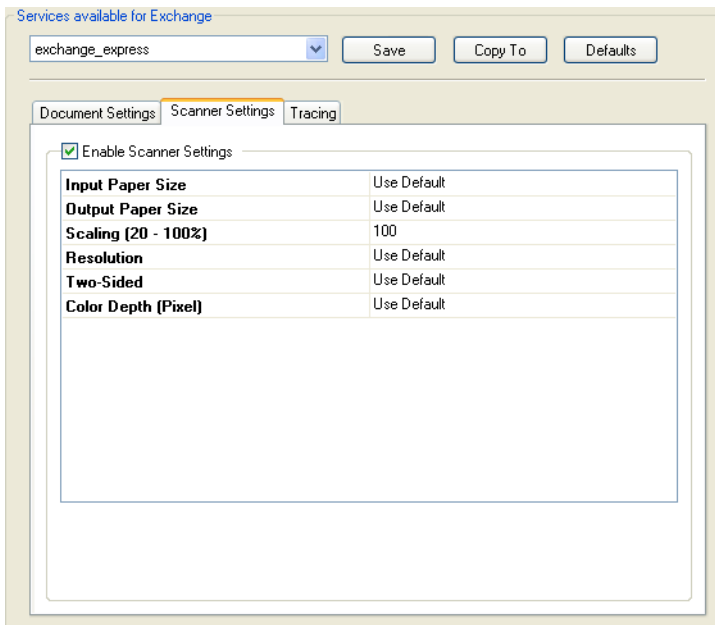
- 1 Select the **Document Settings** tab.
- 2 For each option, specify the default settings that you want available to the user at the device.

If you want to allow the user to change the default setting for an option, select the **User modify** check box.

- 3 Click **Save** to save changes to the profile.

To configure the Scanner Settings service:

- 1 Select the **Scanner Settings** tab.
- 2 Select the **Enable Scanner Settings** check box.
- 3 For each option, specify the default settings that you want this connector profile to use. (You can create additional profiles for the same connector that use different scanner settings at the same device.) The list of scanner settings is a subset of the scanner settings that are available at the device.



- 4 Click **Save** to save changes to the profile.

Setting up the Canon ScanFront device

Setting up this device involves specifying a password for the device and then associating the device with the PC running the ShareScan Services Manager, which is called the ShareScan Host.

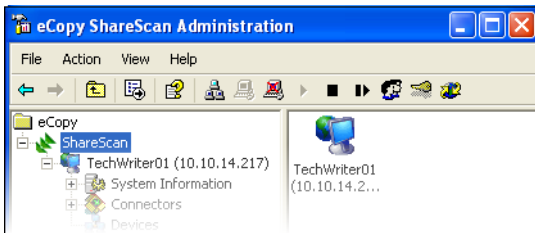
To set up the device:

- 1 Power on the device.
The calibration screen appears.
- 2 Follow the on-screen instructions to calibrate the device screen.
When calibration is complete, the **Password** page appears.
- 3 Specify a password for the device and then select **Next**.
A password is not required. If you do not want to set a password, leave the password field empty and then select **Next**.
The **Network** page appears. This page enables you to connect the device to a network.
- 4 Specify the device's network settings and then select **Save**.

Note: You must specify a valid device name, IP address (static address only), subnet mask, and default gateway. If you do not have this information, see your network administrator.

- 5 When prompted, restart the device.
- 6 Enter the password and then select **Next**.
The **ShareScan Address** page appears.
- 7 Enter the IP address of the PC where you installed ShareScan. (Do not enter the IP address of the ScanFront device.)

You can find the IP address of the Services Manager PC in the Administration console, immediately under the ShareScan node. For example, the IP address in the following sample screen is “10.10.14.217”.



- 8 Click **Connect**.
The ShareScan Client application appears, indicating that you can now add the device to the ShareScan Services Manager (see page 29).

Web administration

After setting up the device, you can administer the ScanFront device from any Web browser or from the Web browser accessed from the Manage node in the ShareScan Administration console.

To manage the ScanFront device remotely:

- 1 Access a Web browser using either of the following methods:
 - Open any Web browser and then enter the IP address of the Canon ScanFront device, using the following format: `http://<deviceIP>`
 - In the ShareScan Administration console, select **Devices > Manage**. A Web browser opens in the right pane.
- 2 In the upper right corner, select the language that you want to use: English, French, Italian, German, or Spanish.

Note: While the ShareScan Administration console enables you to select languages in addition to French, Italian, German, and Spanish for the hard keyboard and the on-screen keyboard, the Web administration component only supports French, Italian, German, and Spanish. In addition, the Web administration component does not support auto-completion or special keys.

- 3 Enter the administrator's password, and then select **Login**.
The Web administration page appears.
- 4 Update the configuration settings (see Table 1).

TABLE 1. Remote administration functions

Configuration tool	Description
Password	Enables you to modify the administrator's password. After modifying the password, select Save .
Network	Enables you to update the device's network settings, which are used to connect the device to a network. After modifying the network settings, select Save .
ShareScan Address	Enables you to associate the device with the PC running the ShareScan Services Manager, which is called the ShareScan Host. Use https enables you to encrypt passwords and is selected by default. This automatically sets the port to 443. eCopy recommends these settings. If you do not select Use https , the port is automatically set to 8080 and password encryption is not enabled. After modifying the IP address, select Connect .

TABLE 1. Remote administration functions (continued)

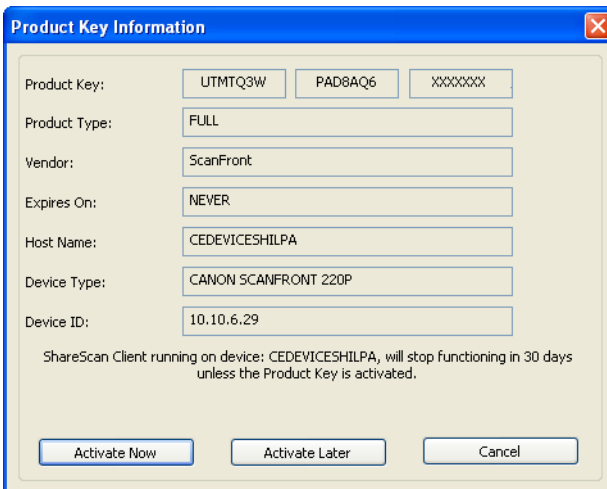
Configuration tool	Description
SSL	Enables you to turn SSL on or off. The default is "On". Turning SSL off improves performance by about .1 second. However, if you turn SSL off, passwords will not be encrypted.
Device restart	Enables you to restart the device.
Device software update	Enables you to update the ShareScan device software. Select the ShareScan CAB file that contains the updated firmware and then select Upload File .
About	Displays product information. Includes a button that enables you to calibrate the device.
Logout	Displays the Password page.

Note: To calibrate the device screen after the initial setup, select About from the ShareScan Home screen.

To add an eCopy-enabled device to the Services Manager:

- 1 Make sure that the device is running.
- 2 Go to the Administration console.
- 3 In the console tree, right-click **Devices** and then select **Add a new device**.
The **Add Device** window lists all available ScanFront devices. The window displays IP Address information, the name of the device, the Client software version, the Services Manager that is currently managing the device, and the domain.
- 4 If a device that you want to add does not appear in the list of available devices, click **Refresh**.
- 5 Select the device or devices that you want to license and then click **OK**.
- 6 When the system prompts you to confirm the device that you want to add to the device list, click **Yes**.

The system displays the product key information.



The image shows a dialog box titled "Product Key Information" with a blue header and a close button in the top right corner. The dialog contains several input fields for product key details:

- Product Key:** Three text boxes containing "UTMTQ3W", "PAD8AQ6", and "XXXXXXXX".
- Product Type:** A text box containing "FULL".
- Vendor:** A text box containing "ScanFront".
- Expires On:** A text box containing "NEVER".
- Host Name:** A text box containing "CEDEVICESHILPA".
- Device Type:** A text box containing "CANON SCANFRONT 220P".
- Device ID:** A text box containing "10.10.6.29".

Below the input fields, there is a warning message: "ShareScan Client running on device: CEDEVICESHILPA, will stop functioning in 30 days unless the Product Key is activated." At the bottom of the dialog, there are three buttons: "Activate Now", "Activate Later", and "Cancel".

To activate the license and generate a report:

- 1 To activate the license through the Internet, click **Activate Now**.

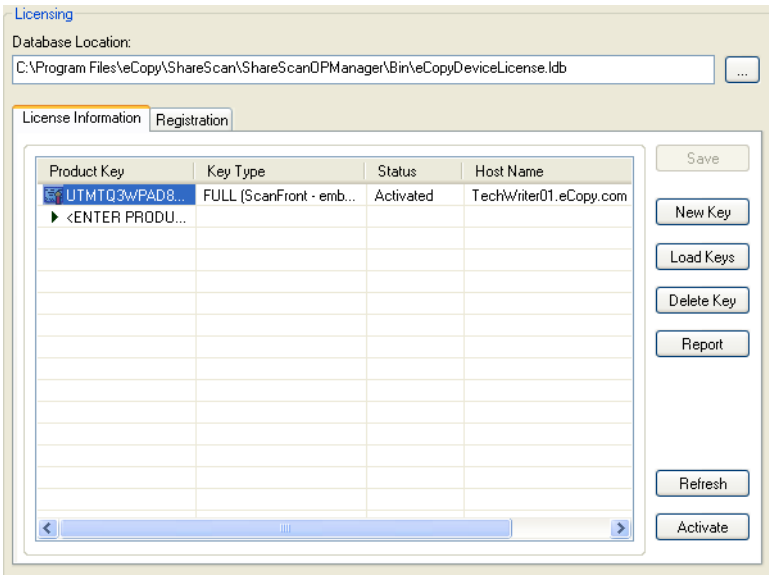
Note: If you cannot activate a license immediately, you have 30 days in which to activate it.

The activation process only takes a couple of minutes.

- 2 Read the registration message, click **OK**, and then click **Done**.

Note: The eCopy Registration Web site enables you to upload the product key information needed to register eCopy-enabled devices from the license report. You typically complete the registration process after adding one or more product keys to the License Information pane and generating the license report. If you add more product keys later, you will need to repeat the registration process.

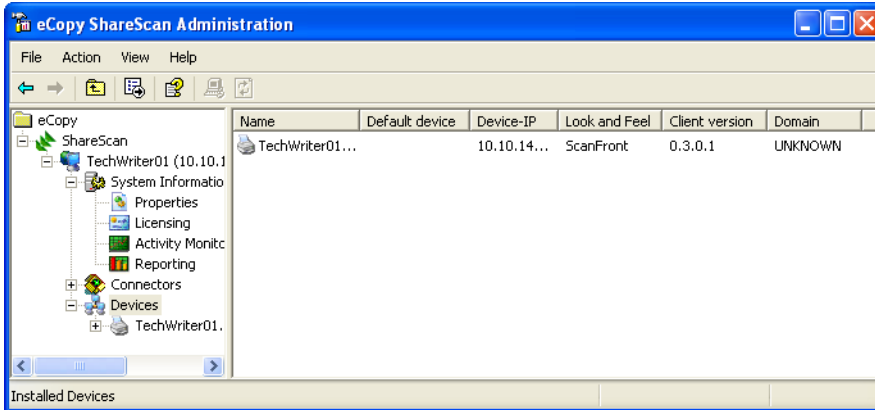
- 3 Click **Report** to generate a license report.



To view the device list:

- 1 In the console tree, select **Devices**.

The new device is listed in the right pane. (To change the view, right-click in the right pane, click **View**, and then select the desired view.)



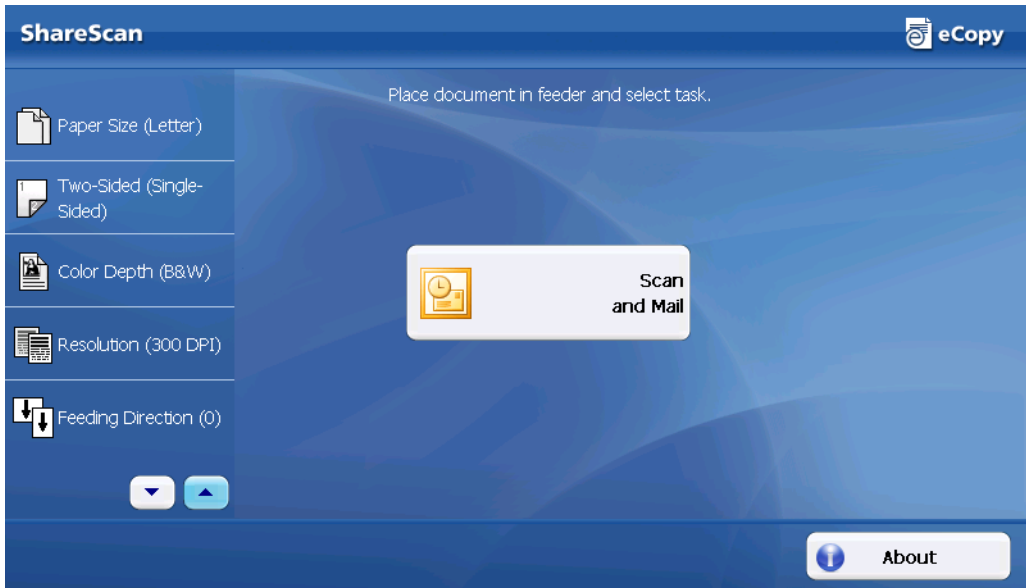
34 | Quick Start: Installing and setting up ShareScan

- 2 Select a configured profile, such as “exchange_express”.
- 3 Click **OK**.

The **No. of Profiles** column indicates that you have activated one connector profile.

- 4 In the **Device Properties** pane, click **Save** to save changes to the profile.

At the device, the touch screen will display a button for each active connector profile.



Reference: Configuring the system

When you install ShareScan, the Administration console, an MMC (Microsoft Management Console) snap-in, is installed along with the Services Manager and any selected eCopy connectors. You use the Administration console to manage Services Managers, connectors, and eCopy-enabled devices.

The Services Manager supports multiple devices running ShareScan Embedded software.

The Administration console automatically detects the Services Managers on your network and lets you select the one that you want to use.

In this chapter

- Starting, stopping, and restarting the Services Manager 36
- Setting security options for a Services Manager. 37
- Configuring system properties 39
- Licensing devices 45
- Monitoring scanning activity. 51
- Reporting scanning activity 52
- Backing up and sharing configuration files 53
- Remote administration 55

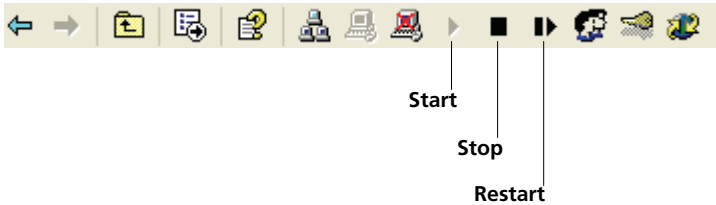
Starting, stopping, and restarting the Services Manager

The Services Manager runs as a Windows service. You start or stop, and restart, the Services Manager from the Administration console.

To start, stop, or restart a Services Manager:

To start, stop, or restart a Services Manager, use either of the following methods:

- In the console tree, right-click the name of the Services Manager. When the shortcut menu displays the available commands, click the command that you want to use.
- In the console tree, select the name of the Services Manager and then click the appropriate button on the console toolbar.



Note: Restarting a Services Manager also restarts the Canon ScanFront device.

Setting security options for a Services Manager

The Security Options function, which you can configure for each Services Manager, enables you to specify whether other Services Managers have the right to add or acquire devices managed by that Services Manager.

In a ShareScan Embedded environment, you might want to set the security options for a specific Services Manager to allow other Services Managers to add devices managed by it.

If you enable security for a Services Manager and add IP addresses to the list of allowed Services Managers, and you later clear the Enable Security option, the addresses stay in the list, but the Services Manager ignores it.

To block access by other Services Managers:

- 1 In the console tree, select the name of the Services Manager and then click the **Display Security Options** button on the console toolbar.
The **Security Options** window opens.
- 2 Select the **Enable** option. By default, this option is disabled.
- 3 Select the **Prevent addition of devices** option. Other Services Managers will not have the right to add or acquire devices managed by this Services Manager.
- 4 Click **OK**.

To grant access to other Services Managers:

- 1 In the console tree, select the name of the Services Manager and then click the **Display Security Options** button on the console toolbar.
The **Security Options** window opens.
- 2 Select the **Enable** option. By default, this option is disabled.
- 3 Select the **Allow addition of devices** option.
- 4 In the address field, enter the IP addresses of the Services Managers to which you want to grant access and then click **Add**.
The addresses appear in the **Manager IP addresses** list.

Note: Even if addresses appear in the list of allowed Managers, access by those Services Managers will be blocked if you select the Prevent addition of devices option.

- 5 Repeat step 4 until you have added the addresses of all the Services Managers to which you want to grant access. Those Service Managers will have the right to add or acquire devices managed by this Services Manager.
- 6 Click **OK**.

To remove access rights from a Services Manager:

- 1 In the console tree, select the name of the Services Manager and then click the **Display Security Options** button on the console toolbar.
The **Security Options** window opens.
- 2 In the **Manager IP addresses** list, select the addresses and then click **Remove**.
- 3 Click **OK**.
The system prompts you to confirm that you want to remove the selected IP addresses.
- 4 Click **OK**.

Configuring system properties

You can specify system properties that apply to all devices connected to the selected Services Manager. The System Properties pane contains tabs that enable you to specify general and advanced properties, keyboard settings, Session Logon settings, and tracing information.

Configuring general system properties

The General tab displays version, language, and operating system information. It also specifies the TCP/IP port used for communication between the Services Manager and eCopy-enabled devices.

To view general system properties:

- 1 In the console tree, select **System Information > Properties** and then select the **General** tab.
- 2 Review the product information.

Configuring advanced system properties

The Advanced tab enables you to configure properties for encryption, the searchable text engine, secure deletion of temporary files, and color compression.

To configure advanced system properties:

- 1 In the console tree, select **System Information > Properties** and then select the **Advanced** tab.
- 2 Configure the advanced properties (see Table 2).
- 3 Click **Save**.

TABLE 2. System properties: Advanced tab

Section	Field Name	Description
Encryption properties	Password Minimum Length ^a	The minimum number of characters that make up the password. When you specify the minimum password length, remember that the longer the password, the more difficult it is to break.
	Password must be alphanumeric	Requires that passwords include a combination of characters and numbers. This helps ensure that passwords are not dictionary words and are not easily guessed.
Searchable Text Engine Properties	Language for Searchable Text creation	The language that you want the Searchable Text engine (the OCR engine) to use. The default is the language specified on the Keyboard Settings tab. The list of languages depends on the YTR files that are installed in the ShareScanOPManager\OCR\Lib folder. The ShareScan installation program installs the language files that are supported by the current version.
Secure Delete	Enable secure delete of temporary files	Enables complete deletion of temporary image files from the PC running the Services Manager. When this check box is selected, ShareScan writes over the files in the ShareScanOPTemp folder multiple times with random characters. There may be a small performance penalty associated with selecting this option.
Color Compression	High	The best text quality and the smallest file size.
	Medium	The best image quality.

^a. Document encryption is only as strong as the password used to generate the encryption key. The rules specified on this tab are enforced when you enable encryption on the Services > Document Settings tab for a connector profile. If a user at a device enters a password that does not meet the requirements, an error message appears and the user must enter a different password.

Configuring keyboard settings

The Keyboard Settings tab enables you to select a language for the hard keyboard as well as for the on-screen keyboard. It also enables you to configure additional settings for the on-screen keyboard.

Notes: Some devices running ShareScan Embedded software support a hard keyboard and the on-screen keyboard. For ScanFront devices, ShareScan automatically detects the USB hard keyboard (but not a PS/2 hard keyboard).. You do not have to specify which keyboard to use on the device. If you are using a Canon ScanFront device, eCopy recommends that you use a USB hard keyboard. If the ShareScan for Canon ScanFront software detects a USB keyboard, a keyboard icon will not appear to the right of fields that require text input.

To configure keyboard settings:

- 1 In the console tree, select **System Information > Properties** and then select the **Keyboard Settings** tab.
- 2 Configure the keyboard settings (see Table 3).
- 3 Click **Save**.

TABLE 3. System information: Keyboard Settings tab

Section	Field Name	Description
Keyboard Settings	Select a language for the keyboard	The keyboard language.
	Default .com entry	On-screen keyboard only. The default extension for the .com key, such as .com.
	Add more entries	On-screen keyboard only. Used to specify additional extensions to include in the list that appears when the user at the device presses the arrow next to the .com key. Additional entries can contain more than eight characters.



Used to add more entries.

Used to delete entry.

Configuring Session Logon

When you enable Session Logon, users at a device only need to log on a single time to ShareScan; their logon information is effective for the entire session. The users do not have to enter their logon information each time they select a connector during the current session; the Services Manager passes the session logon information to the connector.

Note: If a user needs to access different servers, and the logon credentials are not the same on those servers, the system will prompt the user to enter logon information, even when Session Logon is enabled.

If you enable Session Logon for the Quick Connect, LDAP/SMTP, or Fax via SMTP connectors, eCopy recommends that you refer to the connector-specific configuration section for information about selecting the authentication type. Quick Connect, which is an add-on connector, has its own administration guide.

To configure Session Logon:

- 1 In the console tree, select **System Information > Properties** and then select the **Session Logon** tab.
- 2 Select **Enable Session Logon**.
- 3 Configure the Session Logon settings (see Table 4).
- 4 Click **Save**.
- 5 Restart the Services Manager to apply the settings.

TABLE 4. System properties: Session Logon tab

Section	Field Name	Description
Directory Services		The directory service that manages your list of users: Windows Active Directory or Novell Directory Services.
	Domain	The Windows domain, or, for Novell, the preferred NDS Server Name or IP address.
Search Parameters	Search On	The search criterion by which the system searches the user list: <ul style="list-style-type: none"> ■ Windows Active Directory: First Name, Last Name, Display Name, or Account Name. ■ Novell Directory Services: First Name, Last Name, or User ID.
	Base DN	The base DN (distinguished name), or directory root, which is the starting point of the search. This option defaults to the root of the main tree. Use this option to select the specific DN or Context where you want the search to begin.
	Scope	The scope of the search at one level down from the Base DN or down to the lowest level of the tree.
	Directory Access	The type of access required to retrieve user names from the directory: <ul style="list-style-type: none"> ■ Anonymous: No user name or password required. This is the default setting. ■ Use Credentials: The user name and password required to access the directory service.
	Search while typing	Enables or disables the Search while typing option at the device.
Authentication Type		The type of authentication required by the server: Windows or Novell. Displays the authentication type selected under Directory Services.

Configuring system tracing

The system can write transaction information to a trace file to help with troubleshooting. You typically use this feature only when you are working with Customer Support. Enabling tracing will slow down overall system performance.

To configure system tracing:

- 1 In the console tree, select **System Information > Properties** and then select the **Tracing** tab.
- 2 Configure the settings (see Table 5).
- 3 Click **Save**.

TABLE 5. System information: Tracing tab

Section	Field Name	Description
File Tracing Properties	Off/On	Disables or enables file tracing.
	Directory	The location of the trace file.
	Max. Size	The maximum size of the trace file.

Licensing devices

Every device that you use with eCopy software requires a valid license. To obtain a license, you add a unique product key, valid for use with a single eCopy-enabled device, to the local license database (see page 46). Site licenses, valid for activation with a predefined number of devices, are also available (see page 46). eCopy recommends that you leave the license database on the local hard drive. You activate the product key by obtaining a license code from the eCopy activation Web site (see page 49).

To license a device running ShareScan Embedded software, you must add the device to the Services Manager after entering the product key (see page 48).

A product key must be added to the license database before the Services Manager can assign it to a device. Once the key is assigned to a device, it is no longer available for use with other devices.

Note: If you assign a device to another Services Manager, the license moves with the device.

In the Administration console, the License Information tab displays the status of each product key in the license database (see Table 6).

TABLE 6. Product key status options

Status	Description
Activated	The key has been assigned to a device and the license has been activated.
Not Activated	The key has been assigned to a device but the license has not been activated (30 day grace period is in effect).
Expired	The key has been assigned to a device but has expired (you must delete the key and obtain a new key).
Activation Required	The key has been assigned to a device but has not been activated and the 30 day grace period has expired (you must activate the license to use the device).
Blank	The key has not been assigned to a device and is available for use.

Adding product keys

There are three ways to add product keys to the license database:

- Enter each key manually (see page 46). To avoid typing errors, you should copy and paste the key.
- Import the keys from a text file (see page 46). This is the easiest method to use if you receive your product keys electronically. If you buy a 10-pack of the product, you receive a separate CD that contains a text file with the keys that you can import.

eCopy recommends that you use this method when licensing devices that are running ShareScan Embedded software.

- Use a site license.

When your organization purchases a site license, you receive a single site key, valid for activation with a predefined number of devices. When you activate the key for a device, eCopy associates the serial number of the device with the site key. When the number of devices associated with the key reaches the predefined limit, you can no longer use the site key to activate devices. To find out how many activations remain on your site license, call Customer Support.

To enter a product key manually:

- 1 In the console tree, select **System Information > Licensing**.
- 2 Use either of the following methods to enter the product key:
 - Click **<ENTER PRODUCT KEY>** to make the edit field active, enter the product key in the field, and then press ENTER.
 - Click **New Key** and enter the product key in the window that opens.

The system automatically fills in the remaining fields with information about the product key.

- 3 Click **OK**.

When you add a product key for a device running ShareScan Embedded software, the **License Information** tab displays product key information. You must now add the device (see page 48).

To import product keys:

- 1 Create a text (.txt) file containing all your product keys, or, if you received a CD with product keys, access the text file on the CD. If you received your product keys by e-mail, you can copy and paste them into Notepad and save the file with a .txt extension.
Make sure you enter the product keys accurately. The Load Keys function does not report invalid keys.
- 2 In the console tree, select **System Information > Licensing**.
- 3 Click **Load Keys**.
The **Open** window opens.
- 4 Select the text file containing the product keys and then click **Open**.
The **License Information** tab displays the imported keys.

Deleting product keys

You should only delete a key if you are upgrading the license type, for example, if you are upgrading the key from “Evaluation” to “Full Product”. If you delete a key that has been activated, you may lose the use of that key.

Note: If you assign a device to another Services Manager, the license moves with the device; therefore, you do not need to delete the key manually.

Adding a device with an embedded Client

An embedded device is a device running ShareScan Embedded software. You can manage multiple devices with embedded Clients from the Administration console. Each device is associated with a Services Manager. New devices, from the same manufacturer, inherit their initial settings from the default device.

To add a device with an embedded Client:

- 1 Make sure the ShareScan Client is installed and running on the device.
- 2 In the console tree, select **System Information > Licensing** and then verify that you have an available product key of the appropriate type (see page 46.)
- 3 In the console tree, right-click **Devices** and then click **Add a new device**.

The Services Manager can detect devices using Multicast UDP. While UDP is generally faster, it may not work in certain network environments (see page 166).

- Select the device or devices that you want to license and then click **OK**.

If the device is configured for use with another Services Manager, the system displays a notification message.

If acquisition of the device has been disabled using the Security Options feature for the Services Manager, ShareScan displays an error message prompting you to contact the administrator for the device. For information about setting security options, see page 37.

- 4 If access is allowed, click **Yes** to transfer ownership to the current Services Manager.
An **X** will appear next to the device name in the original Services Manager's device list. The original Services Manager can re-acquire the device only by right-clicking the device name and then clicking **Re-acquire device**; this is because the device no longer appears in the device list.
- 5 If prompted, click **Activate Now** to activate your license immediately (recommended), or click **Activate Later** to activate your license later (see page 49).

Activating licenses

When you assign a product key to a device, you can activate the device's license immediately (recommended), or you can activate it later. You have 30 days in which to activate the license. Internet activation is fast and easy.

Important! As soon as you activate your licenses, generate a license report (see page 50).

To obtain a license code manually:

- 1 If you do not have an Internet connection, use the **Report** button on the **License Information** tab to generate a text file containing your product key information.
- 2 Print the report file.
- 3 From any computer with an Internet connection, go to <https://activation.ecopy.biz> and obtain a license code for each key.
- 4 On the **License Information** tab, activate each license individually.

To activate all licenses via the Internet:

- 1 On the **License Information** tab, click **Activate**.
- 2 When prompted, click **Yes** to continue.

To activate a single license:

- 1 In the console tree, select **System Information > Licensing**.
- 2 On the **License Information** tab, double-click the product key you want to activate.
- 3 Use one of the following methods to activate the license:
 - If you have an Internet connection, click **Activate via Internet**.
The system sends information to the eCopy activation Web server, which returns a license code. Use the license code to activate your license.
 - If you do not have an Internet connection, click **Activate Manually** and then follow the instructions for obtaining a license code manually.

Generating a license report

The license report helps you recover your product keys and license codes, if necessary. You should generate a license report whenever you activate your licenses. Keep the report in a safe place in case you need to restore the license information. A printed report is also useful if you need to manually activate product keys from another computer.

To generate a license report:

- 1 In the console tree, select **System Information > Licensing**.
- 2 On the **License Information** tab, click **Report**.
The **Save As** window opens.
- 3 Specify a location for the file.
- 4 Click **Save**.

Monitoring scanning activity

The Activity Monitor enables you to monitor scanning activity on a Services Manager. This is useful for finding bottlenecks as it shows all activity and timing information in real time.

To access and manage the activity log:

- 1 In the console tree, select **System Information > Activity Monitor**.
The **Activity** area displays a list of all requests and status information.
- 2 Click **Start Monitoring** or **Stop Monitoring**.
- 3 In the **Filter** list, select “none” to view activity for all Services Managers or select a specific Services Manager whose activity you want to view.
- 4 To send a text version of the activity log to a file, right-click in the list and then select **Send to File**.
The **Save As** window opens.
- 5 Select a location and file name for the activity log and then click **Save**.
- 6 Click **Clear** if you want to clear all existing entries from the activity log.

Reporting scanning activity

The Reporting function enables you to display the total number of pages scanned. The report can include activity for all devices connected to a Services Manager or for a single device.

To view a report of scanning activity:

- 1 In the console tree, select **System Information > Reporting**.
- 2 Select the appropriate option:
 - **Manager:** Displays the total number of pages scanned at each device connected to the selected Services Manager.
 - **Device:** Displays the total number of pages scanned at the selected device. After selecting a device, specify the time period for which you want to create the report.
- 3 Click **Print** to print the current bar graph.
- 4 Click **Refresh** to update the graph to reflect recent activity.

Backing up and sharing configuration files

The Export / Import utility enables you to perform the following administrative tasks:

- Copy configuration files to a backup directory.
- Restore the Services Manager to a previously-saved configuration.
- Copy configuration files to other Services Managers.

The configuration files include the following items:

- The system profile and forms, System*.xml.
- The profiles and forms associated with all installed connectors, <connector>*.xml.
- All image files used by the connectors.

Important! When you import connector profiles and forms, the imported information overwrites the existing information.

To export files:

- 1 To access the utility, use either of the following methods:
 - Select the Services Manager and then click the **Export or Import Profiles** icon on the Administration console toolbar.



- Right-click the Services Manager and then select **Export / Import Utility**.

The **Export / Import Utility** window opens.

- 2 Click **Export configuration**.
- 3 Select the items and connectors to back up.
- 4 Select the target folder.

If you are copying files to share with other Services Managers, select a shared folder that the other Services Managers can access.

- 5 Click **Export**.

ShareScan creates a time-stamped subdirectory within the target folder and copies the specified files from the \Data and \Images folders associated with each selected connector, including the System connector.

- 6 When the copying is complete, click **Done**.

To import files:

- 1 To access the utility, use either of the following methods:
 - Select the Services Manager and then click the **Export or Import Profiles** icon on the Administration console toolbar.



- Right-click the Services Manager and then select **Export / Import Utility**.

The **Export / Import Utility** window opens.

- 2 Click **Import configuration**.
- 3 Select the files and connectors to import.
If you are importing files that were exported from another Services Manager, the utility does not import system data.
- 4 Select the folder containing the files you want to use.
- 5 Click **Import**.
- 6 Click **Yes** to shut down the Services Manager while the files are imported.
ShareScan will restart the Services Manager when the import is complete.
- 7 Click **Done**.

Remote administration

When the Services Manager, the Administration console, and all available connectors are installed on a network computer, for example, in an information technology (IT) department, you can perform the following tasks for eCopy-enabled devices on the network:

- Connect remotely to a single device and configure its system properties.
- Connect remotely to a single device and configure its device properties.

Note: You cannot configure connectors from an Administration console that is installed on a remote computer.

Setting up remote administration involves installing ShareScan on a remote computer and then granting the appropriate access rights.

By default, remote access to the Services Manager is limited to domain administrators. A domain administrator must grant access rights to anyone else who needs remote access to a Services Manager.

The only users who need remote access rights are those who will configure system and device properties.

To provide users with remote access to a Services Manager:

- 1 To select the users to whom you want to provide remote access, use either of the following methods:
 - Select the Services Manager and then click the **Displays user list for remote access** icon on the Administration console toolbar.



- Right-click the Services Manager and then click **Display user list**.

The **Select Users** window opens.

- 2 In the **Domain** list, select your domain controller.
- 3 In the **Name** field, enter the first few letters of the first name of the person whose name you want to add to the list.
The system displays all the names that match the letters you entered.
- 4 Select a user and then click **Add**
The system adds the user to the user list.
- 5 Repeat steps 3 and 4 until you have added all the names you require to the list and then click **OK**.

To remove a user from the user list:

- 1 To display the user list, use either of the following methods:
 - Select the Services Manager and then click the **Displays user list for remote access** icon on the Administration console toolbar.



- Right-click the Services Manager and then click **Display user list**.

The **Select Users** window opens. The list box displays the users who have been granted remote access.

- 2 Select the user you want to remove from the list.
- 3 Click **Remove**.

Reference: Common configuration information for connectors

An eCopy™ ShareScan system can use the following types of connectors:

- eCopy Connectors that are included with the ShareScan product, such as mail and fax connectors for Microsoft Exchange, Lotus Notes, and SMTP using LDAP.
- The following connectors are also available for download or purchase, depending on your version of ShareScan: Quick Connect, Captaris™ RightFax™, Microsoft® SharePoint®, Livelink ECM™, Interwoven WorkSite, OpenText™ Livelink ECM™-eDOCs DM, EMC® Documentum®, and Canon® imageWARE™.
- Third-party connectors, developed using the ShareScan Software Development Kit (SDK).

You configure connectors by creating connector profiles that specify various settings, such as the appearance of the connector's button and the image format that you want to use during scanning. You can create multiple profiles for each connector and you can activate each connector profile on multiple devices.

In this chapter

- Installing and removing connectors 58
- Configuring connector profiles. 60
- Configuring common Properties settings. 63
- Configuring connector Services 80

Installing and removing connectors

During initial installation of the ShareScan software, you can install any of the eCopy Connectors supplied on the installation CD (see page 9). To install a connector supplied with the ShareScan installation CD that you did not install during the initial installation of ShareScan, you use the Program Maintenance option. You access this option through the Add or Remove Programs function in Control Panel or by running the ShareScan installation program again.

This topic also provides instructions on how to install connectors purchased separately and supplied on their own CD. Depending on your version of ShareScan, you may also be able to download connectors. For more information on downloading connectors please see the instructions provided with your ShareScan CD.

To install a connector from the ShareScan CD after initial installation:

- 1 In **Control Panel**, select **Add or Remove Programs**.
- 2 Select **eCopy ShareScan** and then click **Change**.
The Wizard's **Welcome** window opens.
- 3 Click **Next**.
The **Program Maintenance** window opens.
- 4 Click **Modify** and then click **Next**.
The **Connector Selection** window opens.
- 5 Select the connectors that you want to install and then click **Next**.
- 6 Click **Install** and then follow the instructions.

To remove a connector supplied on the ShareScan CD:

- 1 In **Control Panel**, select **Add or Remove Programs**.
- 2 Select **eCopy ShareScan** and then click **Change**.
The Wizard's **Welcome** window opens.
- 3 Click **Next**.
The **Program Maintenance** window opens.
- 4 Click **Modify** and then click **Next**.
The **Connector Selection** window opens.
- 5 Select the connectors that you want to remove and then follow the instructions.

To install an eCopy Connector from a separate CD:

If you are installing any connector other than those supplied on the ShareScan CD, run the setup program and follow the instructions. The setup program installs the software and registers it on the Services Manager. The connector then appears in the console tree.

To remove an eCopy Connector supplied on a separate CD or by download :

- 1 Run the connector's installation program and then select the **Uninstall** option.
- 2 When the uninstall process is complete, run ShareScan Administration.
The **Remove** icon appears next to the name of the connector that you uninstalled. It indicates that the connector has been uninstalled or is otherwise unavailable
- 3 In the console tree, right-click the name of the connector you uninstalled and then click **Delete** to remove it from the Connectors node.

To refresh the list of connectors:

To refresh the list of connectors, use either of the following methods:

- In the console tree, right-click **Connectors** and then click **Refresh Connectors**.
- Select the Connectors node and then click the **Refresh connectors** button on the Administration console toolbar.



Configuring connector profiles

Each connector profile defines a set of configuration options for that connector. You can configure multiple profiles for each connector. In addition, you can activate multiple profiles for each connector on a single device. For example, you can create two unique profiles for the Exchange connector and activate both on Device X.

TABLE 7. Two profiles for the same connector activated on a single device

Profile Name	Profile Description	Device
Expense Reports	Scans and sends expense reports to a Payroll inbox.	Device X
Resumes	Scans and sends resumes to a Human Resources inbox.	Device X

Configuring and updating connector profiles

Before you can activate a connector profile on a device, you must configure and save at least one profile for the connector. After you configure a profile, it is available for activation in the device's Properties window.

You can use the Copy to option to copy settings between profiles for the same connector (see page 80).

To configure and save a new profile:

- 1 In the console tree, select the connector for which you want to create a profile.
- 2 Select **Properties**, specify the settings for the profile, and then click **Save**.
The **Save Profile** window opens.
- 3 Enter a name for the new profile.
- 4 Click **Save** to save the changes to the profile.
- 5 Select **Services** and then specify the settings for the profile.
- 6 Click **Save** to save changes to the profile.

To update an existing profile:

- 1 In the console tree, select the connector whose profile you want to modify.
- 2 In the list of profiles, select the profile you want to modify.
- 3 Update the **Properties** settings and then click **Save**.
- 4 In the **Save Profile** window, select the target profile and then click **Save**.
- 5 Update the **Services** settings and then click **Save**.

Note: If you update the Services settings before updating the Properties settings and you then click Save, the Save Profile window opens. You must then select the target profile.

Activating connector profiles

To make connector profiles available at a device, you activate the connectors and then select the connector profiles.

Each connector profile that is activated on a device is represented by a separate button on the touch screen.

To activate connector profiles:

- 1 In the console tree, select **Devices** > *<device_name>* > **Properties**.
- 2 Select the **Selection** tab and then select the **Activate Connector** check box for the connector that you want to activate.

The **Select Connector Profiles** window opens.

- 3 In the **Select Profiles** column, select the connector profile that you want to activate.
- 4 Click **OK** and then click **Save**.

You can only select configured profiles, which appear in black. Unconfigured profiles appear in red.

- 5 Select the **Selection** tab and then click **Arrange**.
The **Arrange Profiles** window opens.
- 6 Use the **Move Up** and **Move Down** buttons to arrange the profiles in the list in the order in which you want the connector buttons to appear on the touch screen and then click **Save**.
- 7 Select the **Selection** tab and then click **Save**.
The profile is activated on the device.

Configuring common Properties settings

This section describes how to configure the properties and operations that are common to multiple connectors.

- Display (see page 64)
- Content (see page 65)
- Express (see page 67)
- Search while typing (see page 70)
- Field creation (see page 71)
- Fax address format (see page 73)
- Support for address books via SQL Express (see page 75)

For a table that lists each setting and the connector that uses it, see the “About configuring general Properties settings” topic in the Administration console Help.

Common functions

The following table describes functions that are common to many ShareScan operations.

TABLE 8. Common functions

Function	Description
Defaults	Restores the default settings, such as the Display properties. Deletes any custom entries.
Edit	Edits the selected entry.
Delete	Deletes the selected entry.
Move Up	Moves the selected entry up in a list. The top item in a list is the default.
Move Down	Moves the selected entry down in the list.

Configuring the Display properties

The Display tab specifies the image and label that will be used on the connector button, which appears on the touch screen.

To configure the Display properties:

- 1 In the console tree, select `<connector_name>` > **Properties**.
- 2 Select the **Display** tab and then specify the settings (see Table 9).
- 3 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 9. Connector Properties: Display tab

Field	Description
Image	Used to select a .gif or .jpg file. .gif files have the advantage of transparency. Maximum dimensions for the image are 64x64 pixels.
Label	Used to enter up to three short lines of text. Press ENTER between each line. To make sure the lines of text fit on the button, save the connector profile, activate the connector, and then view the button on the device's touch screen.

Configuring the Content properties

The Content tab specifies the properties for subjects, notes, and bylines that are included in messages sent by e-mail and fax connector profiles. Users at the device can select an existing subject or note or enter their own subject or note. Subjects appear on the subject lines; notes are included in the message body.

To configure the Content properties:

- 1 In the console tree, select > <connector_name> > **Properties**.
- 2 Select the **Content** tab and then specify the settings (see Table 10).
- 3 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 10. Connector Properties: Content tab

Section	Field/Button	Description
<p>Message</p> <p>For e-mail connectors, the Subjects and Notes options appear in the Message list.</p> <p>For fax connectors, only the Subjects option appears in the Message list.</p>	Add	<p>Adds a new subject or note to the list of subjects and notes available to the user at the device.</p> <p>You can use the following variables:</p> <ul style="list-style-type: none"> ■ \$\$USER_NAME\$\$: Can be used in a subject line or in a note. Replaces the variable with the sender name. ■ \$\$RECIPIENTS\$\$: Can be used only in a note. Replaces the variable with the recipient name(s). ■ \$\$FILESIZE\$\$: Can be used in a subject line or in a note. Replaces the variable with the size of the file (in KB). ■ \$\$FILENAME\$\$: Can be used in a subject line or in a note. Replaces the variable with the name of the file. ■ \$\$PAGECOUNT\$\$: Can be used in a subject line or in a note. Replaces the variable with the number of pages in the document.

TABLE 10. Connector Properties: Content tab (continued)

Section	Field/Button	Description
Email Address Format in Message Content (applies to the Lotus Notes Mail Connector)		Determines how recipient names will appear in the body of the message when the \$\$RECIPIENTS\$\$ variable is included. Tip! When you send mail to multiple recipients from a personal Lotus Notes account, the eCopy agent on the Domino server creates an individual message for each recipient. Including the \$\$RECIPIENTS\$\$ variable in a note enables recipients to see who else received the message.
	Name@Domain .com	Displays the recipient's Internet e-mail address.
	FirstName MI LastName	Displays the recipient's "friendly" name, as it appears in the Lotus Notes address list. If the name does not appear in the Lotus Notes address list, the recipient's Internet e-mail address appears.
Byline (applies only to e-mail connectors)		Appears at the bottom of the message body. The byline used depends on the format of the scanned document attachment.
	Custom	Includes the specified byline for scanned documents whose format is PDF or TIFF.
	Enable .cpy file format byline	Includes the standard eCopy byline for scanned documents whose format is eCopy (CPY). The standard byline is: "To view .cpy files, download the latest free eCopy Viewer at: http://www.ecopy.com/downloads/viewer. "

Configuring the Express properties

The Express function enables you to reduce the amount of time that your users spend at the device. You do this by enabling Express in a connector profile and specifying information, such as a recipient's name, on the Express tab. The profile enables the user at the device to scan and send documents without having to enter additional information.

Note: When you configure an Express profile for a connector and Session Logon is enabled for the system, users must still enter their session logon credentials on the main ShareScan Logon screen.

You can configure multiple profiles with Express enabled. Each profile can store documents in different locations.

Depending on the connector, the Express tab enables you to preconfigure information that accompanies the scanned document.

To configure the Express properties:

- 1 Configure the properties on all the other tabs for the connector profile.
If you configure Express first and then try to save the profile, the system will display an error message and you will not be able to save the profile.
- 2 Select the **Express** tab.
- 3 Select **Enable** and then specify the settings (see Table 11). The available settings depend on the connector.
- 4 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 11. Connector Properties: Express tab

Connector	Field/Button	Description
eCopy Connectors for: Microsoft Exchange Lotus Notes SMTP using LDAP	Subject	The subject line for the e-mail to which the scanned document is attached.
	Note	The text included in the body of the e-mail to which the scanned document is attached.
	To:	List of e-mail addresses that will receive the e-mail. To add more recipients, press Add and then use the Add Recipients window to add recipients from your address book. See "Express Add Recipients settings" in the Connector Help.
	Cc:	

TABLE 11. Connector Properties: Express tab (continued)

Connector	Field/Button	Description
eCopy Connectors for: Fax via Microsoft Exchange Fax via SMTP	Destination List	When you enable the Express mode, you can use the available buttons to add, edit, remove, and change the positions of the destinations in the Destinations list.
	Fax Destination window	The window opens when you click the Add or Edit buttons. The window enables you to name your destination, add account information, and enable and configure a cover sheet for the destination.
eCopy Connector for Fax via Lotus Notes	Subject	The subject line for the fax to which the scanned document is attached.
	Fax Number	The fax number to which the scanned document is sent.
	Attach Cover Page/Sheet	Attaches a cover page to the fax.

Setting up Scan to eCopy Desktop with Express functions

There is no separate Express tab for the Scan to eCopy Desktop Connector. The following procedure enables you to configure Scan to eCopy Desktop to use Express functions.

To configure Scan to eCopy Desktop to use Express:

- 1 In the console tree, select **System Information > Properties** and then select the **Session Logon** tab.
- 2 Configure Session Logon (see page 42).
- 3 In the console tree, select **Scan to Desktop > Properties** and then select the **Configure** tab.
- 4 You can create an Express connector profile for a scan inbox or for a destination folder.

To create an Express connector profile for a scan inbox:

- Select **Scan Inbox/Home Folder Settings** and then click the **Properties** button.
The **Scan to Desktop Properties** window opens.
- Configure and test the Environment Settings.
- Select the **General Settings** tab and then select **Scan to Self** as the **Recipient Type**. **Authenticate Users** is selected automatically.
- Click **OK** to return to the **Configure** tab.

To create an Express connector profile for a destination folder:

- Select **Destination Settings** and then click the **Properties** button.
The **Scan to Desktop Properties** window opens.
- Select a destination folder and make sure that **Enable subfolder navigation** is not selected.
- Select one of the following user authentication options: **None**, **Runtime credentials from Scan to Desktop**, **Service account from Scan to Desktop**.

These options do not require the user to provide credentials at the device.

- Test the credentials and then click **OK** to return to the **Configure** tab.
- 5 Click **Save**, select or specify the profile name, and then click **Save**.

Configuring the Search while typing option

The Search while typing option enables ShareScan to automatically search for matching address list entries after each character the user enters. This is a useful feature when the user is searching a long list for an entry. The user does not have to type the entire name in the field.

Example:

A user wants to enter "Chris Levesque" in a user name field. As the user enters "c", the Client displays the first address entry that begins with "c". As the user enters "ch", the Client displays the first address entry that begins with "ch". As the user enters "chr", the Client displays the first address entry that begins with "chr". If there are multiple users with the name "Chris", the user can press the down arrow and select "Chris Levesque".

eCopy recommends that you select this option only when the address list server responds fast enough to allow rapid auto-completion.

By default, this option is enabled. If you do not want to use it, you must clear the Search while typing check box.

If the Search while typing option is not enabled in the Administration console, users at the scanning device will still be able to type in one or more characters and then activate the Search while typing option using one of the following methods:

- If the hard keyboard is selected, the user can press the built-in keyboard button located at the end of the text control.
- If the hard keyboard was not selected, or is not available, the user presses the Search button on the soft keyboard screen.

Example:

A user enters "c" and nothing happens. The user then presses the Search icon or button. The Client then fills in the field with the first address list entry beginning with "c".

Configuring file name and index fields

You use the Field Editor or the Index Field Editor to add or edit fields that the user sees in the Client. For information about index fields, which you use with the optional Quick Connect Connector, see the *eCopy Quick Connect Administrator's Guide*.

When you create file name fields or index fields, you select the field type in the editor. Quick Connect, the Scan to eCopy Desktop Connector, the eCopy mail connectors, and the Activity Tracking function use the Field Editor. For information about the field types used by Scan to eCopy Desktop, the mail connectors, and the Activity Tracking function, see Table 13. For information about the field types used by Quick Connect, see the *eCopy Quick Connect Administrator's Guide*.

The following fields are available in the Field Editor window:

TABLE 12. Field Editor options

Section	Field	Description
Properties	Name	The identifier for the field (15 characters maximum).
	Type	The field type (see Table 13).
	Default	The default value (optional).
	User modify	Enables the user to modify the default value.
Field Size	Minimum	The minimum number of characters allowed.
	Maximum	The maximum number of characters allowed.
	Remember	The number of most recently used values to display in the drop-down list.

The following table lists available field types. Each connector, as well as Activity Tracking, supports a unique group of field types.

TABLE 13. Field Editor: Available field types

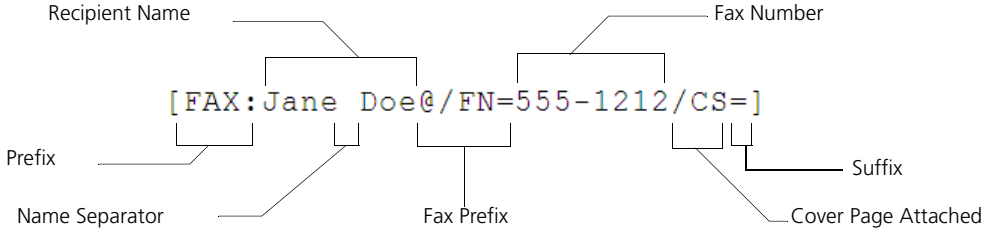
Field Type	Available Settings
Alphanumeric	Field size: The minimum and maximum number of characters allowed. Remember: The number of previous entries to display when the user is prompted for the naming information. If set to zero, no previous values appear in the drop-down list.
Date	Format: The appropriate date format according to local conventions.
Device Name	No additional settings.
File Size	The size (in KB) of the scanned file.

TABLE 13. Field Editor: Available field types (continued)

Field Type	Available Settings
Authenticated User	The user whose credentials were used to scan the document at the device.
Number of Pages	The number of pages in the scanned document.
Numeric	<p>Field Size: The minimum and maximum number of digits allowed.</p> <p>Leading zeroes: Pads all values with leading zeroes to make their length equal to the maximum field size.</p> <p>Remember: The number of previous entries to display when the user is prompted for the naming information. If set to zero, no previous values appear in the drop-down list.</p>
Separator	Value: The field separator character.
Time	Format: The time format.

Configuring the fax address format

For fax connectors, you must define the fax address format required by your fax server application or Internet fax service. A sample format is shown below:



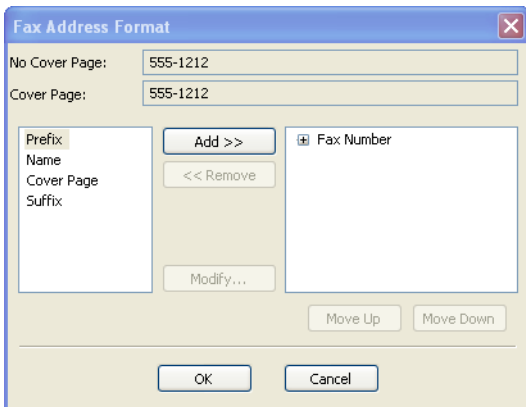
To configure the fax address format:

You configure the fax address format in the Fax Address Format window. The following table shows the location of the window for each fax connector:

TABLE 14. Fax Address Format window access

Connector	Window access
Fax via Microsoft Exchange	From the connector Wizard or on the Fax Format tab of the Fax via Exchange Properties window.
Fax via Lotus Notes	On the Fax Format tab in the connector's Properties window.
Fax via SMTP	From the connector Wizard or on the Fax Format tab of the Fax via SMTP Properties window.

- 1 Open the **Fax Address Format** window.



- 2 Refer to the documentation for your fax server application to obtain the correct format for fax addresses.

Important! Since fax application vendors change these formatting schemes frequently, make sure you obtain the current format.

- 3 Start building the address by adding components. For example, to include a prefix, select **Prefix** from the list on the left and then click **Add**.
- 4 To change the order of the fax address components, select a component and then click **Move Up** or **Move Down**.
- 5 For each component, perform the following tasks:
 - Select the **Value** field (for example, Fax Prefix Value).
 - Click **Modify**.
The **Modify Value** window opens.
 - Enter the appropriate prefix value.
 - Click **OK**.

The completed string appears in the **Fax Address Format** window.

- 6 When you finish building the fax address, click **OK** to close the window.

Configuring support for local address books

ShareScan supports the use of Microsoft SQL Server Express 2005 (SQL Express) for the storage of e-mail and fax addresses in local address books.

Important! You must use the version of the SQL Express installation program that is provided on the ShareScan CD and accessed through the Optional Components menu. Using any other method of installation, such as downloading SQL Express from the Internet, will not provide the configuration settings required for SQL Express to work correctly with ShareScan.

When enabled, the ShareScan address book stores e-mail addresses and fax numbers typed in at the eCopy-enabled device. This enables users at a device to select addresses and fax numbers from a local address book instead of having to type a recipient's complete address or fax number each time.

All Services Managers can share the address book database, which can be on any computer on your network. However, you may choose to create multiple databases on the same SQL Express installation. For example, you may choose to create one database for the Engineering department and another database for the Sales department. If you are using a combination of e-mail and fax connectors, eCopy recommends that you create a separate database for each department.

Note: All e-mail and fax connectors provided by eCopy, Inc., include global address book support that enables users at an eCopy-enabled device to select recipients from a Global Address List. Therefore, you do not need to configure SQL Express for global address book support. You only need to configure SQL Express for local address book support.

Installing SQL Express

You must install SQL Express using the ShareScan installation program.

To install SQL Express:

- 1 Insert the ShareScan installation CD into the CD drive and then click **Optional Components**.
- 2 Select **Install SQL Express** and follow the on-screen instructions.

During installation, SQL Server prompts you for a password. You will need this password when you create an address book database. The password must contain a minimum of 6 characters and must include alpha and numeric characters.

Note: The version of SQL Express provided with ShareScan does not require any further configuration. However, should you need to check the configuration settings, you can access the SQL Server Configuration Manager from the Start menu of your computer. For more information on the installed SQL product, see the Help file available from the Help menu in the SQL Server Configuration Manager.

Creating a local address book database

You can create a local address book database on any PC running the Services Manager. Once you have created the database, it is available to all other Services Managers on the network.

Note: SQL Server must be running when you create the database.
If you are using a firewall, you must add SQLSERVER.exe and UDP Port 1434 to the exceptions list.

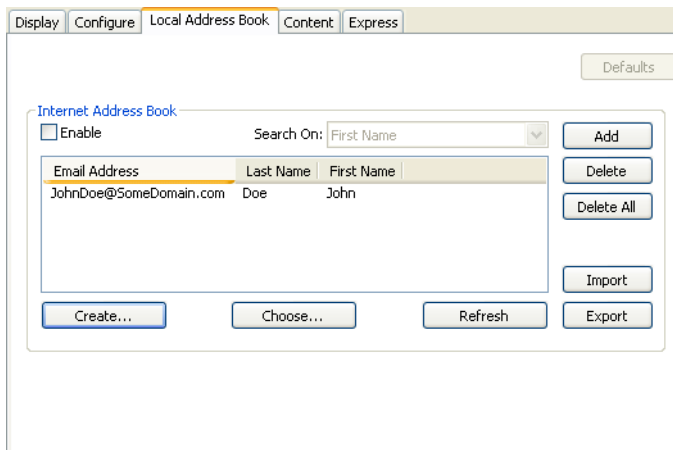
To create a local address book database:

- 1 In the console tree, select your e-mail or fax connector, select **Properties**, and then select the **Address Books** or **Local Address Book** tab.
- 2 Under **Local Address Book** or under **Address Books** (for Lotus Notes connectors), click **Create**.

The **Create an Internet/Fax Address Book Database** window opens.

- 3 Specify the settings (see Table 15) and then click **Create**.
- 4 To use the new address book with the current Services Manager, click **Connect Now**.

After connecting to the database, a sample entry appears.



- 5 To enable the local address book for use with the connector, select **Enable** (see Table 16).
- 6 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 15. Settings for creating a local address book database

Field/Button	Description
SQL Server Name list	The computer where you installed SQL Express. If the server name does not appear on the list, you can enter it manually. You must add the suffix \SQLEXPRESS to the server name. For example: <i>mycomputer\SQLEXPRESS</i> .
Administrator's user ID	User name: sa Password: The password you entered when you installed SQL Express.
Address Book Name	The name you select for the address book.

The following table documents all the settings on the Address Books and Local Address Book tabs, including the settings for the Lotus Notes Address Book and the LDAP Directory.

TABLE 16. Settings for enabling address books

Field/Button	Description
Enable	Enables users to search for and select recipients from the specified address book. In addition, when a local address book is enabled, you can add, delete, import, and export addresses that will then be available at the device. An imported address list must be a text file with a list of comma-separated values (CSV) in the following format: <ul style="list-style-type: none"> ■ E-mail connectors: Last_Name,First_Name,Email_Address ■ Fax connectors: Last_Name,First_Name,Fax_Number You export an address book database to a CSV file.
Search On (available for Internet address books and Lotus Notes Address Books)	The address book field against which you want the connector to search for addresses. The available fields depend on the connector. How ShareScan searches for a matching name depends on the Search Behavior setting.
Address Book (available for Lotus Notes Address Books)	Selects the Global Address List.
Search (available for Lotus Notes address books)	Enables or disables the Search while typing option at the device (see page 70). Note: For the Exchange mail and fax connectors, and for the SMTP mail and fax connectors, the Wizard automatically activates the Search while typing option. You can configure the option manually on the Basic Settings tab of the Properties window.

Configuring connector profiles to use address books

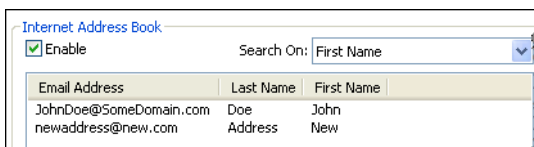
After creating and enabling address books, you can configure connector profiles to use them.

To configure connector profiles to use address books:

- 1 In the console tree, select your e-mail or fax connector, select **Properties**, and then click the **Local Address Book** or **Address Books** tab.
- 2 Under **Local Address Book** or **Address Book** (for Lotus Notes connectors), click **Choose**.

The **Data Link Properties** window opens.

- 3 Select the **Provider** tab and then select **Microsoft OLE DB Provider for SQL Server**.
- 4 Select the **Connection** tab and then specify your connection settings (see Table 17).
- 5 Click **OK** to close the window.
- 6 To verify that you can manually add an entry to the address book, click **Add**, enter user information in the **Add a Contact** window, and then click **Add**.



- 7 If the address book is not enabled, select **Enable**.
- 8 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 17. Data Link Properties window: Connection tab

Step	Option	Description
Select or enter a server name.		The name of your server.
Enter information to log on to the server.	Use a specific user name and password	User name: sa Password: The password specified when you installed SQL Express.
	Allow saving password	Required for correct configuration of the address book.
Select the database on the server.		The address book that you want the connector to use.
	Test Connection	Tests the connection.

Configuring connector Services

This section describes how to configure the connector Services that are common to multiple connectors.

- Document Settings (see page 81)
- Scanner Settings (see page 85)
- Tracing settings (see page 89)

Copying Services settings

Each connector profile can have its own set of Services settings. When the settings are similar between connector profiles, you may want to copy them. The Copy To button in the Services pane enables you to copy settings. (If you have configured only one profile for the selected connector, the button is not available.)

To copy Services settings

- 1 In the console tree, select `<<connector_name>>` **Services**.
The **Services** pane appears.
- 2 Select the connector profile whose settings you want to copy.
- 3 Click **Copy To**.
The **Copy Services Settings** window opens. The **Copy From** field displays the name of the currently selected connector profile.
- 4 In the **To** list, select the target profile.
- 5 In the **Select Profile Settings** area, select each profile setting (Document Settings, Scanner Settings, or Tracing) that you want to copy to the target profile.
- 6 Click **OK**.
The **Services** pane appears.
- 7 Select the target profile and then click **Save**

Configuring Document Settings

The Document Settings tab enables you to specify default settings for options specific to a connector profile, including encryption, searchable text, and file format. It also enables you to specify whether users at the eCopy-enabled device can change the settings; user-modifiable options are available when the user presses the Document Settings button on the Preview screen.

Note: Each connector profile supports a unique group of settings.

To configure the default Document Settings:

- 1 In the console tree, select *<connector_name>* > **Services** and then select the **Document Settings** tab.
- 2 Specify the default settings (see Table 18). To find out which settings are available for each connector, see the Document Settings Matrix topic in the Help.
- 3 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 18. Services: Document Settings tab

Option	Setting	Description
Encryption (for PDF and eCopy file formats only)	On	Prompts the user to enter an encryption password. All scanned documents will be encrypted. If you also select the User modify option, the user can choose encryption on a document by document basis.
	Off	Document encryption will not be available for use with the profile.
	User modify	The user can override the default setting.
	Document Security	Sets document passwords and permissions (see the Document Security Settings topic in the Connector help).
Searchable Text (for PDF, PDF/A, and eCopy file formats only)	On	Processes all scanned documents using the OCR engine and embeds searchable text in the file. If you also select the User modify option, the user can choose whether to make the document text searchable on a document by document basis.
	Off	Searchable text will not be available for use with the profile.
	User modify	The user can override the default setting.
File Format	TIF Fax TIF PDF PDF/A eCopy	Specifies the default format. TIF Fax supports Group3 2D 1-bit. TIF supports Group4 2D 1-bit, GrayScale 8-bit, and Color 24-bit. If you select a TIF option, you must disable the Searchable Text and Encryption options; they are not compatible with the TIF format. Color pages that are scanned using the PDF or eCopy format are automatically compressed.
	User modify	The user can override the default setting.

TABLE 18. Services: Document Settings tab (continued)

Option	Setting	Description
Document Name	Default	The default naming format for the scanned documents: <i>DeviceName_ConnectorID_<DateTime>.ext</i>
	Specify Name	Specifies a default file name for the scanned documents.
	Advanced	Specifies the fields that are used to build a file name for the scanned documents. You use the Add/Edit File Name Fields window and the Field Editor to specify the fields. See the Advanced file naming settings topic in the Help for more information. The system adds the Authenticated User name to the file name only if Session Logon is enabled.
	User modify	The user can override the default setting. Only available if you select the Specify Name option.
Blank Page Removal (for black-and-white documents only)	On	Removes blank pages from the scanned documents when the file size is within the range specified in the Threshold field. Canon ScanFront devices have a scanner setting called "Skip Blank Page" that removes blank pages based on analysis of the content of each page. Therefore, if a user enables the Skip Blank Page option at the device, blank pages will be removed based on content, not on file size. In this case, the Services Manager will not need to use the Blank Page Removal setting because the pages will have been removed during scanning.
	Off	Retains blank pages in the scanned documents.
	Threshold	If Blank Page removal is set to "On", the Threshold value is the size of the file, in kilobytes, that triggers a search for blank pages. The threshold can be an absolute value or a range, for example: "10" or "10-25".
	User modify	The user can override the default setting.

TABLE 18. Services: Document Settings tab (continued)

Option	Setting	Description
Batching (for PDF and eCopy file formats only)	On	Will be available for use with the profile.
	Off	Will not be available for use with the profile.
	Number of pages	Creates a new document after the specified number of pages. You specify the number of pages by clicking the Pages button and entering the number.
	File size	Creates a new document when the file reaches a specified size. You specify the file size by clicking the Size button and entering the size, in kilobytes (KB).
	Blank page	Creates a new document when the system finds a blank page within the range specified in the Threshold field. For black-and-white documents, if the Blank Page Removal option is set to "On", the blank pages that divide the documents are removed from the final scanned document(s).
	User modify	The user can turn batching on or off, but cannot change the type of batching.
Document Tracking	On	When Activity Tracking is enabled for a device, this option creates a black-and-white PDF file, without encryption or searchable text information, and stores the file in the folder specified on the Document Tracking tab (in the Activity Tracking pane). The name of the PDF file is added to the Activity Tracking log.
	Off	Disables Document Tracking. Activity Tracking, which is a separate feature, may still be enabled.

Configuring Scanner Settings

The Scanner Settings tab enables you to attach default scanner settings to a connector profile. For example, assume that a user always scans to Legal size paper with the scaling option set to 90%. You can specify the settings in a profile so that the user at the device does not have to change them.

If the device does not support a setting that you specify in the profile, the connector uses the device's default settings.

To configure the default Scanner Settings:

- 1 In the console tree, select `<connector_name>` > **Services** and then click the **Scanner Settings** tab.
- 2 Specify the default settings (see Table 19). The list of scanner settings is a subset of the scanner settings that are available at the device.
- 3 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 19. Services: Scanner Settings tab

Setting	Description
Enable Scanner Settings	Activates the scanner settings for the profile.
Input Paper Size	Paper sizes currently supported by the Services Manager. The default setting is "Use Default", which enables the profile to use the device's default setting for this option.
Output Paper Size	Paper sizes currently supported by the Services Manager. The default setting is "Use Default", which enables the profile to use the device's default setting for this option.
Scaling	Available values between 20 and 100 percent.
Resolution	Supported resolutions between 100 and 600 dpi.
Two-Sided	Standard options, for example: single-sided, double-sided (book type) and double-sided (calendar type).
Color Depth (Pixel)	Supported color types.

ScanFront scanner settings

The list of scanner settings on the Scanner Settings tab is a subset of the scanner settings that are available on the Canon ScanFront device (see Table 20).

TABLE 20. Canon ScanFront supported scanner settings

Option	Settings	Comments/Description
Paper Size	Mixed Originals, Letter, Legal, A4, A5, A5R, A6, A6R, B5, B6, B6R, Statement, StatementR	
Two-Sided	Single-Sided Double-Sided	
Color Depth (Pixel)	B&W, Text Enhance, Halftone (error diffusion), Grayscale, Color	
Resolution	100 DPI, 150 DPI, 200 DPI, 300 DPI, 400 DPI, 600 DPI	<ul style="list-style-type: none"> ■ 300 DPI provides a good compromise between image quality and file size for text documents. ■ 400 DPI provides best results when creating searchable text. ■ 600 DPI may be necessary to maintain image quality when documents include complex graphics. <p>Note: For double-sided documents, the ScanFront device does not support color scanning at 600 DPI.</p>
Feeding Direction	Auto, 0 degrees, 90 degrees, 180 degrees, 270 degrees	<p>The Auto setting rotates the scanned image based on the orientation of the text.</p> <p>Note: The Auto setting is available only when the Paper Size option is set to "Mixed Originals".</p>
JPEG Compression	0-100 (by 10)	100% provides the highest image quality, but also creates the largest file size.
Brightness	0-100 (by 10)	
Deskew	Yes No	<p>Straightens a skewed image. This option can correct a skew of up to 20%.</p> <p>Note:The Deskew setting is available only when the Color Depth option is set to "B&W".</p>
Inverse	Yes No	Creates a "negative" of the original scanned image, which is useful for blueprints and microfilm.

TABLE 20. Canon ScanFront supported scanner settings (continued)

Option	Settings	Comments/Description
Skip Blank Page	Yes No	During scanning, the device analyzes the content of each page based on the Blank Page Sensitivity value. If it determines that the page is blank, the page is not included in the scanned document that is sent to the ShareScan Services Manager.
Blank Page Sensitivity	1-100	If the Skip Blank Page option is set to “Yes”, this option is enabled. Use the slider option to specify the sensitivity level. The default is “90”. If you specify a value that is too low, pages with text may be treated as blank pages and will not be scanned. If you specify a value that is too high, blank pages may be scanned.
Sharpness	0-100 (by 10)	
Color Dropout	None Red Drop-Out, Green Drop-Out, Blue Drop-Out, Red Enhance, Green Enhance, Blue Enhance	The “drop-out” values leave out the specified color during scanning. The “enhance” values emphasize the specified color. Affects the scanned image only when the Color Depth setting is “B&W” or “Grayscale”. The settings have no effect when the Color Depth setting is “Color”.
Remove Bleed Thru	Yes No	Keeps the images on the reverse side of a thin original document from appearing on the scanned image.
Remove Bleed Thru Level	0-100 (by 10)	Adjust the level to match the type of document.
Double-Feed Detection	None Ultrasonic sensors (SF-220eP only)	<ul style="list-style-type: none"> ■ Ultrasonic sensors: Enables the scanner to detect by ultrasonic sensors when two or more documents are fed together. The scanner stops feeding when it detects a double feed. This method is effective when documents overlap by 1.97” (50mm) or more.
Output Paper Size	Mixed Originals, Letter, Legal, A4, A5, A6, B5, B6, Statement	

TABLE 20. Canon ScanFront supported scanner settings (continued)

Option	Settings	Comments/Description
Orientation	Portrait, Landscape, Same As Originals	
Scaling	20-100 percent	
Mirror	Yes No	Flips the image on the vertical axis to create a mirror image.

Configuring Tracing settings

The Tracing tab enables you to configure the capture of trace information in a log file; this information helps troubleshoot connector issues. You typically do this only when working with Customer Support. Tracing will slow down overall system performance.

To configure the Tracing settings:

- 1 In the console tree, select `<connector_name>` > **Services** and then select the **Tracing** tab.
- 2 Specify the default settings (see Table 21).
- 3 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 21. Services: Tracing tab

Section	Field Name	Description
Enable Tracing	On/Off	Enables or disables tracing.
File	Daily	Creates a new log file each day.
	Unlimited file size	Adds all log entries to a single file.
	When file size reaches	Creates a new file when the file size reaches the specified limit.
	Rolling filenames	If Tracing is configured for the automatic creation of new files, appends a numeric identifier to ensure uniqueness of file names.
Log file Location		Specifies the folder where log files will be stored.

Reference: Connector-specific configuration information

This section provides information about configuring settings specific to each connector. For information about configuring the properties and operations that are common to multiple connectors, see page 63. For information about configuring connector Services that are common to multiple connectors, see page 80.

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eCopy Connector for Microsoft Exchange

The eCopy Connector for Microsoft Exchange enables a user to send scanned documents from an eCopy-enabled device as e-mail attachments from a generic Microsoft Exchange account or from the user's personal Microsoft Exchange account. eCopy recommends that you create a generic Microsoft Exchange account for use by ShareScan.

While ShareScan always uses the ShareScan User account information to log on to the Exchange server and to retrieve the Global Address List, it sends scanned documents from this account only if the Send from personal account option is not selected.

If the Send from personal account option is selected, the connector prompts the user to log on at the device. The Wizard selects the Send from personal account option automatically.

About Exchange Environment connection protocols

The eCopy Connector for Microsoft Exchange supports four combinations of connection protocols that can be used to connect to your Exchange server, depending on your environment. The Wizard automatically selects the protocol based on the Exchange environment information that you supply. For information about the available combinations of protocols and the environments in which they can be used, see Table 22.

TABLE 22. Exchange: Connection protocols

Protocol Combination	Microsoft Outlook Required?	Description
MAPI/MAPI	Yes ^a	Specifically designed for the Exchange 5.5 server only. Performs best if the computer running the Services Manager is a member of the forest where the Exchange server(s) reside.
LDAP/MAPI	Yes ^a	Best suited for intranet environments where the computer running the Services Manager is a member of the forest where the Exchange server(s) reside. Requires that the specified Service Account has access to a Global Catalog Server in the forest where the Services Manager is running. Requires Exchange Server 2000 or later.
LDAP/WEBDAV	No	Best suited for intranet environments where the computer running the Services Manager is not necessarily a member of the forest where the Exchange server(s) reside. Requires that the specified Service Account has access to a Global Catalog Server in the forest where the Services Manager is running. Requires Exchange server 2000 or later.
WEBDAV/ WEBDAV	No	Best suited for Internet environments where the computer running the Services Manager is communicating with a front-end Exchange server on the Internet. For example, in small satellite offices employees can use Outlook Web Access (OWA) over the Internet to communicate with a front-end Exchange server located at a remote facility. Requires the front-end Exchange server to be version 2000 or later.

^a. You must install Microsoft Outlook on the same computer as the Services Manager so that the two applications can share common DLLs.

Note: When Microsoft Outlook is required, you must configure it as the default mail package. You must configure Microsoft Outlook 2000 to work with your Exchange server prior to using the ScanStation Client. eCopy also recommends that you configure Microsoft Outlook 2002, 2003, and 2007 to work with the Exchange server.

To configure eCopy Connector for Microsoft Exchange properties:

eCopy recommends that you use the Wizard to initially configure a connector profile.

- 1 In the console tree, select **Exchange > Properties**.
- 2 Select the **Display** tab and then specify the settings (see Table 9).
- 3 Select the **Configure** tab.

The **Configure** tab displays a summary of the settings that you specify using the **Wizard** or using the **Properties** button.

- 4 Use the **Wizard** to specify the basic connector settings (see page 96).

Note: Use the Properties button on the Configure tab only if you need to make custom modifications after the initial configuration.

- 5 If you are configuring a connector profile for an environment that uses an External Associated Account (EAA) and contains multiple forests, and you want to add additional account forests, see page 95.
- 6 Select the **Local Address Book** tab and then specify the settings (see Table 15 and see Table 16).

Note: This tab allows you to create, configure, and enable an Internet address book. All the fields are documented in the referenced tables.

- 7 Select the **Content** tab and then specify the settings (see page 65).
- 8 Select the **Express** tab and then specify the settings (see page 67).
- 9 Click **Save**, select or specify the profile name, and then click **Save**.

To configure eCopy Connector for Microsoft Exchange services:

- 1 In the console tree, select **Exchange > Services**.
The **Services** pane appears.
- 2 Configure the connector services (see page 80).
- 3 Click **Save**, select the profile name, and then click **Save**.

To add additional account forests:

This procedure applies only to environments that use an External Associated Account (EAA) and contain multiple forests.

- 1 After using the **Wizard** to configure your environment settings, select **Properties** on the **Configure** tab and then select the **Advanced Settings** tab.
- 2 Make sure that the current protocol matches the protocol for your environment.
If you change the protocol, the system will prompt you to re-enter the user credentials on the **Basic Settings** tab (Table 24).
- 3 Select **Use External Associated Account**.
The **Resource Forest Settings** window opens.
- 4 Enter the Global Catalog Server information (see Table 28) and then click **OK**.
In the **Exchange Properties** pane, the **Additional Account Forests** section becomes active.
- 5 Click **New**.
The **Account Forest Settings** window opens.
- 6 Enter the Account Forest and Service Account information for the new account forest.
- 7 Click **Test**.
- 8 When the test is successful, click **OK**.
The new account forest is added to the list.
- 9 Click **OK** to return to the **Configure** tab.

Exchange Connectors Wizard Settings

The settings that you see in the Wizard depend on the information you enter about your Exchange environment. The information that you enter about your environment enables the Wizard to select the correct connection protocol. The settings that appear in the subsequent windows are a filtered subset of the settings in the Properties window. You will see only the settings that are appropriate for the environment that you select.

TABLE 23. Wizard settings: Exchange environment

Field Name	Description
Server type	Enables you to select the type of server that your company uses: <ul style="list-style-type: none"> ■ Exchange 2000 or later: Enables you to choose any of the Environment options. ■ Exchange 5.5: Makes the other selections in the window inactive. Note: If you are using Exchange 5.5, you must use Microsoft Outlook as your default mail package.
Environment	Enables you to select the type of environment that your company uses: <ul style="list-style-type: none"> ■ Single Forest ■ Multiple Forests: Use this option if you have users spread across multiple forests and are using EAA (External Associated Account) to associate users in the resource forest. ■ Hosted over the Internet: Use this option if you have an Internet environment where your users access the server using Outlook Web Access (OWA).
Connect using	Enables you to select the type of connection used by your environment: <ul style="list-style-type: none"> ■ Microsoft Outlook Libraries ■ HTTP/HTTPS

The Wizard prompts you to enter information based on your choice of environment settings. See the following tables for descriptions of the information required for each field:

- **Windows Server Account window:** see Table 24, Exchange Properties: Basic Settings tab.

This window is available only if you select Exchange 5.5 as your server type.

- **Windows Active Directory Server Account window:** see Table 24, Exchange Properties: Basic Settings tab.
- **Exchange Server window:** see Table 25, Exchange Properties: Advanced Account Settings.

This window is available only if you select HTTP/HTTPS as your connection protocol.

- **Resource Forest window:** see Table 28, Exchange Properties: Advanced Settings tab.

This window is available only if you select Multiple Forests as your environment.

- **Fax Format window:** see Table 27, Exchange Properties: Fax Format Settings.

This window is available only if you are configuring the eCopy Connector for Fax via Microsoft Exchange. It enables you to specify the format of the fax addresses used by your server.

Exchange Connectors Properties Settings

The Properties window enables administrators who are more familiar with Exchange server environments to fine-tune the settings without relying on the Wizard. eCopy recommends that you use the Wizard to initially configure a connector profile.

The Properties settings that are available depend on the connection protocols supported by your environment. Although the window opens to the Basic settings tab, you should verify that the correct connection protocols are displayed on the Advanced tab before specifying the settings on the other tabs. If you specify your settings and then change the protocol, the system prompts you to re-enter the user credentials on the Basic Settings tab.

TABLE 24. Exchange Properties: Basic Settings tab

Section	Field/Button Name	Description
ShareScan User^a	User name	The user name for logging on to the Exchange server. The connector does not accept user names that contain spaces. Make sure that the user logon name specified in the Windows Active Server Directory or Exchange account does not contain spaces.
	Password	The Exchange account password.
	Domain	The Windows domain to which this user belongs (for Windows authentication).
	Advanced (Advanced Account Settings)	The advanced settings depend on the connection protocol selected for your Exchange environment (see page 92). For information about the different protocol combinations and the associated settings, see Table 25.
	Test	Validates the logon information.
Search	Search while typing	Enables or disables the Search while typing option at the device.

^a. eCopy recommends that you create a generic Microsoft Exchange account for use by ShareScan.

The following table describes the advanced account settings for each combination of protocols. For information about the protocols, see Table 22.

TABLE 25. Exchange Properties: Advanced Account Settings

Protocol Combination (Advanced Settings tab)	Field/Button Name	Description
MAPI/MAPI Uses MAPI to retrieve the user information when the Search while typing option is enabled, and to send scanned documents.	Mailbox name different from the User name	Tells the connector to use the name specified in the Mailbox name field if the mailbox name is different from the user name for any reason.
	Mailbox name	The mailbox name that is used by the user account.
	E-mail ID	The e-mail ID of the user account.
LDAP/MAPI If the connector cannot find a Global Catalog Server, it prompts you to use the Advanced Account Settings window to configure the Global Catalog Server settings.	Locate server at runtime	Enables the user at the device to select a server.
	Always use the following server	The name of the Global Catalog Server to be used at the device.
	Port	The port that you want the server to use.
	Server requires SSL for communication	Select this option if the Global Catalog Server requires a Secure Socket Layer (SSL).
	Add Base DN	Defines a starting point for the Global Catalog Server search that takes place from the authentication window at the device. When you select a base DN (Distinguished Name), the Search while typing option searches the forest below the location of the Base DN. The browse button opens the Start Search At window, where you can select a Base DN in the Active Directory forest. Only users within the DN can authenticate; however, documents can be sent to any user in the forest. If this field is left blank, the search includes the entire forest.

TABLE 25. Exchange Properties: Advanced Account Settings (continued)

Protocol Combination (Advanced Settings tab)	Field/Button Name	Description
<p>LDAP/WEBDAV Uses the same Global Catalog Server options as the ones available for the LDAP/MAPI combination, along with the following WEBDAV settings for the Exchange server.</p>	Server requires SSL for communication	Select this option if the Exchange server requires a Secure Socket Layer (SSL).
	Use UPN format for User Credentials (user@example.com)	Enables you to pass user credentials to your ISP (Internet Service Provider) using the UPN (User Principal Name) format: UserName@DNSDomainName. The connector uses NETBIOSDOMAINUsername unless this option is selected.
	Server uses forms-based authentication	Presents an Outlook Web Access (OWA), forms-based login screen to the user at the device.
	Server uses non-standard port	Specifies a non-standard port for all WEBDAV communication. Note: Do not select this option if you are using Exchange 2007 with LDAP/WEBDAV or WEBDAV/WEBDAV.
	Specify a front-end Exchange server	Sends All WEBDAV communication through the specified front-end Exchange server.
<p>WEBDAV/WEBDAV Uses the same WEBDAV settings as the ones available for the LDAP/WEBDAV combination:</p> <ul style="list-style-type: none"> ■ Server requires SSL for communication ■ Use UPN format for User Credentials ■ Server uses forms-based authentication ■ Server uses non-standard port 	Enter the domain names that the user can select at the device.	Enables the user at the device to select a domain from the domain names you enter in the Domains field.
	Username different from mailbox name	Select this option if Active Directory user names and mailbox names do not match. When you select this option, the Search while typing option will not be available on the Logon screen at the device; the connector will use the name that the user enters.

All the settings in this table apply to the eCopy Connector for Microsoft Exchange. Settings that also apply to the eCopy Connector for Fax via Microsoft Exchange are indicated in the table.

TABLE 26. Exchange Properties: General Settings tab

Section	Field Name	Description
Sender Settings (Available in the eCopy Connector for Fax via Microsoft Exchange.)	Send from personal account	Enables users to send e-mail from their personal Exchange account, rather than from the ShareScan User account (specified on the Basic Settings tab). Prompts the user at the device to log on to Exchange. The user can enter his or her personal logon information or, if authorized, another user's logon information. The connector sends each e-mail from the specified account.
	Add messages to Sent Items folder	Saves sent messages in the user's Sent Items folder.
Recipient Settings	Allow user to select recipients	Enables the user at the device to select recipients for the scanned documents.
	Allow user to add recipients to Cc list	Enables the user at the device to send a copy of a message to one or more recipients who are not the primary recipients.
	Send to self	Disables the list of recipients and sends the scanned documents only to the logged on user. You can use the \$\$FILENAME\$\$ variable on the Subject or Notes line to distinguish among scanned documents.

TABLE 26. Exchange Properties: General Settings tab (continued)

Section	Field Name	Description (continued)
Other General Settings	Search Global Address List	Enables the user at the device to search the Global Address List and select recipients from it.
	Search Outlook Contacts (Available in the eCopy Connector for Fax via Microsoft Exchange for LDAP/WEBDAV and WEBDAV/WEBDAV protocols.)	Enables the user at the device to search the Outlook Contacts folder and select recipients from it. While Microsoft Outlook supports more than one Contacts folder per user, the connector searches for addresses only in the default Contacts folder. If a user needs access to addresses in a specific Contacts folder, the user must make that folder the default folder. Since this procedure is not the same for all Outlook clients, refer to your Outlook documentation for information about how to make a Contacts folder the default folder.
	Enable user to manually enter addresses when sending e-mail	Enables the user at the device to enter e-mail addresses that do not belong to any of the other address books or to the Contacts folder.
Message Options	Enables configuration message settings that are also available through Microsoft Outlook and OWA (Outlook Web Access): Importance, Sensitivity, Delivery Receipt, Read Receipt. Selecting the User Modify option for any of these settings enables the user to change the settings at the device.	

Fax Format settings are available only for the eCopy Connector for Fax via Microsoft Exchange.

TABLE 27. Exchange Properties: Fax Format Settings

Section	Field Name	Description
Fax Address Format	Cover Page / No Cover page	Displays the fax format that you define in the Fax Address Format window.
	Format	Opens the Fax Address Format window where you define the fax address format required by your fax server application or Internet fax service. Refer to the documentation for your fax application to obtain the correct format for the fax address. Since fax application vendors change these formatting schemes frequently, make certain you obtain the current format.
Valid characters in Fax number		Enables you to define the characters allowed by your fax application or service as part of a fax address.

TABLE 28. Exchange Properties: Advanced Settings tab

Section	Field Name	Description
<p>Use External Associated Account Available only if the LDAP/MAPI or LDAP/WEBDAV combination is selected. Enables you to connect between a resource forest and one or more account forests^a.</p>	Resource Forest	<p>Opens the Resource Forest Settings window where you specify information about a Global Catalog Server in the resource domain:</p> <ul style="list-style-type: none"> ■ Locate Global Catalog Server at runtime: Selects a server in the specified domain at runtime. ■ Always use the following server in the Resource Forest: Specifies the name of the Global Catalog Server to be used at the device. ■ Base DN: Defines a starting point for the Global Catalog Server search from the authentication window at the device. When you select a base DN (Distinguished Name), the Search while typing option searches the forest below the location of the Base DN. <p>The connector uses the credentials specified on the Basic Settings tab to log on to the specified Global Catalog Server.</p>
<p>Additional Account Forests</p>	List table	<p>Enables you to add account forests to the list if you have more than one forest or edit settings for existing account forests. If there is a two-way trust between the account forest and the resource forest, and the user account specified on the Basic Settings tab is an enabled user in the resource forest, you do not need to specify additional service accounts for additional account forests. The Account Forest Settings window enables you to specify information about the Account Forest and the Service Account:</p> <ul style="list-style-type: none"> ■ Locate Global Catalog Server at runtime: Selects a server in the specified domain at runtime. ■ Always use the following Global Catalog Server: Specifies the name of the Global Catalog Server to be used at the device. ■ Use Account information specified on the Basic Settings tab or Specify Account settings (see Table 24): Specifies the Service Account for the account forest.
<p>Connection Protocol</p>	Current Protocol	<p>The connection protocol used by your environment (see Table 22). The default is LDAP/MAPI. If you change the protocol, the system will prompt you to re-enter the user credentials on the Basic Settings tab. The only settings that are preserved when you change protocols are the user name, password, domain, and Exchange server.</p>

^a. An Exchange Resource Forest runs Exchange and hosts mailboxes. An Account Forest holds active users and groups. EAA is useful if you want to manage multiple account forests from a central location.

eCopy Connector for Microsoft Exchange Local Address Book Settings

This Local Address Book tab enables you to configure the local address books that store Internet e-mail addresses entered at the device, addresses that are not in the Global Address List or in the Contacts folder. For information about creating and configuring address books, see page 75.

When you select the Enable user to manually enter addresses when sending e-mail option on the General Settings tab and you enable the Internet Address Book option on the Local Address Book tab, the system automatically adds the addresses entered by a user at the device to the local address book.

eCopy Connector for Fax via Microsoft Exchange

The eCopy Connector for Fax via Microsoft Exchange enables users to scan and fax documents from an eCopy-enabled device through an e-mail-to-fax gateway on the Microsoft Exchange server. To use this connector, you must have a network fax server and the appropriate Exchange server plug-in.

The recipient's fax number is included in the To field (on the ShareScan Client) in the format required by the fax server. The server plug-in recognizes the recipient address as a fax number and hands the request off to the network fax server for delivery as a fax.

While ShareScan always uses the ShareScan User account information to log on to the Exchange server and retrieve the Global Address List, it sends scanned documents from this account only if the Send from personal account option is not selected.

If the Send from personal account option is selected, the connector prompts the user to log on at the device. The Wizard selects the Send from personal account option automatically.

Note: The eCopy Connector for Fax via Microsoft Exchange and the eCopy Connector for Microsoft Exchange have many common functions and settings. Where common information exists, cross-references in this section are to the relevant section of the eCopy Connector for Microsoft Exchange documentation.

About Exchange Environment connection protocols

The eCopy Connector for Fax via Microsoft Exchange supports four combinations of connection protocols that can be used to connect to your Exchange server, depending on your environment. The Wizard automatically selects the protocol based on the Exchange environment information that you supply. For more information about the available combinations of protocols and the environments in which they can be used, see Table 22.

To configure eCopy Connector for Fax via Microsoft Exchange properties:

eCopy recommends that you use the Wizard to initially configure a connector profile. Use the Properties button on the Configure tab only if you need to make custom modifications after the initial configuration.

- 1 In the console tree, select **Fax via Exchange > Properties**.

- 2 Select the **Display** tab and then specify the settings (see Table 9).

- 3 Select the **Configure** tab.

The **Configure** tab displays a summary of the settings that you specify using the **Wizard** or the **Properties** window (see page 96).

- 4 Use the connector **Wizard** to specify the basic settings (see Table 23).

This includes specifying the Fax Format (see page 73).

- 5 If you are configuring a connector profile for an environment that uses an External Associated Account (EAA) and contains multiple forests, and you want to add additional forests (see page 95).

- 6 Select the **Local Address Book** tab and then specify the settings (see Table 15 and see Table 16).

- 7 Select the **Content** tab and then specify the settings (see Table 10).

- 8 Select the **Express** tab and then specify the settings (see Table 11).

- 9 Click **Save**, select or specify the profile name, and then click **Save**.

To configure eCopy Connector for Fax via Microsoft Exchange services:

- 1 In the console tree, select **Fax via Exchange > Services**.

The **Services** pane appears.

- 2 Configure the connector services (see page 80).

- 3 Click **Save**, select the profile name, and then click **Save**.

eCopy Connector for Lotus Notes Mail

The eCopy Connector for Lotus Notes Mail enables users to send scanned documents from an eCopy-enabled device as e-mail attachments from a generic Lotus Notes account or from the user's personal Lotus Notes account. eCopy recommends that you create a generic Lotus Notes account for use by ShareScan.

Before e-mail can be sent from a personal Lotus Notes account, you configure the eCopyMail pass-through database on a Domino HTTP server. Refer to the technical documentation in the following directory for further information and setup instructions:

```
c:\Program
Files\eCopy\ShareScanOP\ShareScanOPManager\Connectors\LNNotesMail\PassThruDB
```

The connector provides access to the Lotus Notes address book as well as to the local Internet address book. When a user sends e-mail from a personal Lotus Notes account, a copy of the message is automatically delivered to the sender's Inbox folder.

Important! You must install the Lotus Notes client before you can install the Lotus Notes e-mail or fax connector. The Lotus Notes e-mail and fax connectors will not be available for installation unless the Lotus Notes client is installed on the computer running the Services Manager. If the Lotus Notes client installation program prompts you to choose between the Multi-User Install option and the Single User Install option, make sure that you select the Single User Install option.

ShareScan typically uses the login name specified in the Active ID file to access the Global Address List, while sending messages from the user's personal Lotus Notes account.

To configure eCopy Connector for Lotus Notes Mail properties:

- 1 In the console tree, select **Lotus Notes Mail > Properties**.
- 2 Select the **Display** tab and then specify the settings (see Table 9).
- 3 Select the **Configure** tab and then specify the settings (see Table 29).
- 4 Select the **Address Books** tab and then specify the settings (see Table 15 and see Table 16).

Note: This tab allows you to configure and enable the Lotus Notes Address Book and create, configure, and enable an Internet address book. All the fields are documented in the referenced tables.

- 5 Select the **Content** tab and then specify the settings (see Table 10).
- 6 Select the **Express** tab and then specify the settings (see Table 11).
- 7 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 29. Lotus Notes Mail Properties: Configure tab

Section	Field/Button	Description
ShareScan User The account used to access the Global Address List.	Active ID File	The name of the Lotus Notes ID file installed on the local computer.
	User Name	The user name associated with the Active ID file.
	Password	The password associated with the Active ID file.
	Test	Validates the logon information.
Email Send Options	Send from personal account	Sends e-mail from a personal Lotus Notes account, rather than from the ShareScan User account. This option is available only if the Lotus Notes Address Book option is enabled (on the Address Books tab). If you select this option, you must configure a Domino HTTP/HTTPS server to use the eCopyMail pass-through database and specify the Domino Server, Mail Send Port, and encryption options.
	Domino Server	The name of the HTTP/HTTPS server where the eCopyMail pass-through database is installed: <ul style="list-style-type: none"> ■ For HTTP: Enter the server name, IP address, or fully qualified domain name, as appropriate, for your Domino environment. ■ For SSL/HTTPS: Enter the server name exactly as it appears in the SSL certificate. For example, if the name is "lsphere.ecopydocs.com", enter this text in the field.
	Mail Send Port	The port number used to send mail (defaults are 80 for HTTP; 443 for SSL/HTTP).
	Use SSL/HTTPS	Encrypts communication with the server using SSL/HTTPS
Send to self		Disables the list of recipients and sends the scanned documents only to the logged on user. You can use the \$\$FILENAME\$\$ name variable on the Subject or Notes line to distinguish among scanned documents.
Enable user to Cc recipients when sending mail		Enables the user at the device to send a copy of a message to one or more recipients who are not the primary recipients.

To configure eCopy Connector for Lotus Notes Mail services:

- 1 In the console tree, select **Lotus Notes Mail > Services**.
The **Services** pane appears.
- 2 Configure the connector services (see page 80).
- 3 Click **Save**, select the profile name, and then click **Save**.

eCopy Connector for Fax via Lotus Notes

The eCopy Connector for Fax via Lotus Notes enables users to scan and fax documents from an eCopy-enabled device through an e-mail-to-fax gateway on the Lotus Notes server. To use this connector, you must have a network fax server and the appropriate Lotus Notes server plug-in.

The scanned document, along with sender and recipient information, is sent to the Lotus Notes server using the local Lotus Notes client.

Before faxes can be sent from a personal Lotus Notes account, you must configure the eCopyMail pass-through database on a Domino HTTP server. Refer to the technical documentation in the following directory for further information and setup instructions:

```
c:\Program  
Files\eCopy\ShareScanOP\ShareScanOPManager\Connectors\LNNotesMail\PassThruDB
```

The connector provides access to the Lotus Notes address book as well as to the local Internet address book. When a user sends e-mail from a personal Lotus Notes account, a copy of the message is automatically delivered to the sender's Inbox folder.

Important! You must install the Lotus Notes client before you can install the Lotus Notes e-mail or fax connector. The Lotus Notes e-mail and fax connectors will not be available for installation unless the Lotus Notes client is installed on the computer running the Services Manager. If the Lotus Notes client installation program prompts you to choose between the Multi-User Install option and the Single User Install option, make sure that you select the Single User Install option.

The recipient's fax number is included in the To field (on the ShareScan Client) in the format required by the fax server. The server plug-in recognizes the recipient address as a fax number and hands the request off to the network fax server for delivery as a fax.

ShareScan typically uses the login name specified in the Active ID file to access the Global Address List, while sending messages from the user's personal Lotus Notes Mail account.

To configure the eCopy Connector for Fax via Lotus Notes properties:

- 1 In the console tree, select **Fax via Lotus Notes > Properties**.
- 2 Select the **Display** tab and then specify the settings (see Table 9).
- 3 Select the **Configure** tab and then specify the settings(see Table 30).
- 4 Select the **Fax Format** tab, which displays samples of the current fax address format, and then specify the Fax format (see page 73).

If your fax server uses an embedded tag, enter the tag in the **Cover Page Via Embedded Tag** field. (Some fax servers use an embedded tag to indicate that a cover page is required.) When a user requests a cover page, ShareScan adds the embedded tag string to the body of the message.

- 5 Select the **Address Books** tab and then specify the settings (see Table 15 and see Table 16).

Note: This tab allows you to configure and enable the Lotus Notes Address Book and create, configure, and enable a fax address book. All the fields are documented in the referenced tables.

- 6 Select the **Content** tab and then specify the settings (see Table 10).
- 7 Select the **Express** tab and then specify the settings (see Table 11).
- 8 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 30. Fax via Lotus Notes Properties: Configure tab

Section	Field/Button Name	Description
ShareScan User^a The account used to access the Global Address List.	Active ID File	The name of the Lotus Notes ID file installed on the local computer.
	User Name	The user name associated with the Active ID file.
	Password	The password associated with the Active ID file.
	Test	Validates the logon information.
Email Send Options	Send from personal account	Sends e-mail from a personal Lotus Notes account, rather than from the ShareScan User account. This option is available only if the Lotus Notes Address Book option is enabled (on the Address Books tab). If you select this option, you must configure a Domino HTTP/HTTPS server to use the eCopyMail pass-through database and specify the Domino Server, Mail Send Port, and encryption options.
	Domino Server	The name of the HTTP/HTTPS server where the eCopyMail pass-through database is installed: <ul style="list-style-type: none"> ■ For HTTP: Enter the server name, IP address, or fully qualified domain name, as appropriate, for your Domino environment. ■ For SSL/HTTPS: Enter the server name exactly as it appears in the SSL certificate. For example, if the name is "lsphere.ecopydocs.com", enter this text in the field.
	Mail Send Port	The port number used to send mail (defaults are 80 for HTTP; 443 for SSL/HTTP).
	Use SSL/HTTPS	Encrypts communication with the HTTP server using SSL/HTTPS.

^a. eCopy recommends that you create a generic Lotus Notes account for use by ShareScan.

To configure eCopy Connector for Fax via Lotus Notes services:

- 1 In the console tree, select **Fax via Lotus Notes > Services**.
The **Services** pane appears.
- 2 Configure the connector services (see page 80).
- 3 Click **Save**, select the profile name, and then click **Save**.

eCopy Connector for SMTP using LDAP

The eCopy Connector for SMTP using LDAP enables users to send scanned documents from an eCopy-enabled device as e-mail attachments using an SMTP server on the network. When a user sends e-mail from a personal SMTP account, the system prompts users to log on to validate their identity. The Global Address List is provided by an LDAP server.

eCopy recommends that you use the Wizard to initially configure a connector profile.

To configure the eCopy Connector for SMTP using LDAP properties:

- 1 In the console tree, select **LDAP/SMTP > Properties**.
- 2 Select the **Display** tab and then specify the settings (see Table 9).
- 3 Select the **Configure** tab.

The **Configure** tab displays a summary of the settings that you specify using the **Wizard** or using the **Properties** window.

Use the **Wizard** to specify the basic connector settings (see Table 31).

Note: Use the Properties button on the Configure tab only if you need to make custom modifications after the initial configuration.

- 4 Select the **Local Address Books** tab and then specify the settings (see Table 15 and see Table 16).

Note: This tab allows you to create, configure, and enable an Internet address book. All the fields are documented in the referenced tables.

- 5 Select the **Content** tab and then specify the settings (see Table 10).
- 6 Select the **Express** tab and then specify the settings (see Table 11).
- 7 Click **Save**, select or specify the profile name, and then click **Save**.

To configure the eCopy Connector for SMTP using LDAP services:

- 1 In the console tree, select **LDAP/SMTP > Services**.
The **Services** pane appears.
- 2 Configure the connector services (see page 80).
- 3 Click **Save**, select the profile name, and then click **Save**.

SMTP using LDAP connector Wizard settings

The Wizard enables administrators to initially configure the connector. Many windows contain a Test button that enables you to validate the logon information or test the server connection.

TABLE 31. Wizard settings: SMTP using LDAP

Wizard Window	Field	Description
LDAP Server Type	Server Type	<p>The available server types:</p> <ul style="list-style-type: none"> ■ Generic LDAP Server ■ Windows Active Directory ■ Windows Active Directory (Untrusted) ■ Novell eDirectory ■ Netscape LDAP Server ■ Open LDAP Server ■ IBM Domino Server <p>Your selection enables the Wizard to set your user ID, e-mail address, first name, last name, and common name. If your server type is not on the list, select the Generic LDAP Server option.</p>
<p>Windows Active Directory Server Account</p> <p>Available only if you select Active Directory as the server type.</p>	Account Settings	<p>Active Directory Server Account settings:</p> <ul style="list-style-type: none"> ■ User name ■ Password ■ Domain <p>The Wizard uses this information to set the user DN and server name.</p>

TABLE 31. Wizard settings: SMTP using LDAP (continued)

Wizard Window	Field	Description
LDAP Server Settings Not available if you select Active Directory as the server type.	LDAP Server Settings	LDAP server settings: <ul style="list-style-type: none"> ■ Server ■ Port ■ User DN ■ Password You must provide the full user DN if the server requires it. The Wizard assumes that the server is using the default port number (389). The Wizard resets the port back to 389 if it was changed in the Properties window.
	Connect Anonymously	Bypasses the Select LDAP User window and allows anonymous connection to the LDAP server, if the server supports anonymous authentication.
Select LDAP User Not available if you select Active Directory as the server type.		Enables you to select a user from the LDAP tree in the Select LDAP User window.

TABLE 31. Wizard settings: SMTP using LDAP (continued)

Wizard Window	Field	Description
Search Settings	Start Search At	The node on the LDAP tree from which all searches should begin. If you do not know the node, click the Browse button and then select the node from the tree structure in the selection window.
	Search scope	Select a search level: <ul style="list-style-type: none"> ■ All levels below search starting point: Allows expanded searching. ■ One level below search starting point: Optimizes LDAP queries and improves performance.
	Sender Search	The search criterion that the server uses to find the sender: <ul style="list-style-type: none"> ■ First Name ■ Last Name ■ Common Name ■ User ID The setting defines the information that the user sees on the Logon screen at the device.
	Recipient Search (for Mail via SMTP using LDAP only)	The search criterion that the server uses to find the recipient: <ul style="list-style-type: none"> ■ Common Name ■ First Name ■ Last Name ■ User ID The setting defines the information that the user sees on the Send screen at the device. <p>Tip: If you are using an Active Directory server and want the list of recipients to display groups as well as individuals, eCopy recommends that you retain the default setting, Common Name. If you select any other search criterion, users who want to send documents to a group must enter the complete e-mail address of the group at the device.</p>
	Search while typing	Enables or disables the Search while typing option at the device (see page 70)
SMTP Settings	Server	The SMTP server name.
	Port	The SMTP port number.

TABLE 31. Wizard settings: SMTP using LDAP (continued)

Wizard Window	Field	Description
User Logon Settings	None	Sends the user at the device directly to the Send screen without displaying the Logon screen. If you select this option, you must specify a generic e-mail address or select the User modify option, or select both.
	Generic e-mail	A generic e-mail address that is used as the sender account for all e-mail.
	User modify	The user at the device can modify the sender's e-mail address.
	LDAP	Requires the user at the device to enter the user name and password specified for the LDAP server.
	Windows domain	Enables users at the device to use their Windows logon information, via the SAMAccountName attribute, to log on. The Domain field specifies the Windows domain name, populated from the Account Settings window. This is required if you select the Windows option. Available only if you select Active Directory as the server type.
	Novell tree	The Novell tree. This is required if you select the Novell option. Available only if you select eDirectory as the server type.
Fax Address Format (For Fax via SMTP using LDAP only.)	Cover Page / No Cover Page	Displays the fax format that you define in the Fax Address Format window.
	Format	Opens the Fax Address Format window where you define the fax address format required by your fax server application or Internet fax service (see page 73). Refer to the documentation for your fax application to obtain the correct format for the fax address. Since fax application vendors change these formatting schemes frequently, make certain you obtain the current format.
Settings Summary		Enables you to review your settings. Use the Back button if you need to change any settings. Use the Finish button to apply your settings to the connector profile.

eCopy Connector for SMTP using LDAP Properties

The Properties window enables administrators who are more familiar with LDAP to fine-tune the settings, without relying on the Wizard. Many windows contain a Test button that you use to validate the logon information or test the server connection.

TABLE 32. LDAP/SMTP Properties: Basic LDAP tab

Section	Field	Description
LDAP Server The server that will provide the Global Address List; the same server is used for sender authentication if LDAP authentication is enabled.	Server	The IP address, DNS name, or URL of the LDAP server associated with the directory you want to use.
	Port	The LDAP port number. The default is 389. If this does not work, try 3268.
	Server requires SSL for communication	Requires the client to use SSL to communicate with the server.
	User DN	The distinguished name (DN) of the server account. The account must have the appropriate permissions to query the supplied base DN and extract attributes from the query results.
	Password	The password associated with the server account.
	Connect Anonymously	Allows anonymous connection to the LDAP server, if the server supports anonymous authentication.

TABLE 32. LDAP/SMTP Properties: Basic LDAP tab (continued)

Section	Field	Description
Search	Base DN	<p>The DN of the base or root of the directory in which to search. This varies depending on the server you are using and the portion of the directory you wish to search.</p> <p>Examples of potential base DN's are:</p> <ul style="list-style-type: none"> ■ "DC=ecopy" ■ "CN=users" ■ "DC=ecopy "DC=com" ■ "OU=marketing,DC=ecopy" <p>If you leave this field blank, the connector uses "DC=" and tries to obtain the directory root from the LDAP server automatically.</p>
	Search scope	<p>Select a search level:</p> <ul style="list-style-type: none"> ■ All levels below search starting point: Allows expanded searching. ■ One level below search starting point: Optimizes LDAP queries and improves performance.
	Sender Search	<p>The search criterion that the server uses to find the sender:</p> <ul style="list-style-type: none"> ■ First Name ■ Last Name ■ Common Name ■ User ID <p>The setting defines the information that the user sees on the Logon screen at the device.</p>
	Recipient Search (for Mail via SMTP using LDAP only)	<p>The search criterion that the server uses to find the recipient:</p> <ul style="list-style-type: none"> ■ Common Name ■ First Name ■ Last Name ■ User ID <p>The setting defines the information that the user sees on the Send screen at the device.</p> <p>Tip: If you are using an Active Directory server and want the list of recipients to display groups as well as individuals, eCopy recommends that you retain the default setting, Common Name. If you select any other search criterion, users who want to send documents to a group must enter the complete e-mail address of the group at the device.</p>
	Search while typing	<p>Enables or disables the Search while typing option at the device (see page 70).</p>

TABLE 33. LDAP/SMTP Properties: Advanced LDAP tab^a

Section	Field	Description
<p>LDAP Attributes If you use a non-standard attribute in the e-mail, First Name, Last Name, and Common Name fields, enter the attribute name in the field.</p>	Class	The LDAP class to which the attributes you want to query belong: <ul style="list-style-type: none"> ■ DominoPerson ■ Person ■ User
	User ID	The attribute that your system uses to query the user ID: <ul style="list-style-type: none"> ■ SAMAccountName ■ uid
	e-mail	The attribute that your system uses to query the mail id: <ul style="list-style-type: none"> ■ mail ■ e-mail
	First name	The attribute that your system uses to query the user's first name: <ul style="list-style-type: none"> ■ givenName ■ sn ■ uid ■ SAMAccountName
	Last name	The attribute that your system uses to query the user's last name: <ul style="list-style-type: none"> ■ sn ■ givenName ■ uid ■ SAMAccountName
	Common name	The attribute that your system uses to query the user's common name: <ul style="list-style-type: none"> ■ uid ■ SAMAccountName ■ sn ■ cn ■ givenName
<p>Custom LDAP Attributes</p>		Control the display of sender and recipient information at the device. Use square brackets to define custom attributes and static text to enter elements that remain constant, as in the following example that displays the sender or recipient's title and their company (eCopy): <pre>[title] - eCopy John Smith (Software Engineer - eCopy)</pre> "title" is an LDAP attribute that belongs to the Person class.

^a. This tab enables you to customize your queries to the LDAP database and choose the LDAP attributes to query

TABLE 34. LDAP/SMTP Properties: SMTP Settings tab

Section	Field/Button	Description
SMTP Server	Server	The IP address or DNS name of the SMTP server to use for outgoing messages. If the server supports anonymous access, it must be disabled if you want to use SMTP authentication.
	Port	The SMTP port number (default is 25).
Mail Account (For Mail via SMTP using LDAP only.)	Allow user to select recipients	Enables the user at the device to select recipients for the scanned documents: <ul style="list-style-type: none"> ■ Allow user to add recipients to Cc list: Enables the user at the device to send a copy of a message to one or more recipients who are not the primary recipients. ■ Send copy to Sender: Automatically delivers a copy of the message to the person specified in the From field.
	Send to self	Disables the list of recipients and sends the scanned documents only to the logged on user.
SMTP Server Logon Available only if SMTP Basic Authentication is enabled on the server. Note: If Session Logon is enabled, and SSL is not enabled, eCopy recommends that you select "None" or "Login As".	None	Use if the SMTP server does not require authentication.
	Use Sender's User ID, LDAP Attribute, and runtime password	Uses the sender's LDAP authentication information to connect to the SMTP server.
	Login As	Enables the user at the device to connect to the SMTP server without being prompted for authentication information. The connector uses the specified user name and password.
	Runtime: Prompt Sender for a user name and password	Prompts the user at the device to enter a user name and password when the user presses the Send button on the Send screen.

TABLE 35. LDAP/SMTP Properties: User Logon tab

Section	Field	Description
Logon	Send from a generic account	Sends the user at the device directly to the Send screen without displaying the Logon screen. If you select this option you must specify a generic e-mail address or select the User modify option, or select both. If you do not want to use the LDAP Address Book, you must select this option.
	Generic e-mail	A generic e-mail address that is used as the sender account for all e-mail.
	User modify	The user at the device can modify the sender's e-mail address.
	LDAP	Requires the user at the device to enter the user name and password specified for the LDAP server.
	Windows domain	Enables users at the device to use their Windows logon information, via the SAMAccountName attribute, to log on. The Domain field specifies the Windows domain name. This is required if you select the Windows option. Available only if you select Active Directory as the server type.
	Novell	The Novell tree. This is required if you select the Novell option. Available only if you select eDirectory as the server type.

Fax Format settings are available for the eCopy connector for Fax via SMTP only.

TABLE 36. LDAP/SMTP Properties: Fax Format Settings

Section	Field Name	Description
Fax Address Format	Cover Page / No Cover page	Displays the fax format that you define in the Fax Address Format window.
	Format	Opens the Fax Address Format window where you define the fax address format required by your fax server application or Internet fax service. Refer to the documentation for your fax application to obtain the correct format for the fax address. Since fax application vendors change these formatting schemes frequently, make certain you obtain the current format.

eCopy Connector for Fax via SMTP

The eCopy Connector for Fax via SMTP enables users to scan and fax documents from an eCopy-enabled device through an SMTP e-mail-to-fax gateway. To use this connector, you must have a network fax server and the appropriate SMTP server plug-in.

The scanned document along with the sender and recipient information is sent to the SMTP server as a MIME-formatted mail message.

The recipient's fax number is included in the To field (on the ShareScan Client) in the format required by the fax server. The server plug-in recognizes the recipient address as a fax number and hands the request off to the network fax server for delivery as a fax.

To configure eCopy Connector for Fax via SMTP properties:

- 1 In the console tree, select **Fax via SMTP > Properties**.
- 2 Select the **Display** tab and then specify the settings (see Table 9).
- 3 Select the **Configure** tab

The **Configure** tab displays a summary of the settings that you specify using the **Wizard** or the **Properties** window.
- 4 The **Enable LDAP Address Book** option is selected by default. To disable this option you must select **Send from a generic account** as your **User Logon** setting (see Table 35).
- 5 Use the connector **Wizard** to specify the basic settings (see Table 31).

This includes specifying the Fax format (see Table 36).

Use the **Properties** button on the **Configure** tab only if you need to make custom modifications after the initial configuration. (see page 118).
- 6 Select the **Local Address Book** tab and then specify the settings (see Table 15 and see Table 16).
- 7 Select the **Content** tab and then specify the settings (see Table 10).
- 8 Select the **Express** tab and then specify the settings (see Table 11).
- 9 Click **Save**, select or specify the profile name, and then click **Save**.

Note: The eCopy Connector for Fax via SMTP and the eCopy Connector for SMTP using LDAP have many common functions and settings. Where common information exists, cross-references in this section are to the relevant section of the eCopy Connector for SMTP using LDAP documentation.

To configure eCopy Connector for Fax via SMTP services:

- 1 In the console tree, select **Fax via SMTP > Services**.
The **Services** pane appears.
- 2 Configure the connector services (see page 80).
- 3 Click **Save**, select the profile name, and then click **Save**.

Scan to eCopy Desktop™

The eCopy™ Scan to eCopy Desktop Connector enables ShareScan users at an eCopy-enabled device to scan documents and send them to recipients' scan inboxes or to network home directory folders, where the scanned documents can be retrieved by eCopy Desktop. For information about using eCopy Desktop, refer to the eCopy Desktop documentation or Help.

Depending on the configuration of the connector, the recipient may be the user scanning the document or any other eCopy Desktop user whose scan inbox is set up to receive scanned documents via the connector. The connector can also be configured to send scanned documents to storage destination, specifically Windows, Novell, or FTP folders, or to folders on a USB Flash Drive.

The following list provides several notes about this connector:

- You cannot configure a connector profile to send scanned documents to both scan inboxes/home directories and a storage destination.
- When a ShareScan user at an eCopy-enabled device chooses a recipient, the scanned document is delivered to the recipient's scan inbox or to the specified folder in the recipient's network home directory.
- You can configure the connector to secure the scan inboxes of recipients. Users must enter the network password associated with a recipient's scan inbox before the connector can send scanned documents to the scan inbox. The Authenticate users option is automatically selected when the inbox type is set to "Home Directories".

Any user can send a scanned document to any user's scan inbox. However, only the owner can read from the scan inbox.

- The list of available recipients that appears on the Specify Recipient screen (in the ShareScan Client) includes all users in the Windows Active Directory or Novell eDirectory, unless you restrict usage by choosing a base DN that limits the scope of the search.

About eCopy Desktop scan inboxes and home directories

eCopy Desktop can use either scan inboxes or network home directories to store scanned documents received from the Scan to eCopy Desktop Connector:

- Scan inboxes:** The connector creates scan inboxes when users first use the connector at a device. The connector creates scan inboxes in folders located beneath the Inbox root directory.

When the connector creates scan inboxes, it assigns the permissions needed to ensure the appropriate level of scan inbox privacy. The connector uses the ShareScan Administrator group you designate in the Scan to Desktop Properties window to implement the required security.

TABLE 37. Scan to eCopy Desktop: Security for scan inboxes

System	Role	Permissions
Windows Active Directory	Administrators	Full control
	Domain Administrators	Full control Not used in workgroups
	<groupname> (your designated ShareScan Administrator group)	Full control
	<owner>	Full control of the owner's individual inbox folder
Novell (NDS)	Admin	Full control
	<groupname> (your designated ShareScan Administrator group)	Full control
	<owner>	Full control

- **Home Directories:** The network administrator must create these directories. If you configure the connector to use a network home directory to store scanned documents, the connector automatically uses the Scan to Self and Authenticate Users options.

Network security ensures that only the Local Administrator, the ShareScan Administrator, and the local user can read from or write to the root of the network home directory or to the specified subdirectory. Scan to eCopy Desktop must connect to the specified folder as the owner of the home directory.

Important! Network home directories configured through a logon script are not supported.

You configure a Scan to eCopy Desktop connector profile to scan to a single inbox type: scan inboxes or network home directories. You cannot configure the connector profile to scan to both types of inboxes. However, if you modify the inbox type in the connector profile, so that some users have scan inboxes while others have network home directories, both types of inboxes can co-exist on the same system.

The following table shows sample scan inbox paths:

TABLE 38. Sample scan inbox locations

System	User	Domain	Inbox path
Windows Active Directory	User1	Single domain mode (recommended)	\\Server\Inbox_Root\User1
Windows Active Directory	User1	Multiple domain mode option (only if required)	\\Server\Inbox_Root\xyz.com\<domain_name>\User1
Novell (NDS)	Cn=testuser ou=engineering 0=eCopy	Use user ID for folder names (recommended)	\\Server\Inbox_Root\testuser.engineering.e copy
Novell (NDS)	Cn=testuser ou=engineering 0=eCopy	Use eDirectory hierarchy (only if required)	\\Server\Inbox_Root\<eCopy>\engineering\test user

About the Inbox root directory

The Inbox root directory, which was called “Inbox Management Directory” in previous versions of ShareScan, contains scan inboxes and a file named “userdirs.txt”. When users at a device use the connector for the first time, their names and the paths to their scan inboxes or network home directories are added to the userdirs.txt file.

The Inbox Agent uses the userdirs.txt file to provide eCopy Desktop with the path information that eCopy Desktop needs to connect to scan inboxes or network home directories (see page 138).

Before you can use the Scan to eCopy Desktop Connector, you must configure the Inbox root directory (see page 130).

The connector automatically assigns specific file and folder permissions to ensure inbox security (see Table 39 or see Table 40) depending on your network environment.

TABLE 39. Inbox root directory permissions (Windows)

File or folder	Role	Permissions
<Inbox root directory>	Administrators	Full control: applied automatically
	<groupname> (your designated ShareScan Administrator group)	Full control: applied automatically.
	Everyone	Read (List folder): applied automatically.
userdirs.txt	Administrators	Full control: applied automatically.
	<groupname> (your designated ShareScan Administrator group)	Full control: applied automatically.
	Everyone	Read: applied automatically.

TABLE 40. Inbox root directory permissions (Novell NetWare [NDS])

File or folder	Role	Permissions
<Inbox root directory>	Admin	Full control
	Domain Admins (not used in workgroups)	Full control: applied automatically
	<groupname> (your designated ShareScan Administrator group)	Full control
	Everyone	File scan
userdirs.txt	Admin	Full control
	Domain Admins (not used in workgroups)	Full control: applied automatically
	<groupname> (your designated ShareScan Administrator group)	Full control
	Everyone	None

Supporting multiple Inbox root directories

For information on the support of multiple Inbox root directories, refer to the Ask eCopy knowledge base, or contact eCopy Customer Support.

Preconfiguring Scan to eCopy Desktop

Notes: If you are migrating from an earlier version of eCopy ShareScan and have already configured an Inbox root directory, you can use the existing location and settings. You can also import profiles from earlier versions of the connector using the Import / Export tool in the Administration console. For more information see the Administration console Help.

If you have a Novell network with multiple trees, you must set the Preferred tree field in the Novell client configuration so that the eCopy Inbox Agent and Scan to eCopy Desktop Connector will function properly.

Before you can configure Scan to eCopy Desktop in the Administration console, a network administrator must complete the following steps.

To preconfigure Scan to eCopy Desktop:

- 1 Create the Inbox root directory. If the directory is on a Microsoft or Novell network, you must share it.
- 2 Create a service account that will deliver scanned documents to scan inboxes or to network home directories.
- 3 Add the service account to a new or existing group in one of the following locations:
 - On the domain controller, for Windows domain-based networks.
 - On NDS , for Novell networks.
 - On the local machine, for workgroups.

ShareScan uses this group when assigning permissions to the Inbox root directory and scan inboxes.

Note: If multiple Services Managers are pointing to the same userdirs.txt file in the Inbox root directory, the group to which the service account belongs must be identical on all those Services Managers.

- 4 Give the group Full Control access rights to the Inbox root directory.
- 5 For workgroup implementations only, on the PC where the scan inboxes are located, create a local account for each user of Scan to eCopy Desktop.

Configuring Scan to eCopy Desktop

After completing the pre-configuration steps, you can configure the connector.

To configure Scan to eCopy Desktop Connector properties:

- 1 In the console tree, click **Scan to Desktop > Properties**.
- 2 Select the **Display** tab and then specify the settings (see Table 9).
- 3 Select the **Configure** tab.
- 4 Select either **Scan Inbox/Home Folder Settings** or **Destination Settings**.
 - If the connector profile uses scan inboxes or home directories, select **Scan Inbox/Home Folder Settings** and then click **Properties**, specify the settings (see Table 41 and see Table 42), and then click **OK**.
 - If the connector profile uses destinations, select **Destination Settings**, click **Properties**, specify the settings (see Table 43 and see Table 44), and then click **OK**.
 This option allows you to send scanned documents to network locations, such as Windows, Novell, or FTP folders, or to folders on a USB Flash Drive.
- 5 Select **Inbox Agent > Start Service**. The Inbox Agent provides eCopy Desktop with the path information that eCopy Desktop needs to connect to scan inboxes or network home directories.
 The first time you click **Start Service**, the Inbox Agent registry settings are automatically configured.
- 6 Click **Save**, select or specify the profile name, and then click **Save**.

Scan Inbox/Home Folder settings

The environment settings depend on the environment type that you select in the Scan to Desktop Properties window. The general settings are the same for all environments. The connector supports the following environments:

- Windows Active Directory
- Novell eDirectory:
- Local Computer (Workgroup): Select this option if you do not have a domain controller or NetWare server on your network, or if you are authenticating in a workgroup. If you select this option, each user must have an account on the local computer.

TABLE 41. Scan to eCopy Desktop Properties: Environment settings

Section	Field/Button	Description
Service Account	User Name Password	The authentication information for the administrative user account created by your network administrator. If you select Windows Active Directory as the environment type, you must also specify a domain. If you select Novell eDirectory as the environment type, you must also specify a tree.
	Advanced	Enables you to configure the Advanced Account Settings.
	Test	Validates the authentication information. If validation is successful, the user name turns blue. If the user name remains red, make sure that the account is a member of your designated ShareScan Administrator group.
ShareScan Administrator	Group	When the test is successful, the Group field is populated with the list of groups to which the service account belongs.
Inbox Root	UNC Path	Specifies the path to the Inbox root directory. If the system prompts you to update permissions, click the Yes button; this ensures the security of scan inboxes and of the userdirs.txt file. The system creates an empty userdirs.txt file in the selected directory (unless a file already exists).
(Windows environment)	Single domain mode (recommended)	Select this option if you upgraded from a version of ShareScan prior to version 4.2, or if you are running ShareScan 4.2 or 4.5 as well as prior versions of ShareScan in the same environment.
	Multiple domain mode (only if required)	Select this option only if you are running ShareScan 4.2 or 4.5 exclusively.
(Novell environment)	Use user ID for folder names (recommended)	Select this option if you upgraded from a version of ShareScan prior to version 4.2, or if you are running ShareScan 4.2 or 4.5 as well as prior versions of ShareScan in the same environment.
	Use eDirectory hierarchy (only if required)	Select this option only if you are running ShareScan 4.2 or 4.5 exclusively.

TABLE 42. Scan to eCopy Desktop Properties: General settings

Section	Field/Button	Description
Inbox Settings	Inbox Type	Scan Inboxes: Scans documents to scan inboxes. Home Directories: Scans documents to a network home directory. This option is not available if you select Local Computer (Workgroup) as the environment type.
	Recipient Type	Multiple: Enables users at the device to select multiple recipients for scanned documents. This option is not available if you select Home Directories as the inbox type. Scan To Self: Sends the scanned documents to the logged-on user's scan inbox or network home directory.
	Authenticate Users	Secures the scan inboxes of recipients. Users must enter the network password associated with the recipient's scan inbox to send scanned documents. This option can only be modified if you select Scan Inboxes as the Inbox Type and Multiple as the Recipient Type.
Search	Search while typing	Enables or disables the Search while typing function at the device.
If a scanned image file already exists		Specifies the action for the connector to take if the recipient's scan inbox already contains a scanned document with the same file name: <ul style="list-style-type: none"> ■ Overwrite always: Replaces an existing scanned document with the one the connector is currently saving. ■ Return error: Displays an error message prompting the user at the device to change the file name. ■ Create unique file name: Adds a unique number to the file name, for example filename.1, filename.2. The scanned document is saved to the location using a unique file name and the existing document is not overwritten.

Destination settings

Scan to eCopy Desktop enables you to scan to the following destination types:

- Windows Folder
- Novell Folder
- FTP Folder
- USB Flash Drive

For each type of folder, except for the USB Flash Drive, you must supply the folder location and authentication settings.

TABLE 43. Scan to eCopy Desktop: Destination settings

Section	Field	Description
If scanned image file already exists		<p>Specifies the action for the connector to take if the recipient’s scan inbox already contains a scanned document with the same file name:</p> <ul style="list-style-type: none"> ■ Overwrite always: Replaces an existing scanned document with the one the connector is currently saving. ■ Return error: Displays an error message prompting the user at the device to change the file name. ■ Create unique file name: Adds a unique number to the file name, for example filename.1, filename.2. The scanned document is saved to the location using a unique file name and the existing document is not overwritten.
Folder Location (For an FTP folder you must enter and test the authentication information before you select a folder location.)	Path to the folder	Destination information for the scanned documents. Click the Browse button and then select a folder.
	Enable subfolder navigation	Enables users to select a subfolder at the device.
	Maximum folder levels	The number of folder levels down that users may navigate.

TABLE 43. Scan to eCopy Desktop: Destination settings (continued)

Section	Field	Description
Authentication	Authenticate User	<p>The options are:</p> <ul style="list-style-type: none"> ■ None: Sends scanned documents to the destination without requiring user authentication. The Services Manager requires write access to the destination. The FTP server must be configured to allow anonymous login to work with this option. ■ Logon as: Sends scanned documents to the destination using the specified authentication information; the user does not need to enter authentication information at the device. Specify the domain/tree, user ID, and password to use for authentication. The specified account requires write access to the destination. ■ RunTime: The user at the device must log on to the destination before the scanned document is sent. You specify the domain/tree to use for authentication. <p>Note: If you select FTP Folder as a destination type and Session Logon is enabled, eCopy recommends that you select "Anonymous" or "Logon as" as the authentication type.</p>
	Server (FTP only)	The FTP Server name.
	Advanced	Enables you to configure the Advanced Account Settings.

Advanced account settings are used in the configuration of scan inboxes and destinations for Windows Active Directory and Novell eDirectory.

TABLE 44. Scan to eCopy Desktop: Advanced Account settings

Environment type	Field name	Description
Windows Active Directory	Global Catalog Server settings	Locate server at runtime: The connector finds the Global Catalog Server at runtime. Always use the following server: The name of the Global Catalog Server to be used at the device.
	LDAP Port	The port that you want the server to use. Default is 3268.
	Server requires SSL for communication:	Select this option if the Global Catalog Server requires a Secure Socket Layer (SSL).
	Base DN	Defines a starting point for the Global Catalog Server search that takes place from the authentication window at the device. When you select a base DN (Distinguished Name), the Search while typing option searches the forest below the location of the Base DN. The Browse button opens the Start Search At window, where you can select a Base DN in the Active Directory forest. Only users within the DN can authenticate. However, documents can be sent to any user in the forest. If this field is left blank, the search includes the entire forest.
	Domain Controller settings	LDAP Port: The port that you want the domain controller to use. Default is 389. Server requires SSL for communication: Select this option if the Global Catalog Server requires a Secure Socket Layer (SSL).

TABLE 44. Scan to eCopy Desktop: Advanced Account settings (continued)

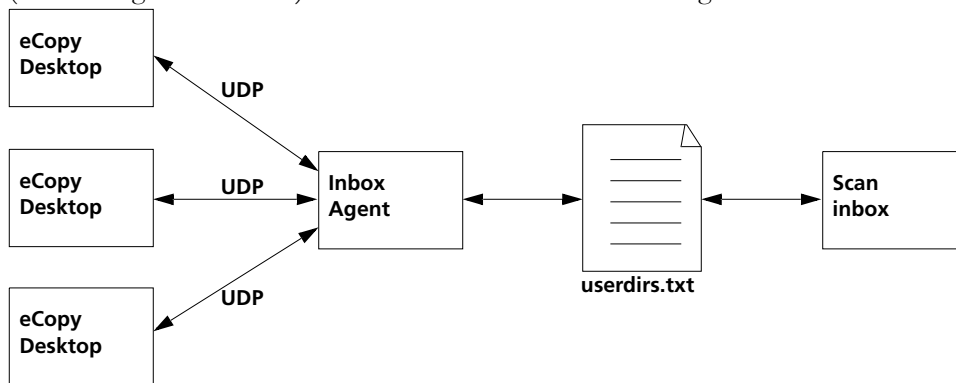
Environment type	Field name	Description
Novell eDirectory	Novell eDirectory Server settings	Locate server at runtime: The connector finds the Global Catalog Server at runtime. Always use the following server: The name of the Novell eDirectory Server to be used at the device.
	LDAP Port	The port that you want the server to use. Default is 389.
	Server requires SSL for communication	Select this option if the Novell eDirectory Server requires a Secure Socket Layer (SSL).
	Server allows Anonymous Bind	eDirectory can obtain information from the server without authenticating the user.
	Search On	The search criterion that the server uses to find the sender: <ul style="list-style-type: none"> ■ First Name ■ Last Name ■ Common Name ■ User ID The setting defines the information that the user sees on the Logon screen at the device. Note: eCopy recommends that you select First Name, Last Name, or User ID. However, if you choose Common Name, eCopy recommends that you select a base DN to improve the search performance of this option.
	Base DN	Defines a starting point for the Global Catalog Server search that takes place from the authentication window at the device. When you select a base DN (Distinguished Name), the Search while typing option searches the forest below the location of the Base DN. The browse button opens the Start Search At window, where you can select a Base DN in the Novell forest. Only users within the DN can authenticate; however, documents can be sent to any user in the forest. If this field is left blank, the search includes the entire forest. Examples of potential base DNs are: <ul style="list-style-type: none"> ■ "DC=ecopy" ■ "CN=users" ■ "DC=ecopy "DC=com" ■ "OU=marketing,DC=ecopy"

To configure Scan to eCopy Desktop Connector services:

- 1 In the console tree, select **Scan to Desktop > Services**.
- 2 Configure the connector services (see page 80).
- 3 Click **Save**, select the profile name, and then click **Save**.

About the Inbox Agent

The eCopy Inbox Agent is a Windows service that is installed with the Services Manager. It uses the userdirs.txt file to provide eCopy Desktop with the path information that eCopy Desktop needs to connect to scan inboxes or network home directories. eCopy Desktop uses the UDP (User Datagram Protocol) to communicate with the Inbox Agent.



Important! The default UDP server port is 9999 and the client port is 8888. The default multicast server and client IP address is 239.254.5.6. If you need to change these settings, contact Customer Support for assistance.

Example

If you are logged on to your PC as *<ouser>*, eCopy Desktop sends a UDP message to the Inbox Agent requesting the path to your scan inbox. The Inbox Agent looks up *<ouser>* in the userdirs.txt file and returns the path to eCopy Desktop, which uses it to open *<ouser>*'s scan inbox.

If you do not enable the Inbox Agent, each eCopy Desktop user must manually configure the path to the scan inbox. For information about configuring eCopy Desktop, see the eCopy Desktop documentation or Help.

Scan to Printer

The eCopy Scan to Printer Connector enables users at an eCopy-enabled device to scan and print documents to a network printer, regardless of its physical location. Users can select various printing and page layout options.

To configure eCopy Scan to Printer Connector properties:

- 1 In the console tree, select **Scan to Printer > Properties**.
- 2 Select the **Display** tab and then specify the settings (see Table 9).
- 3 Select the **Configure** tab and then specify the settings (see Table 45).
- 4 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 45. Scan to Printer Properties: Configure tab

Field/Button	Description
Enable Express Mode	Does not display the settings screen to the user at the device. The scanned documents print directly to the default printer, using the default print settings from the print driver.
Available Printers	The printers that will be available at the device.
Set default printer	Used to specify the default printer. The name of the default printer appears in blue at the top of the list.

To configure eCopy Scan to Printer Connector services:

- 1 In the console tree, select **Scan to Printer > Services**.
- 2 Configure the connector services (see page 80).
- 3 Click **Save**, select the profile name, and then click **Save**.

Reference: Managing eCopy-enabled devices

Managing eCopy-enabled devices involves various tasks, such as specifying the default device. For information about adding devices running ShareScan Embedded software, see the “Adding a device with an embedded Client” section in the installation guide provided with the embedded products.

In this chapter

- Specifying a default device 144
- Specifying default scanner settings 145
- Configuring Activity Tracking 146
- Configuring the Document Tracking function 151
- Configuring the ID Services function 153

Specifying a default device

You can specify a default device from which new devices inherit their initial configuration of connector profiles. For example, if the default device is configured to use the Exchange and Scan to Printer connectors, new devices are automatically configured to use the same connectors.

Note: Devices can only inherit connector profiles from a default device from the same manufacturer.

If you do not specify a default device, new devices will not be configured to use any connectors.

To specify the default device:

- 1 In the console tree, right-click the device name.
- 2 Select **Set as default device**.

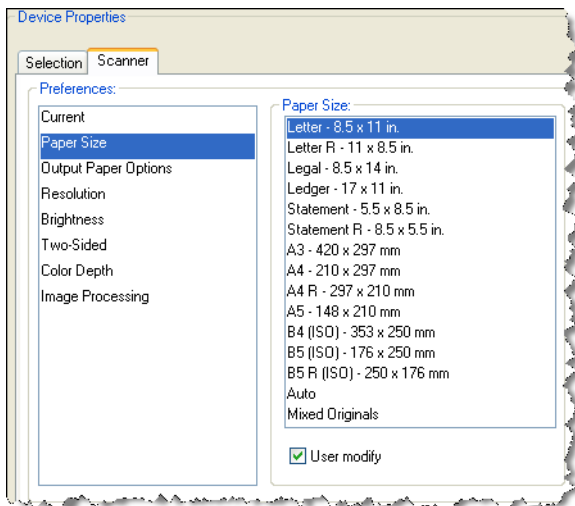
Specifying default scanner settings

You can specify default scanner settings for eCopy-enabled devices. (For information about attaching default scanner settings to a connector profile, see page 85.)

To specify default scanner settings for a device:

- 1 In the console tree, select **Devices** > *<device_name>* > **Properties**.
- 2 Select the **Scanner** tab.

The information on the **Preferences** pane depends on the device you are using. See the Administration console Help for a table that describes some of the scanning preferences and associated options that you may see.



- 3 Specify the default scanner settings.

The **User modify** option enables you to specify whether or not users at the device can override the default scanner settings (by pressing the **Settings** button)

- 4 Click **Save**.

Configuring Activity Tracking

The Activity Tracking function writes detailed information about each job to a log file.

The Activity Tracking function enables you to perform the following tasks:

- Configure the Activity Logging function (see page 147)
- Configure additional activity tracking fields (see page 150)
- Configuring the Document Tracking function (see page 151)

Configuring the Activity Logging function

When the Activity Logging function is enabled for a device, the Services Manager generates a log file. The general format for each record in the log file is:

```
<Date>|<Time>|<Connector Label>|<Number of Pages in Document>|<Connector-Specific Fields>|<SUCCESS/FAILURE>|<Device Name>
```

If you select the Extended Fields function, the log file includes the preceding fields and may include the following fields:

```
<Document Size>|<DOC SENT>|<DOC TRACKED>|<USERNAME>|<DOMAIN>
```

If a user sends a scanned document to multiple recipients, each name is separated with a semicolon.

To configure the Activity Logging function:

- 1 In the console tree, select **Devices** > *<device_name>* > **Activity Tracking**.
- 2 Select the **Activity Logging** tab and then select **Enable**.

The screenshot shows the 'Activity Tracking' configuration window. It has four tabs: 'Activity Logging', 'Document Tracking', 'Additional Fields', and 'ID Services'. The 'Activity Logging' tab is active. Inside the window, there is a 'Save' button in the top right. Below it, there is a section for 'Activity Logging' with a checked 'Enable' checkbox. Underneath, there is a section for 'Activity Log Location' with a text box containing 'C:\Program Files\veCopy\ShareScan\ShareScanOPManager\ActivityTracking\Tech' and a 'Credentials' button. Below that is a section for 'Activity Log Overflow' with a 'Maximum Log Size' of 5000 KB and two radio button options: 'Rolling filenames (ShareScan.001, .002, etc..)' (selected) and 'Overwrite oldest events'. At the bottom is a section for 'Log Field Properties' with a 'Field Separator' of '|' and a checked 'Extended Fields' checkbox.

- 3 Specify the settings (see Table 46).
- 4 Click **Save**.

TABLE 46. Devices: Activity Logging tab

Section	Field/Button	Description
Activity Log Location	Activity Log Location field	The full path and file name for the log file, ShareScanOPActivity.log. The location must be in the current Windows domain or in a trusted Windows domain.
	Credentials	Enables you to create secured access to the log file. The Credentials button opens the Enter Credentials window where you enter the user name, password, and domain that are required to access the location of the log file. The specified user must have access rights to the location. If you choose to put the log file in a location on your local computer, you do not need to specify credentials. However, the Local System account must have access rights to the location.
Activity Log Overflow	Maximum Log Size	The maximum size for the log file, in kilobytes (KB).
	Rolling filenames	Specifies whether to use rolling file names when the existing log file reaches the maximum size and you want the system to create a new log file. When you select this option, the system renames the existing log file — “ShareScan.001”, “ShareScan.002”, etc. — and then creates the new log file.
	Overwrite oldest events	Specifies whether to overwrite existing entries, starting at the beginning of the log file.
Log Field Properties	Field Separator	The separator character to use between each log field. The following characters are valid: , / \ * ? " < > :
	Extended Fields	Specifies additional fields to include in the log file, in addition to the basic fields (see Table 47). By default, this option is not selected.

TABLE 47. Activity Logging: Basic and Extended Fields

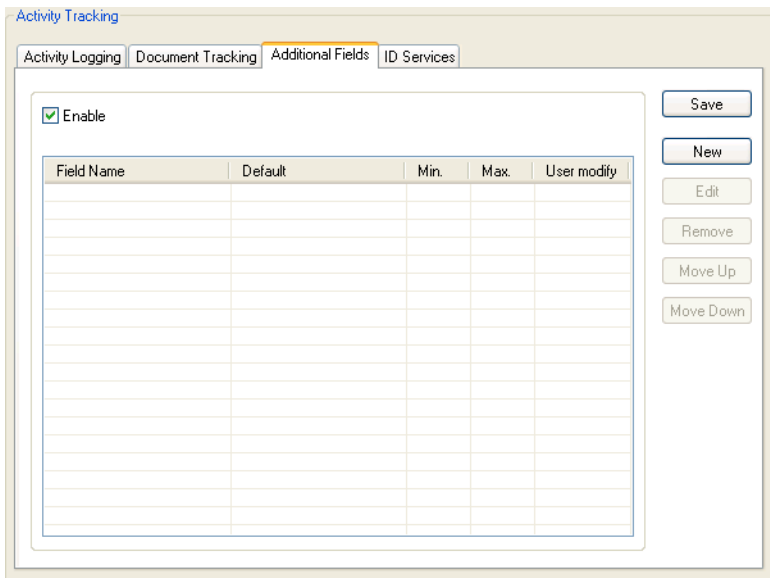
Field	Description
Date	The date the document was scanned.
Time	The time the document was scanned.
Connector label	The connector label specified on the Display tab.
Number of pages in document	The number of pages in the scanned document.
Connector-specific fields	Connector-specific fields. Typically this field in the log file includes "From", "To", "Recipients" and "Destination List" information.
SUCCESS / FAILURE	Specifies whether the scan job completed successfully or failed.
Device name	The name of the device, such as "User01".
Document size	The size in kilobytes of the scanned document.
DOC SENT	The file name of the scanned document that the connector creates and sends to a destination, such as: USER589_EXCHANGE_01252007-104003.PDF
DOC TRACKED	The file name of the copy of the scanned document that the Services Manager creates and stores in a document tracking folder, when the Document Tracking service (see page 151) is enabled for the connector profile, such as: USER589_Exchange_01-25-2007-104009.pdf
USERNAME	The name of the user logged on through Session Logon. In some cases the logged on user may not be the same as the user sending the scanned document. For example, when a connector is configured to use a generic e-mail account to send scanned documents, the Services Manager will record both the name of the logged on user and the name used for the generic e-mail account.
DOMAIN	The domain specified for Session Logon.

Configuring the Additional Fields function

The Additional Fields function enables you to obtain more tracking information, such as an account number or patient ID, from users at the device. The system prompts users to enter the information before the document is scanned. The system adds the information to each entry in the log file, immediately before the machine name.

To configure additional activity tracking fields:

- 1 In the console tree, select **Devices** > *<device_name>* > **Activity Tracking**.
- 2 Select the **Activity Logging** tab and then select **Enable**.
- 3 Select the **Additional Fields** tab and then select **Enable**.



- 4 To create a new activity tracking field, click **New**.
The **Field Editor** window opens.
- 5 Specify the settings (see page 71) and then click **OK**.
- 6 Click **Save**.

Configuring the Document Tracking function

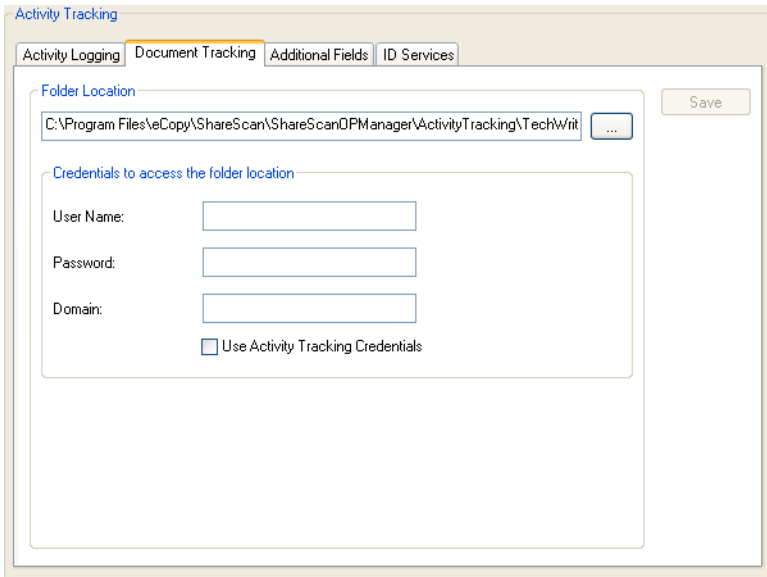
The Document Tracking function enables you to save a copy of every scanned document, as a PDF file, in a secure network location that is in the same domain as the Services Manager PC. This function also adds the name of the PDF file to the Activity Tracking log.

The Document Tracking function works only when Activity Tracking is enabled for the device.

You turn the Document Tracking function on or off for individual connector profiles (see Table 18).

To configure the Document Tracking function:

- 1 In the console tree, select **Devices** > <device_name> > **Activity Tracking**.
- 2 Select the **Activity Logging** tab and then select **Enable**.
- 3 Select the **Document Tracking** tab.



The screenshot shows the 'Activity Tracking' configuration window with the 'Document Tracking' tab selected. The window has a title bar 'Activity Tracking' and four tabs: 'Activity Logging', 'Document Tracking', 'Additional Fields', and 'ID Services'. The 'Document Tracking' tab is active. Inside the window, there is a 'Folder Location' section with a text box containing the path 'C:\Program Files\eCopy\ShareScan\ShareScanOPManager\ActivityTracking\TechWrit' and a browse button (...). To the right of this section is a 'Save' button. Below the folder location is a section titled 'Credentials to access the folder location' which contains three input fields for 'User Name:', 'Password:', and 'Domain:'. At the bottom of this section is a checkbox labeled 'Use Activity Tracking Credentials'.

- 4 Specify the settings (see Table 48).
- 5 Click **Save**.

TABLE 48. Devices: Document Tracking folder settings

Section	Field	Description
Folder Location	Location field	The full path and file name for the folder. The location must be in the current Windows domain or in a trusted Windows domain.
Credentials to access the folder location	User Name	The user name, password, and domain that are required to access the folder.
	Password	
	Domain	
	Use Activity Tracking Credentials	Uses the same credentials that are specified using the Credentials button on the Activity Logging tab. If you select this option, the system fills in the credentials on this screen.

Configuring the ID Services function

ID Services are available on compatible MFP devices that use identification devices such as card readers or proximity cards. ID Services allow user authentication credentials from the identification device to be encrypted and passed to ShareScan. This preserves security and streamlines the logon process by allowing the user to avoid entering authentication credentials at the device.

To configure ID Services:

- 1 In the console tree, select the device for which you want to enable the ID Service and then select **Activity Tracking**.

The right pane displays the Activity Tracking information.

- 2 On the **Activity Tracking** tab, select **Enable** and then click **Save**.
ID Services cannot be activated unless Activity Tracking is enabled.
- 3 Select the **ID Services** tab.

The screenshot shows the 'Activity Tracking' configuration window with the 'ID Services' tab selected. The 'Enable' checkbox is checked, and the 'Port' is set to 9425. The 'Enable Tracing' checkbox is unchecked. Under the 'Encryption' section, the 'Type' is set to 'TripleDES', the 'Path' is 'C:\Documents and Settings\ECOPY\Desktop\' with a browse button, and the 'Key' is '8AD7662AAE4E49DABC1269FB' with a 'Generate' button. A 'Save' button is located in the top right corner. A note at the bottom states 'Session Logon must be enabled.'

- 4 Enable the service and specify the settings (see Table 49).
- 5 Click **Save**.

The ID Service settings are saved for the selected device.

- 6 Verify that Session Logon is configured correctly:
 - In the console tree, select **System Information > Properties**.
 - Select the **Session Logon** tab.
 - Depending on the requirements of your identification device, enable or disable the **Enable Session Logon** option.

TABLE 49. Devices: ID Service Settings

Section	Field Name	Description
ID Services	Enable	Enables all functions on the ID Services tab.
	Port	The port number must match the TCP port configured for the identification device. The default port is 9425.
	Enable Tracing	Writes ID Service transaction information to a trace file to help with troubleshooting. You typically only do this when you are working with Customer Support. Enabling tracing slows down overall system performance.
Encryption	Type	Enables encryption for your ID Service, if appropriate: <ul style="list-style-type: none"> ■ None: Passes credentials to ShareScan without encryption. ■ Triple DES: Enables you to encrypt the information that is sent from the application that is supplying the credentials to ShareScan. You do this by creating an encryption key that you store on the computer where the Services Manager is running and on the ID Service device.
	Path	Specifies a path to the storage destination for the encryption key on the device where the Services Manager is running.
	Key	Generates the encryption key and stores it in the file: <code>eCopyKey.txt</code> . You must manually copy this file to the ID Service device. If you regenerate the key, you must copy the new key to the ID Service device. Important: All devices that use ID Services and are managed by the same Services Manager must use the same encryption key. After generating a key for the first device, When you configure subsequent devices you must select the same path you selected for the first device. ShareScan automatically recognizes the key file that is already in the storage destination.

Reference: Using eCopy Connectors

After you configure connector profiles and activate them on a device, you use a profile by selecting its button on the Client screen. The “look and feel” of the Client depends on the eCopy-enabled device that you are using.

In this chapter

- Using the fingerprint scanner 156
- Using the on-screen keyboard. 157
- Quick reference to using an eCopy Connector 158

Using the fingerprint scanner

To configure the fingerprint scanner you must:

- Use the ShareScan Administration console to configure Session Logon (see page 42) and enable Activity Logging (see page 147) and ID Services (see page 153).
- Register user fingerprints at the device.

Registering fingerprints at the device

The first time a user tries to use the fingerprint scanner, the device checks to see if the fingerprint is already registered in its database. If the fingerprint is not found, the Fingerprint Registration Wizard opens.

To register a fingerprint:

- 1 With the Fingerprint Registration Wizard open, swipe your finger three times across the fingerprint scanner.
All three fingerprint swipes must match. If any fingerprint swipes do not match, press **Retry** and then repeat the process.
- 2 When the fingerprints match, click **Next**.
The **Login Information** window opens.
- 3 Enter your user name, password, and domain, and then click **Test**.
The information is authenticated and is then associated with the scanned fingerprint.
- 4 Click **Save** to store the information.
The next time you use the device you can use the fingerprint scanner to log on.

Logging on using the fingerprint scanner

Make sure that Session Logon is configured, before you try to log on using the fingerprint scanner. The fingerprint scanner only works when the Session Logon screen is displayed.

To log on using the fingerprint scanner:

- 1 When the device displays the Session Logon screen, swipe your finger across the fingerprint scanner.
A window shows the progress of the authentication process.
- 2 When the main ShareScan client screen appears, continue scanning your document.

Notes:








- If your fingerprint is already registered and the Registration screen appears when you try to log on using the fingerprint scanner, click **Cancel** and re-swipe your finger.
- If your password has changed, the Fingerprint Registration Wizard will prompt you to enter the new password when you swipe your finger.

Using the on-screen keyboard

The sequence of some procedures depends on whether you are using a hard keyboard or the on-screen keyboard for text input.

Notes: Some devices running ShareScan Embedded software support a hard keyboard and the on-screen keyboard. For ScanFront devices, ShareScan automatically detects the USB hard keyboard (but not a PS/2 hard keyboard).. You do not have to specify which keyboard to use on the device. If you are using a Canon ScanFront device, eCopy recommends that you use a USB hard keyboard. If the ShareScan for Canon ScanFront software detects a USB keyboard, a keyboard icon will not appear to the right of fields that require text input.

The following list summarizes a few on-screen keyboard functions:

-  Enables you to move between fields without pressing the OK button, .
-  When the Search while typing option is enabled, displays a list of available values for the field.
-  Enables the Search while typing option.
-   Accepts or cancels an operation.
-  Enables the Caps lock key.

On a device with an embedded Client, the on-screen keyboard appears when you press a button or field that requires text input.

Quick reference to using an eCopy Connector

This section provides you with a general procedure for using an eCopy Connector to scan and send a document. For information about functions unique to each connector, refer to the connector-specific information in this guide.

This general procedure includes information about performing functions that are common to many connectors, such as specifying document and scanner settings. The actual steps that your users will perform will depend on the connector profile they use. For example, if you configure a connector profile to use the Express function (see page 67), users will not need to perform many of the steps included in the procedure in this section.

This procedure uses the eCopy Connector for Microsoft Exchange as an example. The connector profile uses the following configuration settings:

- Enable Session Logon
- Send from personal account
- Add messages to Sent Items folder
- Allow user to select recipients
- Allow user to add recipients to Cc list
- Search Global Address List
- Search Outlook Contacts
- Enable user to manually enter addresses when sending e-mail
- Default subject line and note

The process described in this section assumes that you are using the hard keyboard.

General procedure for using an eCopy Connector

Scan

- 1 Place your document in the feeder.

If your system is configured to use the Session Logon feature, enter your user credentials on the Logon screen and then press **Logon**, or, if your device supports a fingerprint scanner, swipe your finger across the scanner. If your Session Logon credentials are not valid, the **Logon** screen for the connector will appear after you preview the scanned document.

Notes: If the profile is configured to send scanned documents from a generic ShareScan User account; you will not need to log on.

If **Search while typing** is enabled on the **Session Logon** tab, ShareScan will search for matching address list entries after each character you enter in the **User Name** field. Select your name from the list that appears as you enter each character.

When you have successfully logged in, the **Home** screen appears.

- 2 Review the default scanner settings in the left pane; use the down arrow button to view additional scanner options. To change a setting, press the option, such as “Paper size” and then press the setting on the toolbar that appears.

ShareScan will use the modified scanner settings for all subsequent pages that you scan during this session, unless you change settings from the **Preview** screen.

- 3 After changing the scanner settings, press a connector button, such as a Scan and Mail connector button, to start scanning the document that is in the feeder.

The Client displays the “Processing” message in the lower left corner of the screen.

Preview

- 1 When the connector finishes scanning the document, review the scanned images.
The buttons on the **Preview** screen enable you to view, delete, rotate, and change the magnification of the images. After pressing either of the Zoom buttons, you can scroll through an image and move it by dragging your finger along the image, or by using Page Up, Page Down, Home, or End keys or the arrow keys.
- 2 If necessary, scan additional pages or re-scan any of the original pages by placing the pages in the feeder and then pressing the Scan More button. ShareScan uses the current scanner settings.



When you scan additional pages, the Client inserts them after the page that is currently displayed on the **Preview** screen. For example, if the Client is displaying page 5 of an 8-page document and you scan 2 more pages, the Client inserts the new pages after page 5.

- 3 To review and change the scanner settings, press the **Scanner Settings** button on the **Preview** screen. The **Scanner Settings...** screen appears. After changing the scanner settings, press **OK**.
- 4 To review and change the document settings, press the **Document Settings** button on the **Preview** screen. After changing the document settings, press **OK**.
- 5 When you have scanned all the pages in the document and are satisfied with the settings, press **Next**.
- 6 If prompted, enter any additional document information requested by the connector profile. For example, mail connector profiles can be configured to prompt you to specify an output file name.

Authenticate (by Connector)

- 1 If **Session Logon** was not enabled, and if the connector profile is configured to send scanned documents from a personal e-mail account, the system will prompt you to log on.

Note: If the profile is configured to send scanned documents from a generic ShareScan User account; you will not need to log on.

- 2 Enter your user name and password and then press **Next**.

Send

- 1 If the **Send** screen appears, select or enter the recipients of the scanned document and, optionally, specify subject line and notes information. (The fields depend on the connector [see Table 50].)

Note: If the profile is configured to use the Express or Send to self features, the Send screen will not appear.

If the connector profile allows you to manually enter recipient addresses, it may also be configured to add those addresses to a local address book (see page 79). The next time you want to send a document to those recipients, you will be able to select them from the local address book. You will not have to manually enter the addresses again.

If the Search while typing option is enabled and the profile is configured to search the Global Address List and the Outlook Contacts folder for recipient names, as well as to allow you to manually enter e-mail addresses, the connector displays the first address in the address list or Contacts folder that matches the characters that you type. For example, assume that you want to enter **client1@address.com** in the **To** field. When you type **c**, the connector will display **CentralShipping**, if it is in the Global Address List or in the Contacts folder. Continue entering the entire Internet e-mail address.



- 2 When you are ready to send the document, press **Send**.
After the connector sends the document, the **Document successfully sent screen** appears.
- 3 Select one of the post-scanning options (see Table 51):

TABLE 50. Client: Send screen settings

Field/Option	Applicable connectors	Description
To	E-mail	The primary recipients.
Search	Fax via Microsoft Exchange and Fax via SMTP	If the recipient is already in your address book or Exchange contacts (Fax via Microsoft Exchange only) you can use the Search while typing option. Depending on how the search is configured by your administrator, search on the first or last name, or the email address of the recipient. When you select a recipient, the fax number is displayed in the Fax Number field.
Number or Fax Number	Fax	The recipient's fax number (required). For Fax via Microsoft Exchange or Fax via SMTP, if the recipient is not already in your address book, you can add the recipient by clicking the Save to Address book button.
CC:	E-mail	One or more recipients who are not the primary recipients.
First Name	Fax via Lotus Notes	The recipient's first name (optional for Fax via Microsoft Exchange and Fax via SMTP, required for Fax via Lotus Notes).
Last Name	Fax via Lotus Notes	The recipient's last name (optional).
Subject	E-mail and fax	The subject to include in the subject line (optional).
Notes	E-mail, Fax via Microsoft Exchange, and Fax via SMTP	Notes to include in the message body (optional).
Mail Options	Exchange (e-mail)	Message settings that are also available through Microsoft Outlook and OWA (Outlook Web Access): Importance, Sensitivity, Delivery Receipt, Read Receipt. The availability of each setting depends on the configuration of the connector profile.
Attach Cover Page or Use Cover Sheet	Fax	Specifies whether to attach a cover page to the fax.

TABLE 51. Client: Post-scanning options

Option	Description
Log Out	Displays the Logon screen. Appears only when Session Logon is enabled.
Home	Displays the Home screen.
New Document	Displays the Preview screen and enables you to scan a new document using the current settings. Place the new document in the feeder and then press the Scan More button.
New Task	Enables you to send the scanned document to another connector. Press the button and then select the target connector from the list. The Client opens the target connector and displays the scanned document on the Preview screen. Press Next and then follow the prompts provided by the target connector.

Reference: Installation environment

eCopy™ ShareScan® is a client/server-based application that is designed to work with a wide range of scanning devices

This section describes the hardware, software, and network requirements for setting up the Services Manager and eCopy-enabled devices. Please complete the worksheets in this chapter before your scheduled installation and make sure that all devices are configured as required.

In this chapter

- Network environment 166
- Hardware configuration guidelines 167
- Services Manager PC worksheet 168
- Device worksheet 170
- Firewall and switch worksheet 171
- Network infrastructure worksheet 173
- DNS considerations 174
- Novell support 174

Network environment

ShareScan uses TCP ports for communication between the Client and the server application on the PC running the Services Manager. Several ports must be available (not blocked) in order to enable this communication (see page 171). Internal network traffic between the client and server is minimal.

You can use multicast UDP to automatically discover and connect to other Services Managers for remote administration. Multicast UDP also provides a fast way to discover eCopy-enabled devices.

ShareScan runs on domain-based networks and in workgroup environments. In a domain environment, the system requires static IP addresses. The Domain Name System (DNS) is used to resolve host names in a domain environment. In a workgroup environment, all eCopy-enabled devices and Services Managers must have static IP addresses.

eCopy-enabled devices and the Services Manager can be on different subnets or virtual local area networks (VLANs) provided that the devices can communicate with the Services Manager using an IP address.

ShareScan does not support network attached storage (NAS) devices.

For information about Novell support, see page 175.

Hardware configuration guidelines

To help you gauge hardware requirements, there are three typical usage scenarios and the hardware requirements for each scenario (see Table 52).

TABLE 52. Hardware configuration guidelines

Scenario type	Description	Hardware requirements
General office use	A typical office environment where multiple multifunction peripherals (MFPs) support a combination of printing, copying, and scanning.	Equivalent to an Intel® Pentium® 4 (P4) 2.4 GHz machine with Hyper-Threading enabled and with 1 GB of RAM (recommended). The minimum RAM requirement is 512 MB.
Light production scanning	An environment where multiple devices scan simultaneously for continuous periods with occasional creation of searchable text. Requires CPU-intensive OCR processing by the Services Manager.	Dual processor P4 3.2 GHz machines with Hyper-Threading enabled and with at least 1 GB of RAM.
Heavy production scanning	Same as light production scanning except that searchable text is created for all scanned pages. Includes file batching.	Dual processor Xeon machines with at least 1 GB of RAM.

For the most effective throughput, consider the following information:

- Memory is the most important element in the achievement of efficient throughput. If the Services Manager PC is supporting more than 3 devices, it must have at least 512 MB of RAM.
- While a fast IDE drive (7200 RPM) is acceptable, a fast SCSI drive (15,000 RPM) improves throughput. NTFS is the required drive format.
- Desktop or workstation P4 or Xeon class machines with more memory are more effective than traditional server-class machines, such as Intel Pentium III class machines with high I/O throughput.

For the maximum number of devices supported for each hardware configuration and usage scenario, refer to the eCopy Web site. Your company's network configurations, the amount of simultaneous scanning, and the use of the Create Searchable Text option can affect system performance, which in turn can affect the supported number of devices.

Services Manager PC worksheet

Each site requires at least one network PC to run the Services Manager; each Services Manager can support multiple eCopy-enabled devices.

You should not install the Services Manager on a PC that is also running Microsoft Exchange server.

Copy and complete the following worksheet for each Services Manager you plan to install.

TABLE 53. Services Manager PC worksheet

Item	Notes	Services Manager PC	Example
CPU (type/speed)	Review the hardware configuration guidelines (see page 167).		P4/2.4 GHz
RAM			512 MB
Operating system	Windows XP Professional (SP3) Windows 2003 Server Windows 2008 Server Microsoft Windows Vista. ShareScan Embedded supports Windows Vista Enterprise SP1 and Windows Vista Business SP1. Use the latest service packs and critical updates.		Windows XP
Drive size	Minimum 40 GB.		40 GB
Drive type and format	IDE or SCSI drive. NTFS format is required.		IDE/NTFS
Network interface card	10/100 NIC is required.		10/100
TCP/IP installed	Required.		Yes
Client for Microsoft Networks installed	Required.		Yes
Novell® client installed	Required only for Novell authentication of scan inboxes on a Novell server.		No
IP address	Static IP address is required.		
DNS server address	Required only if you are using DNS (see page 174).		192.168.1.113
Domain or workgroup	Runs in either environment.		domain

TABLE 53. Services Manager PC worksheet (continued)

Item	Notes	Services Manager PC	Example
Domain name	Enter a name, if applicable.		ecopy
Network login name and password	Name used during normal operation (must be a local administrator). Have password available during installation.		sharescan
Local firewall	It is recommended that you disable firewalls on this PC (see page 169).		Closed
Local security policy	Log on locally rights must be assigned to all "Domain Users".		Yes

Managing firewalls

If you choose to enable a firewall, make sure the required ports are open for communication between the Services Manager and the eCopy-enabled devices.

In the Windows Firewall program, the firewall is on by default. On the Exceptions tab, you must add the following programs and port:

- ShareScanOPManager.exe
- ShareScanOPAgent.exe
- ShareScanOPClient.exe
- MMC.exe
- InboxAgent.exe
- SQLServer.exe (if you are using the Internet Address Book)
- UDP port 1434 (if you are using SQL Express)

Device worksheet

Copy and complete the worksheet below for each eCopy-enabled device that you plan to use with ShareScan.

TABLE 54. Device worksheet

	Notes	Device	Example
Model	eCopy-enabled device.		ScanFront 220
Location	Physical location of the device.		1-B32
Language			English
IP address	Domain-based networks: eCopy requires that you use static IP addresses. Workgroups: You must use static IP addresses.		10.10.10.68
Gateway address	Leave blank unless required by other applications.		<blank>
Primary DNS server	Domain-based networks: Not required. However, if you do not specify a DNS server, the Services Manager PC must have a static IP address. Workgroups: Leave this field blank.		10.10.10.10
Secondary DNS server	Leave blank.		<blank>
Host name	A unique name for the device that must not exceed 60 characters.		eCopyClient1-B32
Domain name	Enter a name, if applicable.		ecopy

Firewall and switch worksheet

Certain TCP ports must be open for communication between the devices on the network. You can open the required ports (on switches, routers, or firewalls) between specific devices; you do not need to open a required port to *all* devices on the network.

9100 is the main port used for communication between the Services Manager and an eCopy-enabled device. You can change the port number through the Administration console. If you change the port number, make the appropriate changes to your device settings.

Copy and complete the worksheet for each router, switch, firewall, or multi-homed PC that could affect communication.

TABLE 55. Firewall and switch worksheet

Item	Description	Firewall or other device	Example
Manufacturer			Cisco
Model			
Location			2-C22
80, 8080, 443, 8081, 8082	Ports 80 and 8080 and 443 (if you use HTTPS) must be open for communication between Apache Tomcat (the Web client) and the ScanFront device. Port 8081 must be open for communication between Apache Tomcat and the ScanFront device when sending scanned documents from the ScanFront device to Apache Tomcat. Port 8082 is used to transfer the processed document from Scan to eCopy Desktop to a USB drive plugged into the ScanFront device.		Open

TABLE 55. Firewall and switch worksheet (continued)

Item	Description	Firewall or other device	Example
9030, 9100	Must be open for communication between the Services Manager and eCopy-enabled devices. You can open the required ports between specific devices.		Open
8899, 9988 on multicast IP address 239.254.5.6^a	Optional, for encrypted UDP communication between the Services Manager and eCopy-enabled devices.		Open
8888, 9999 on multicast IP address 239.254.5.6	Required, if you are using the eCopy Inbox Agent with Scan to eCopy Desktop. Optional, for unencrypted UDP communication between eCopy Inbox Agent, Services Manager, and eCopy Desktop clients.		Open
9200 - 9250	Used internally on PCs where the Services Manager is running. No special configuration is required.		Default
9010, 9101	Used for communication between the Administration console and the eCopy Agent service.		
7125	Used internally on PCs where the Services Manager is running.		

^a. 239.254.5.6 is an administratively scoped Class D IP address. It is used so that the packets are contained within the network. The multicast source relies on multicast-enabled routers to forward the packets.

Network infrastructure worksheet

Multiple domains and multiple workgroups are supported only if the Services Manager and all eCopy-enabled devices are configured to communicate with one other via TCP or UDP, without any port filtering or blocking.

Depending on the topology of the network, degradation in performance can occur when devices span multiple domains. ShareScan supports child domains provided that the devices and the Services Manager can communicate using an IP address. When devices cross domains, the system checks to see whether the device can resolve the IP address by name. If it cannot resolve the address, the device communicates using the IP address of the Services Manager.

TABLE 56. Network infrastructure worksheet

Item	Notes	Network	Example
Workgroup or domain-based network?			Domain
Devices span single or multiple domains?	eCopy recommends a single domain for best performance.		Single domain
Devices span single or multiple workgroups?	eCopy recommends a single workgroup for best performance.		Not applicable
Microsoft Active Directory installed?	Required on domain-based networks to support remote access to the Services Manager.		Yes
Devices on different subnets or VLANs?	eCopy-enabled devices and the Services Manager can be on different subnets or virtual LANs (VLANs), provided that the devices can communicate with the Services Manager using an IP address.		Yes
Router configured to pass packets between subnets or VLANs?	Required when devices span multiple subnets or VLANs.		Yes

DNS considerations

The Services Manager must be able to resolve the names of associated devices, whether through a Domain Name Service (DNS) server on the local network or through the HOSTS file on the Services Manager PC.

DNS should only be enabled on an eCopy-enabled device when there is a DNS server on the local network.

Using a DNS server on the local network

Make sure the DNS server on the local network automatically registers the host names and IP addresses of all devices on the local network. Older versions of operating systems and DNS servers do not do this automatically.

Configuring the HOSTS file

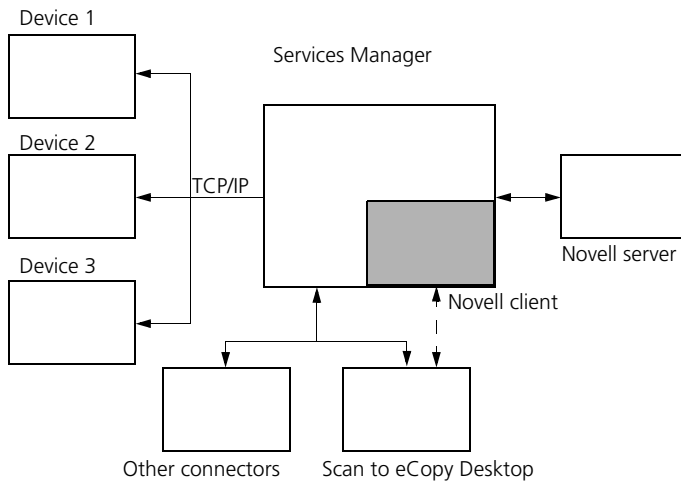
If you do not have a DNS server on the local network, add the IP addresses and host names to the HOSTS file in the `\Windows\System32\Drivers\Etc` directory on the Services Manager PC, as in the following example:

```
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
# For example:
#          102.54.94.97      rhino.acme.com          # source server
#          38.25.63.10     x.acme.com             # x client host
127.0.0.1 localhost
10.10.10.99 EnabledDevice
```

Novell support

On Novell networks, ShareScan does not support direct communication between the Services Manager and eCopy-enabled devices. However, when the Novell client is installed on the PC that is running the Services Manager, some connectors (Quick Connect, Scan to eCopy Desktop, and LDAP/SMTP) can use a back-end Novell server for authentication and temporary file storage (of scan inboxes).

Novell environment for eCopy-enabled devices with embedded Clients



Although Windows includes the Microsoft Client for NetWare Networks, eCopy has not tested ShareScan with this client software and cannot recommend it. You should install the same NetWare client you are using on the rest of your networked PCs. eCopy strongly recommends that you install the latest 32-bit Novell client.

Note: If you have a Novell network with multiple trees, you must set the Preferred tree field in the Novell client configuration for the eCopy Inbox Agent (see page 138) and Scan to eCopy Desktop connector to function properly.

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