eCopy™ Quick Connect

Version 4.5 for ShareScan®

Administrator's Guide

eCopy™

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Introduction

Quick Connect enables users to scan documents and deliver them to predetermined network locations, Web locations, databases, or to an SMTP server, with minimal data entry requirements. It is ideally suited to environments where large numbers of documents must be scanned quickly into automated or manual workflows.

In this chapter

About this guide

This guide is intended for administrators responsible for the installation and configuration of eCopy Quick Connect. It provides an overview of the connector as well as system requirements, installation instructions and configuration options, and procedures.

Further information

The eCopy Connector for Quick Connect documentation set consists of the following documents:

- **eCopy Quick Connect Administrator's Guide:** This document.
- **eCopy Quick Connect Help:** Provides configuration and how-to information. To access Help, select the connector in the ShareScan Administration console tree and then click the Connector Help button.

Registering your software

You must register your software to receive customer support.
You can access the Registration web site by using the following link:
http://www.ecopy.com/registration.

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.

Installing and configuring the connector

This chapter describes the installation prerequisites and guides you through the installation and configuration process.

In this chapter

Installation procedures

Installation prerequisites

The following are the installation prerequisites:

- Quick Connect version 4.5
- eCopy ShareScan 4.5

Note: Quick Connect supports Oracle® Database 10*g*. When you install Oracle Client 10*g*, select the Custom Installation option and then make sure that you select the Oracle Provider for OLE DB component. This enables Quick Connect to connect to the Oracle database and store scanned documents and other information.

Installing the connector

Important! Before installing eCopy Quick Connect, make sure that the ShareScan software is installed and functioning correctly. Refer to the *eCopy ShareScan Installation and Setup Guide* for details.

To install the connector:

1 Double-click the **Setup.exe** file.
2 Click **Install Connector** to start the installation.
3 Follow the on-screen instructions
4 When the installation is complete, click **Finish**.

Planning and configuring connector profiles

Once you have installed eCopy Quick Connect, the eCopy ShareScan Administration console enables you to configure connector profiles. This gives you the flexibility to configure access to your Quick Connect destinations in the ways that best suit your organization.

Planning your connector configuration

To obtain the best results from your connector, you may want to consider the ways in which eCopy products are used in your work environment as well as other factors that are important to your organization, for example:

- **Saving time:** If you want to reduce the amount of time your users spend at the device, you can set up an Express connector profile that allows the user to scan and send the document by simply pressing the connector button at the device. You can create multiple buttons and configure each to store documents in a different destination. For more information, see "Configuring an Express connector profile" on page 33.

    - Users can also save time by not having to enter their credentials each time they use the device. Depending on the destination type, you may be able to skip this step in the scanning process, by predefining the authentication information when you configure the destination for your connector profile. For more information see "Defining a scanning destination" on page 11.

    - You may also want to consider using the ShareScan Session Logon feature on your client device. If the Session Logon credentials match the Quick Connect credentials, users do not see the connector Logon screen.

- **Enhancing security:** If you want to keep track of the documents sent by each user, you can configure the connector authentication process to force users to log on each time they use the connector and allow the system to keep a record of the documents sent by each user in the log file.

You may also want to use the ShareScan Document Tracking functionality. For more information, see the *ShareScan Installation and Setup Guide* or the *eCopy Quick Connect Help.*

- **Controlling access:** You can limit access to destinations in your system in several ways:
  - Configure connector profiles that only allow access to a single destination.
  - Configure connector profiles that allow access to a limited set of destinations.

Configuring the connector

This section explains all the connector configuration options and the procedure for setting up an Express connector profile for more streamlined use (see page 33).

To configure a connector profile:

1 In the console tree, select **Quick Connect** > **Properties**.

2 Select the **Display** tab and then configure the **Image** and **Label** options for the connector button.
   See "Configuring the Display settings" in the *eCopy ShareScan Installation and Setup Guide* or the *eCopy Quick Connect Help.*

   Note: The button that the user sees at the eCopy-enabled device displays the information that you specify on this tab. To avoid confusion, if you create more than one connector profile, you should give each profile a unique button label.

3 Select the **Destinations** tab and then define a scanning destination (see page 11).

4 Select the **File Name** tab and then define any file naming fields (see page 16).

5 Select the **Index File** tab and then define any index fields (see page 18).

6 Click **Save**, select or specify the profile name, then click **Save**.
   The system saves your settings as part of the connector profile, or creates a new profile.
   See "Creating and saving connector profiles" in the *eCopy ShareScan Installation and Setup Guide* or the *eCopy Quick Connect Help.*

7 In the console tree, select **Quick Connect** > **Services**.
   The **Services** pane appears.

8 Configure the connector services.
   See "Configuring Connector Services" in the *eCopy ShareScan Installation and Setup Guide* or the *eCopy Quick Connect Help.*

9 Click **Save**, select the profile name, then click **Save**.

Defining a scanning destination

Defining a scanning destination enables you to specify where the connector will send scanned documents.

You must define at least one destination. If you define more than one destination, the connector will prompt the user to select one during the scanning process.

To define a destination:

1. Select **Quick Connect** > **Properties**.
2. Select the **Destinations** tab and then click **New**.
   The **New destination** window opens.
3. In the **Name** field, type the name of the new destination.
4. Specify the type of destination (see page 11) and then specify information for the new destination.
5. When you have defined the new destination, click **OK**.
   The **Destinations** list includes the new destination.

Destination types

The following tables show the available Quick Connect destination types and their settings.

Folder destinations (see Table 1) apply to the following destinations:

- Windows folders
- Novell Netware folders
- FTP folders
- WebDAV folders

Other destination types are:

- SMTP messages (see Table 2)
- Databases (see Table 3)
- Destination lists (see Table 4)

TABLE 1. Folder Destination settings

Section	Field/Button	Description
Folder location	Path to the folder	Destination information for the scanned documents. For Windows or Novell folders, click the Browse button and then select an existing folder or create a new folder and then select it. For an FTP folder, enter the FTP location, such as "ftp://ftp01/scans". (The Browse button is not available for FTP folders.) For a WebDAV folder, enter the Web location, such as "http:/10.10.10.100/scans" or "https:/10.10.10.100/scans".
	Enable subfolder navigation	Enables users to select a subfolder at the device.
	Maximum folder level	The number of folder levels down that users may navigate.
	Acquire Scheme	Applies only to WebDAV Folder option. Enables you to select an authentication scheme (NTLM, NTLM/Kerberos, or Basic.) After selecting the scheme, the authentication options specified in the scheme are enabled

TABLE 1. Folder Destination settings (continued)

Section	Field/ Button	Description
Authen-tication	Authen-ticate User	The options are: ■ None: Sends scanned documents to the destination without requiring user authentication. The Services Manager requires write access to the destination. ■ 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. **Note:** If you select FTP Folder as a destination type and Session Logon is enabled, eCopy recommends that you select "None" or "Logon as" as the authentication type.

TABLE 2. SMTP Message Destination Settings

Section	Field/ Button	Description
SMTP Server	Name	The name of the server to use when sending scanned documents.
	Port	The port number of the server.

TABLE 2. SMTP Message Destination Settings (continued)

Section	Field/ Button	Description
Send From	Personal Account	Sends scanned documents from the user's personal e-mail account.
	Generic account	Sends scanned documents from a generic account. Use this field to specify the return address that will always be used by the connector.
	Cc: Sender	Sends a copy of scanned documents to the sender.
	Authenticate user and Domain (available only if you select the Personal account option)	The options are: ■ Windows: Sends scanned documents from the personal account in the specified Windows domain. ■ Novell NetWare: Sends scanned documents from the personal account in the specified Novell tree. ■ LDAP: Sends scanned documents from the personal account specified in the LDAP Server Settings window **Note:** If you select SMTP Message as the destination type and Session Logon is enabled, eCopy recommends that you select the same authentication type that you selected for Session Logon.
Destin- ation	To	Specifies address information for SMTP recipients. You add recipients by clicking Add and then entering an SMTP address in the Add Recipient window.
	Subject	A subject line for the message.

TABLE 3. Database Destination settings

Section	Field/Button	Description
Destination	Data source, Catalog, Table, and Column	Sets a database as a destination, enabling users at the device to scan documents and store them in the destination database. Database mapping allows you to store the name of the document and the file extension. For information about setting a database destination, see page 25.

TABLE 4. Destination List settings

Section	Field/ Button	Description
Destinations	Name, Location, and Network	Enables you to create a list of destinations to which the connector profile can send scanned documents. When you add a destination to the list, you specify the destination name, type, and location, as well as the authentication information. The New destination window then lists all the destinations.

Note: To make sure that users have to log on, at most once, at the device, you cannot mix certain combinations of destination type and authentication in a destination list. For example, if you add a Windows Folder destination that uses Runtime authentication to the destination list, you cannot then add a Novell NetWare Folder destination that uses Runtime authentication. If you add a Windows Folder or Novell NetWare Folder destination that uses Runtime authentication, and you then add an FTP Folder destination, a message appears indicating that the user's Windows or Novell credentials will be used to authenticate against the FTP server. Invalid options will not be available in the Authenticate User list.

Defining a file naming field

The file name generated at the eCopy-enabled device is composed of one or more fields. Quick Connect includes several file naming options:

- You can configure a connector profile to use the default file name, which names scanned documents using the following format:

  format: `device-connector-date-time.ext`

  result: `machine01-QuickConnect1-03172005-112259.pdf`

- You can build a file name using fields that you define. For example, you can build a file name that contains the company name, the date, and the time, as in the following example:

  `eCopy03172005141847.pdf`

- You can specify whether users can modify all or part of the file name. For example, you can build a file name that contains the company name, a city, the date, and the time. You can allow users to modify the city name, but not the company name, as in the following example:

  ```
  "eCopyParis03172005142327.pdf",
  "eCopyRome03172005142327.pdf",
  "eCopyLondon03172005142327.pdf"
  ```

You use the Field Editor to define the fields to use in a file name and their default values. The Default, User modify, and Required fields are not available with all field types.

For a list of options that are available if a scanned document already exists in a selected destination see Table 5.

TABLE 5. File naming settings

Option	Description
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 specified destination using a unique file name and the existing document is not overwritten.

To define file naming fields:

1 Select the **File Name** tab.

2 Click **New**.

3 Use the Field Editor to define a file name field and its default values.

The **Default**, **User modify**, and **Required** fields are not available with all field types.

4 Click **OK**.

5 Repeat this procedure for each new file naming field.

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

Defining index fields

When you configure Quick Connect's document indexing option, the connector prompts the user to enter information in one or more fields. The information describes the content of the document, such as a case ID, a client name, or a document type. Quick Connect saves the index information with the scanned document. This option is useful with back-end applications that can process the scanned documents (image files) and index files in the destination folder.

To define index fields:

1. Select the **Index File** tab.
2. Click **New**.
3. Use the Index Field Editor to define an index field and its default values, see page 19.
    The **Default**, **User modify**, and **Required** fields are not available with all field types.
4. Click **OK**.
5. Repeat this procedure for each new index field.
6. Click **Save**, select or specify the profile name, and then click **Save**.

Configuring file name and index fields

You use the Field Editor to add or edit fields that the user sees in the Client. When you create file name fields you select the field type in the editor.

The following fields are available in the Field Editor window:

TABLE 6. Field Editor fields

Section	Field	Description
Properties	Name	An identifier for the field.
	Type	The data type (see Table 7). The fields that appear depend on the selected field type.
	Default	The default value.
	User Modify	Enables a user to modify the default value at the device.
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.

Quick Connect uses the Field Editor and an Index Field Editor. The following fields are available in the Field Editor and Index Field Editor for Quick Connect:

TABLE 7. Field Types

Field Type	Description	Availability
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.	Both editors.
Batch Number	Length: The maximum number of digits allowed for the batch number, including leading zeroes. Leading zeroes: Pads all values with leading zeroes to make their length equal to the maximum field size. For example, if you specify "3" in the Length field and you enable leading zeroes, batches are numbered "001", "002", … , "010", "011", … , "100", "101", … , "999". If you do not enable leading zeroes, batches are numbered "1", "2", etc.	Field Editor
Database	The database location in which the list of values for the field is stored.	Both editors.
Date	Format: The appropriate date format according to local conventions.	Both editors.
Destination Path	The path to the network location where the document is stored.	Index Field Editor
Device Name	No additional settings.	Both editors.
File Name	The name of the scanned file.	Index Field Editor

TABLE 7. Field Types (continued)

Field Type	Description	Availability
Authenticated User	The user whose credentials were used to scan the document at the device.	Index Field Editor
Number of Pages	Number of pages in the scanned document.	Index Field Editor
Numeric	Field Size: The minimum and maximum number of digits allowed. Leading zeroes: Pads all values with leading zeroes to make their length equal to the maximum field size. 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.	Both editors
Separator	Value: The field separator character	Field Editor
File size	The size (in KB) of the scanned file.	Index Field Editor
List	Required: If you select this option, the user at the device must select a value from the list. If you do not select this option, the user at the device can leave the field blank. If you select the Required option and do not select the User Modify option, you should set one of the list items as the default value.	Both editors
Time	Format: The time format.	Both editors

Configuring an index file

When a user enters indexing information at a device, Quick Connect writes the field names and their values to an index file or to a database table. The index file has the same name as the scanned document, but has a different file extension. The available formats of the index file are:

- XML
- CSV (comma-separated value)
- TSV (tab-separated value)
- Database

Examples:
CSV
```
Case_Number,Client,Operator
135643,eCopy,sjones
```
XML
```
<?xmlversion="1.0" encoding="UTF-8" ?>
<Data>
<index id="Case_Number">135643</index>
<index id="Client">eCopy</index>
<index id="Operator">sjones</index>
</Data>
```

When the Batching option is enabled on the Document Settings tab, you can configure Quick Connect to create a single index file that will record the index values entered at the device for all the scan jobs in a batch. For information on connector Services, see the *eCopy ShareScan Installation and Setup Guide* or the *eCopy Connector for Quick Connect Help*.

- The connector uses the information on the File Name tab to generate a name for the index file (see page 16); if you do not configure a file name, the connector uses the default file naming rule.

  If the naming rule includes the Batch Number field, the connector sets the current batch number in that field; otherwise, the connector adds an underscore (_) to the batching number, as in "document-20070131_1.pdf".

If a file name already exists and the Create unique file name option is configured, the connector adds a period to the rolling number, as in "document-20070131_1.1.pdf".

- There are three types of index values. The type of index value determines the frequency of changes to index values (see page 18).
- The Repeat unchanging index values option enables you to record the index values for a batch job each time the user enters the index values, even if the user at the device enters the same index values many times.

   If you do not select this option, the connector records the system- and scan job-dependent index values only once.

   Since batching job-dependent index values have different values based on the batching job, they will be recorded multiple times, by default. However, if there is only a single batching job, the index values will be treated like system- and scan job-dependent values.

   If you select this option, batching job-dependent index values will be recorded in a different node (for an XML file) or a different row (for CSV and TSV files, and database tables). This does not apply when the connector is processing only one batch scanning job.

To configure the index file:

   1 Select the **Index File** tab.
   2 In the **File Format** area, select the format of the index file.
   3 If the Batching option is enabled and you want to create a single index file, select **Create single index file when Batching is enabled**.
   4 If you want to duplicate unchanging index values, select **Repeat unchanging index values**.
   5 Click **Save**, select or specify the profile name, and then click **Save**.

TABLE 8. Index value types

Value type	Description	Field types
System	The index field retains the same index value when the user at the device starts a new scan job.	Device Name
Scan Job	The index values in index fields of this type are the same for the entire scan job.	Alphanumeric Numeric Date Time List Logged on user Destination path Database
Batching Job	A scan job can comprise multiple batching jobs. The index values in index fields of this type change for each batching job.	File name Number of pages File size

Setting a database as a destination

Setting a database as a destination enables you to configure a connector profile so that users at the device can scan and index documents and store them in the specified database. You can configure the profile to store the index information in a file, in the same database as the scanned document, or in a different database.

When you set a database as a destination, you can use the Map Document Destination feature to map the name and file extension of the scanned document to STRING fields in a table in the database. This enables you, or a database administrator, to create associations between the scanned document and any index information that the user enters on the Index screen for the document, wherever that index information is stored.

To set a database as a destination:

1 In the console tree, select **Quick Connect** > **Properties** > **Destinations** and then click **New**.

   The **New destination** window opens.

2 In the **Name** field, enter a name for the destination.

3 In the **Type** list, select **Database**.

4 Configure the data source (see page 31).

   When you have successfully configured the data source, the **Data Field Selector** window opens.

5 On the **Map Document Destination** tab, under **Select Table Name**, select a table.

   The **Database Fields** list displays only those columns that have been defined as IMAGE or STRING data types. Quick Connect stores documents in IMAGE fields and file names in STRING fields.

6 Under **Map Fields**, select the Quick Connect field that you want to map to a database field.

The **Data Field Selector** window displays a maximum of three Quick Connect fields that you can map to database fields in the selected table. The fields allow you to store the document data (the scanned document), document name, and document extension.

7 In the **Database Field** column, select the target field.

An administrator with knowledge of the database should know what data type to select for each Quick Connect field. For example, the **Document Data (BLOB)** field must be mapped to an IMAGE data type field for SQL and Access databases or to a BLOB data type field for Oracle databases.

8 Click **OK**.

The **New destination** window displays the database settings.

9 Click **OK** to save the settings.

The **Destinations** list displays the name and summary information for the database destination you created.

Mapping index fields to fields in a database

This feature enables you to specify a database to store index values entered at an eCopy-enabled device. You can map any type of Quick Connect index field to fields in an SQL, Access, or Oracle database. When a user enters values in mapped index fields, the connector profile stores the values in the associated database fields.

Note: The connector profile stores all mapped index values in the target database as STRING data, regardless of the type of index field

If you are storing scanned documents in a database and you want to create a relationship between the database fields where the documents are stored and the database fields where the index values are stored, make sure that one of the mapped index fields is of the type "File Name". Index fields of type "File Name" automatically use the file name of the scanned document that is stored in the database destination..

Example:

You configured a connector profile to scan insurance claims using the following file naming format:

    <eCopy><Claims><*Date*><*Time*>

You configured the profile to store the scanned documents, named as shown below, in the target database:

    eCopyClaims20060523123318.pdf

    eCopyClaims20060523123319.pdf

    eCopyClaims20060523123320.pdf

You created several Quick Connect index fields to capture account information and mapped them to fields in a database.

To associate the database record used to store the scanned documents with the database record used to store the scanned document's index values, you must have an index field of type "File Name" that captures the file name during scanning.

If you modify the name of an index field, the mapping becomes invalid. You must always re-map mapped index fields after you change them.

You can map one index field to one database field.

To map index fields to fields in a database:

1 In the console tree, select **Quick Connect** > **Properties**.

2 Select the **Index File** tab, click **New**, and then define each index field that you want to map (see page 18).

3 Under **File Format**, select **Database** and then click **Map Fields**.

If you have not yet configured a data source, configure it now (see page 31).

If you previously configured a data source, the **Data Field Selector** window opens. It displays the connection information.

- To use the current data source, proceed to step 4.
- If you do not want to use the current data source, click **Modify** to select a different data source. When the **Select Recent Data Source** window opens, click **New** and follow the instructions for configuring a new data source (see page 31).

4 On the **Map Database Fields** tab, under **Select Table Name**, select a table.

5 Under **Map Fields**, which displays the index fields that you created, select the Quick Connect index field that you want to map to a database field. You do not have to map all the Quick Connect fields.

In the **Database Field** column, which only displays fields of STRING data type, select the target field. The index values that the user at the device enters in the index fields will be stored in the database fields after the document is scanned.

6 Click **OK** to save the settings and return to the **Index File** tab.

> **Note:** The Index File tab does not indicate whether an index field is mapped to a database field.

Using a database as the source of field values

You can create a file name field or an index field that uses a database as the source of field values. Users at the device can then select from a list of available values for that field.

If the database administrator modifies, in a database, values that are associated with a Quick Connect field, users will have access to the changed values. You do not need to make any changes to the field in the Administration console.

To use a database as the source of field values:

1 In the console tree, select **Quick Connect** > **Properties** > **File Name** or **Index File**.

2 Click **New**.

   The **Field Editor** or **Index Field Editor** window opens (see page 19).

3 In the **Name** field, enter a name for the new field.

4 In the **Type** field, select **Database** as the type.

5 Configure the database.

   If you have previously configured a data source, the **Select Recent Data Source** window opens.

   ■ To use an existing data source, select it and then click **OK**.

   ■ If you do not want to use an existing data source, click **New**. The **Configure Data Source** window opens. Follow the instructions for configuring a new data source (see page 31).

   If you have not previously configured a data source, the **Configure Data Source** window opens. Follow the instructions for configuring a new data source.

   After selecting or configuring a data source, the **Data Field Selector** window opens.

6 On the **Choose Field** tab, select a table, select a column in the table, and then select the default file name or index value from the list of available values. The user at the device can accept the default value for the field or select a value from the list.

7 Click **OK** to return to the **Field Editor** or **Index Field Editor** window.

The window displays the settings you have configured.

8 Select the **Required** option if you want to require users at the device to specify a file name or index value.

9 Click **OK** to save the settings and return to the **File Name** or **Index File** tab.

The tab displays the name and summary information for the Database field you created.

Configuring a data source

You can configure an existing data source or a new data source.

To configure an existing data source:

1 If the **Select Recent Data Source** window opens, select the data source that you want to use and then click **OK**.

The **Data Field Selector** window opens.

2 Perform one of the following functions:

- Map the document destination for the index fields (see page 11).
- Map Quick Connect index fields to database fields (see page 27).
- Set the default values for file name or index fields that will use a database as the source of values (see page 29).

To configure a new data source:

1 In the **New destination** window, click **Configure**.

The **Configure Data Source** window opens.

2 Select the database type.

3 Specify the appropriate settings (see page 31).

4 After specifying the settings, click **Test Connection**.

5 When the system displays the "Successfully attached to the database" message, click **OK** twice.

The **Data Field Selector** window opens.

6 Perform one of the following functions:

- Map the document destination for the index fields (see page 27).
- Map Quick Connect index fields to database fields (see page 29).
- Set the default values for file name or index fields that will use a database as the source of values (see page 31).

TABLE 9. Database types and settings

Database type	Settings
Microsoft Access	Specifies the path to the Access database (*.MDB), which can be on a local drive or on a Universal Naming Convention (UNC) path. If the database is on a local drive and does not require a user name and password, select the Blank Username and Password check box. If the database is on a UNC path, enter the appropriate credentials. The user must have permission to access the specified path.
Microsoft SQL	Specifies the SQL server, user name, and password used to access the SQL Server, and the Catalog/Database. ■ SQL Server: The SQL server that you want to use. If the Microsoft Data Access Objects component is installed on the computer, the system automatically fills the SQL Server list with the names of SQL servers on the local segment of the network and you can select the server from the list. If MDAO is not installed, you can type the server name in the field. ■ Username: SQL server user name. ■ Password: Password for the specified user. ■ Catalog/Database: The database where you want to start browsing tables. You can select the catalog or database from the list, if MDAO is installed, or you can type the catalog or database name in the field.
Oracle	Specifies the listener, user name, and password used to access the Oracle database. ■ TNS Name: Listener on the Oracle database server. ■ Username: Oracle user name for the integrated security user on the target database. ■ Password: Oracle password for the specified user.

Configuring an Express connector profile

An Express connector profile allows you to control the number of screens that the user sees at the device. The profile below allows the user to scan and store the document by simply pressing the button on the Home screen. You can customize the profile so that the user sees as many or as few screens as you want.

To configure an Express connector profile:

1 In the console tree, select **Quick Connect** > **Properties**.

2 Select the **Display** tab and then specify the **Image** and **Label** settings.

3 Select the **Destinations** tab and then define a single scanning destination and then(see page 11):

   ■ Disable subfolder navigation.

   ■ Specify "no authentication" or pre-define the logon information.

   This ensures that the user at the device does not see the **Logon** screen or the **Destinations** screen.

4 Select the **File Name** tab and then define a default file name that the user cannot modify (see page 16).

5 Select the **Index File** tab and then create an index file with index fields that the user cannot modify. (see page 18).

6 Click **Save**, select or specify the profile name, then click **Save**.

7 In the console tree, select **Quick Connect** > **Services**.

8 Configure the connector services.
   Do not select **User modify** for any of the **Document Settings**.

9 Click **Save**, select the profile name, then click **Save**.

Using the connector

This chapter describes the workflow that the connector user will experience at the scanning device.
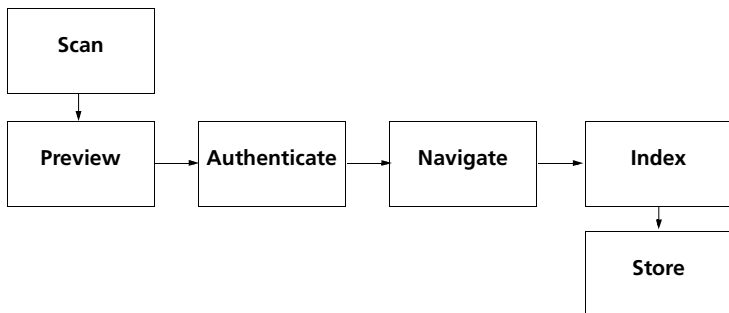
In this chapter

Connector workflow

eCopy Quick Connect lets you scan documents directly into folders or databases using different, configurable scanning workflows. When you install the connector and configure and activate a connector profile on an eCopy-enabled device, a Quick Connect button is added to the eCopy ShareScan Home screen.

Before using a connector, review the "Quick Reference to using a ShareScan connector*"* in the *eCopy ShareScan Installation and Setup Guide* for an overview of the scanning process and for information that is common to all the connectors.

The eCopy Connector for Quick Connect follows the simple workflow used by all eCopy Connectors:

```
┌──────────┐
│  Scan    │
└────┬─────┘
     │
     ▼
┌──────────┐    ┌──────────────┐    ┌──────────┐    ┌──────────┐
│ Preview  │──▶ │ Authenticate │──▶ │ Navigate │──▶ │  Index   │
└──────────┘    └──────────────┘    └──────────┘    └────┬─────┘
                                                          │
                                                          ▼
                                                    ┌──────────┐
                                                    │  Store   │
                                                    └──────────┘
```

Scan

1 Place your document in the feeder.

2 If your system is configured to use the Session Logon feature, enter your user credentials on the **Logon** screen.

If your Session Logon Credentials are not valid, the Logon screen for the connector will appear after you preview the scanned document.

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

4   Press the connector button.

Preview and Authenticate

1   When the connector finishes scanning the document, review the scanned images. If necessary, scan additional pages or re-scan any of the original pages by placing the pages in the feeder and then pressing **Scan More**.

2   To review and change the scanner settings, select the **Scanner Settings** button on the **Preview** screen. The **Scanner Settings...** screen appears. After changing the scanner settings, select **OK**.

3   To review and change the document settings, select the **Document Settings** button on the **Preview** screen. After changing the document settings, select **OK**.

4   When you are ready to store the document, press **Next**.

5   If the **Logon** screen appears, enter your user credentials, then press **Next**.

Navigate

If you configure the connector to allow navigation, the **Folder Navigation** screen appears. The list can display 200 entries at one time.

1   Select the target subfolder in the destination folder.

2   Select sub-levels in the list until the complete path appears in the **Path** field at the top of the screen.

3   When you have selected the destination, press **Next**.

Index and Store

The indexing feature of the connector uses two screens. If the connector is configured to allow file naming, the File Name screen enables you to create a unique file name for the document. The second screen enables you enter more indexing information that is stored with the document.

1   If the **File Name** window opens, enter the information needed to create the file name, and press **Next**.

2   If the **Index** window appears, enter or select the appropriate information in the available fields and press **Next**.

    The indexed document is stored in the selected destination.

3   Select one of the post-scanning options (see Table 10).

TABLE 10. 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 Scan More.
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.