ScanRouter DocumentServer
Version 2

Introduction Guide

1 ScanRouter DocumentServer Introduction Guide
2 Using Authentication Manager
3 Using ScanRouter DocumentServer
4 Client Operations

Read this manual carefully before you use this product and keep it handy for future reference.

Introduction

This manual describes basic instructions and notes about the use of this product. To get maximum versatility all operators are requested to read this manual carefully and follow the instructions. Please keep this manual handy for future reference.

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How to Read This Manual

Symbols

In this manual, the following symbols are used :

Important

This symbol indicates a situation that may result in property damage or malfunction if instructions are not followed. Be sure to read the instructions.

Preparation

This symbol indicates information or preparations required prior to operating.

Note

This symbol indicates precautions for operation, or actions to take after abnormal operation.

Limitation

This symbol indicates numerical limits, functions that cannot be used together, or conditions in which a particular function cannot be used.

Reference

This symbol indicates a reference.

[ ]

Elements on the machine's display panel or the computer's display, such as keys, buttons, and menus.

1. ScanRouter DocumentServer Introduction Guide

When ScanRouter DocumentServer is used for document management, documents are stored and managed in the cabinets of the document management server.

Documents added using DeskTopBinder Professional or ScanRouter Web Navigator are sorted for each folder created in the cabinet, and then stored and managed. Added documents can be shared among multiple client computers to be viewed and handled using DeskTopBinder Professional or ScanRouter Web Navigator.

Also, ScanRouter DocumentServer can manage user authentication settings collectively using Authentication Management Service. For user authentication, you can specify Windows Authentication (NT compatible), Windows Authentication (native), or Basic Authentication. Authentication Management Service is possible using Authentication Manager.

This manual explains basic operations for adding a document to ScanRouter DocumentServer (document management server).

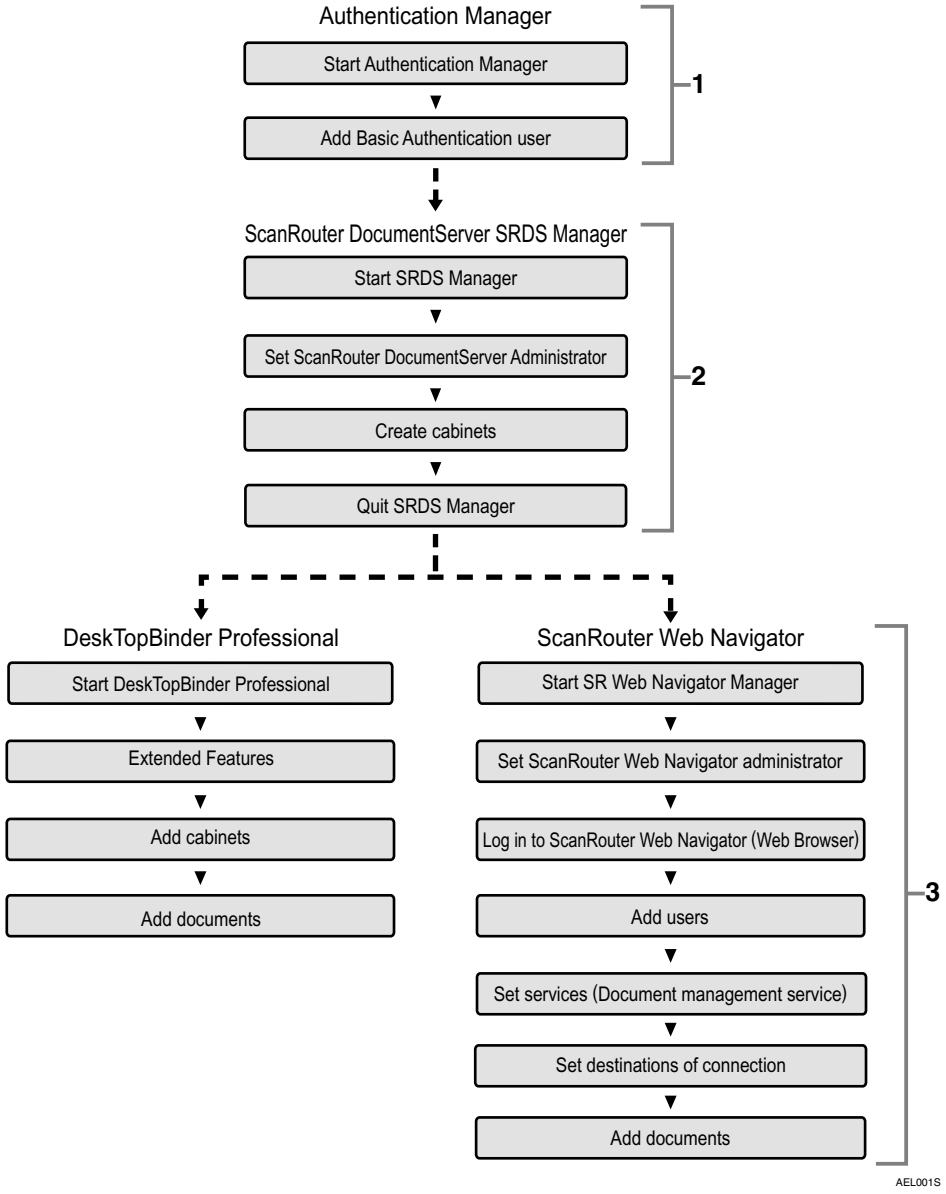
Operational Flow

Firstly, access Authentication Management Service using Authentication Manager, and then register users.

Secondly, create cabinets where documents are stored using SRDS Manager under the registered user.

Finally, add documents to each cabinet using DeskTopBinder Professional/ScanRouter Web Navigator.

Follow the procedure described as an example of specifying Basic Authentication for the user authentication.



1. **Add a user. See p.5 "Using Authentication Manager".**

2. **Create a cabinet for adding documents. See p.11 "Using ScanRouter DocumentServer".**

3. **Add documents to the cabinet created in step 2. See p.19 "Client Operations"**

2. Using Authentication Manager

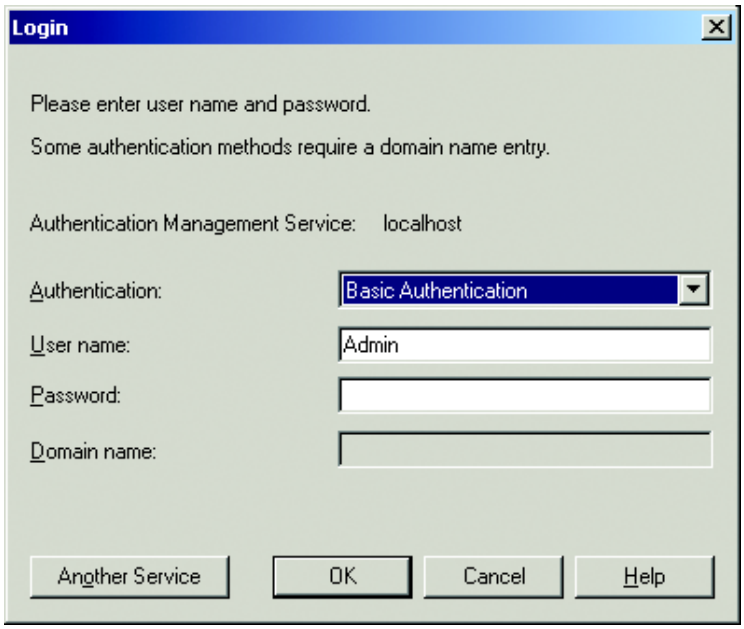
Registering Basic Authentication User

This section explains operating procedures when Basic Authentication is used as the authentication method.

Start Authentication Manager to operate Authentication Management Service, and register a Basic Authentication user.

1 **On the [Start] menu, point to [Program], point to [ScanRouter System], and then click [Authentication Manager].**

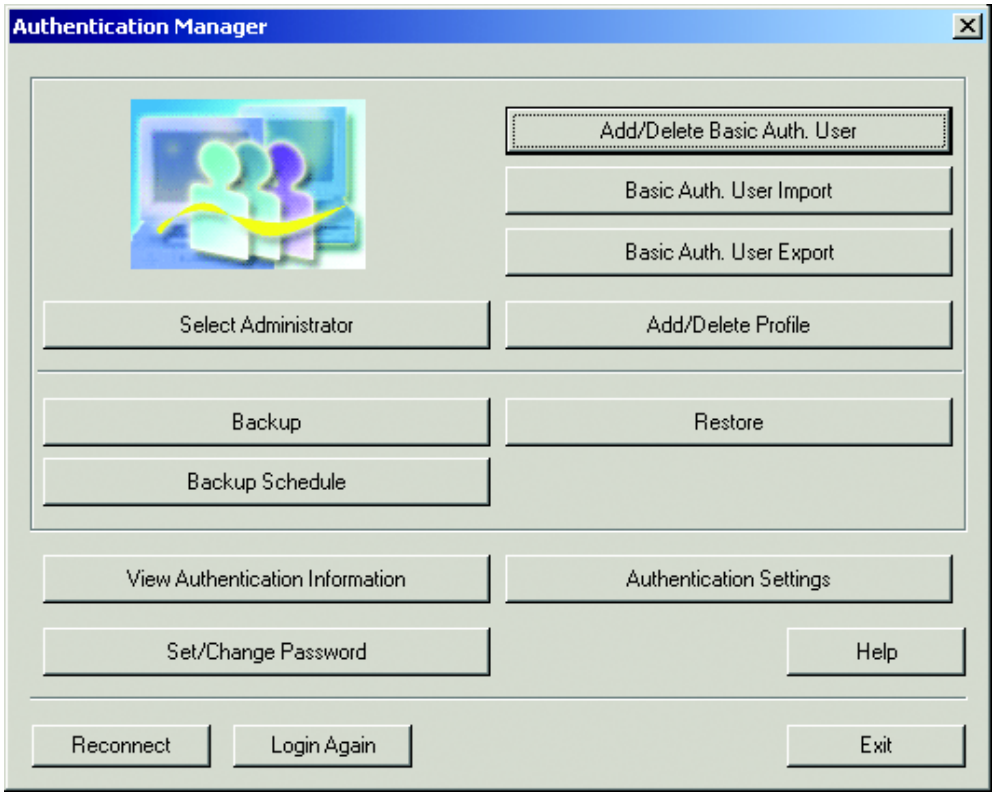
The **[Login]** dialog box appears.



2 **Click [Basic Authentication] on the [Authentication:] tab, and then enter "Admin" in [User name:] and the built-in user password specified during installation in [Password:].**

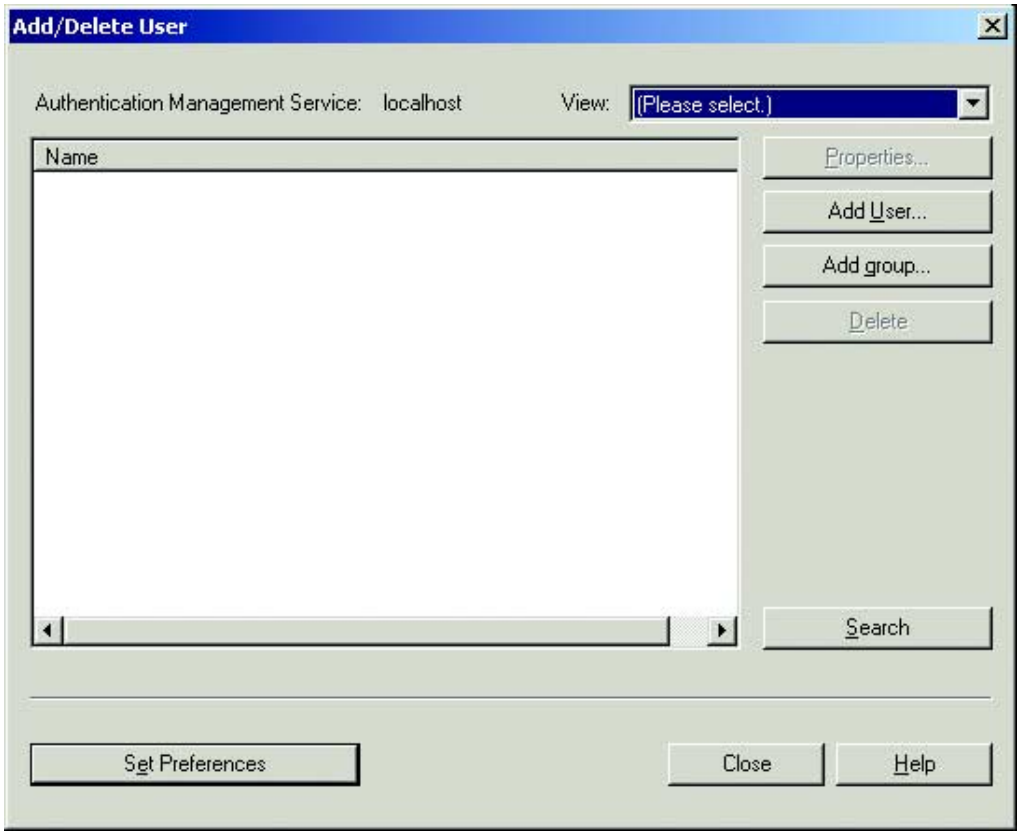
3 **Click [OK].**

Authentication Manager starts.



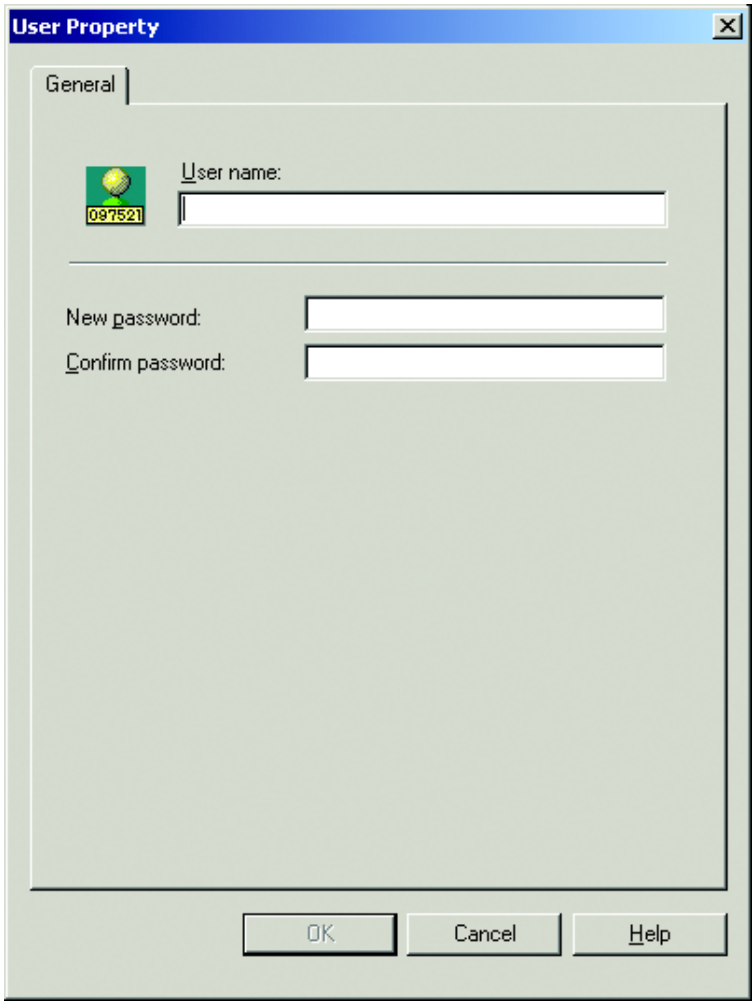
4 **Click [Add/Delete Basic Auth. User].**

The **[Add/Delete User]** dialog box appears.



5 **Click [Add User...].**

The **[User Property]** dialog box appears.

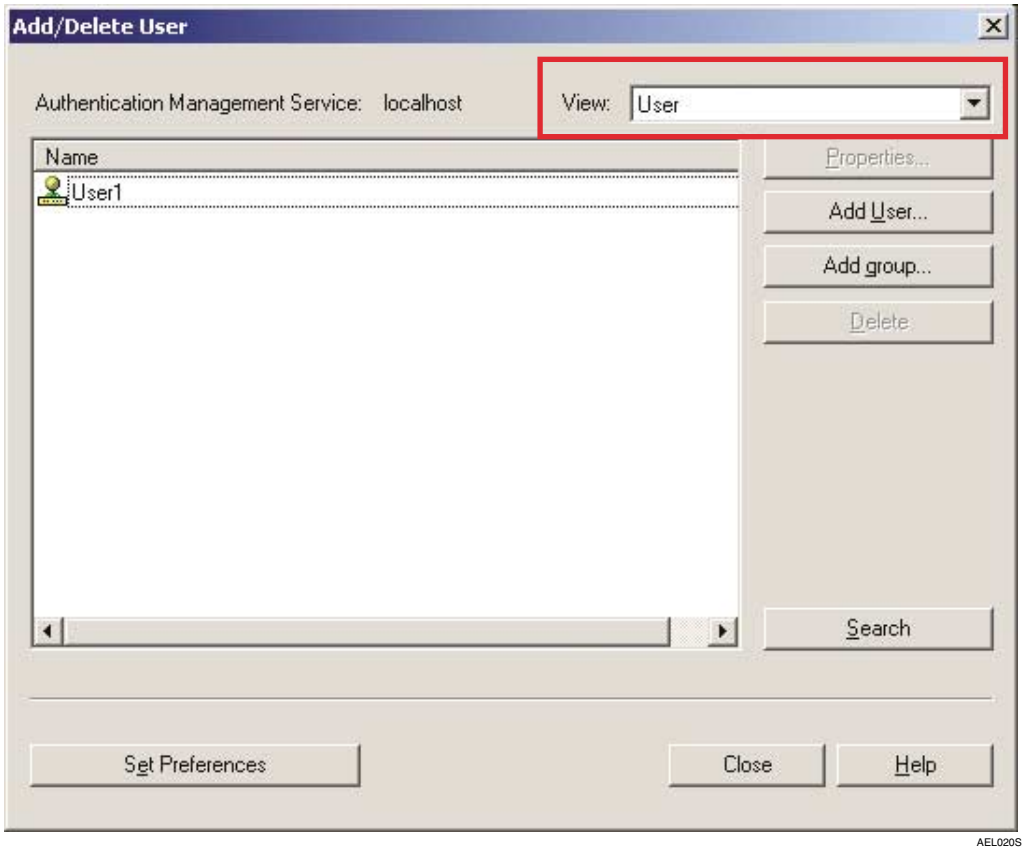


6 **Enter a user name and password, and then click [OK].**

An additional confirmation dialog box appears.

7 **Click [OK].**

The **[Add/Delete User]** dialog box reappears. When **[Users]** under **[View:]** is selected, the list of added users is displayed.



8 **Click [Close].**

9 **Click [Exit].**

Authentication Manager quits.

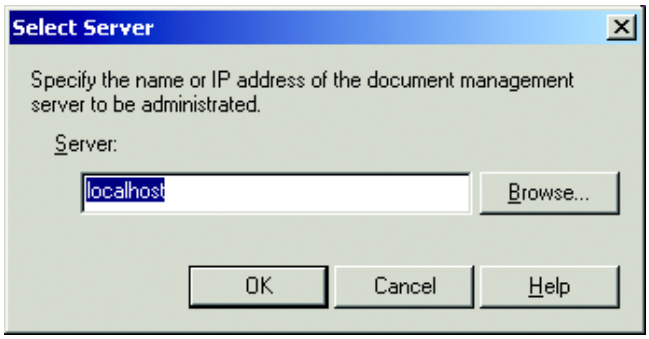
3. Using ScanRouter DocumentServer

Creating Cabinets Using SRDS Manager

Follow the procedure below to create cabinets in the document management server, in which documents can be stored.

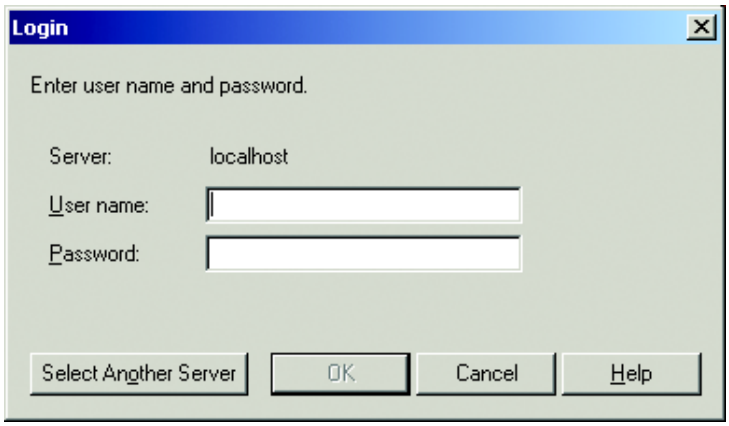
1 **On the [Start] menu, point to [Programs] > [ScanRouter System] > [ScanRouter DocumentServer], and then click [SRDS Manager].**

The **[Select Server]** dialog box appears.



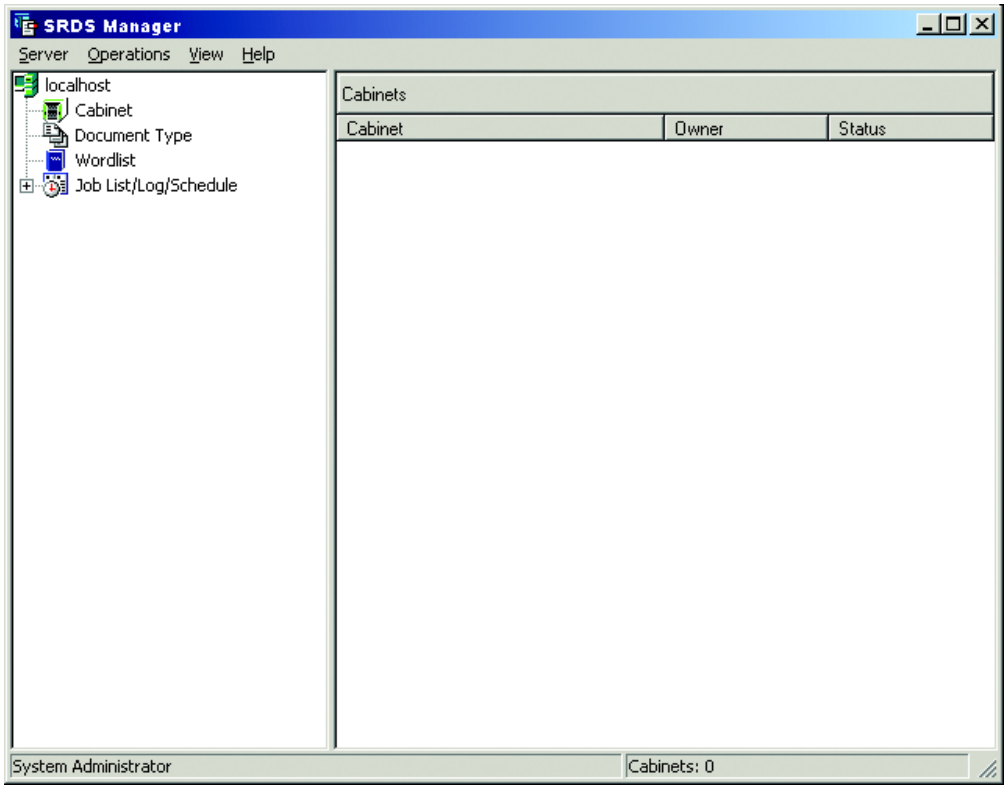
2 **Enter the name of the server where cabinets are created, and then click [OK].**

The **[Login]** dialog box appears.



3 **Enter the built-in user name (Admin) in [User:] and the built-in user password specified during installation in [Password:], and then click [OK].**

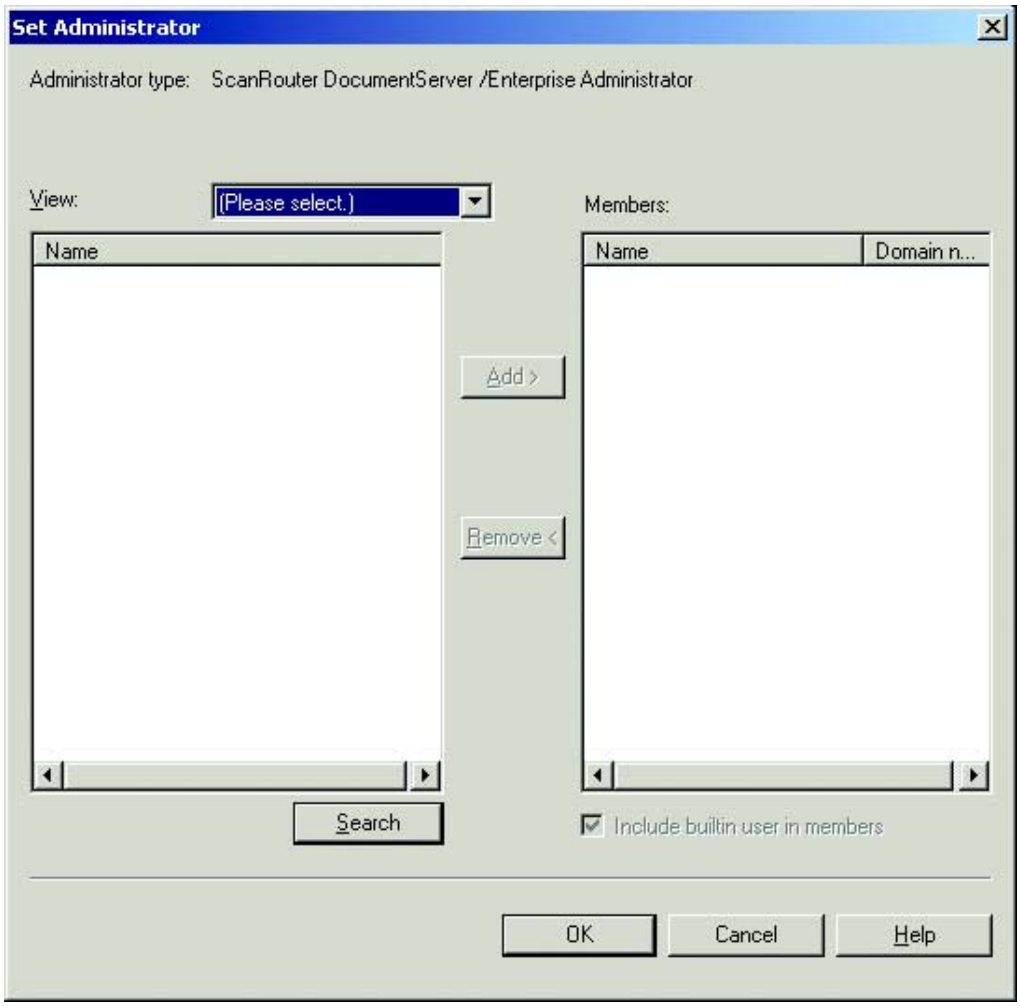
SRDS Manager starts.



4 Make the following settings for the ScanRouter DocumentServer Administrator:

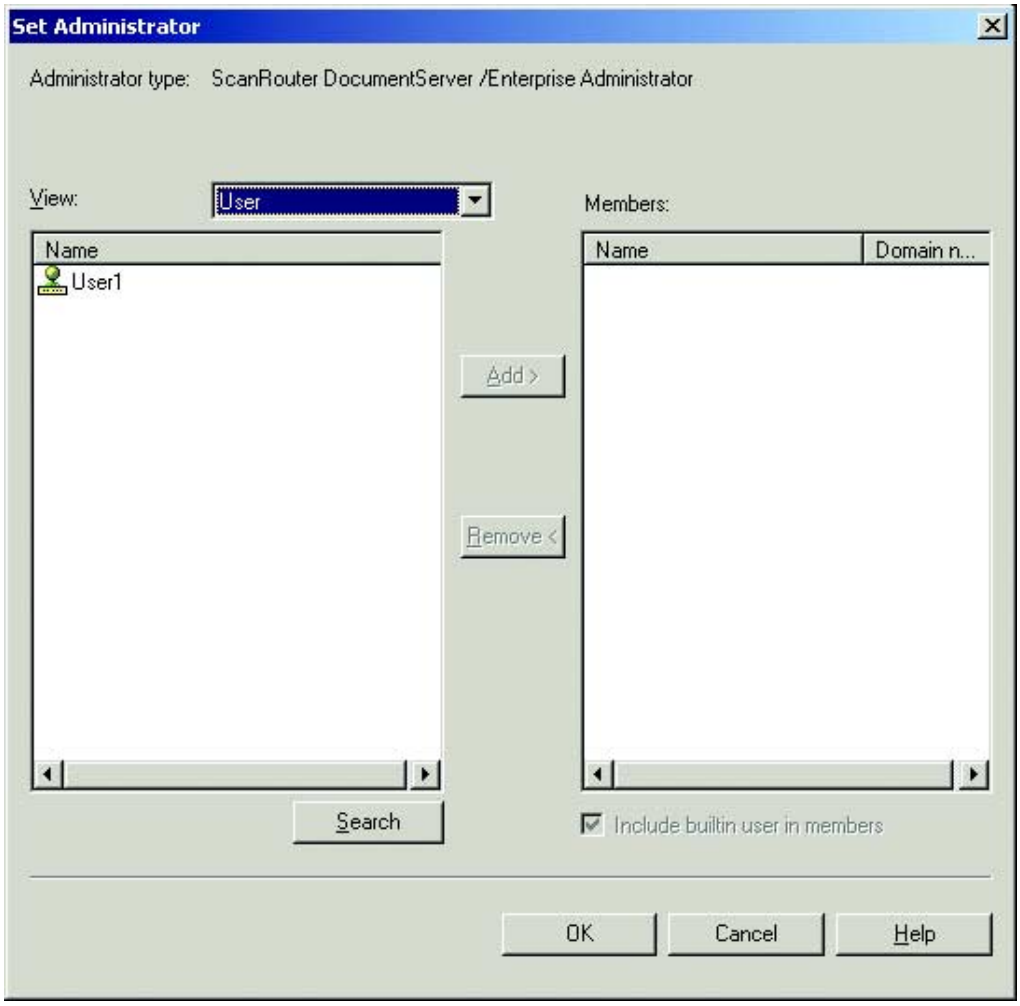
❶ On the [Server] menu, click [Set Administrator].

The **[Set Administrator]** dialog box appears.

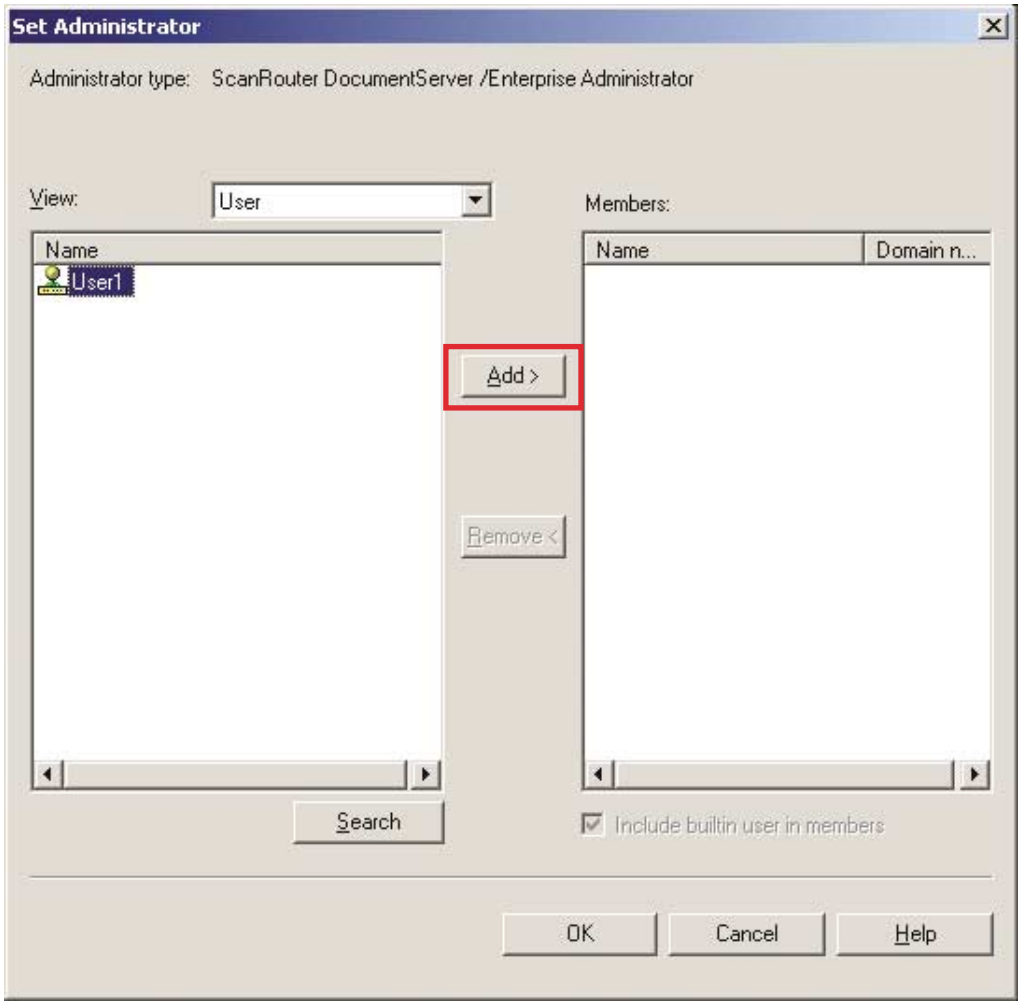


❷ **Click [Users] on the [View:].**

A list of users appears.



❸ **Select the user you want to specify as the administrator, and then click [Add >].**



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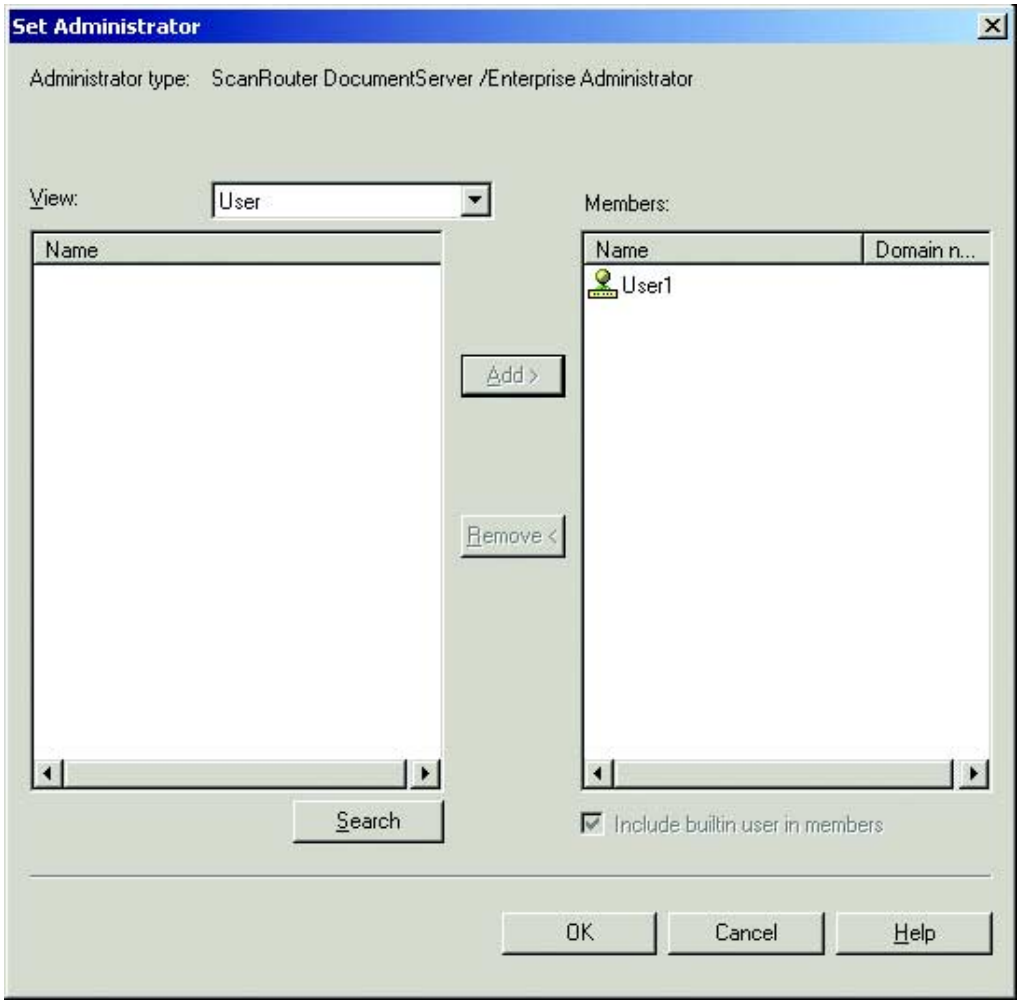
The selected user is displayed in **[Members:]**.



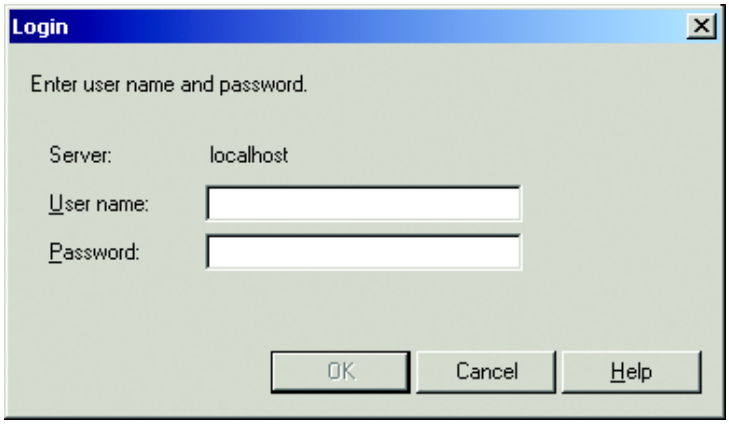
❹ **Click [OK].**

The selected user is specified as the ScanRouter DocumentServer Administrator.

5 **Log in to the server again under the administrator specified in step 4.**

❶ **On the [Server] menu, click [Login as another User].**

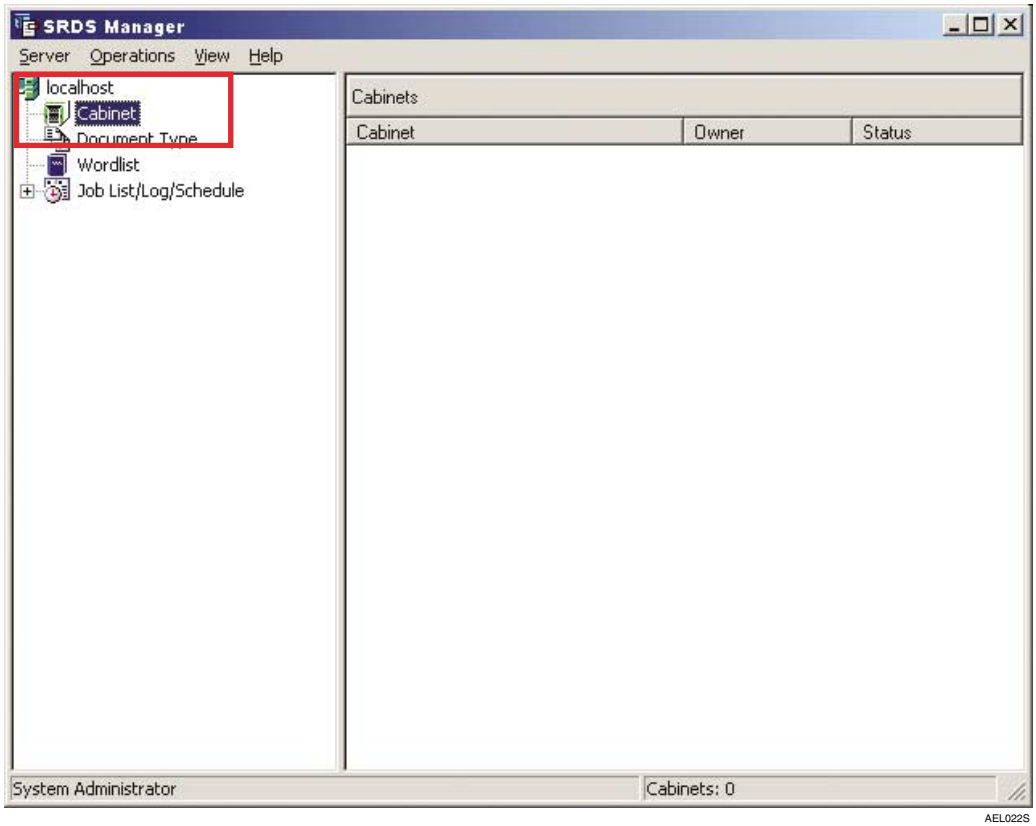
The **[Login]** dialog box appears.



❷ **Enter the user name and password for the administrator specified in step 4, and then click [OK].**

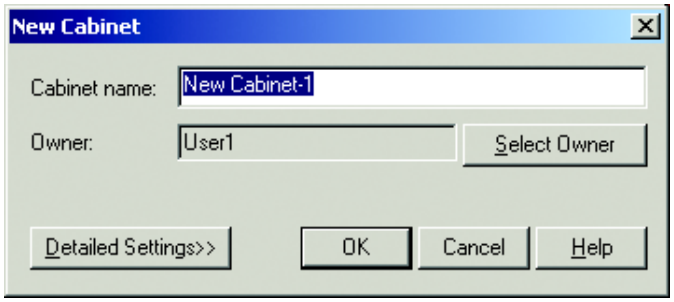
6 **Create a cabinet.**

❶ **In the tree pane, click [Cabinet].**



❷ **On the [Operations] menu, click [New Cabinet].**

The **[New Cabinet]** dialog box appears.

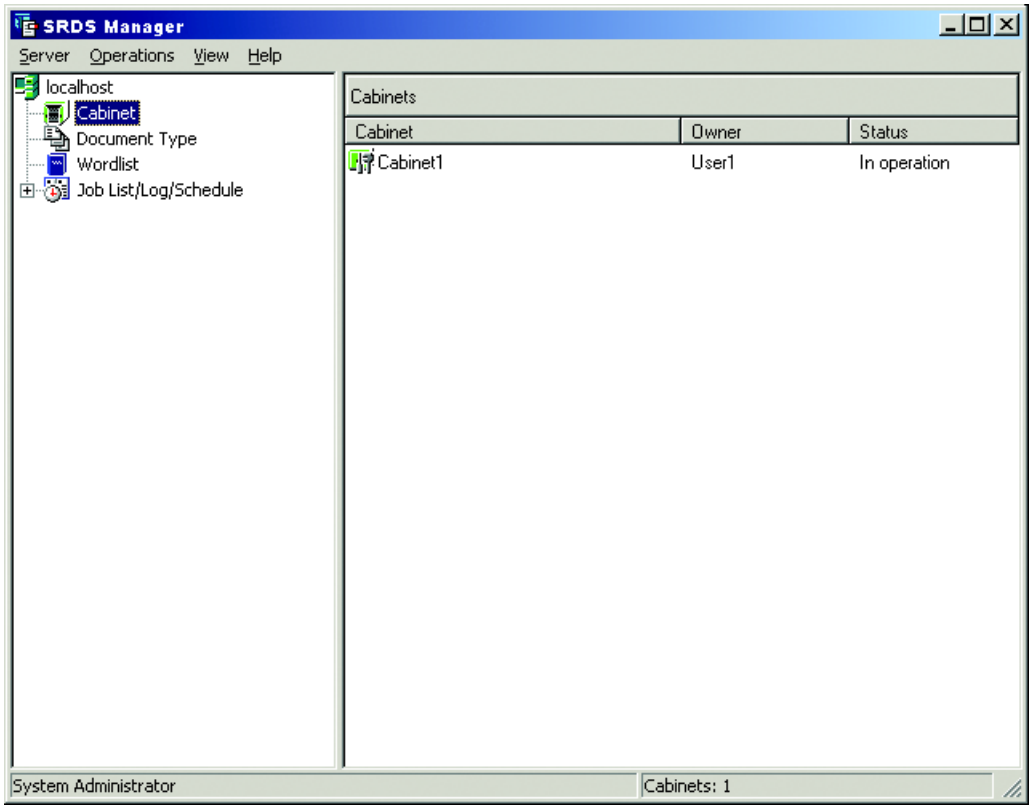


❸ **Enter a name in [Cabinet name:], and then click [OK].**

The dialog box appears, notifying you that a cabinet has been created.

❹ **Click [OK].**

The created cabinet is displayed in **[Cabinets]**.



❼ **On the [Server] menu, click [Exit].**

SRDS Manager quits.

Adding Cabinets and Documents

Follow the procedure below to add cabinets created in "Creating Cabinets Using SRDS Manager" using DeskTopBinder Professional or ScanRouter Web Navigator, and then add documents to them.

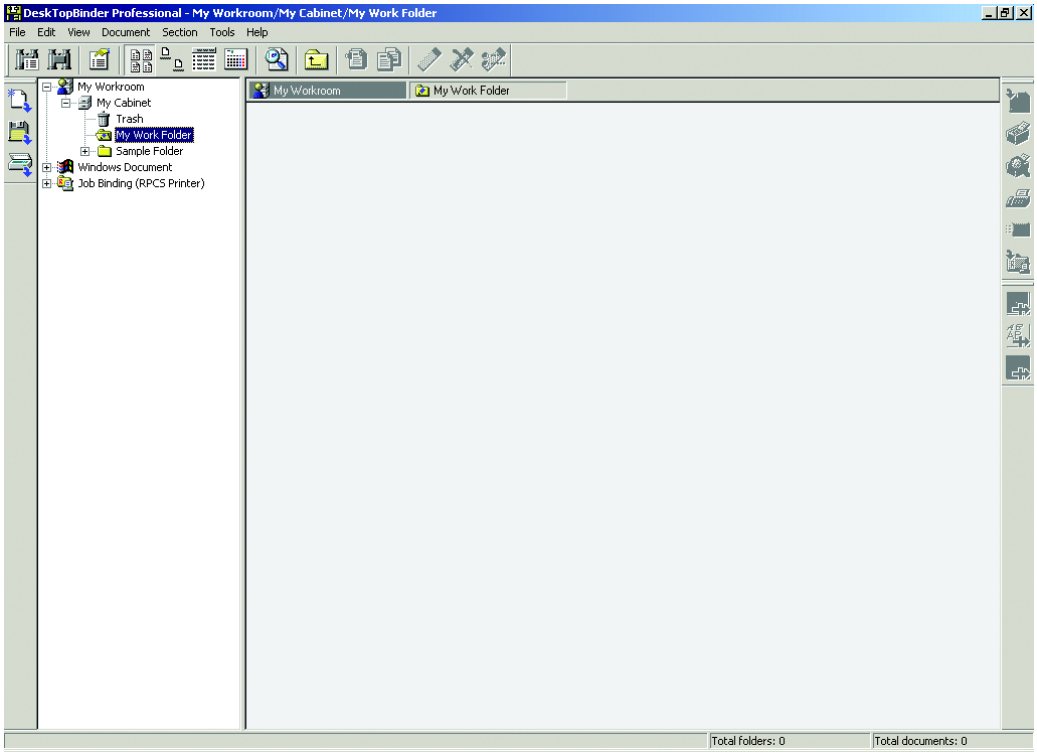
Using DeskTopBinder Professional

Adding Cabinets

Follow the procedure below to add ScanRouter DocumentServer Cabinets.

1. **On the [Start] menu, point to [Programs], point to [DeskTopBinder], and then click [DeskTopBinder].**

   DeskTopBinder Professional starts.

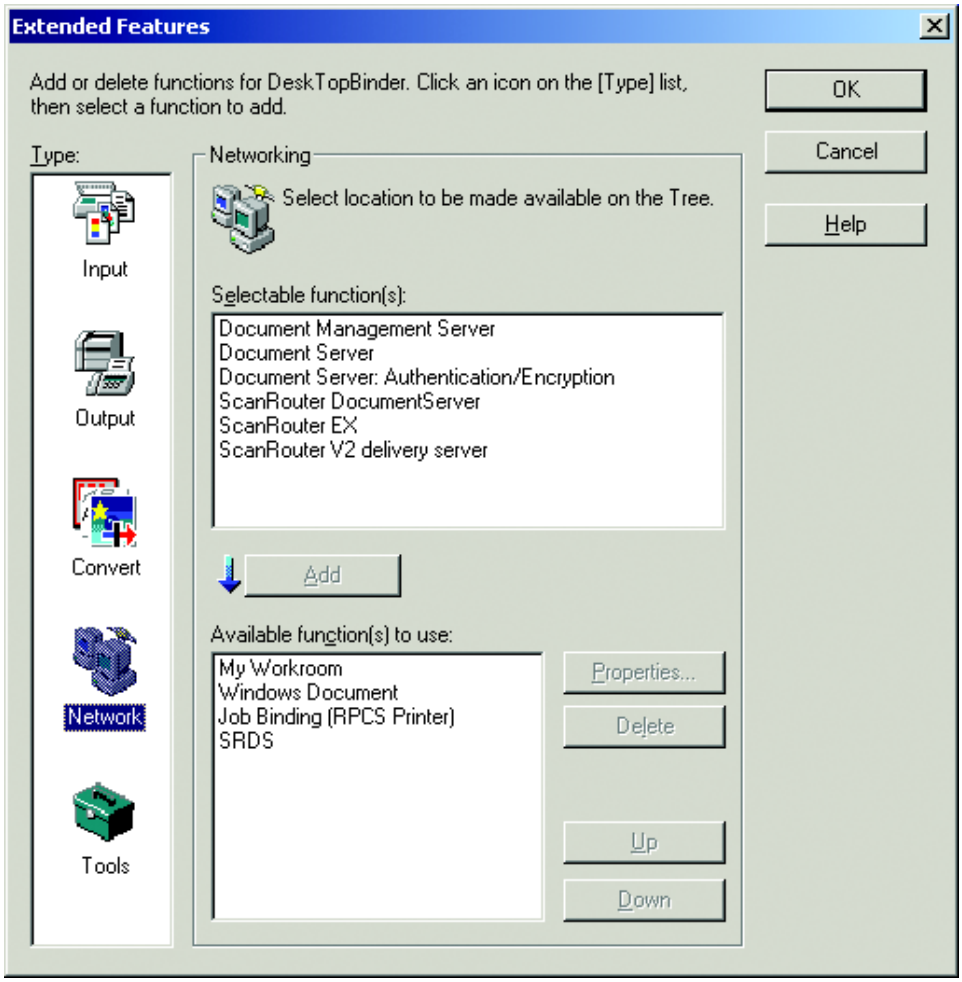


2. **On the [Tools] menu, click [Extended Features...].**

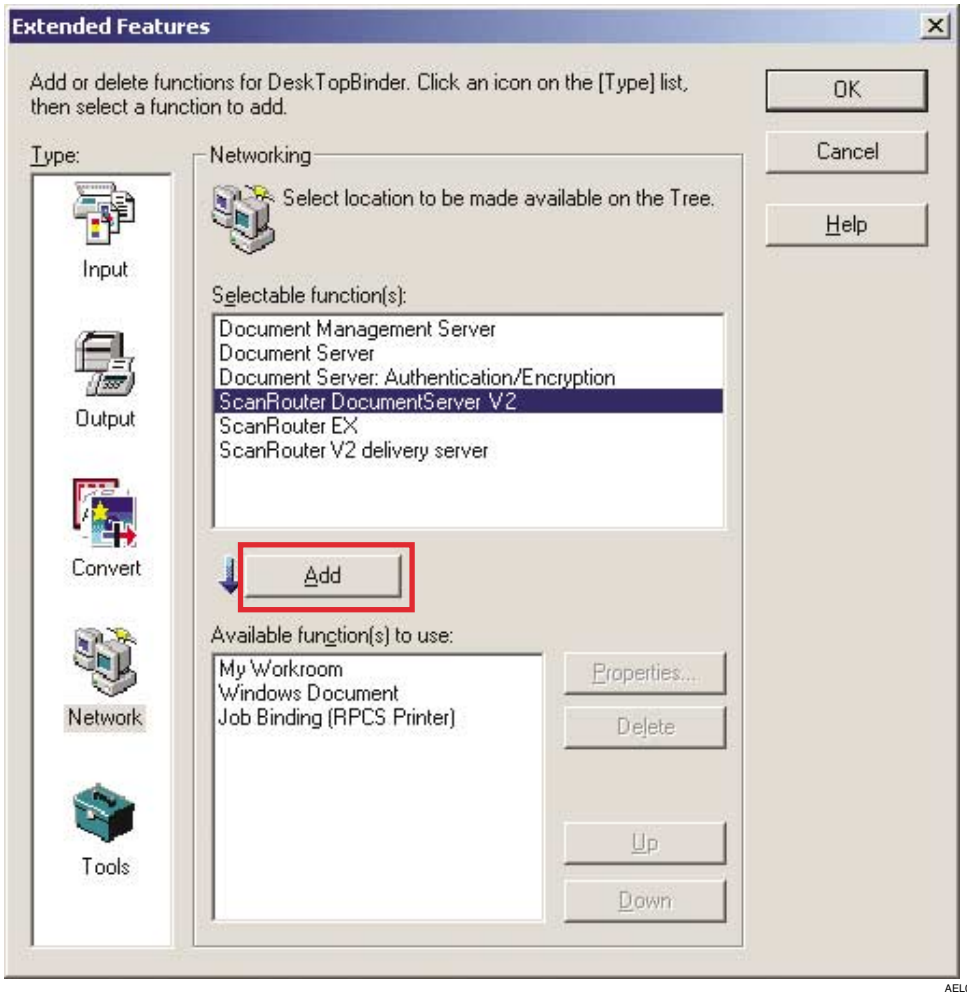
   The **[Extended Features]** dialog box appears.

3 **Click [Network] in [Type:].**

The network list is displayed in **[Selectable function(s):]**.



4 **Click [ScanRouter DocumentServer V2] in [Selectable function(s):], and then click [Add].**

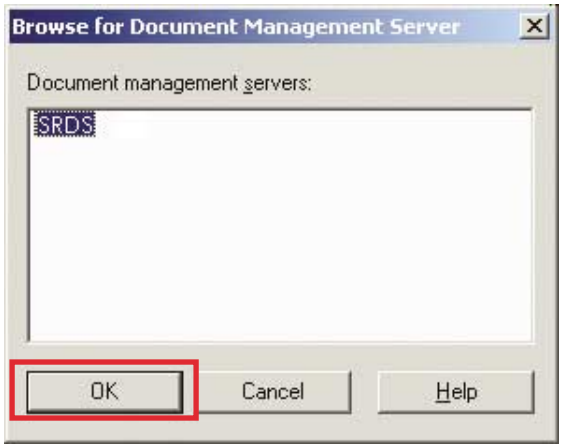


The **[Document Management Server Properties]** dialog box appears.

5 **Click [Browse...] for the [Server:].**

The **[Browse for Document Management Server]** dialog box appears.

6 **Select the server to be connected, and then click [OK].**



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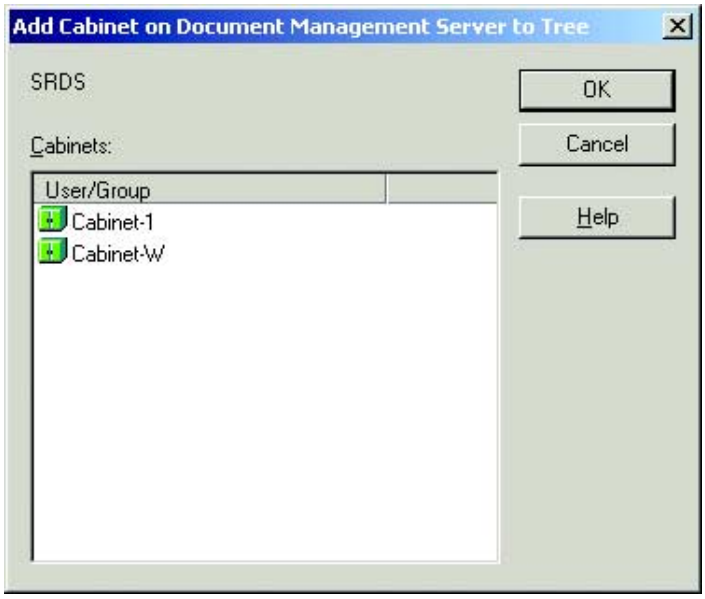
The **[Document Management Server Properties]** dialog box reappears. The selected cabinet is displayed in the list.

7 **Click [Add...] under [Server cabinet(s) added to Tree:].**

The **[Enter Password]** dialog box for the selected server appears.

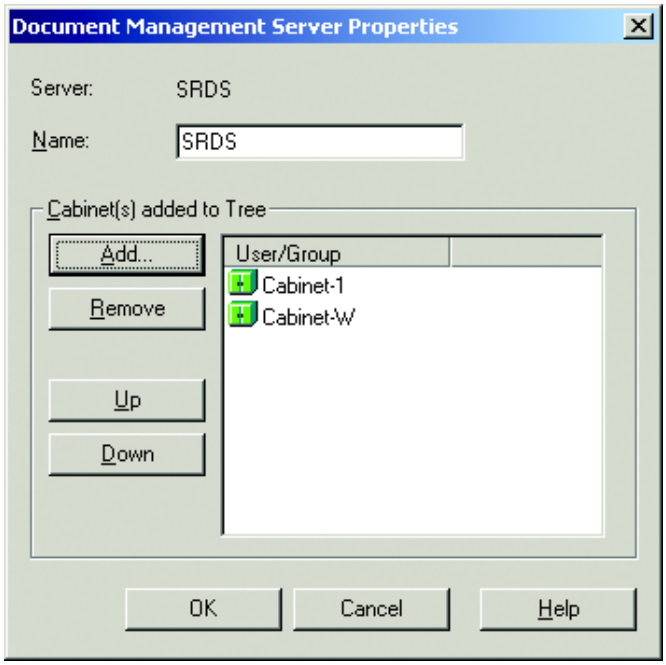
8 **Enter a user name and password, and then click [OK].**

The **[Add Cabinet on Document Management Server to Tree]** dialog box appears.



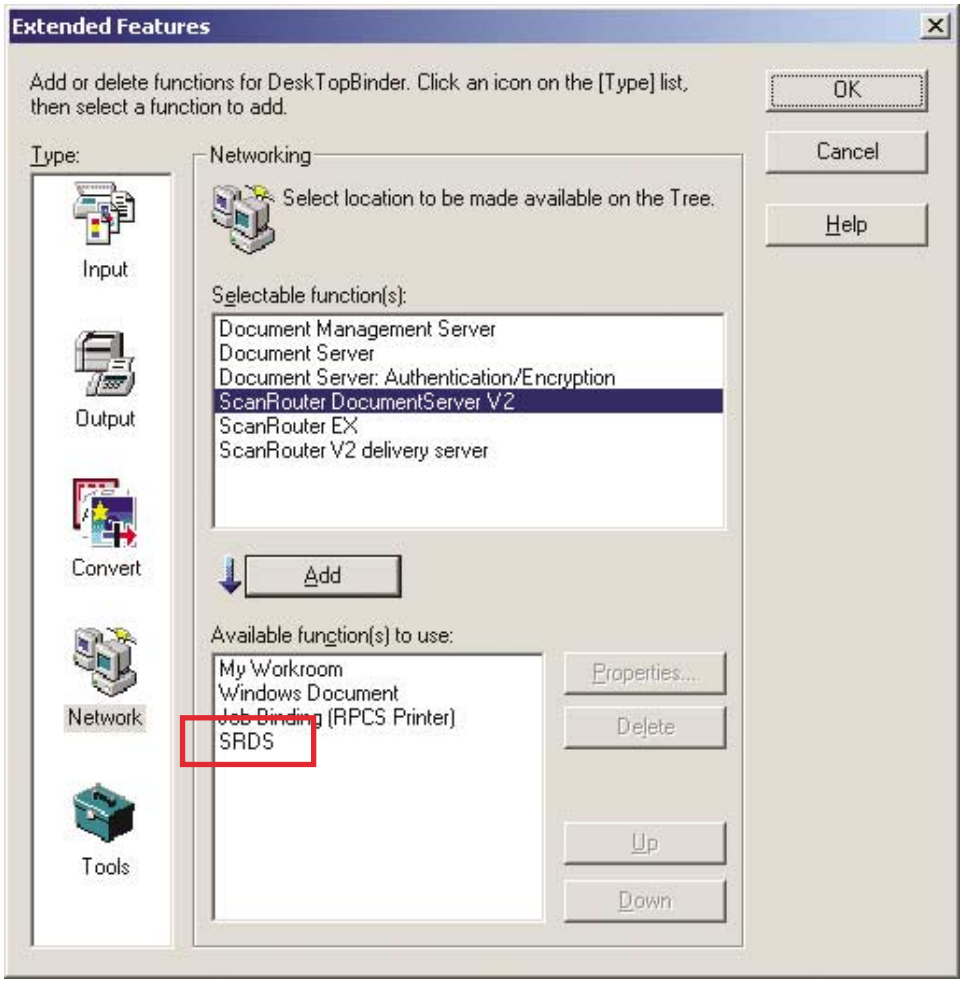
9 **Select the cabinet you want to register from the cabinet list, and then click [OK].**

The **[Document Management Server Properties]** dialog box reappears.



❿ Click [OK].

The **[Extended Features]** dialog box reappears. The server selected in step ❻ is displayed in the **[Available function(s) to use:]** list.



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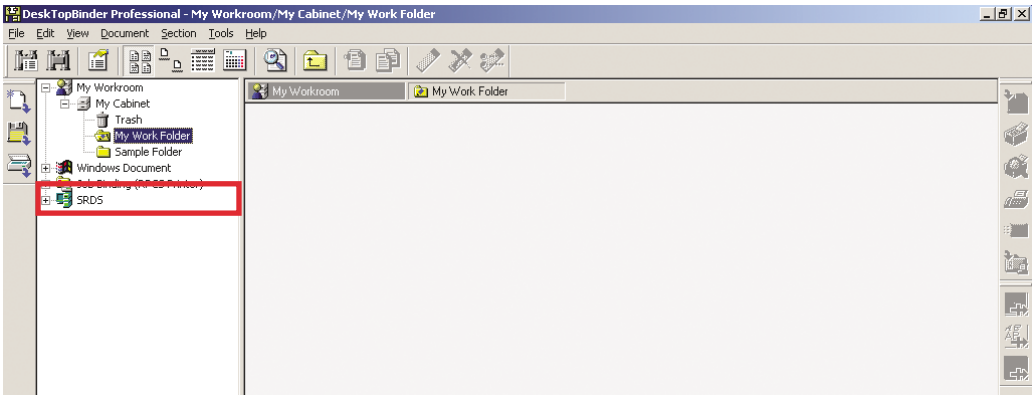
11 **Click [OK].**

The registered ScanRouter DocumentServer is displayed in the DeskTop-Binder Professional tree pane.



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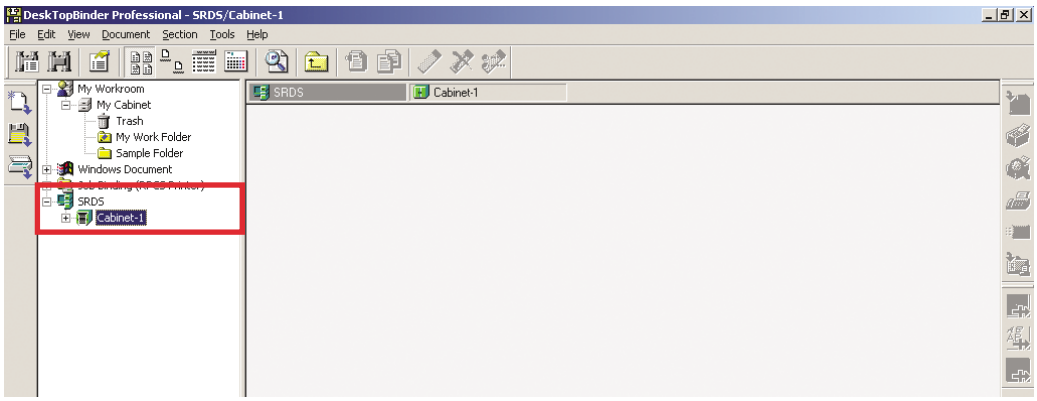
Adding Documents

Follow the procedure below to create a folder in the registered ScanRouter DocumentServer cabinet and add documents to it.

Documents can be added by various methods. This section explains adding documents registered in DeskTopBinder Professional and Windows files.

1 **Create a folder in the cabinet.**

❶ Select a cabinet registered in the ScanRouter DocumentServer tree pane.



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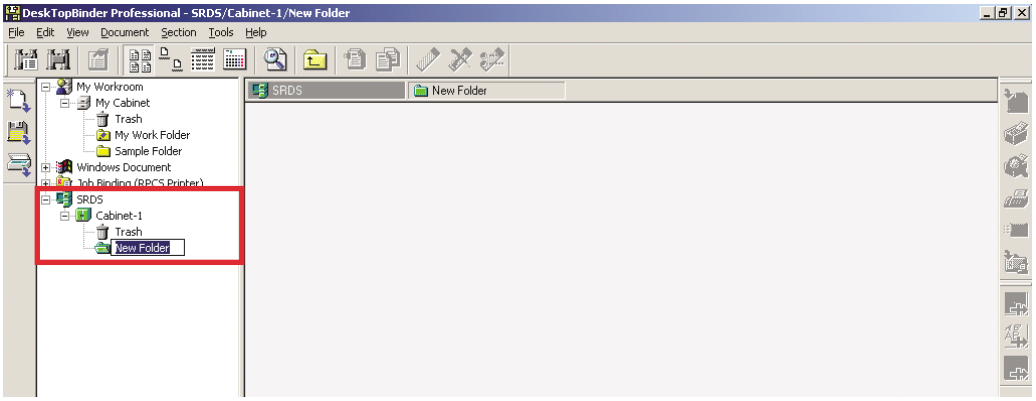
❷ **On the [File] menu, click [Create New Folder].**

A new folder is created under the cabinet.



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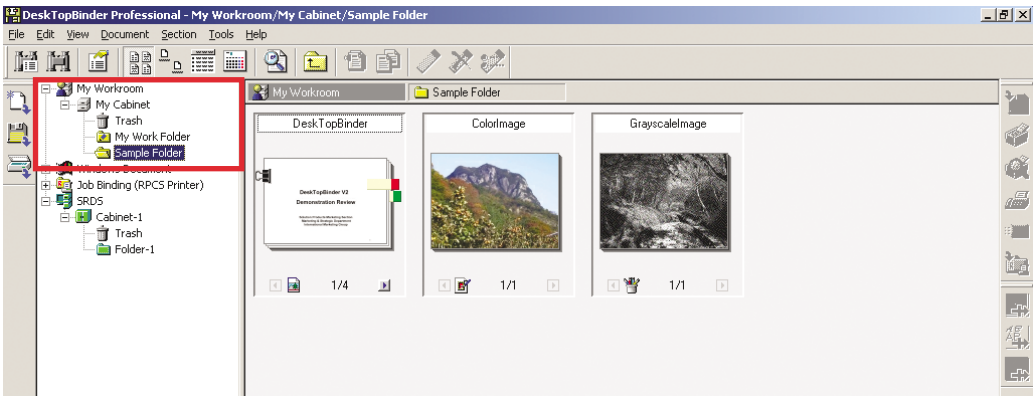
❸ **Enter the folder name.**

2 **Copy the document registered in DeskTopBinder Professional or the Windows file, and then add it to the folder created in step 1.**

Adding DeskTopBinder Professional documents

❶ **In the tree pane, select [Sample Folder] under [My Workroom] under [My Cabinet].**



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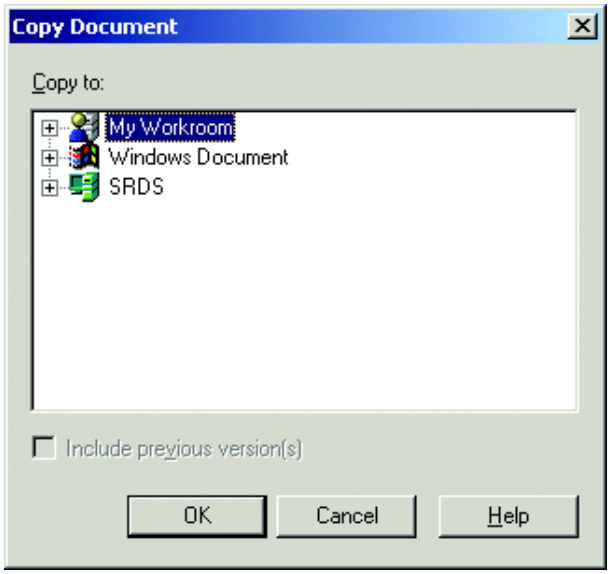
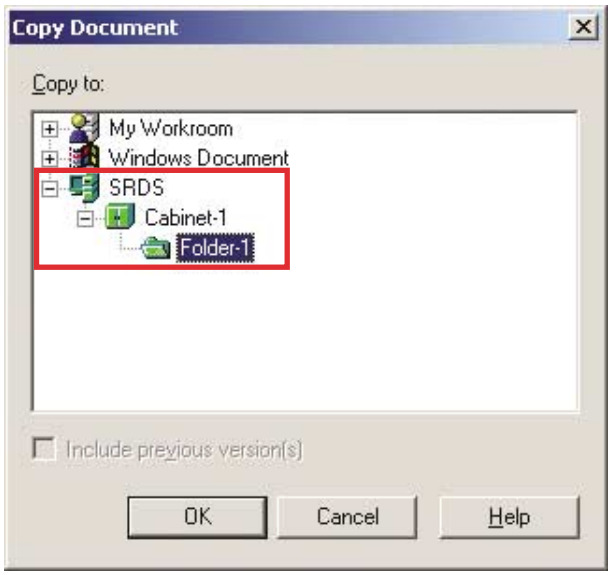
❷ **Select a document in the folder, and then click [Copy...] on the [Edit] menu.**

The **[Copy Document]** dialog box appears.



❸ **Select a ScanRouter DocumentServer folder in [Copy to:], and then click [OK].**



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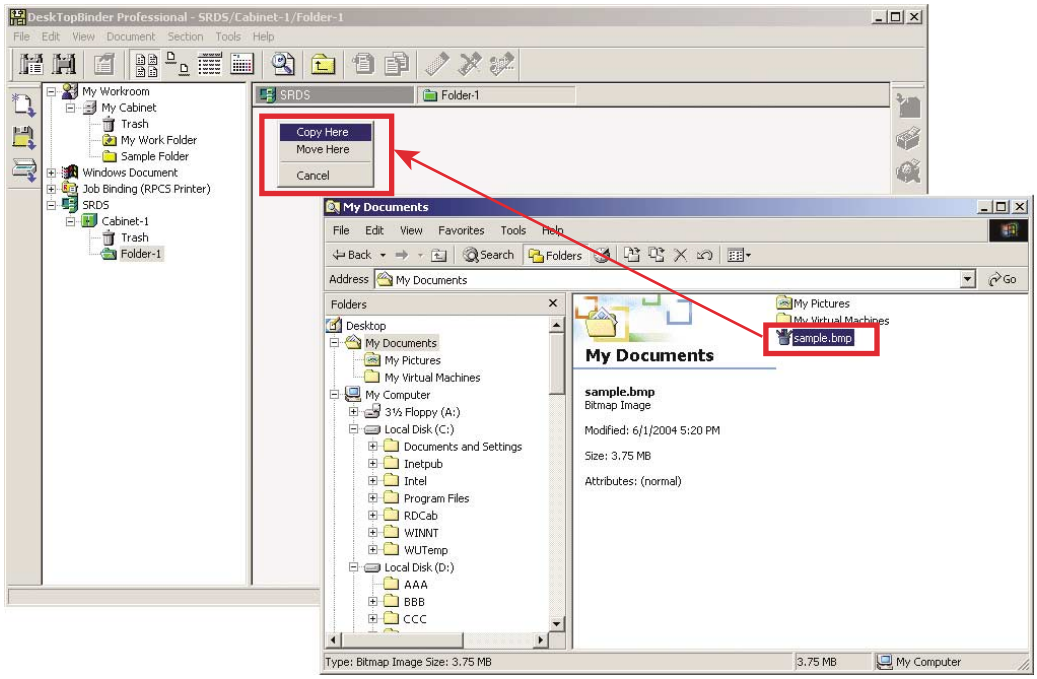
The selected document is copied and stored in the folder.

Adding windows files

❶ **Open Windows Explorer.**

❷ **Select the file you want to add, and then drag and drop it to the Scan-Router DocumentServer folder in the DeskTopBinder Professional tree pane.**



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❸ **On the pop-up menu that appears, click [Copy Here].**

The selected document is copied and stored in the folder.

Using ScanRouter Web Navigator

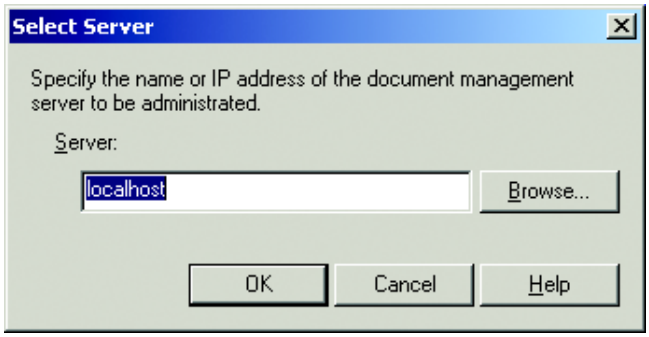
Specifying Administrator of ScanRouter Web Navigator

Start SR Web Navigator Manager, and then specify a ScanRouter Web Navigator servers administrator.

Log on to ScanRouter Web Navigator under the administrator specified here to make default settings.

1 **On the [Start] menu, point to [Programs], point to [ScanRouter System], point to [ScanRouter Web Navigator], and then click [SR Web Navigator Manager].**

The **[Select Server]** page appears.



2 **Click [Browse] to display [Browse Server] page, and then select the servers to manage.**

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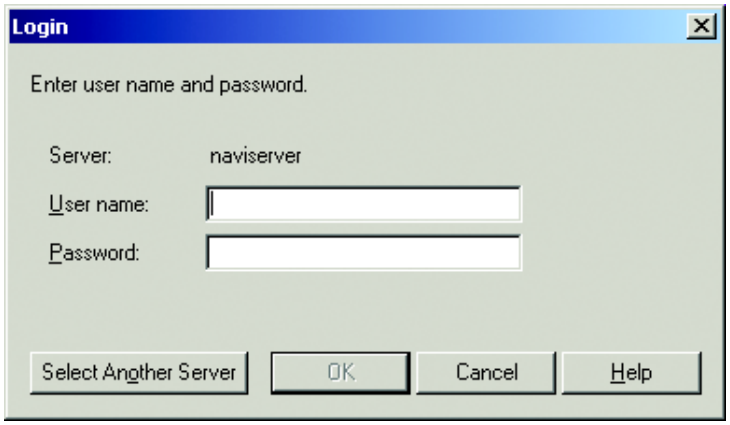
3 **Click [OK].**

The **[Select Server]** page reappears.

4 **Click [OK].**

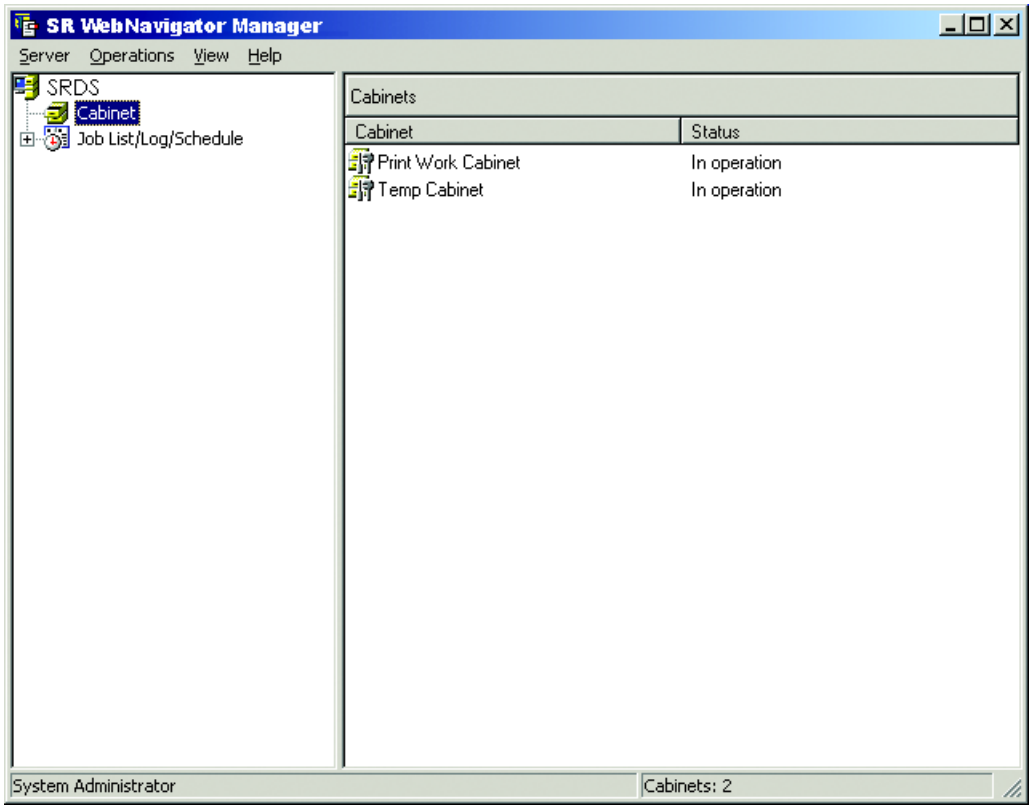
The **[Login]** dialog box appears.



5 **Enter the built-in user name ("Admin") and the password.**

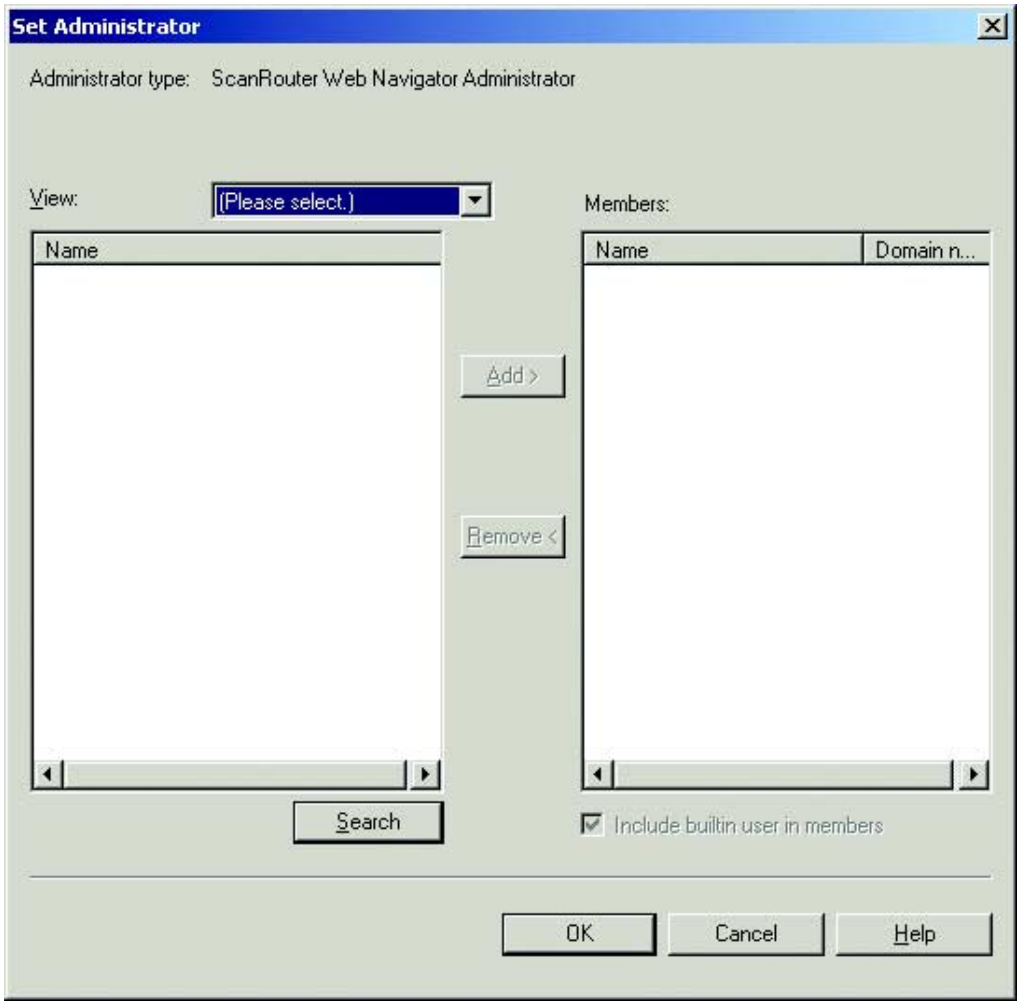
6 **Click [OK].**

SR Web Navigator Manager starts.



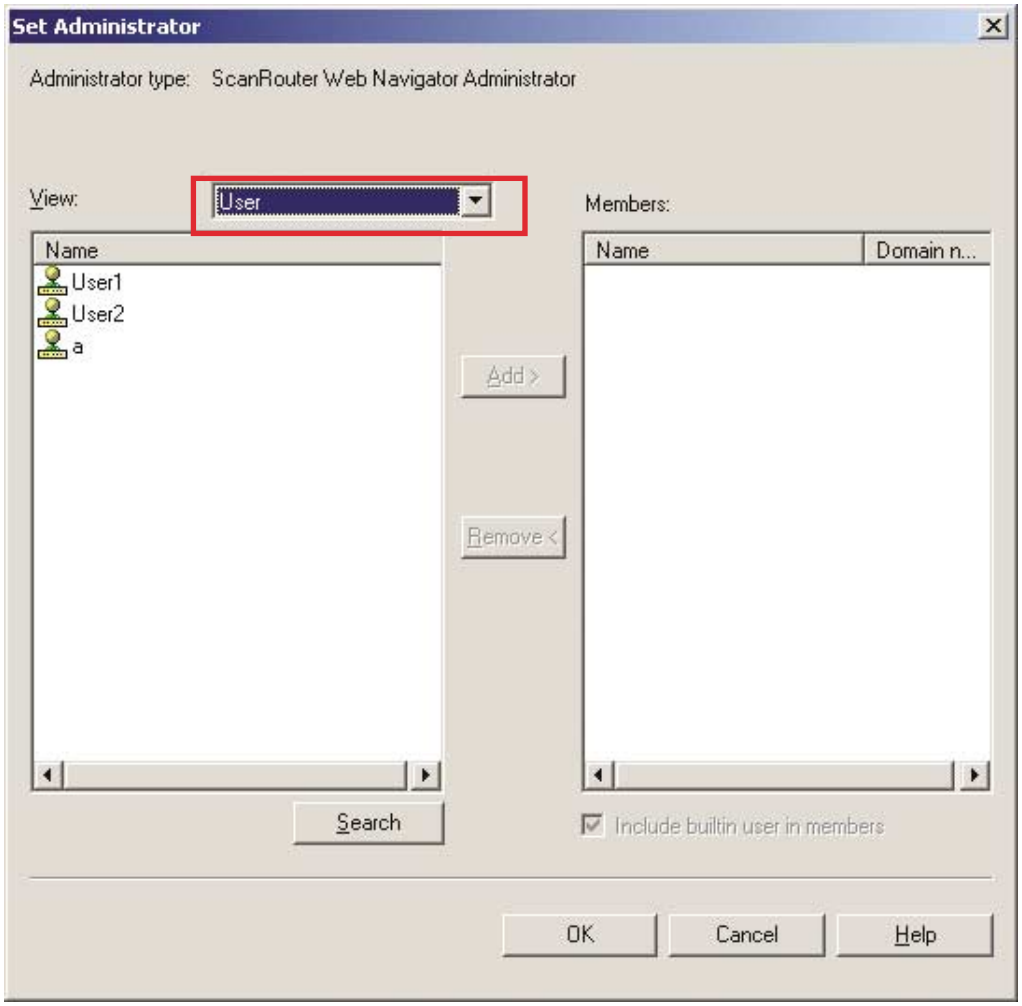
7 **On the [Server] menu, click [Set Administrator].**

The **[Set Administrator]** page appears.

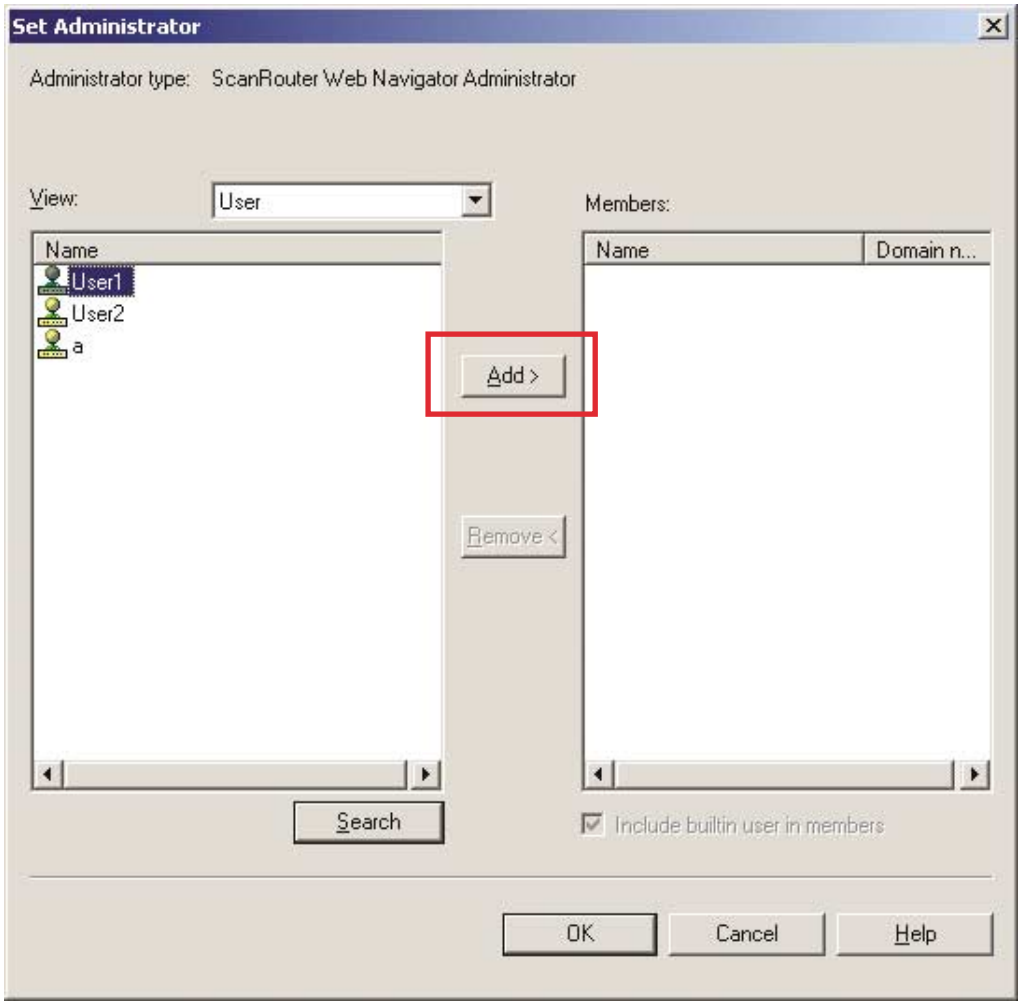


8 **Click [User] on the [View].**

Users are displayed in the **[Name]** list.



9 **Select a user in the [Name] list to specify the administrator, and then click [Add].**



To remove the administrator in the **[Name]** list, select it, and then click **[Remove]**.

The user can also be searched for and added by clicking **[Search]**.

10 **Click [OK].**

Adding Users

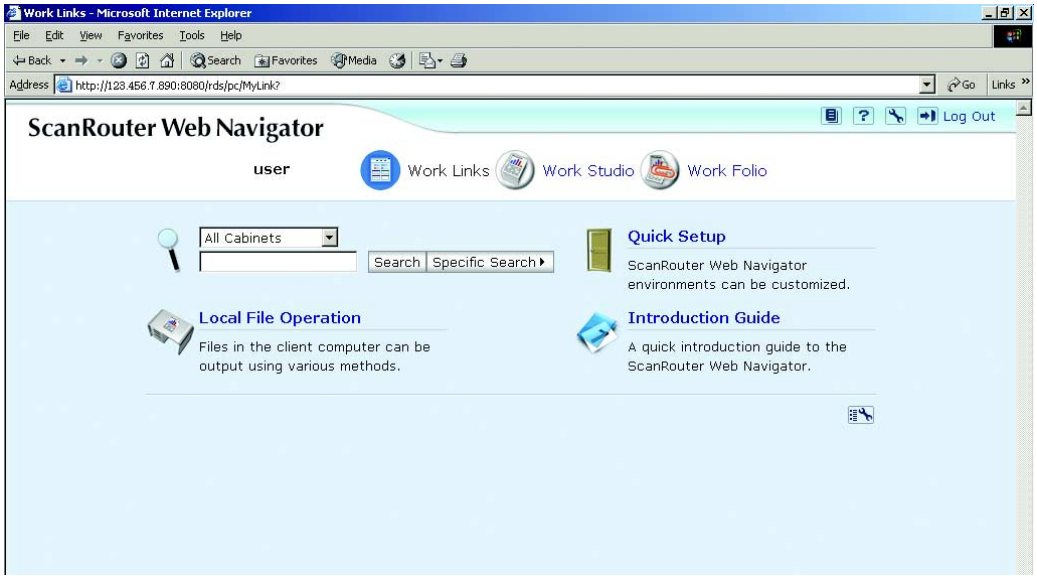
Follow the procedure below to log on to ScanRouter Web Navigator, and then add users who can use it.

1 Start a Web browser, and then enter the ScanRouter Web Navigator URL in [Address].

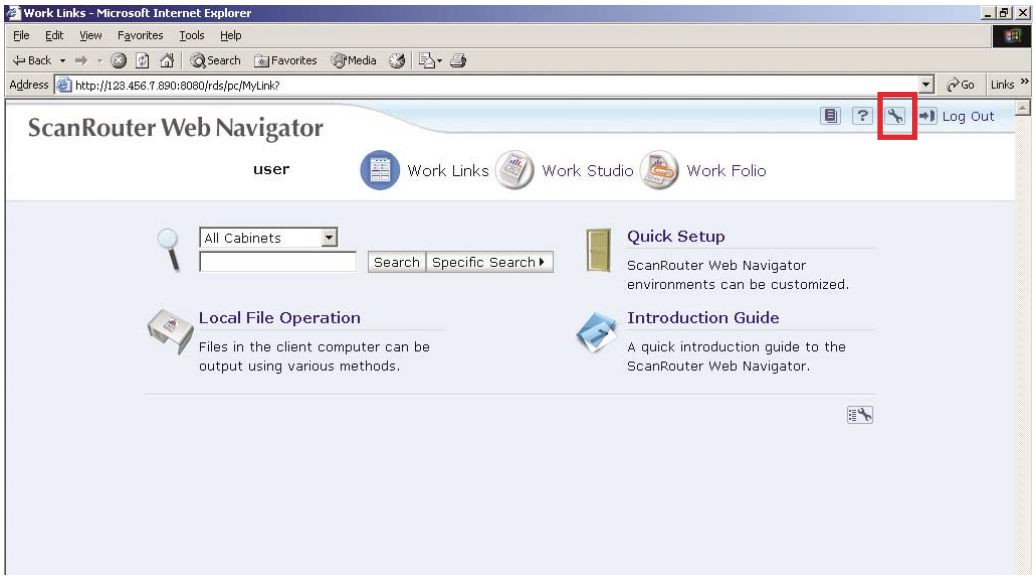
The ScanRouter Web Navigator login page appears.

2 **Enter the user name and password for the administrator set in "Specifying Administrator of ScanRouter Web Navigator", and then click [Login].**

The Work Links page appears.



3 **Click the [Settings] button in the header area.**



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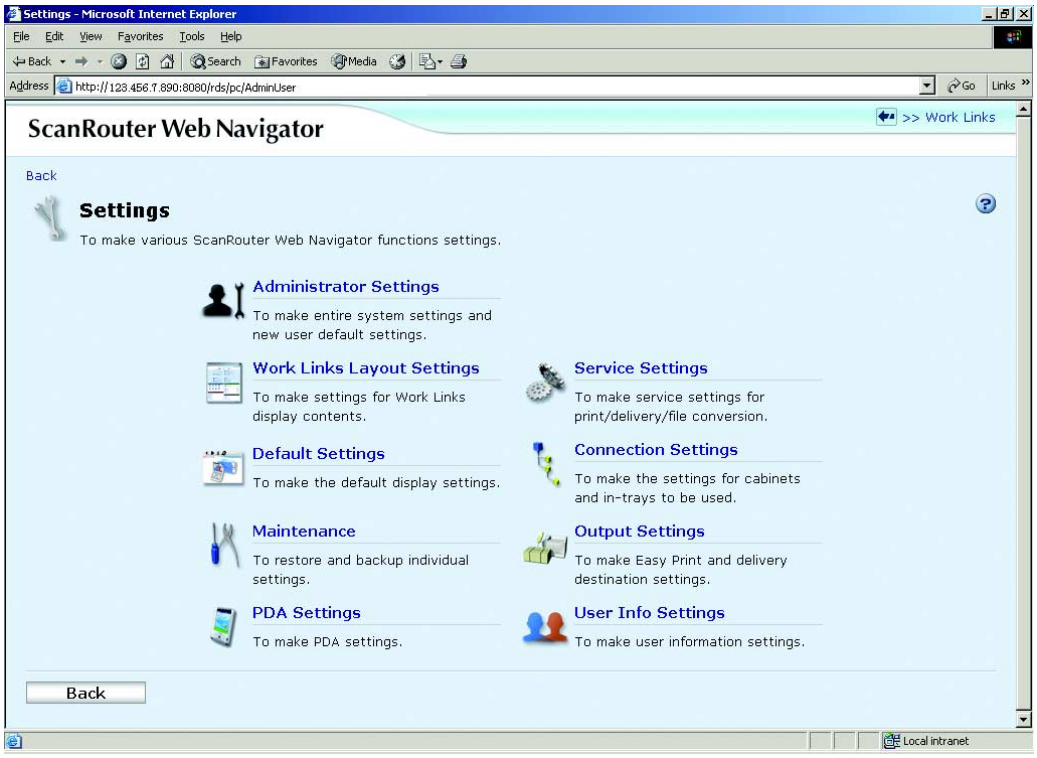
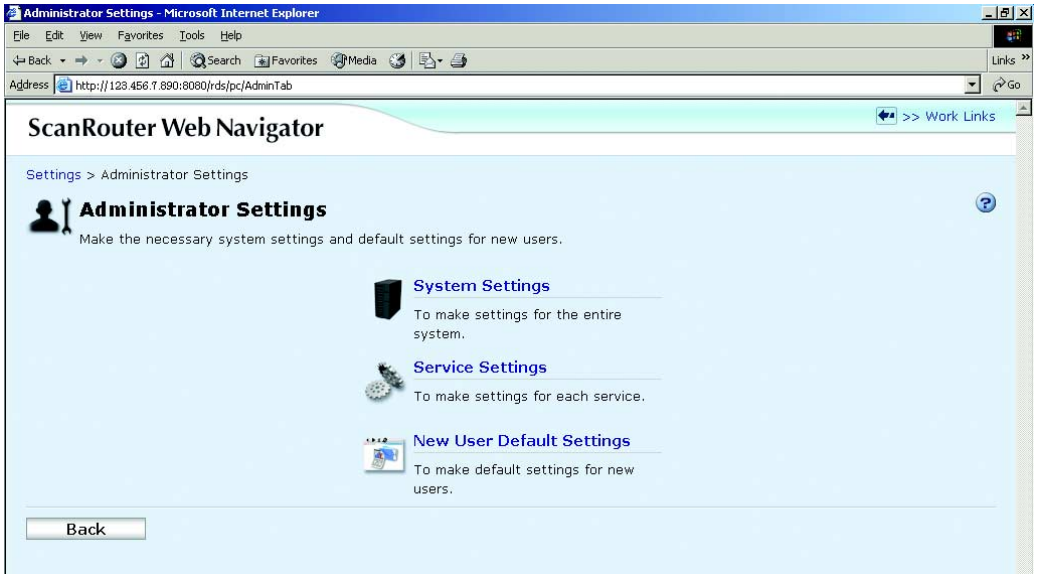
The **[Settings]** page appears.



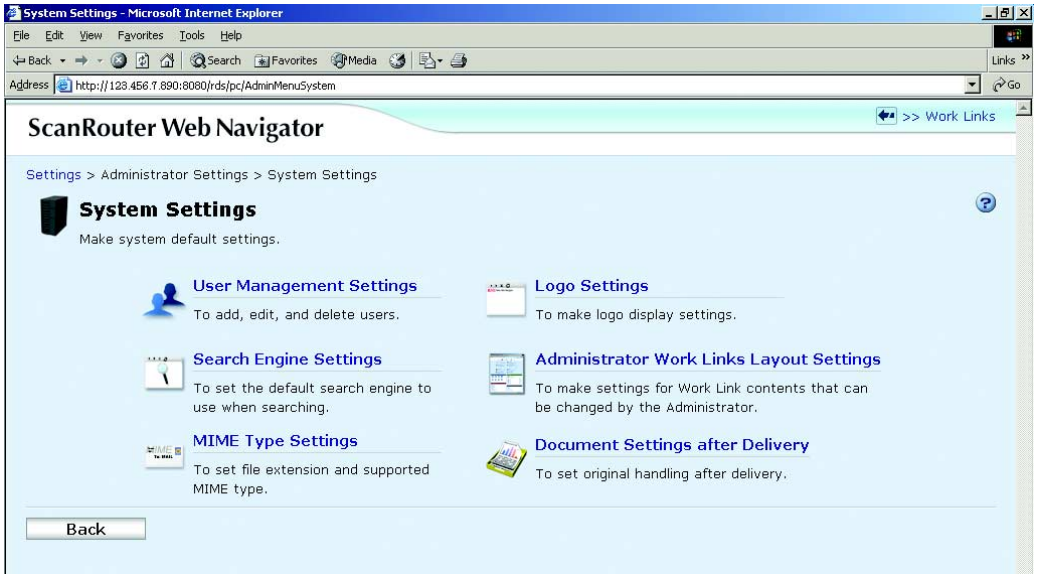
4 Click **[Administrator Settings]**.

The **[Administrator Settings]** page appears.



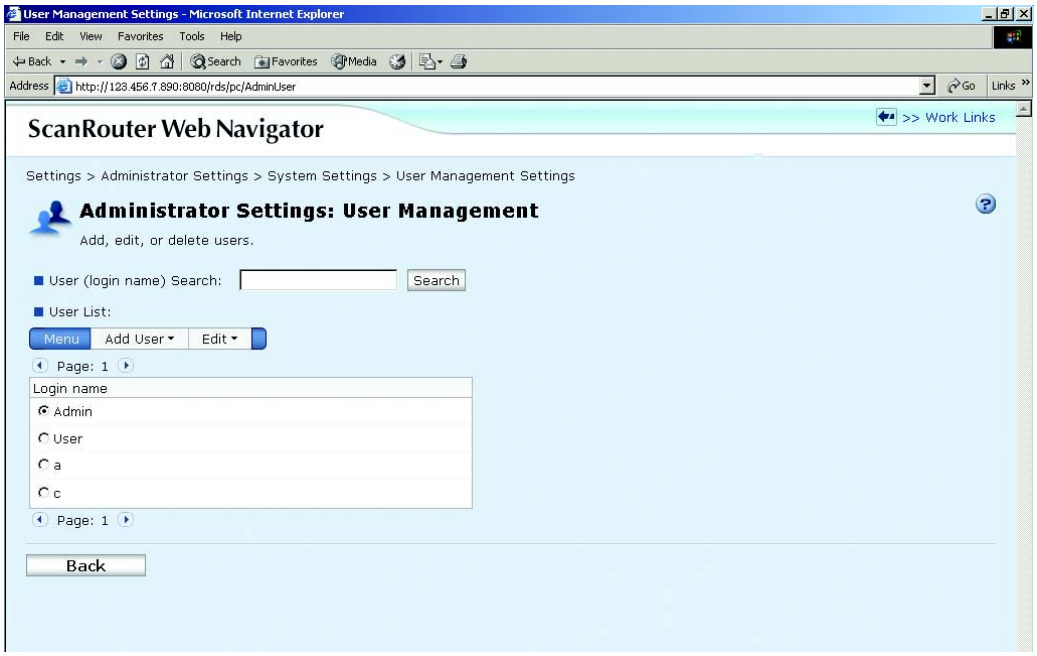
5 Click [System Settings].

The **[System Settings]** page appears.

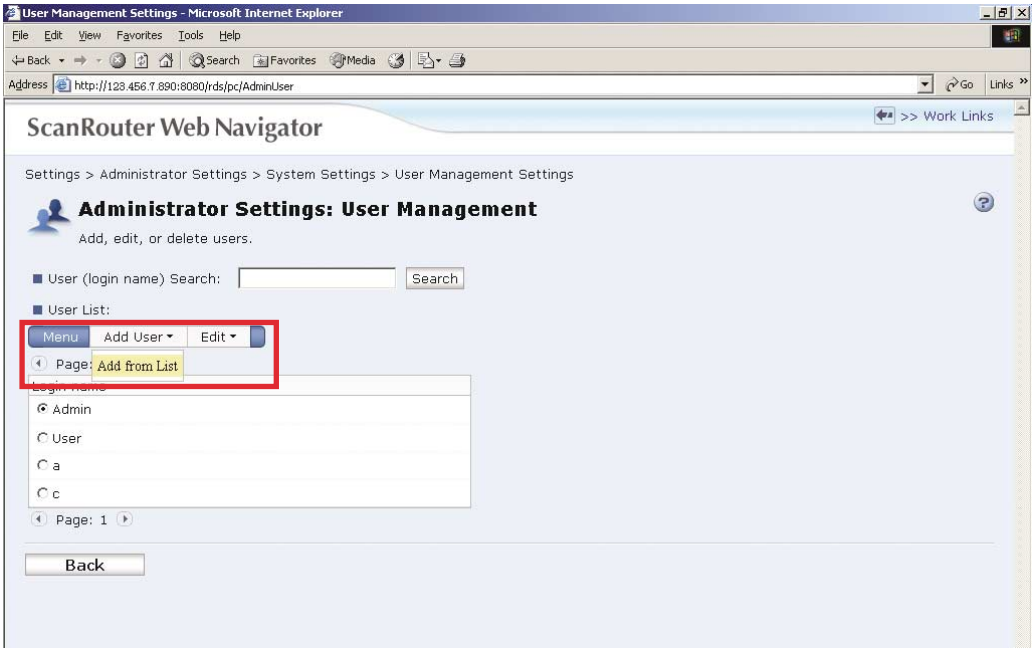


6 Click [User Management Settings].

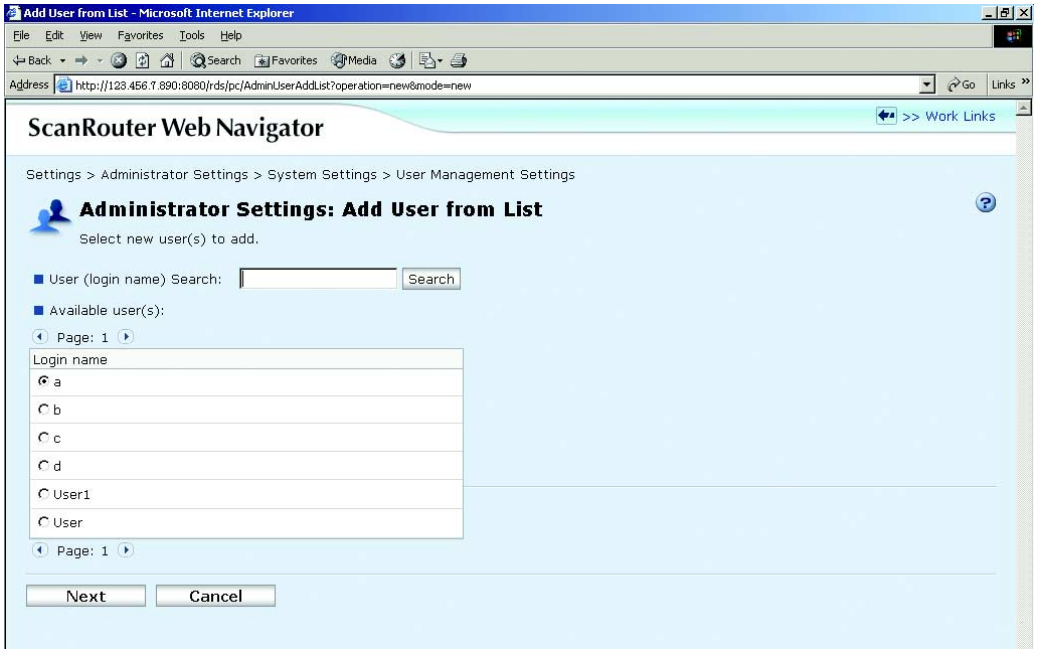
The **[Administrator Settings: User Management]** page appears.



7 On the [Add User] menu, click [Add from List].

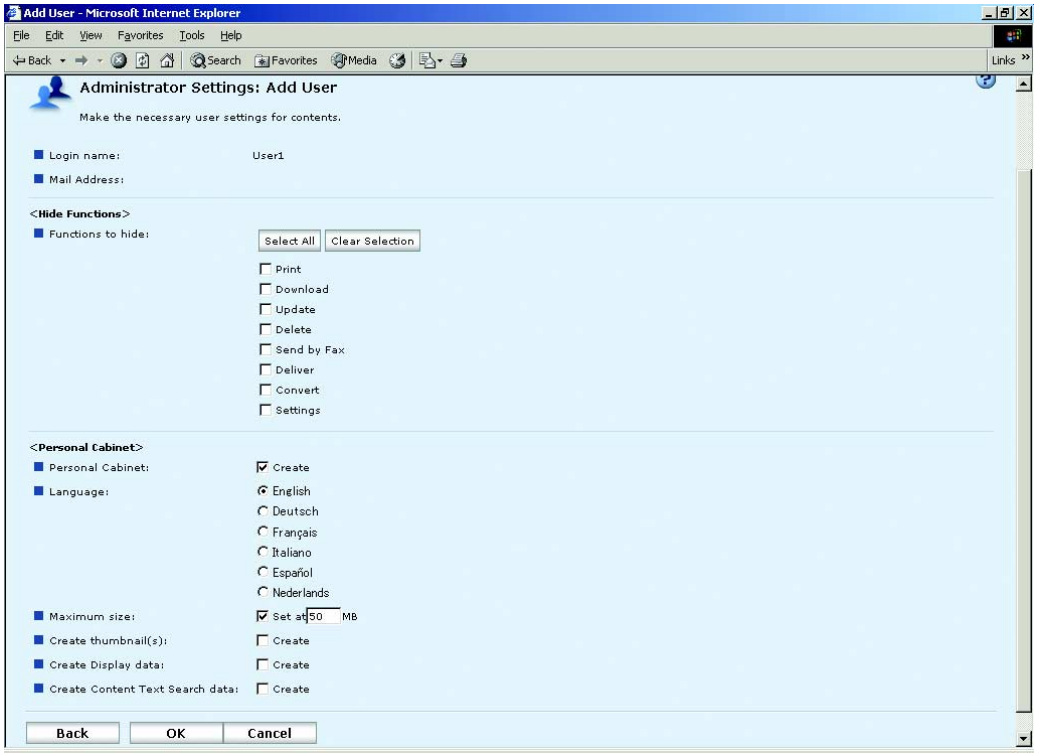


The **[Administrator Settings: Add User from List]** page appears.



8 **Select a user to be added, and then click [Next].**

The **[Administrator Settings: Add User]** page appears.

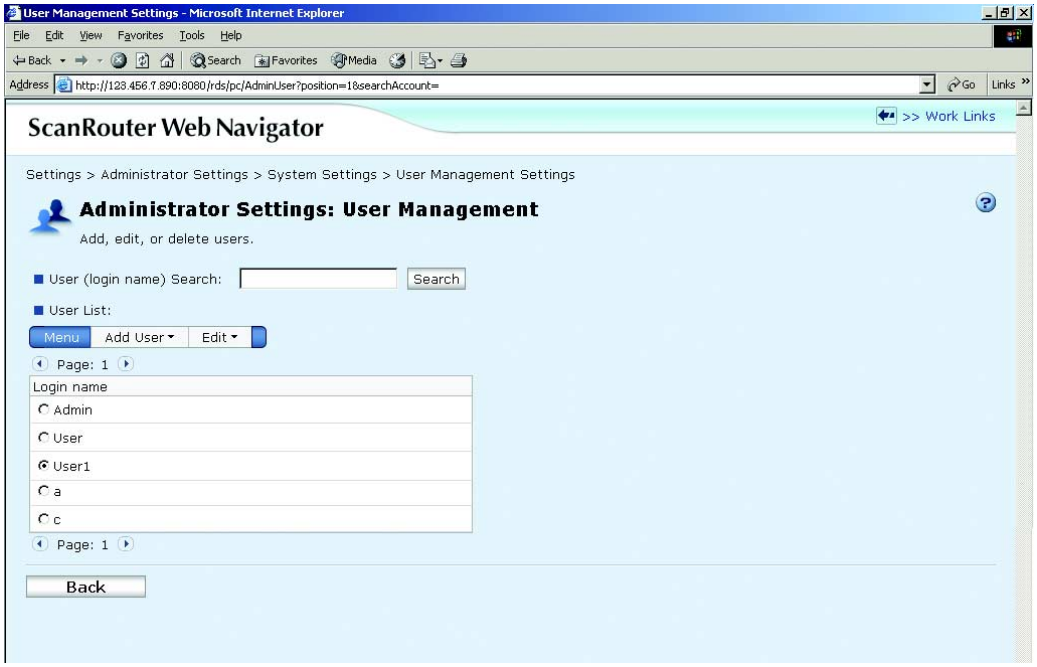


9 **Enter the settings of the user.**

10 **Click [OK].**

The **[Administrator Settings: User Management Settings]** page reappears.

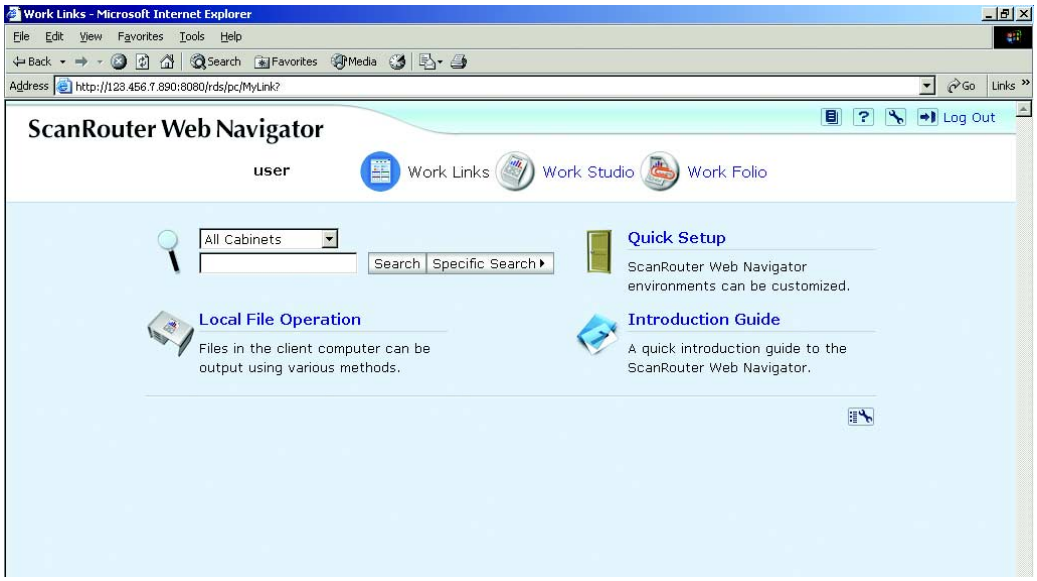
11 Check the added users are displayed in the added user list.



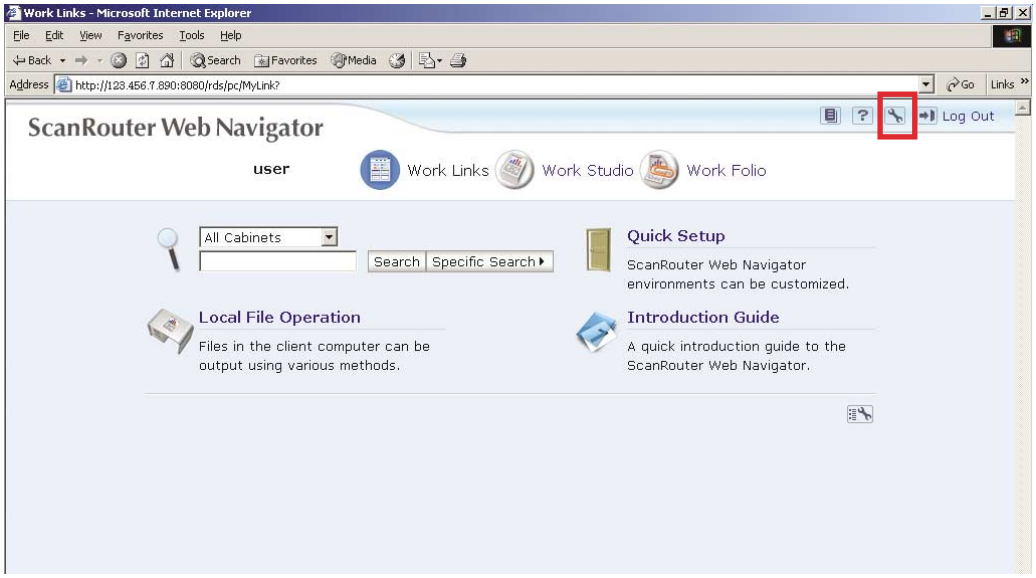
Making Settings for Document Management Service

Follow the procedure below to make necessary settings for the document management service you want to use.

1 **Use a Web browser to display the [Work Links] page of ScanRouter Web Navigator.**



2 **Click the [Settings] button in the header area.**



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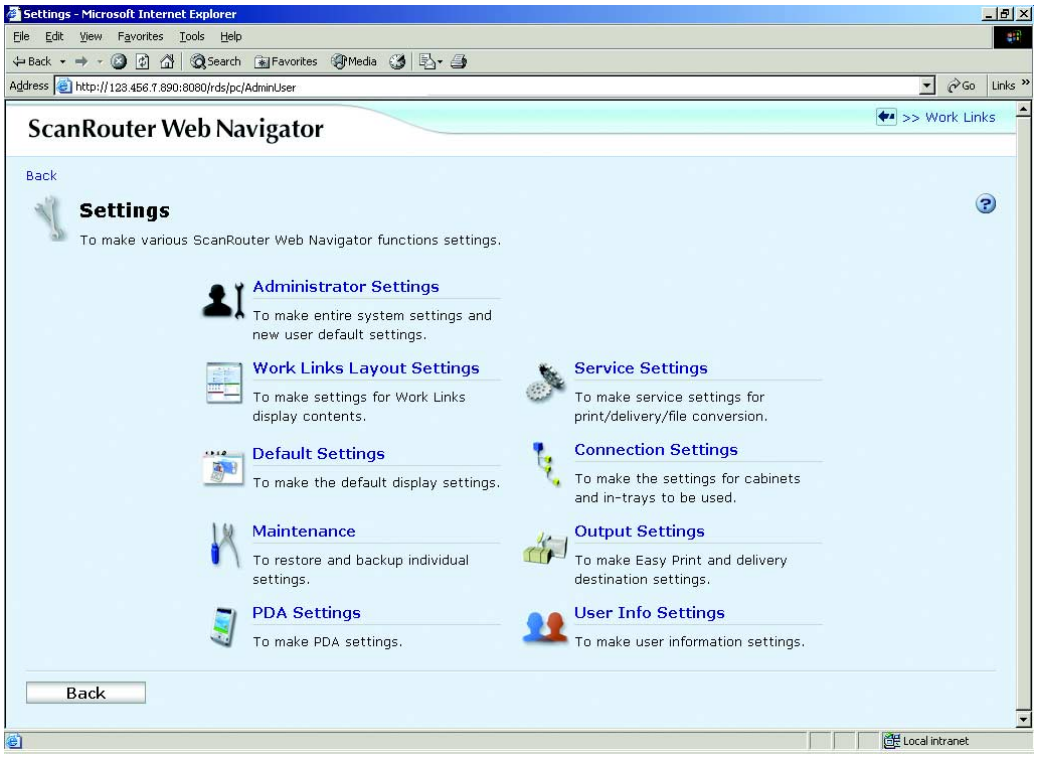
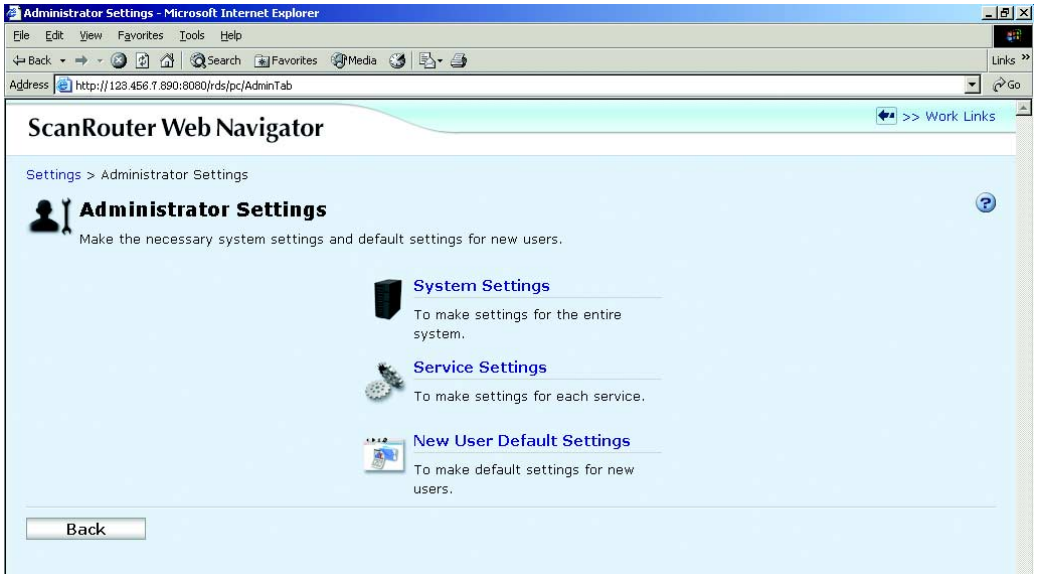
The **[Settings]** page appears.



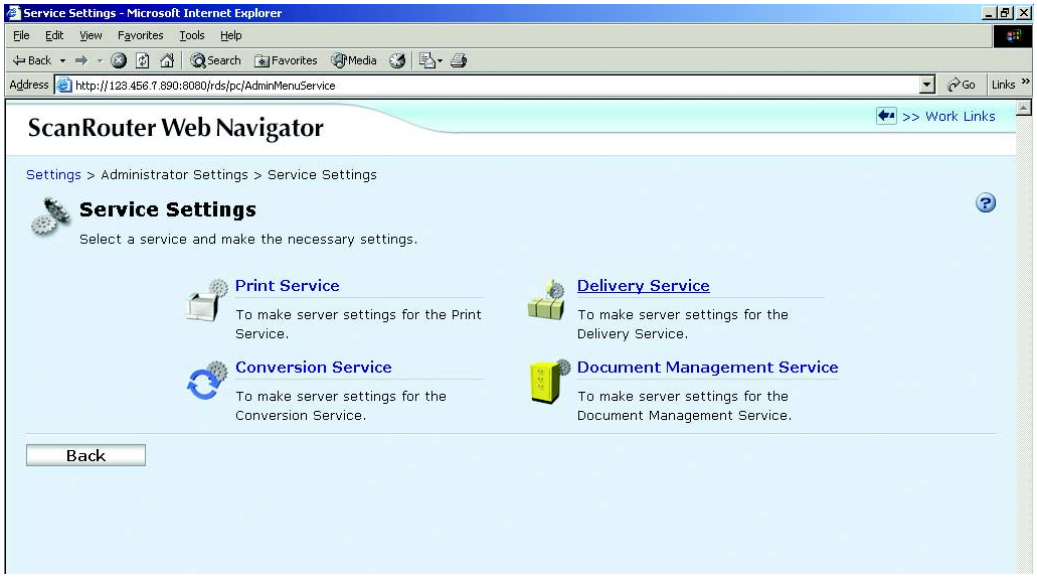
3 Click **[Administrator Settings]**.

The **[Administrator Settings]** page appears.



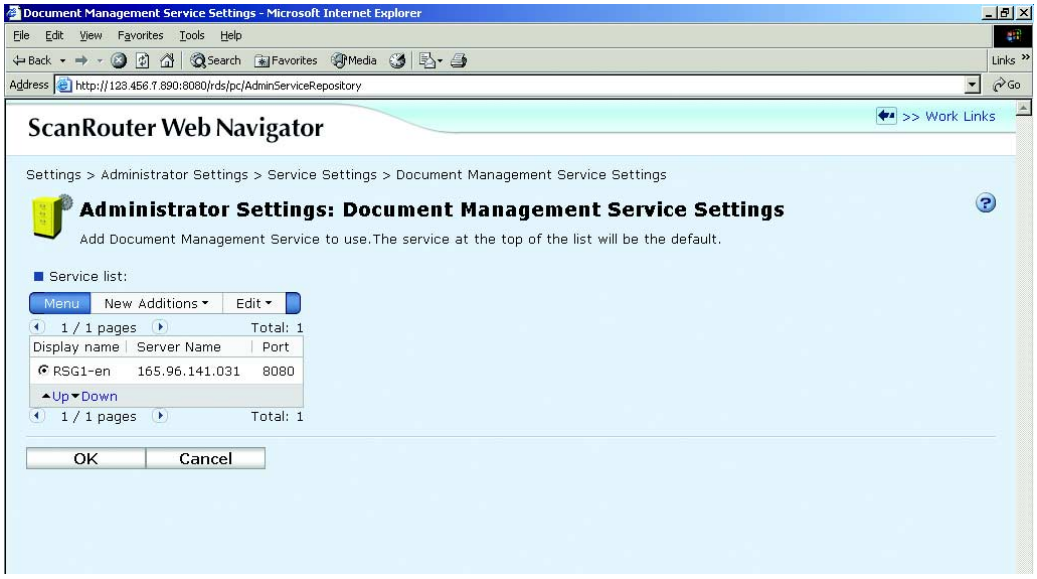
4 Click **[Service Settings]**.

The **[Service Settings]** page appears.

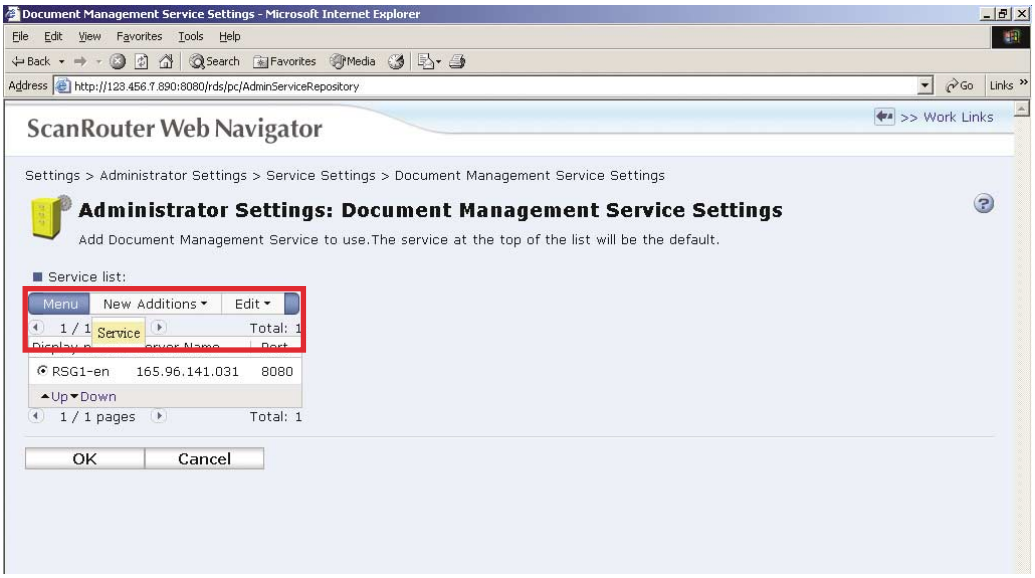


5 Click **[Document Management Service]**.

The **[Document Management Service]** page appears.



6 **On the [New Additions] menu, click [Service].**



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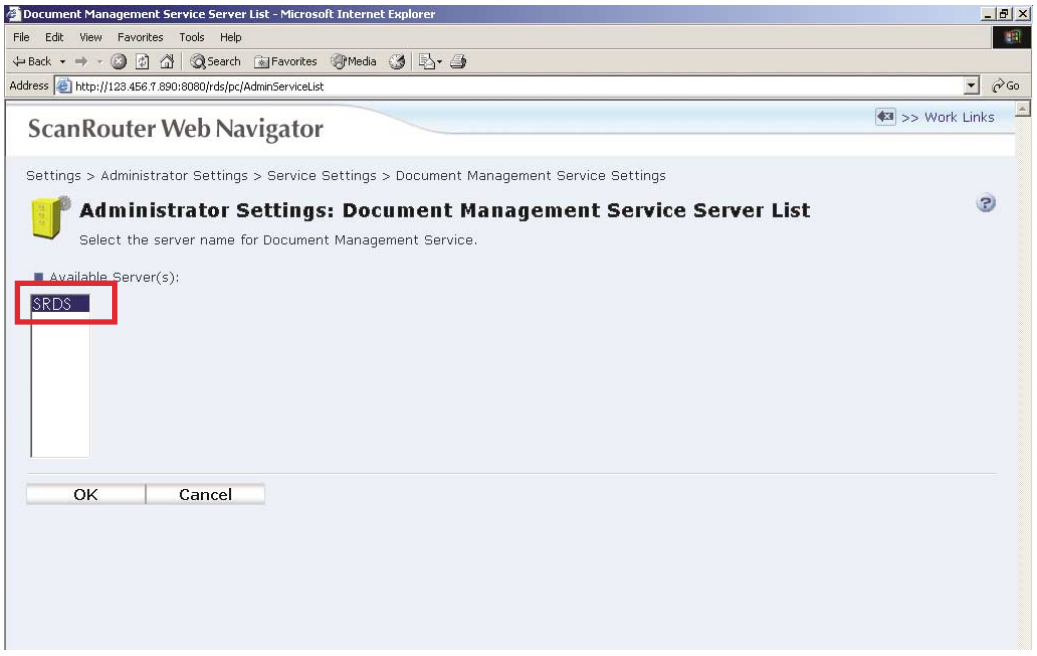
The **[Document Management Service]** page appears.

7 **Click [Browse] to display [Document Management Service Server List] page, and then select the document management server where documents are to be added.**



AEL014S

8 **Click [OK].**

The selected server name appears on the **[Document Management Service]** page.

9 **Enter the name to be displayed, and then click [OK].**

The **[Document Management Service]** page reappears.

Check the specified document management server is displayed in the service list.

10 **Click [OK].**

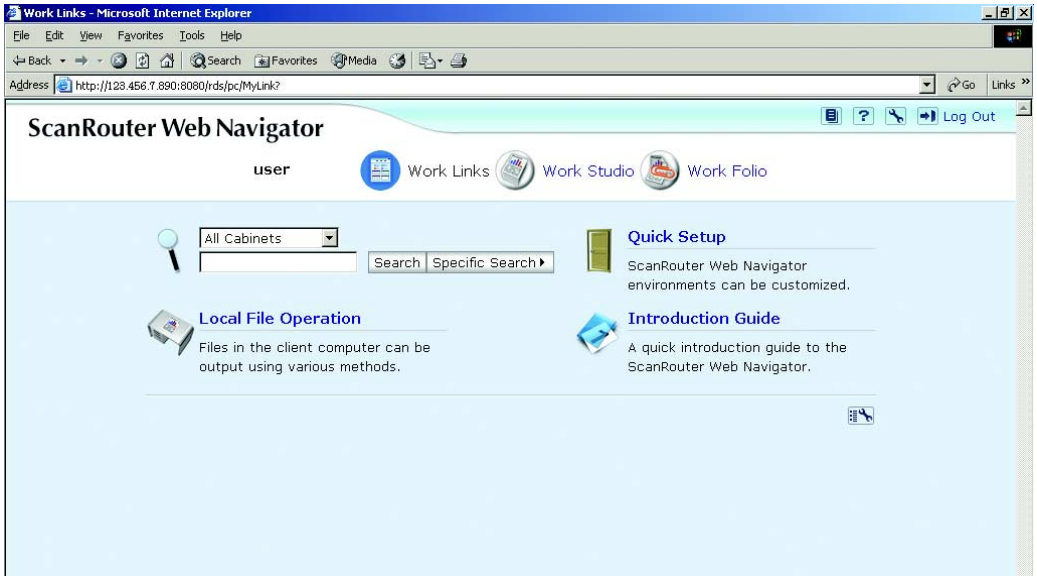
The **[Service Settings]** page reappears.

To return the **[Work Links]** page, proceed to click **[Back]**.

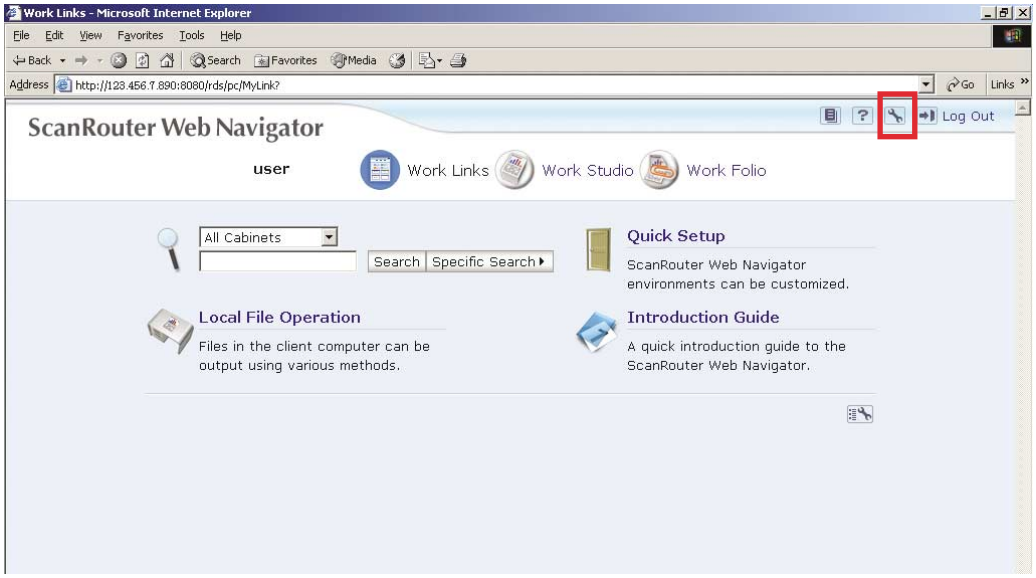
Adding Cabinets

Follow the procedure below to add ScanRouter DocumentServer cabinets.

1 **Use a Web browser to display the [Work Links] page of ScanRouter Web Navigator.**



2 Click the [Setting] button in the header area.



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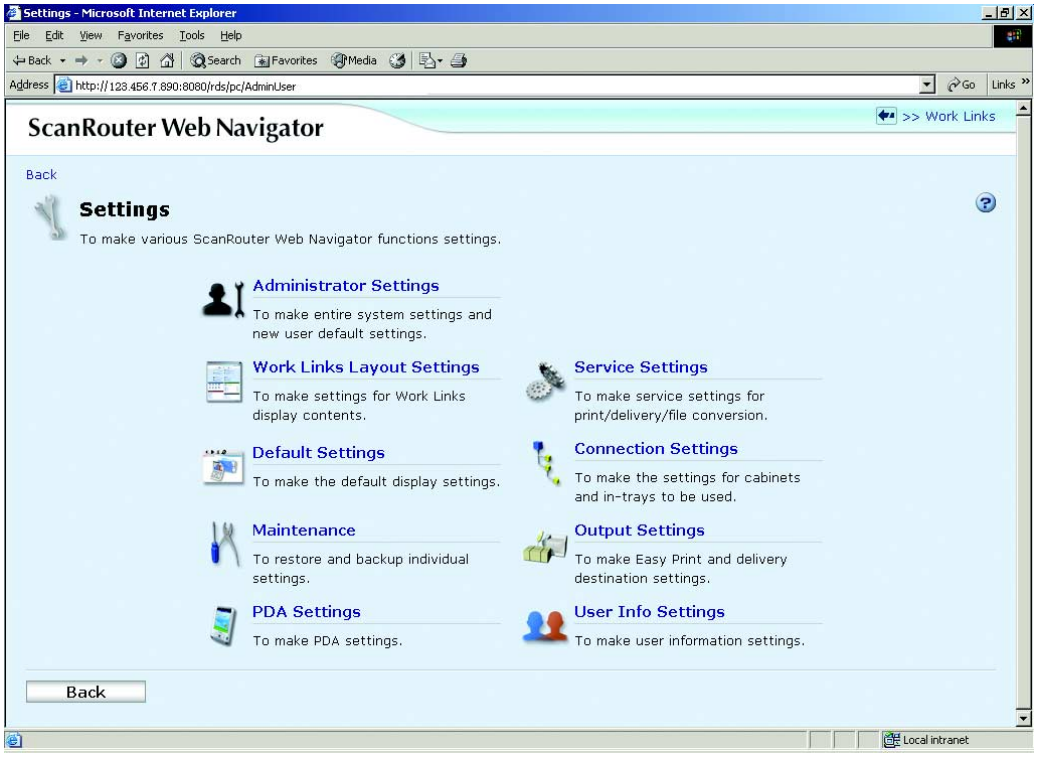
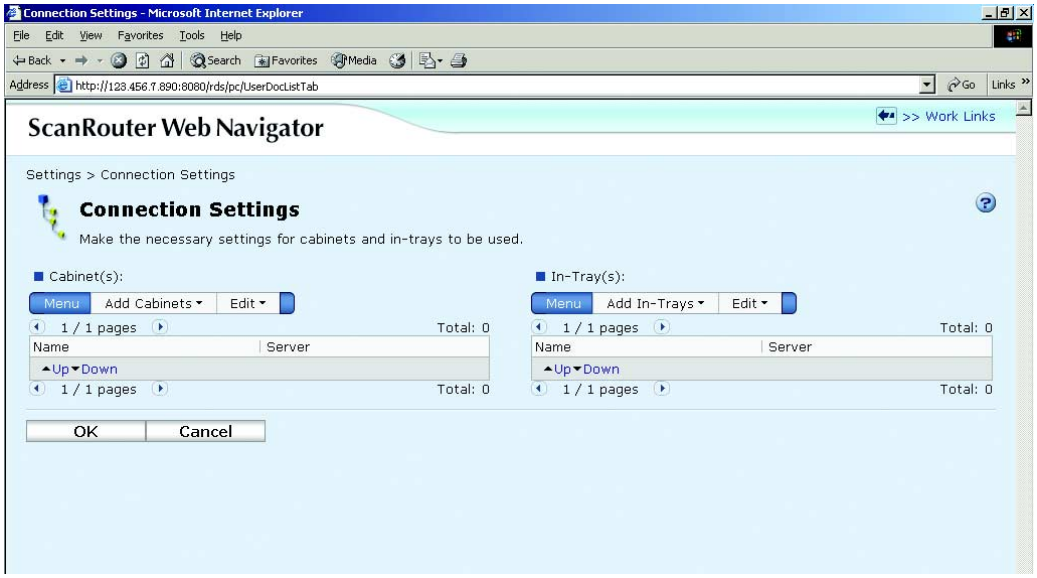
The **[Settings]** page appears.

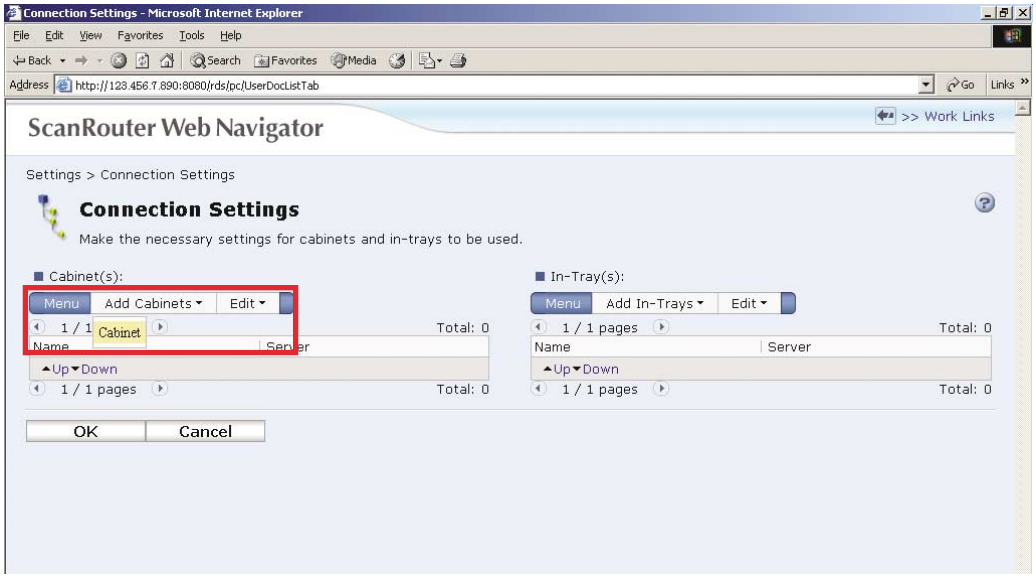


3 Click **[Connection Settings]**.

The **[Connection Settings]** page appears.



4 On the [Add Cabinets] menu, click [Cabinet].



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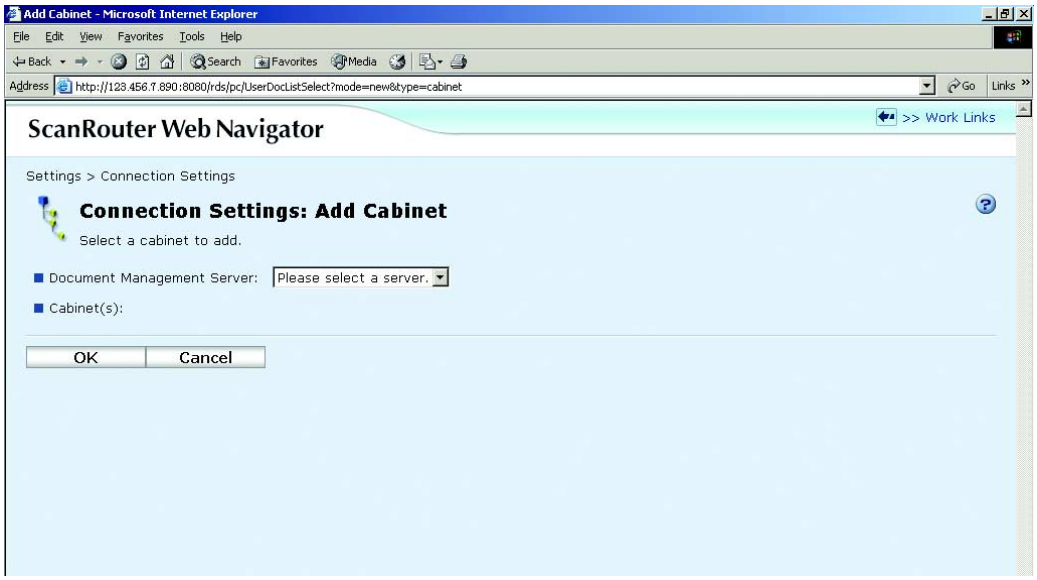
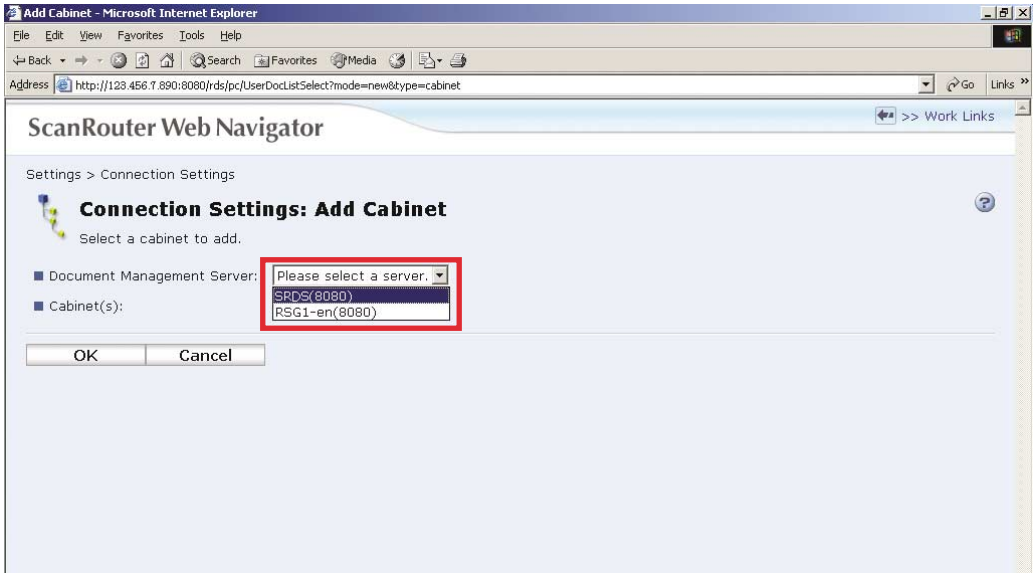
The **[Connection Settings: Add Cabinet]** page appears.



5 **Select the document management server to use in the list.**



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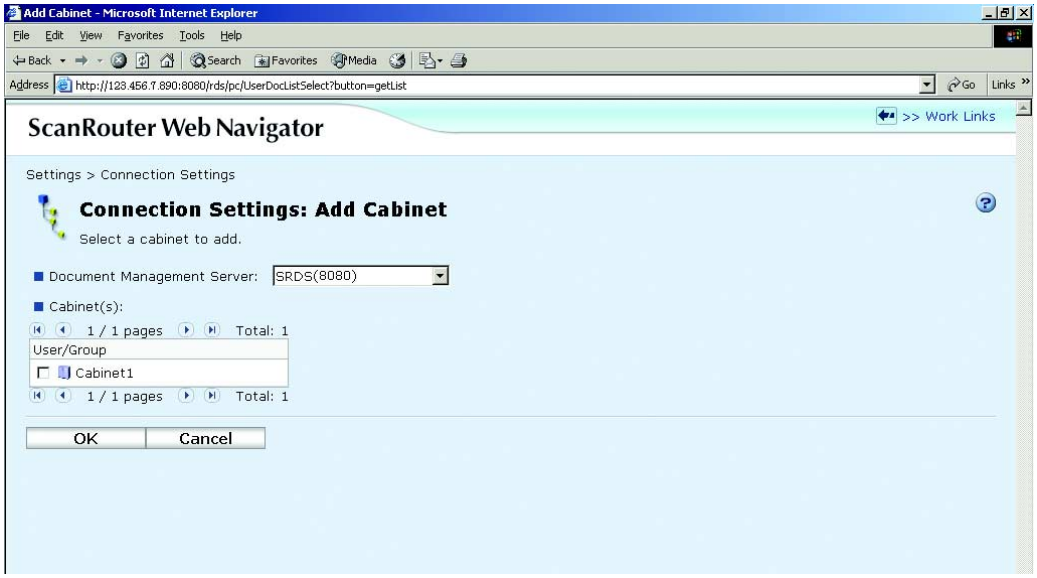
The **[Login]** dialog box for the selected server appears.

6 **Enter a user name and password, and then click [OK].**

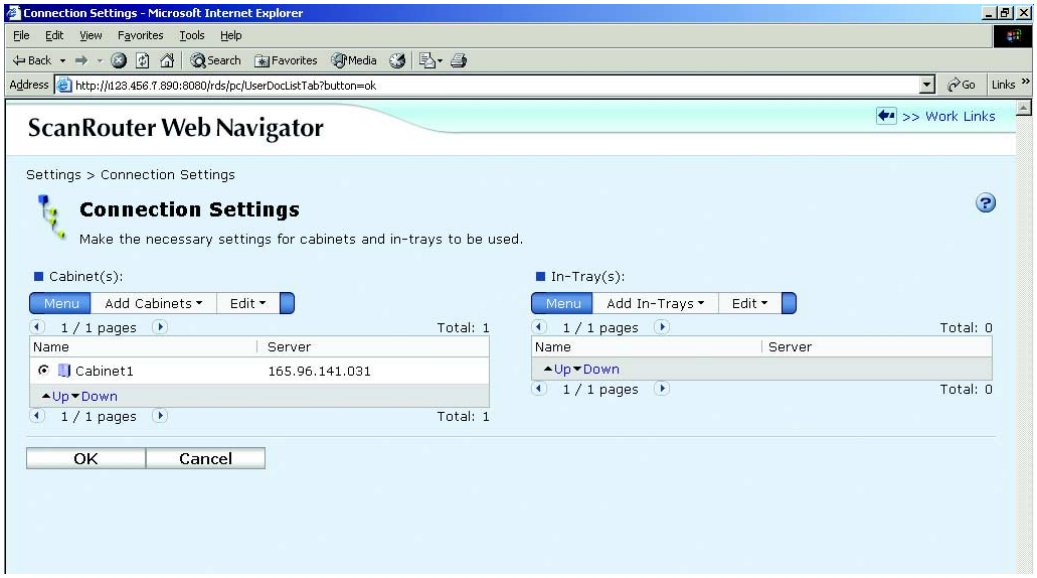
The **[Connection Settings: Add Cabinet]** page reappears.

A list of the cabinets added in the document management server appears.



7 **Select a cabinet to be added as a destination, and then click [OK].**

The **[Connection Settings]** page reappears. The selected cabinet is displayed in the list.



8 **Click [OK].**

The **[Settings]** page reappears.

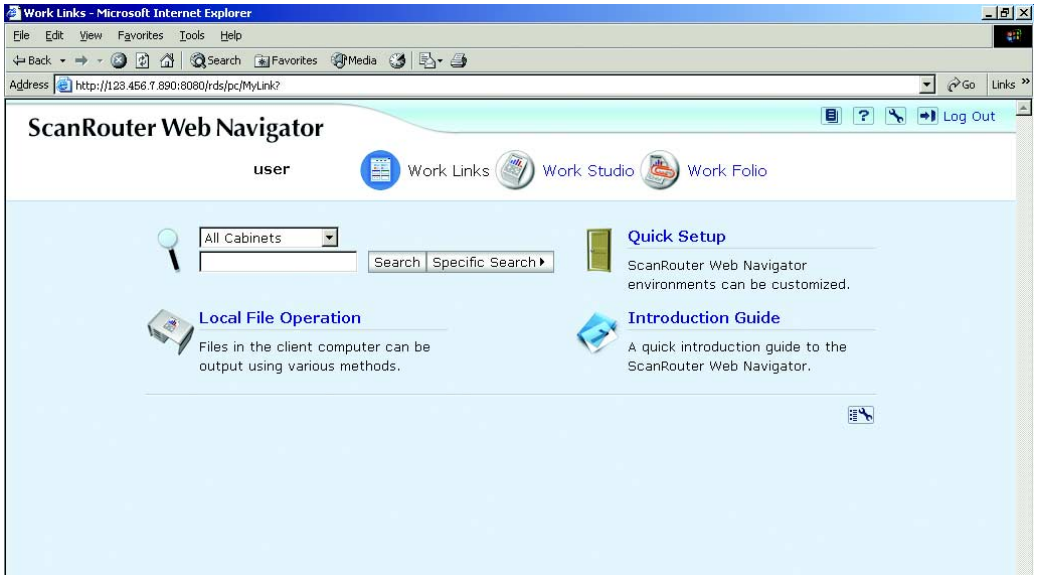
To return the **[Work Links]** page, proceed to click **[Back]**.

Adding Documents

Follow the procedure below to add a document to the registered ScanRouter DocumentServer cabinet.

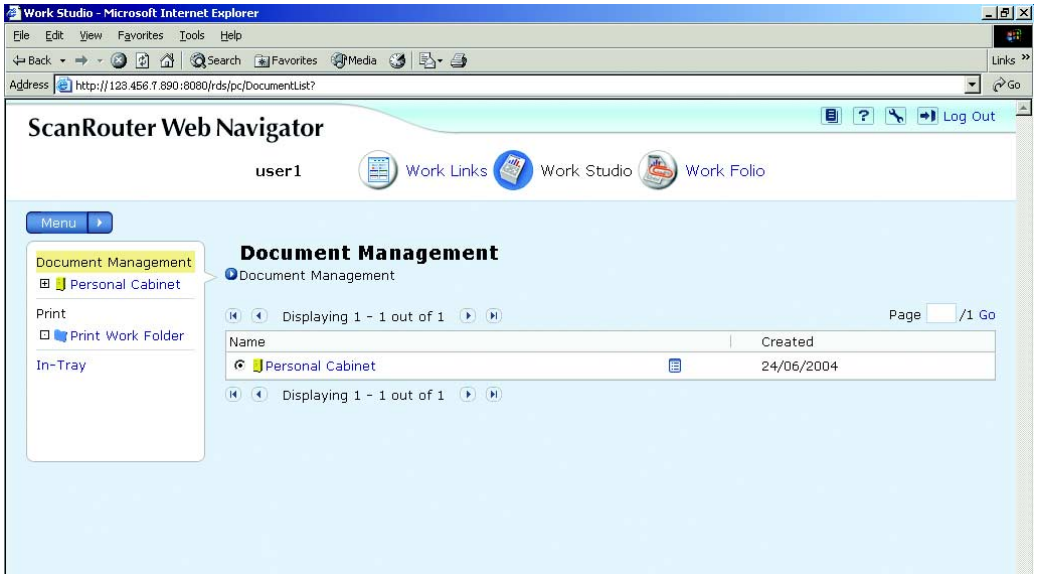
This section explains importing an existing file and adding it as a document.

1 **Use a Web browser to display the [Work Links] page of ScanRouter Web Navigator.**

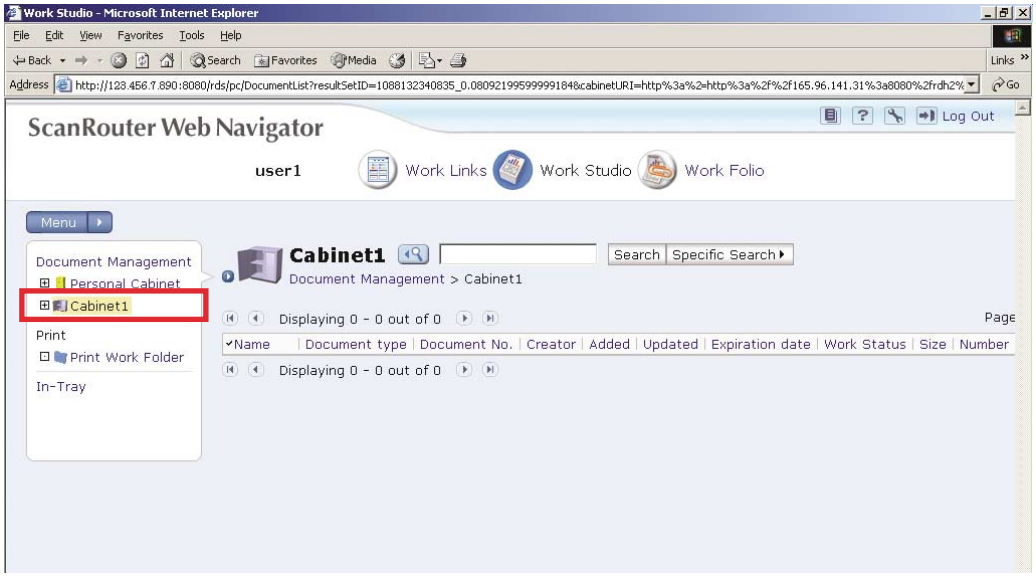


2 **Click [Work Studio].**

The **[Work Studio]** page appears.

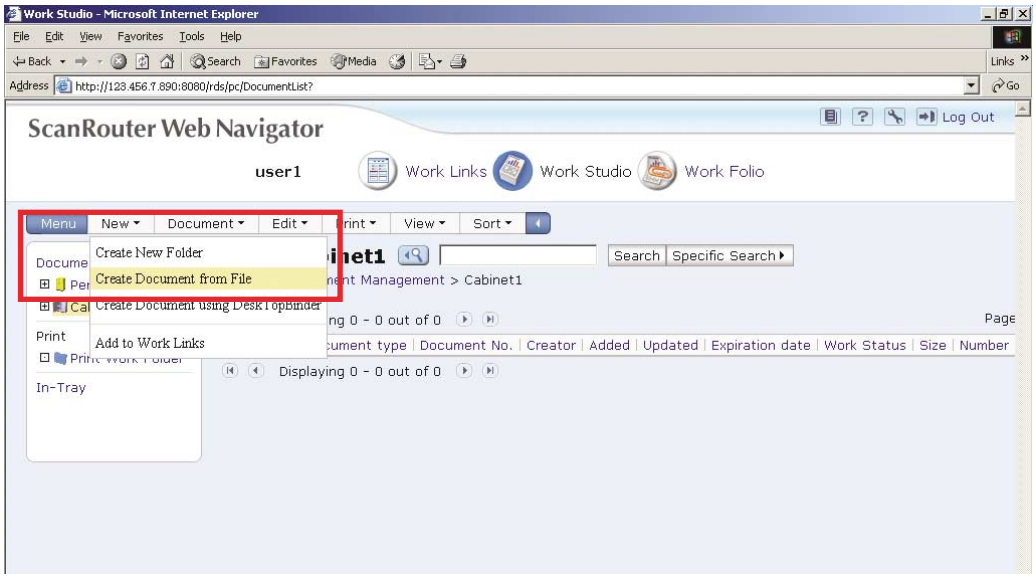


3 In the tree pane, select the cabinet where you want to add the document.



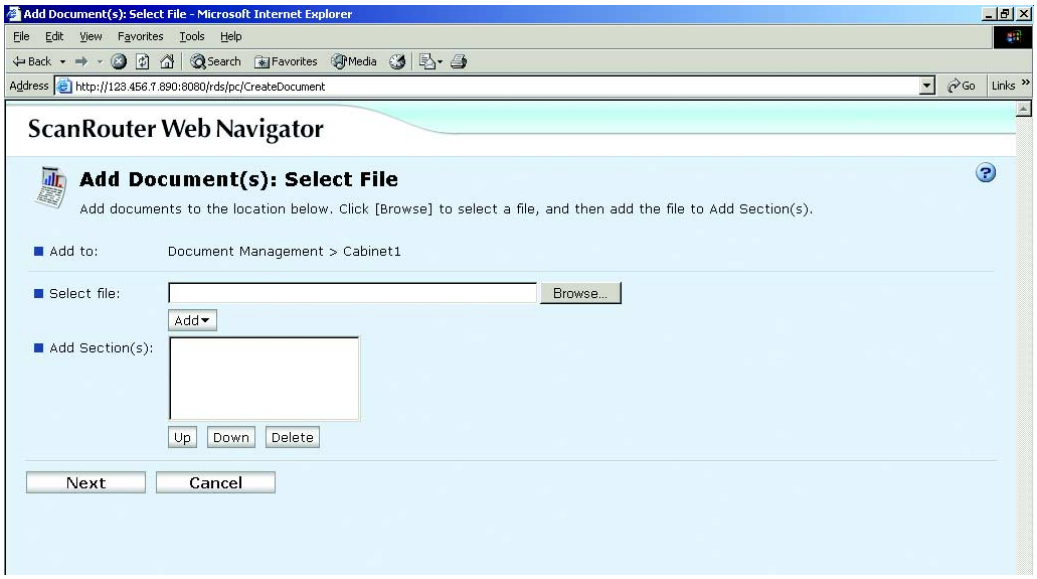
AEL017S

4 Click **[Create document from File]** on the **[New]** menu under **[Menu]**.



AEL018S

The **[Add Document(s): Select File]** page appears.



5 **Click [Browse], for the [Select file].**

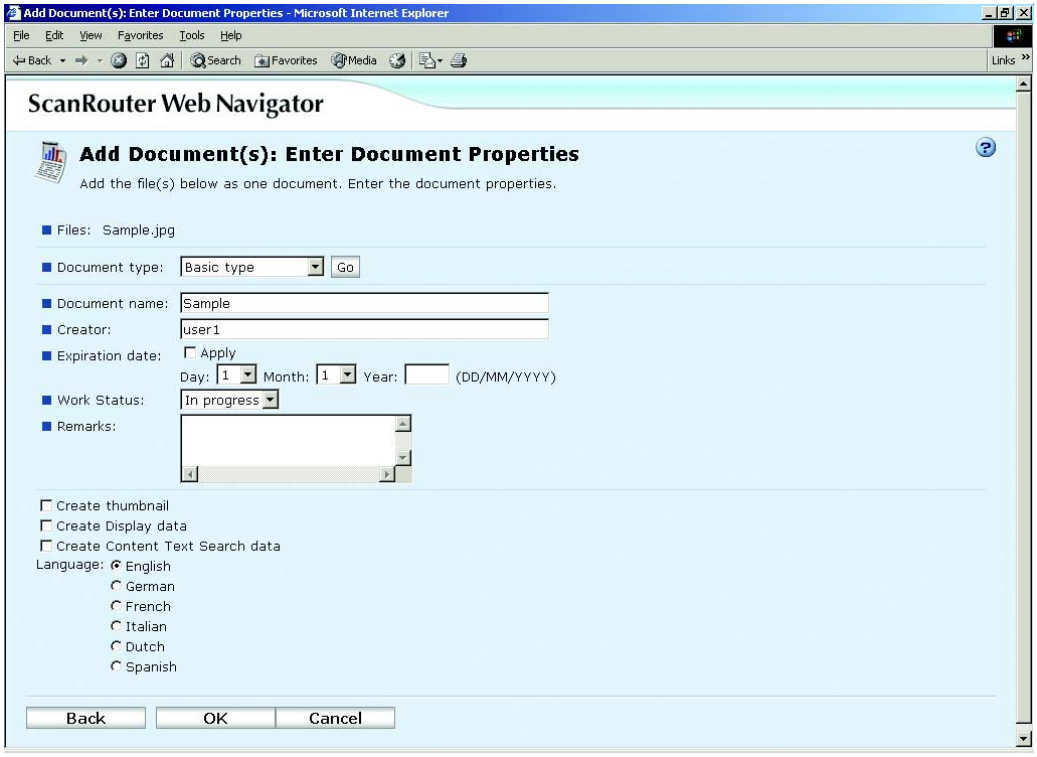
6 **Select the file to add, and then click [Open].**

7 **Click [Add].**

The selected file is displayed in the **[Add Section(s)]**.

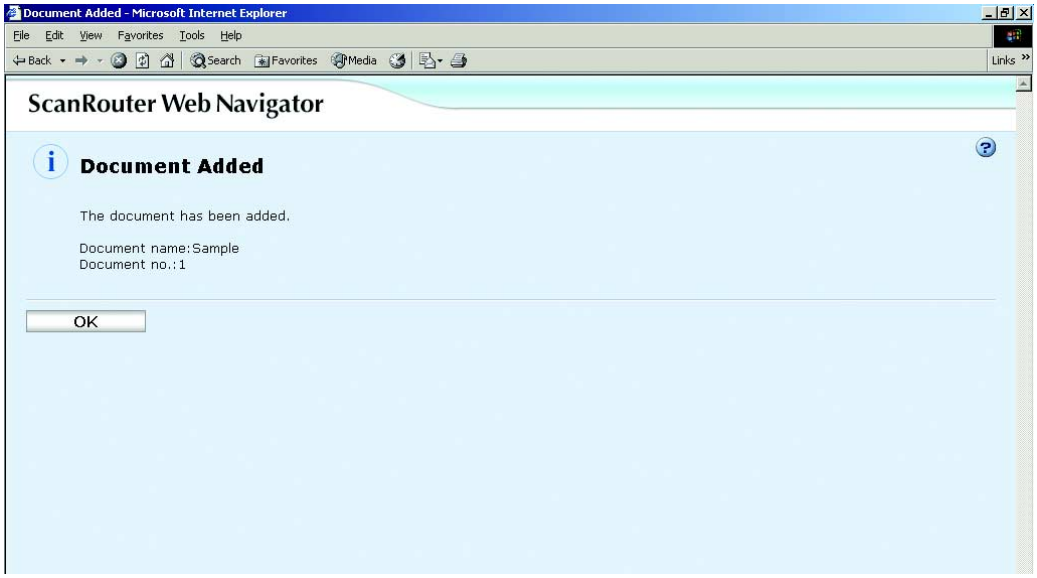
8 **Click [Next].**

The **[Add Document(s): Enter Document Properties]** page appears.



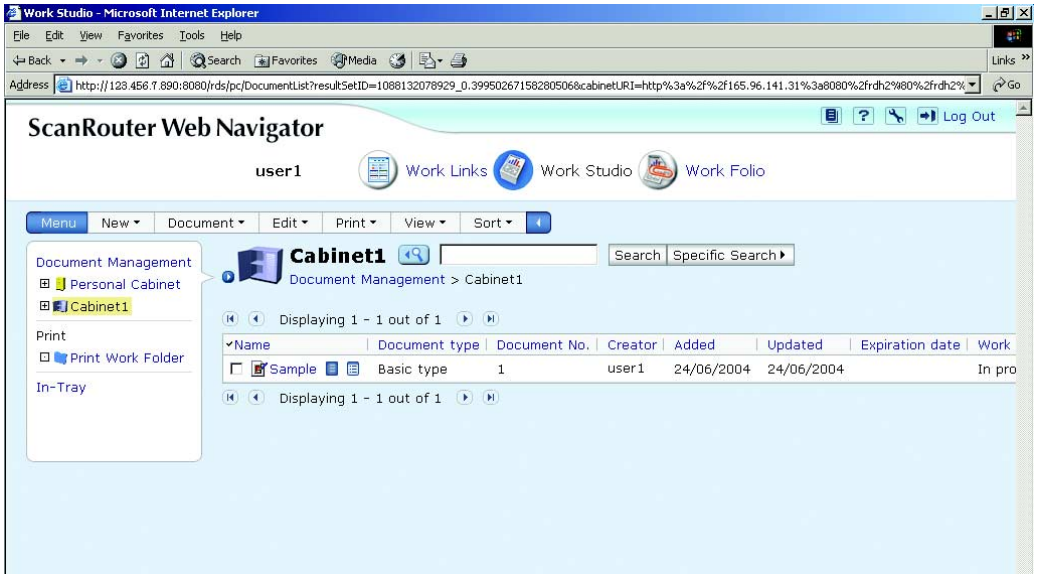
9 **Enter each item, and then click [OK].**

The **[Document Added]** page appears.



⑩ Click [OK].

The selected file is added as a document.



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