

eCopy ShareScan® OP

Version 3.0

Installation and Setup Guide for Send to eCopy (for Sharp)



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Introduction

About this guide

This guide is intended for administrators responsible for installing eCopy ShareScan® OP. It provides an overview of ShareScan OP and describes system requirements and installation procedures.

Further information

The ShareScan OP documentation set consists of the following documents:

- **eCopy ScanStand™ Assembly Instructions:** Provides information about assembling the ScanStand that is used with eCopy ScanStation.
- **ShareScan OP Installation and Setup Guide:** Provides information about important network prerequisites and guides you through the initial installation and setup process.
- **ShareScan OP Configuration Guide:** Provides information about licensing scanning devices, configuring general system properties, and configuring core connectors provided by eCopy, Inc.
- **ShareScan OP Help:** The Help files contain the same information that is in the configuration guide.



To get Help about eCopy ShareScan OP Administration from the ShareScan OP Administration Console, click **Help > Help Topics**. On the **Contents** tab, double-click **ShareScan OP Administration Console**. When the Services Manager is selected, you can also click the Help button on the console toolbar.



To get Help on a connector, right-click the connector in the console tree and then click **Connector Help**. You can also click the Help button on the toolbar.

Obtaining technical support

Technical support is available to registered users from eCopy during the warranty period or for the duration of your software support and maintenance agreement. Contact your supplier for details.

When calling eCopy Technical Support, please be at your computer with your system powered on and be prepared to provide the technical support representative with the following information:

Item	Description
eCopy serial number and product key	These numbers are printed together on stickers. Depending on your eCopy product, you may find these numbers in one of the following locations: the back of the eCopy software CD case, the eCopy ScanStation PC, the bottom of the eCopy software packaging box, the shipping box, and the inside packaging box.
eCopy software version	The version of the eCopy software you are using. For example, on Windows XP, you can find this information by clicking Help > About (in eCopy Desktop or eCopy ShareScan OP Administration) or by clicking the About tab (in eCopy ShareScan Administration). Examples: Version 1.1.0.4, Version 8.5 (Build 0.7)
Operating system and network	The version of the operating system that the eCopy software is running on, along with any network information that you can provide.
Third-party products	A list of third-party applications that are used in conjunction with eCopy products, such as Microsoft® Exchange, Microsoft Outlook®, Lotus Notes, Captaris™ RightFax™, Interwoven™ iManage™, and Lotus® Domino.Doc.
Problem description	A detailed description of the problem, the steps needed to reproduce it, and the exact wording of any error messages.
Contact information	Dealer contact information as well as your contact information (for follow-up). Please include name, e-mail address, and telephone number.

US/North America

Technical Support hours are Monday through Friday, 6:00 A.M. to 5:30 P.M. EST.

Phone: +1 (603) 881-4450 (select option 8)

E-mail: support@ecopy.com

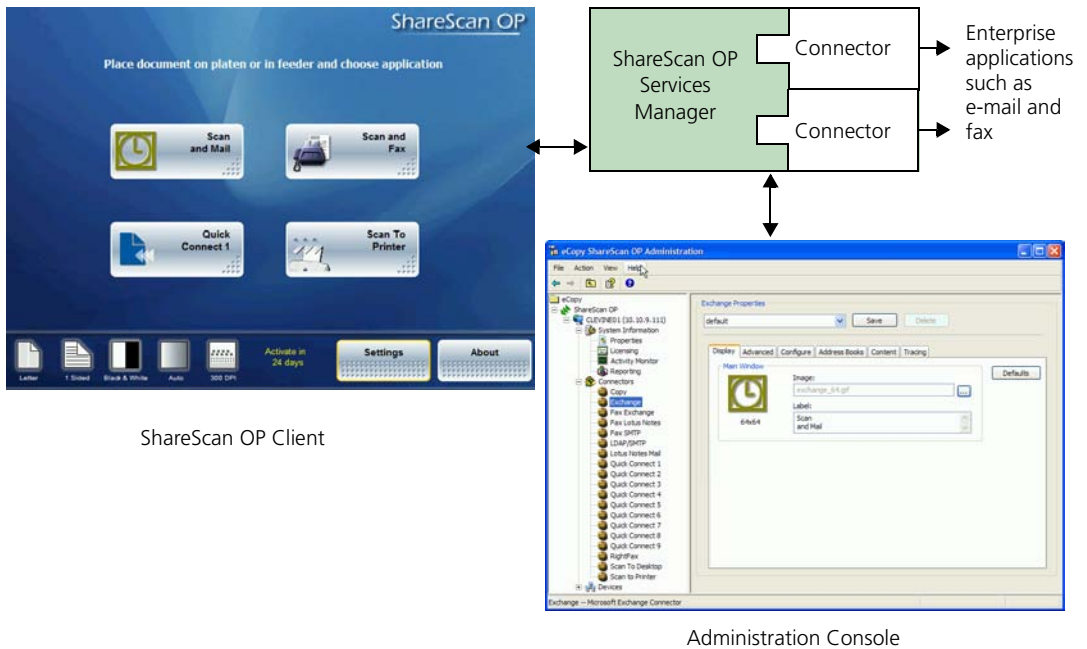
Outside North America

Please contact your local dealer or national sales organization.

ShareScan OP overview

eCopy ShareScan OP (Open Platform) extends the capabilities of digital copiers and scanners. A complete system includes the following components:

- A client.
- A PC running the ShareScan OP Services Manager and one or more connectors.
- An Administration Console.



ShareScan OP Client

Administration Console

The **ShareScan OP client** is installed on the ScanStation. It displays the user interface and handles user input. All information, including the raw scanned image file, is passed back to the eCopy ShareScan OP Services Manager for processing.

The **ShareScan OP Services Manager** and the **connectors** are installed on a network computer running Microsoft® Windows® 2000 or Windows XP. (No special server hardware is required.) The Services Manager handles requests from the client and processes the image file. It returns user interface forms and thumbnail images to the client and creates the master image file according to the selected options (file type, searchable text, encryption, etc.). The connectors provide connectivity to various back-end applications, such as e-mail and fax servers. For example, the Exchange connector enables users to scan documents and e-mail them using Microsoft Exchange.

The **Administration Console** is a Microsoft Management Console (MMC) snap-in that enables system administrators to configure and administer ShareScan OP Services Managers, connectors, services, and scanning devices.

Installation overview

Installing ShareScan OP on a ScanStation includes the following tasks:

- Installing the Universal Pointing Device Driver (UPDD), which is also called the touch screen driver. You do not need to install this driver if you have an existing ScanStation on which the driver was pre-loaded.
- Installing the ShareScan OP Services Manager, the Administration Console, and the client.
- Licensing and configuring the scanning device used with the ScanStation.
- Setting up your multifunctional product (MFP) device for use with the ScanStation OP Send to eCopy feature.

Installation Environment

Overview

eCopy ShareScan OP is a client/server-based application. The ShareScan OP Services Manager on a ScanStation supports a single digital copier or scanner.

Network environment

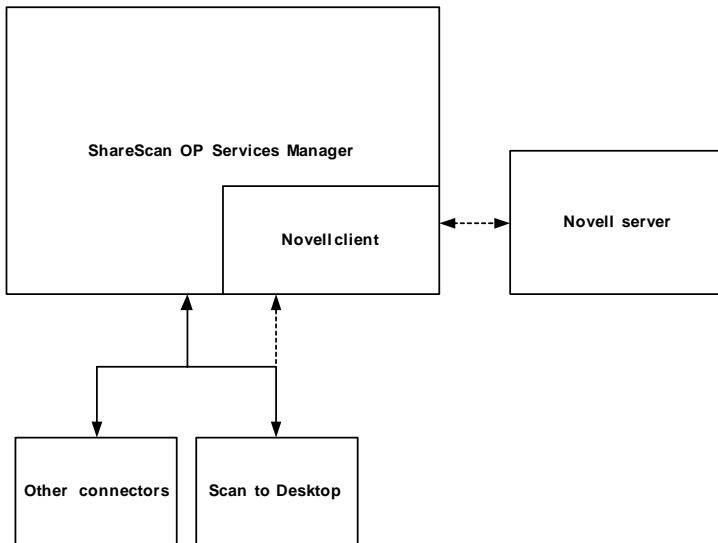
eCopy ShareScan OP runs on domain-based networks and in workgroup environments. In a domain environment, static or dynamic IP addressing is supported. In a workgroup environment, ShareScan OP Services Managers must have static IP addresses.

A ScanStation is networked to a scanning device. If the scanning device is not on the same network segment as the ScanStation, there can be performance issues.

For information about Novell support, see "Novell support" on page 6.

Novell support

When Novell client software is installed on the computer that is running the ShareScan OP Services Manager, some eCopy ShareScan OP connectors (Quick Connect, Scan to Desktop, and LDAP/SMTP) can use a back-end Novell server for authentication and temporary file storage (of scan inboxes).



To communicate with a Novell server, Novell client software must be installed on the Services Manager PC. Although Windows includes the Microsoft Client for NetWare Networks, eCopy has not tested ShareScan OP 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 and Scan to Desktop connector to function properly.

Installing the UPDD driver

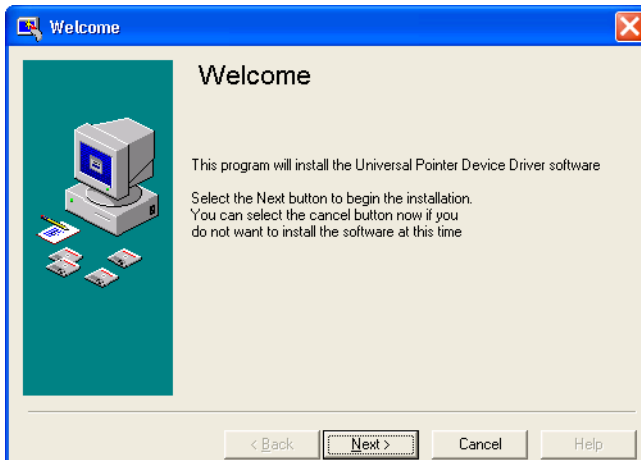
Overview

To enable the touch screen on the ScanStation, you must install the Universal Pointing Device Driver (UPDD). If you are installing on an existing ScanStation, you may not need to calibrate the touch screen.

Installing the UPDD driver

To install the driver:

- 1 Insert the eCopy ShareScan OP CD (Disk 1) in the drive.
- 2 When the launch screen appears, click **Drivers** and then click **Explore Touchscreen Drivers**.
- 3 Open the folder that corresponds to your operating system (Win2K or XP) and then run **Setup.exe**.



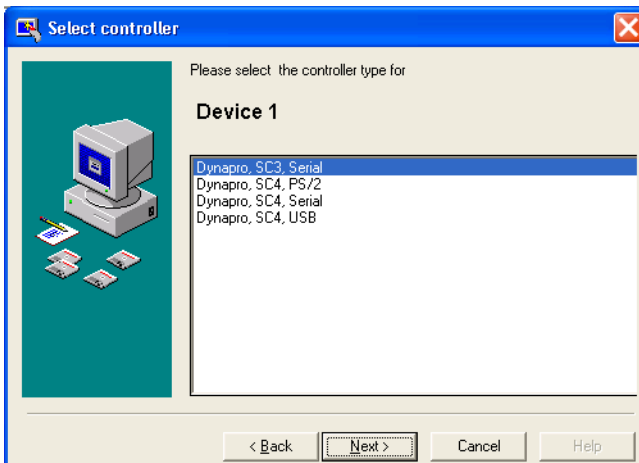
- 4 Click **Next**.
- 5 In the License Agreement window, read the agreement and then click **Next**.

8 | Installing the UPDD driver

- 6 Follow the instructions on subsequent screens until the Number of Devices window appears. Then enter the number of devices that will be attached to the system and click **Next**.

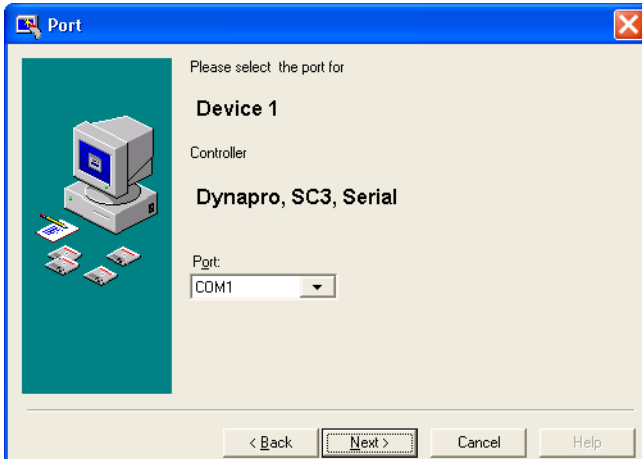


- 7 Select **Whole Desktop** as the logical desktop segment and then click **Next**.

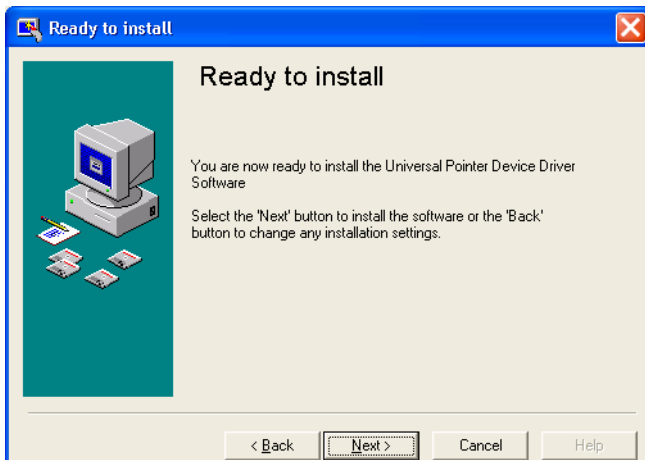


- In the list of controller types, select **Dynapro, SC3, Serial** (the first item in the list) and then click **Next**.

Important! Do not select any of the other items.



- In the Port list, select **COM1** and then click **Next**.



- Click **Next** to finish the installation.

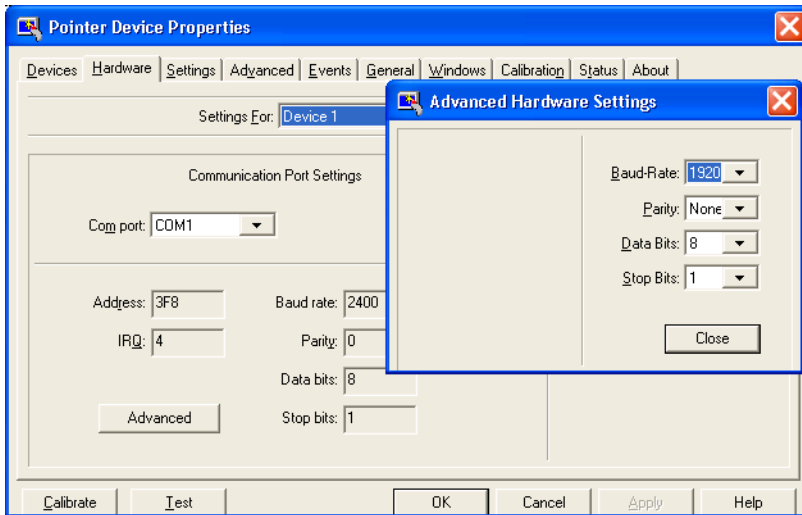
Configuring the touch screen

You must configure and calibrate the touch screen *only* if you have a new ScanStation.

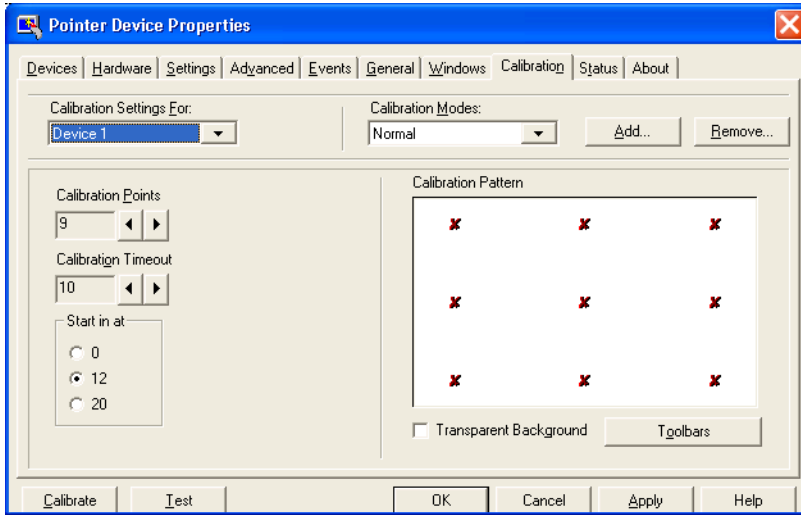
Note: Older ScanStations use a baud rate of 2400, while the new ScanStations used a baud rate of 19200. To determine whether you have an old ScanStation, locate the model number on the outside of the ScanStation PC. If the model number is "D530" or "D510", you have an old ScanStation.

To configure and calibrate the touch screen (new ScanStations only)

- 1 Click **Start > Settings > Control Panel** and then double-click **Pointer Devices**, or click **Start > Program Files > UPDD**.
- 2 On the **Hardware** tab, click **Advanced**. Change the baud rate to **19200**, click **Close**, and then click **Apply**.



- 3 On the **Calibration** tab, set the number of calibration points to **9**. (The default is 2.)



- 4 Click **Calibrate**.
- 5 Follow the calibration instructions on the touch screen.

Installing eCopy ShareScan OP

Overview

The eCopy ShareScan OP Setup program installs the following components:

- Client
- ShareScan OP Services Manager
- ShareScan OP Administration Console
- One or more connectors

Installing eCopy ShareScan OP

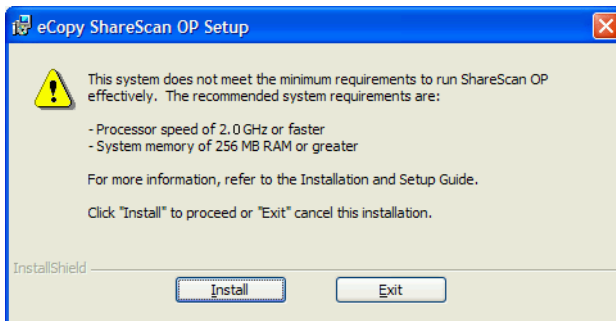
To install the software:

- 1 Insert the eCopy ShareScan OP CD (Disk 1) in your drive. When the launch screen appears, click **Install ShareScan OP**.



14 | Installing eCopy ShareScan OP

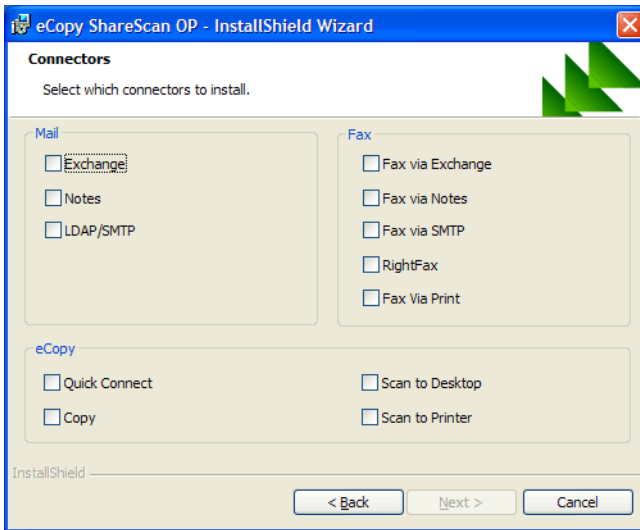
- 2 Click **Next**. If your computer does not meet the minimum requirements, Setup displays the following message:



- 3 Click **Install** to proceed. Setup displays the Welcome screen again.
- 4 Click **Next**. The Components screen lists all the components that Setup will install.



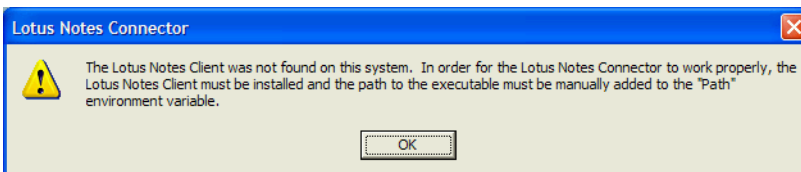
5 Click **Next**.



6 Select the connectors you want to install and then click **Next**.

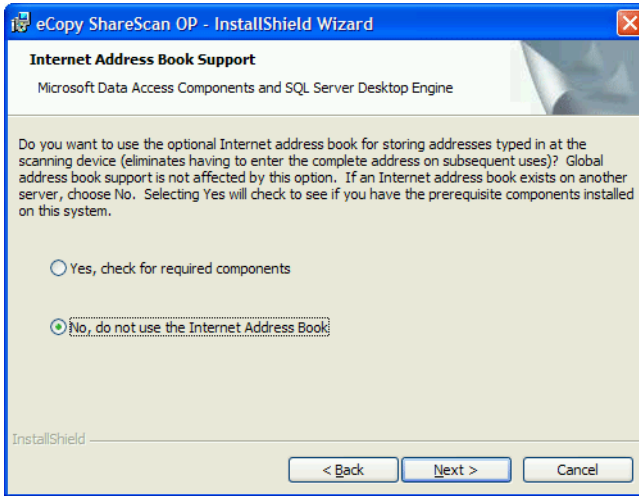
Note: While you can install all the connectors, you can use Copy only on an eCopy-enabled device with an embedded client and Fax via Print only on an eCopy ScanStation.

If you selected a Lotus Notes e-mail or fax connector and the Lotus Notes client is *not* yet installed on the computer, Setup displays the following message. Click **OK** to continue the installation.



If you selected an e-mail or fax connector, the Internet Address Book Support window opens.

Note: The Internet address book stores e-mail addresses and fax numbers manually entered at the scanning device or ScanStation, eliminating the need to enter the complete address or fax number on subsequent uses. ShareScan OP uses Microsoft SQL Server Desktop Engine (MSDE 2000) to store Internet e-mail addresses and fax numbers.

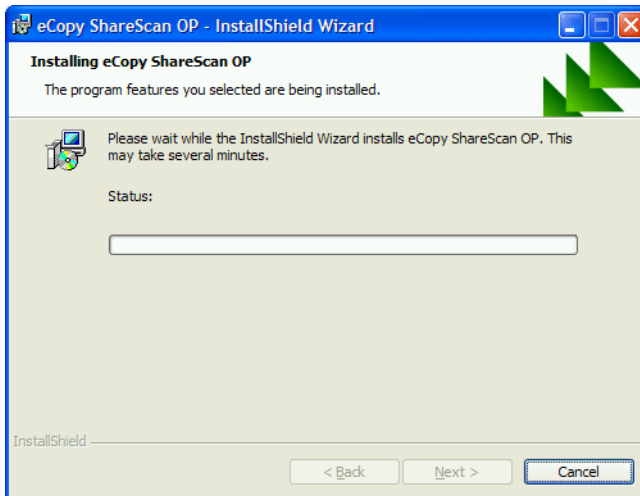


Note: For information about installing the required components, see the “Installing MSDE from the setup launcher” section in the *eCopy ShareScan OP Configuration Guide*. Even if there are multiple ShareScan OP Services Managers on your network, you need only one copy of MSDE.

If you do not plan to install the address book database on this computer, select **No** and then click **Next**. Then proceed to step 6.

If you plan to install the address book database, select **Yes** and then click **Next** to check for the required components on your computer. Setup displays a message. After reading the message, click **OK** and then click **Next**.

- 7 When the Ready to Install screen appears, click **Install**.



- 8 When the installation is complete, click **Finish**.

Licensing and configuring ScanStation OP

Overview

You license and configure the product from the ShareScan OP Administration Console. This process involves the following tasks:

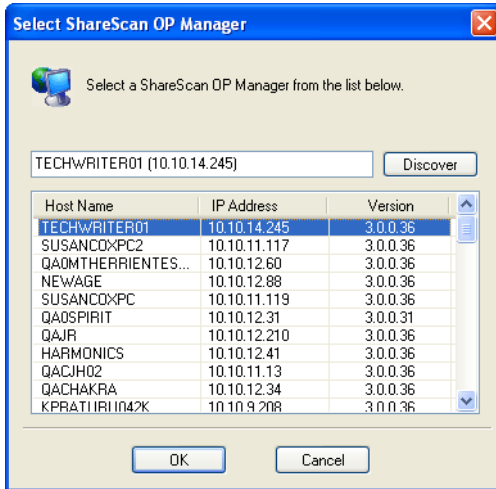
- Starting eCopy ShareScan OP Administration and selecting your ShareScan OP Services Manager.
- Licensing a ScanStation by performing the following tasks:
 - > Adding the appropriate product key to the local license database.
 - > Activating the product key by obtaining license codes from eCopy.
- Configuring one or more connectors by performing the following tasks:
 - > Configuring a profile (for each connector that you want to use).
 - > Enabling one or more connectors for use with a device.
- Setting up a supported multifunctional product (MFP) device that you plan to use with ScanStation OP's Send to eCopy feature.

This chapter provides enough information to complete the basic licensing and configuration process. For more detailed information, refer to the *eCopy ShareScan OP Configuration Guide* (or to the Administration Console Help).

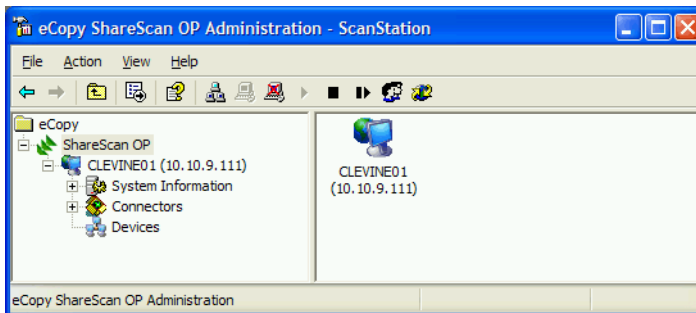
Licensing the scanning device

To license the scanning device:

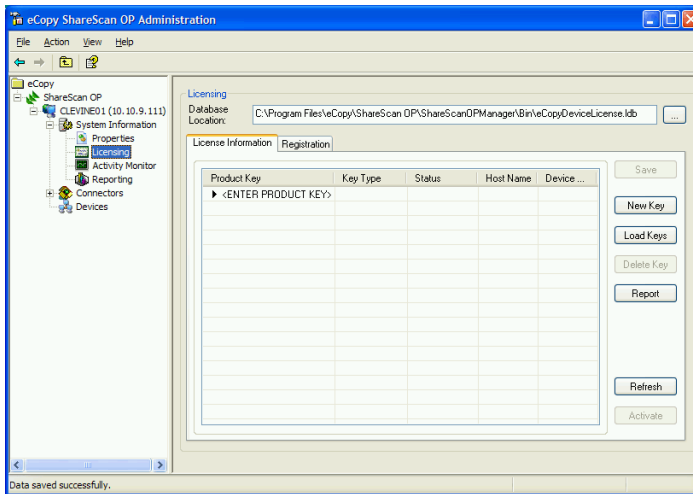
- 1 Click **Start Programs > eCopy Applications > ShareScan OP Administration**.



- 2 Select your ShareScan OP Services Manager and then click **OK**. The Administration Console opens. If you installed ShareScan OP on a ScanStation, the title bar includes "ScanStation".



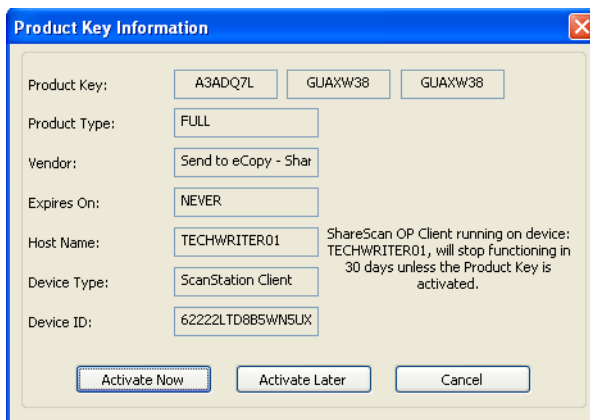
3 Double-click **System Information** and then click **Licensing**.



4 Enter the product key using either of the following methods. (If you received the key in electronic form, you may want to copy and paste it.)

- > Click **New Key** and enter the key (manually or by pasting a copied key).
- > Click **<ENTER PRODUCT KEY>** to make the edit box active, enter the key, and then press ENTER.

When you have added the product key, the Services Manager displays product key information.



Configuring a connector

This section describes the basic process of configuring a connector. To complete the installation and setup process, you may want to configure Scan to Printer, which has fewer settings to configure than other connectors. Refer to the Configuration Guide or the online Help for detailed information about configuring each connector.

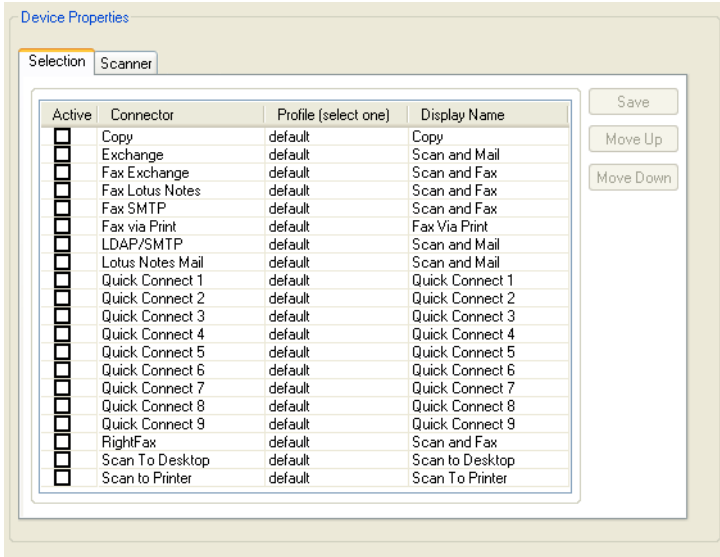
To configure a connector:

- 1 In the console tree, click **Connectors**.
- 2 Double-click the connector that you want to configure.
- 3 Specify the connector's settings.
- 4 Click **Save** to save the settings in a connector profile. Leave "default" as the name and then click **Save**.

Enabling a connector

To enable a connector:

- 1 In the console tree, click **Devices** > <ScanStation_name> > **Properties**. The Device Properties screen lists all the connectors that you installed.

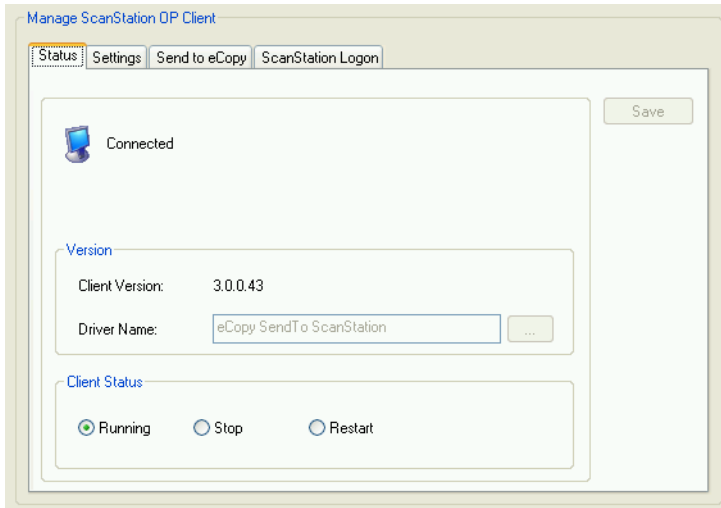


- 2 Select the check box in the Active column next to each connector that you want to enable. (You cannot enable a connector until you create a profile for it.)
- 3 In the Profile column, select the desired profile (if you have created more than one).
- 4 Click **Save**. When you run the ScanStation client, it will display a button for each active connector.

Running the ScanStation client

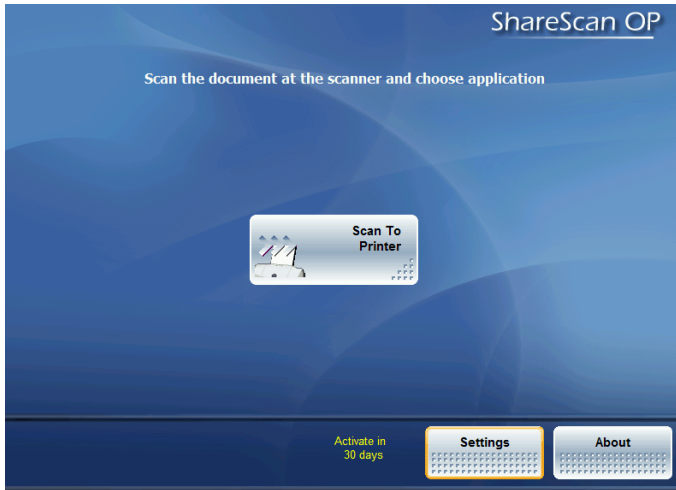
To run the ScanStation client:


- 1 In the console tree, click **Devices > Manage**. The Manage ScanStation OP Client pane displays information about the client. The information in the Driver Name field is based on the product key.



- 2 On the **ScanStation Logon** tab, select the **Use preceding credentials** check box. Enter your user name, password, and domain, and then click **Save**. (See the “Managing the ScanStation Client” chapter in the *Configuration Guide* for more information about the options on this screen.)

- 3 On the **Status** tab, click **Start**. The client application opens.



- 4 To quit the application, use one of the following methods:
 - > If you are using the hard keyboard, press **ESC** and then press **Yes**.
 - > If you are using the on-screen keyboard, press **About**, press  (Exit), and then press **Yes**.

Setting up Sharp MFP devices to use with Send to eCopy

Overview

eCopy ScanStation OP enables users of supported multifunctional products (MFP) to scan documents and send them to a shared storage folder on a ScanStation. The ScanStation must be licensed to use eCopy Send to eCopy.

In addition to installing, configuring, and licensing ScanStation OP, you must perform the following tasks:

- Create a folder to temporarily store the scanned image files. Depending on the MFP, the storage folder can be a *network shared folder* or an *FTP folder*.
- Configure the MFP device.
- Create a profile to use with Send to eCopy.
- Configure Send to eCopy.

Creating a network shared folder

eCopy recommends that you create the shared folder on the ScanStation. Make sure that you assign the appropriate permissions to the folder.

To make sure that the folder can be accessed, go to a different computer on the network and try to create a folder in the shared folder. Then try to copy a text file into it. If the system displays any error messages, check the permissions on the shared folder.

Creating an FTP folder

If your company does not have an FTP site, you must create one. See your Microsoft Internet Information Services (IIS) documentation for information about creating the FTP site; you may want to specify “C:\eCopy” as the home directory for the site.

When you create the FTP site, it is recommended that you perform the following tasks:

- Create it on the ScanStation.
- Clear the **Allow Anonymous Connections** check box on the Security Accounts tab.
- Enter the name of a local user who will have access to the FTP site. (You may want to create a dedicated local user account named “FTPeCopy”.)

28 | Setting up Sharp MFP devices to use with Send to eCopy

After creating the FTP site, perform the following steps:

- 1 Open a Web browser and make sure that the site is active.
- 2 Create a folder on the site. Use a descriptive name, such as: **eCopyScans**.
For security reasons, you may want to limit access to the folder to a single user.
- 3 Make sure that you can copy a file to the FTP folder.
- 4 Make sure that you create the local user account specified on the Security Accounts tab.

Supported scan settings

Send to eCopy supports the following settings:

- Black-and-white scans — 100 - 600 dots per inch (DPI).
- Color and gray-scale scans — 300 DPI.
- PDF — G3 and G4 compressed PDF.

Send to eCopy does not currently support scanning documents to uncompressed PDFs.

Creating a profile that uses a network folder (SMB)

If you are using a shared network folder for storage of scanned image files, you specify the path to the target folder in a profile. You use the Sharp Network Scanner Tool to create the profile. The user selects the profile at the device.

To create a profile:

- 1 Run the Network Scanner Tool (**Start > Programs > Sharpdesk > Network Scanner Tool**).
- 2 On the **Profiles** tab, click **New**.
- 3 In the **Properties for Profile** dialog box, specify the profile information, including the profile name and descriptive information, such as: **Scan to shared folder for eCopy**.
- 4 Select the **Move File to Folder** check box and then click **Details**. Select the target folder and then click **OK**.
- 5 Click **OK** to return to the main Network Scanner Tool screen.
- 6 Click **Apply** to save the new profile on the devices specified on the Scanners tab, and then click **Close**.
- 7 Click **OK** to quit the program.

Creating a profile that uses an FTP folder

When you configure the MFP device, you specify information about the target FTP site and the authorized FTP user in a profile.

Make sure that you have the device's IP address before you begin.

To configure the MFP:

- 1 Open a Web browser.
- 2 In the Address bar, type the Internet address (URL) for the device you want to connect to, using the format **http://device_IP_address**, and then press ENTER. The System Information page opens.
- 3 Under **Image Send Management**, click **Destination**.
- 4 Log in to the device.
- 5 Under **New Destination**, click **FTP**.
- 6 Under **FTP Destination Control**, make sure that you specify the following information, which is required by Send to eCopy, in addition to any information that is required by the device:

Hostname or IP Address — Enter the address of the FTP site, such as: **10.10.12.110**.

Note: To use this profile with Send to eCopy, you must enter user name, password, and directory information, even though the screen indicates that the fields are optional.

User Name — Enter the name of the FTP user created to access the FTP site, such as: **FTPeCopy**.

Password — Enter the password of the FTP user.

Directory — Enter the path to the target FTP folder created for temporary storage of the scanned image files, such as: **\scans** or **\scans\HR**.

- 7 Click **Submit**. When the “Your request was successfully processed” message appears, the configured profile is available at the device.

Configuring Send to eCopy

The Send to eCopy tab is available on the eCopy ShareScan OP Administration Console only after you license the ScanStation using a Send to eCopy product key (see "Licensing the scanning device" on page 20).

To configure Send to eCopy:

- 1 Click **Start** > **Programs** > **eCopy Applications** > **ShareScan OP Administration**.
- 2 In the console tree, click **Devices** > *device_name* > **Manage** > **Send to eCopy**.
- 3 Under **Configuration**, specify the number of seconds. ScanStation looks in the storage folder for files older than the specified time and then deletes them.
- 4 Under **Location**, specify the following information about the target storage folder:
 - > **Type** — Select **SMB** or **FTP**.
 - > **Folder** — For an SMB location, enter the path to the shared folder, such as: C:\Sharp_drop or \\FileServer\Sharp_drop. For an FTP location, specify the FTP folder, such as: \scans or \scans\HR.
 - > **Hostname** — For an SMB location, enter the hostname or the IP address of the computer where the ShareScan OP server is installed, such as: **10.10.9.111**. For an FTP location, enter the IP address of the FTP site, such as: **10.10.12.245**.
 - > **Login** — Enter the name of the user who has access to the storage folder. For an FTP folder, the name must match the FTP user name, such as: **FTPeCopy**.
 - > **Password** — Enter the password associated with the user name.
- 5 Click **Save**.
- 6 Restart the ScanStation client.

Sending to the scan destination

To send to the scan destination:

- 1 Load your originals into the MFP.
- 2 Press the **Image Send** button on the control panel.
- 3 Press **Address Book** on the touch screen.
- 4 Select the scan destination.
- 5 Press the green **Start** button on the control panel to start scanning.

Using Send to eCopy

When an MFP device is ready to use with Send to eCopy, the following procedure allows users to access and use Send to eCopy:

To use Send to eCopy:

- 1** To scan a document to the designated folder, follow the instructions for your MFP device. (For your Sharp MFP, see "Sending to the scan destination" on page 31.)
- 2** At the ScanStation, click **Settings** if you want to modify the output and image processing options.
- 3** Press the desired connector button, such as "Scan and Mail". The connector retrieves the scanned image files from the storage folder and opens them in the ScanStation client's scan preview window. (For information about using the eCopy connectors, refer to the user quick reference document provided for each connector.)

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