

**Loffler's Worldox**

**Connector for eCopy  
ShareScan v 5.x**

**User's Guide**



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# Part 1 Introduction

## General Overview

The eCopy Connector for Worldox allows you to scan documents directly into Worldox. This Connector is designed for eCopy ShareScan v5.xx or higher.

NOTE: It is assumed that you already have eCopy ShareScan installed and configured and that you have the Worldox client installed on the ShareScan computer. If you need help finding eCopy resource, refer to Appendix A for contact information.

## About This Guide

This guide is an addendum to the ShareScan User's Guide and describes how to install, configure, and use the eCopy Connector for Worldox.

It contains the following sections:

- **Part 1** provides a general overview of eCopy Connector for Worldox.
- **Part 2** is for ScanStation administrators and describes how to install and configure the eCopy Connector for Worldox.
- **Part 3** is for ScanStation users and describes how to scan documents into Worldox.
- **Part 4** contains some troubleshooting tips.

## Activating Your eCopy Connector for Worldox

Each instance of the eCopy Connector for Worldox must be activated in order to function.

You should have received a license key with your Connector order. This license key is machine specific. You will need a different license key for each computer on which you install the connector.

The activation program has a link to obtain a license key for you and must be performed from the computer on which you are installing.

## Part 2 Setting up the Connector

### Installation Prerequisites

- eCopy ScanStation with ShareScan 5.x with Service Pack 2
- Worldox client GX or higher
- Microsoft .NET Framework 2.0
- Logged on to ScanStation computer as a user with Administrator rights to that machine.
- eCopy Connector for Worldox

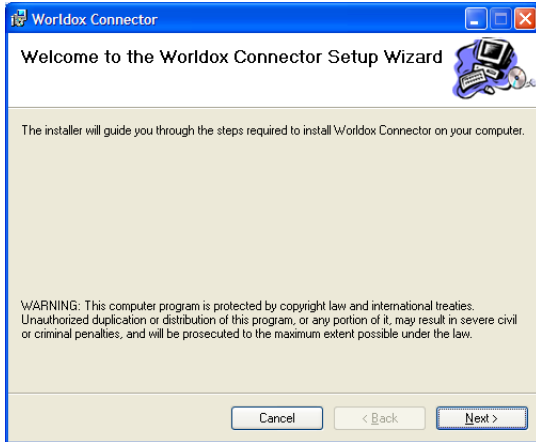
### Note – before beginning the Connector installation:

1. **Apply at least Service Pack 2 on your eCopy 5.0 system and client. You MUST be at least at client version 5.0.20303.10.**
2. **You must also install a “hotfix” if you are running embedded – open a support call with your Nuance provider. Note that you need the hotfix to fix an issue with field fill-in and drop downs on the embedded version only.**
3. **Ensure you have the local Worldox administrator available during Connector installation.**
4. **eCopy ShareScan must be installed and tested using email QuickConnect or other validation process.**
5. **Using the Worldox client, ensure that you are able to search for documents.**
6. **We recommend the Worldox client software be installed on the eCopy ScanStation or the server on which the eCopy administrative module is installed, NOT on a shared network directory. The Worldox Connector communicates with the Worldox Client for communication to the Worldox server.**
7. **Ensure the Worldox LISTENER program is running. Note that you want the listener to be using a VALID Worldox username. SAVE AND RESTART the Listener with the valid username to ensure the Connector continues to use this username to connect to Worldox.**

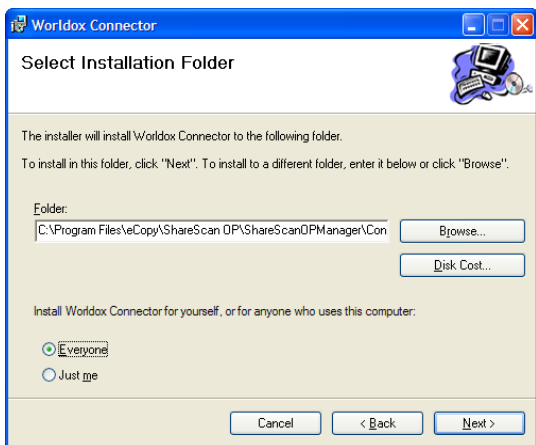
## Installation

Download the eCopy Connector for Worldox from <http://connectors.loffler.com>.

Go to the eCopy Connector for Worldox download directory and click on Setup.exe. This will launch the Setup program for the Worldox Connector, which brings up the following screen:



Click on “Next”, which brings up the following screen.



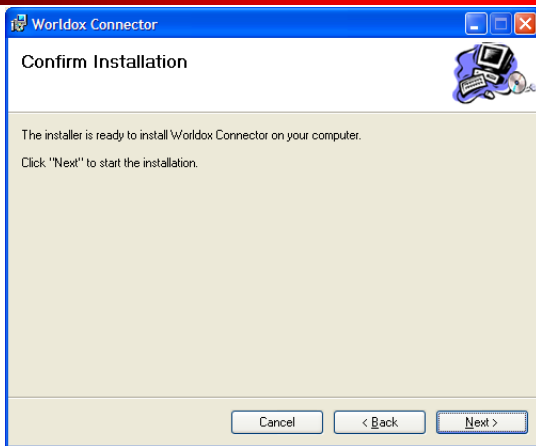
Select the folder to install the Worldox Connector.

The default is

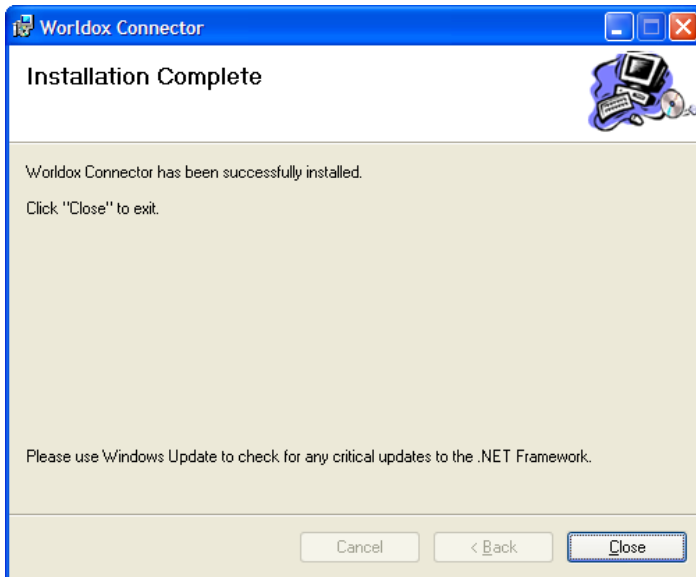
“C:\Program Files\Nuance\ShareScan5\Server\Connectors\Worldox Connector”

This should be OK for most systems.

Also, click on the “Everyone” radio-button and then click “Next” which brings up the following screen:



Click on “Next”. The Worldox Connector will now be installed. When it is finished, you will get the following screen:



Click “Close” and you are done, the Worldox Connector is now installed on the ShareScan computer.

**NOW run the ConnectorRegistryRegistration.bat file downloaded with the User’s Guide using the securefile link provided in your email.**

Note that you must have administrator rights to change the Registry contents – or open the CMD prompt “as administrator”.

**If you are in a 64-bit environment**, you must edit the command line. Change all instances of */program files/* to */program files (x86)/*.

Continue on the next page to *activate* the Connector.

## Activating the Connector

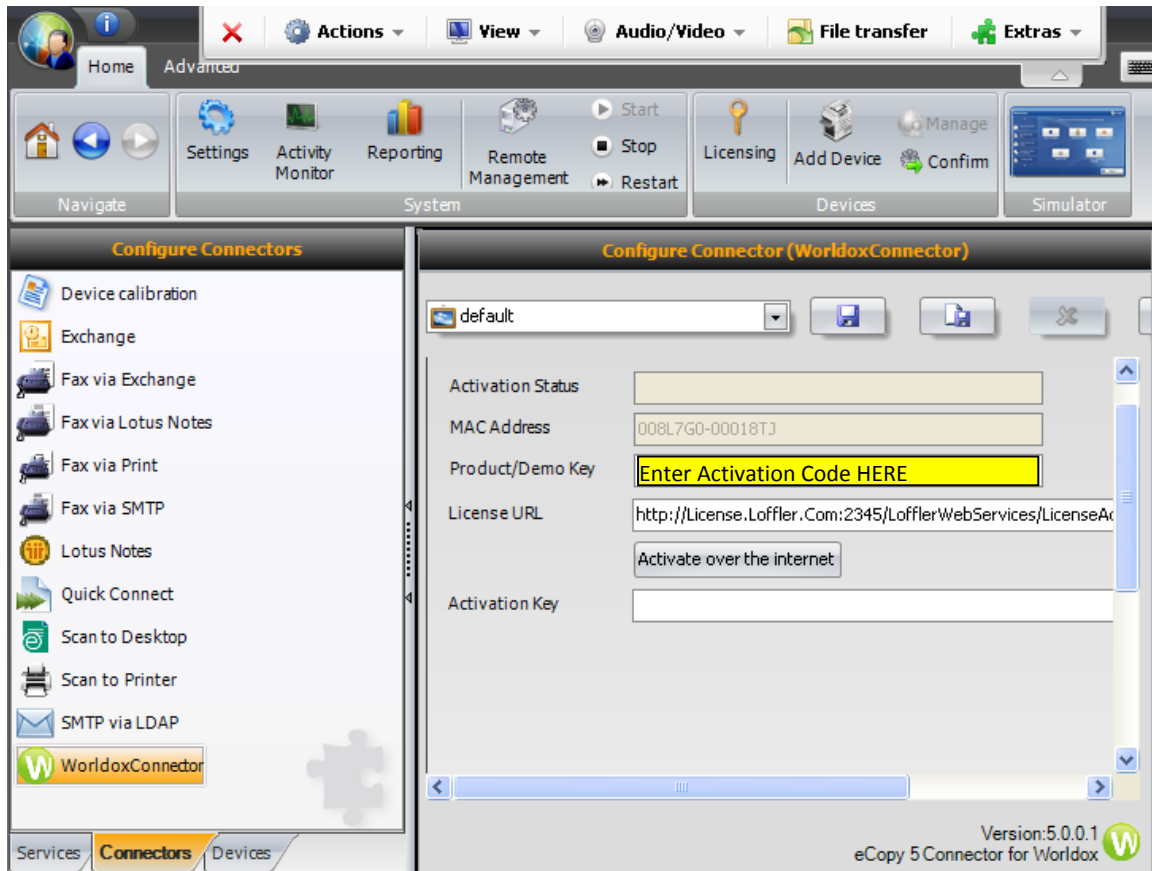
Each instance of the eCopy Connector for Worldox must be activated in order to function.

You should have received a license key with your Connector order. This license key is machine specific. You will need a different license key for each computer on which you install the connector. The activation program has a link to obtain a license key for you and must be performed from the computer on which you are installing.

The link to the software is <http://connectors.loffler.com>. NOTE: .Net framework is required. Our activation process is a web service. Please ensure that your computer has .net framework installed and that your aps.net process recognizes an asmx service.

Each Connector, through its activation, is keyed to a specific PC MAC address. In the process of entering your product activation key, the PC will forward the MAC address to our server which will provide a unique activation for that computer.

From the ShareScan Administration Console, select the CONNECTORS tab. Select the WORLDOX CONNECTOR and the ACTIVATION tab.



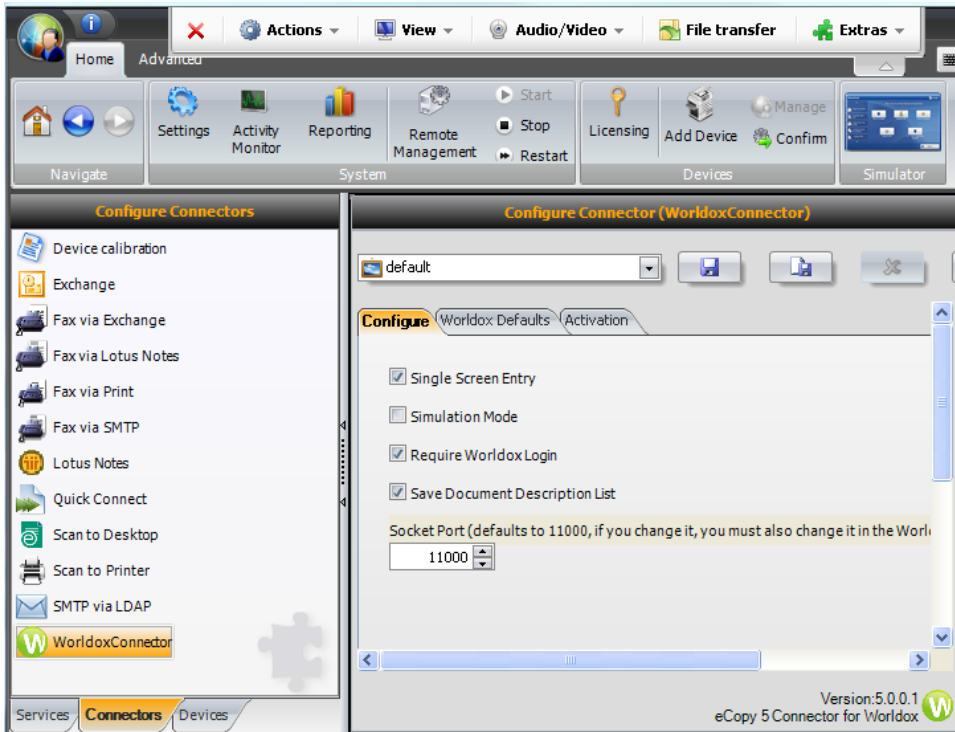
Enter the product key given to you at the time of order (it is best if you can copy and paste this product activation key) and select "Activate over the Internet". The license server will return an activation status of "Activated" in the lower box.

If the ShareScan computer does not have internet access or with any other installation issues, please email [connectorsupport@loffler.com](mailto:connectorsupport@loffler.com) requesting an Activation Code. Provide your maintenance agreement number and the MAC address of your eCopy Server.

## ShareScan Administrator Configuration

Now that the Connector is installed, you must configure it to run on your ShareScan client. You do this under the **CONFIGURE** and **WORLDOX DEFAULTS** tab.

Your screen should look like this:



Under the **CONFIGURE** tab:

\*\* Single Entry Screen will put all profile fields on a single screen rather than on separate screens. This is typically the best option. If you have some unusual profile fields that rely on previous fields, you might want to uncheck this. Then click “Save”.

\*\* Simulation mode is for demonstration purposes and will not connect to a Worldox Server. Leave this option unchecked for live installations of the Connector and Worldox.

\*\* Require Worldox Login is an option for Worldox GX installations only:

If the Worldox client is running in the background the Connector will use the account that is logged in to the ShareScan computer. The Connector will also use this computer account if the “Require Worldox Login” is not checked.

The Connector will prompt the user to enter the login name of the account for the Connector to run under. The Worldox API will start in the background and pass the login name to the Worldox server.

- ✓ A successful login will use the profiles and access available to that user.
- ✓ A non-existing user will return a denied access prompt.
- ✓ There is no password option available in the connector.
- ✓ The Worldox client can NOT be running in the background of the ShareScan computer.

(continued on next page)

Select the **WORLDOX DEFAULTS** tab. Clicking on the “Worldox Defaults” tab will bring up the following screen (*you will need client input on these options!*):

Field Name	Field Selection	Current Default	Reverse Link	Sort By Description	Set Default
Author	<Blank>	<Blank>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Set Default
Client	<Blank>	<Blank>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Set Default
Matter			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Set Default
Doc Type	<Blank>	<Blank>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Set Default

Select the INIT WORLDOX button to allow changes to the defaults. Enter the default Worldox User.

The Worldox server returns a list of available profiles and associated properties based on the currently logged in user to the ShareScan computer. Use the Current Profile Group pulldown to select the desired profile group. Select SET CURRENT TO DEFAULT.

Selecting “Clear Default” will clear the default data associated to the field and use the first item in the dropdown list.

In each dropdown, there is a ‘<blank>’ option. That is different than the ‘Clear Default’ button. <blank> will add a blank option to the dropdown in the Connector and then you can set the default to that.

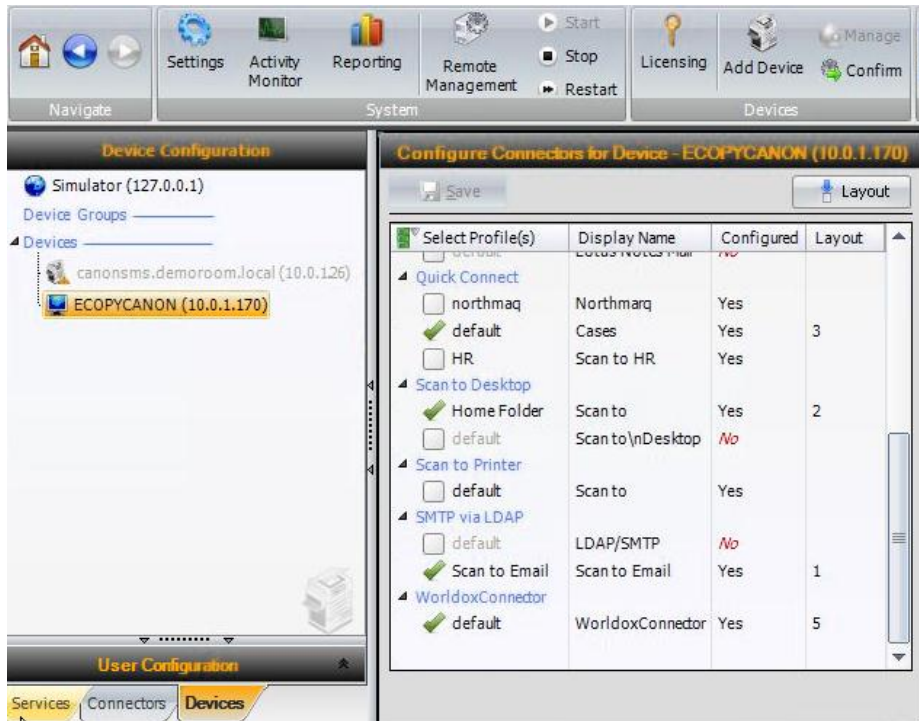
Rename the profile and click “Save”.

## Configuring Devices

Finally you must tell the ShareScan device(s) (a device is a computer running ShareScan) to use the connector. Click “Devices” and expand the list of devices, then click on the computer name for this ShareScan machine, and click on “Properties”.

### OTHER CONFIG NOTES:

ShareScan copies the scanned image to a temporary folder. The default temp folder is “C:\Program Files\Ecopy\ShareScan OP\ShareScanOPManager\Connectors\Worldox Connector\CopyTemp”, and is created for you. It is only a temporary folder; the Connector will copy the file to Worldox and then delete the temporary file. You have the option to change the temporary folder to any valid folder on the local pc or network.



On the DEVICES tab, select the name of your Ecopy ScanSatation. Click on the checkbox to the left of “WorldoxConnector” as shown above and then click “Save”.

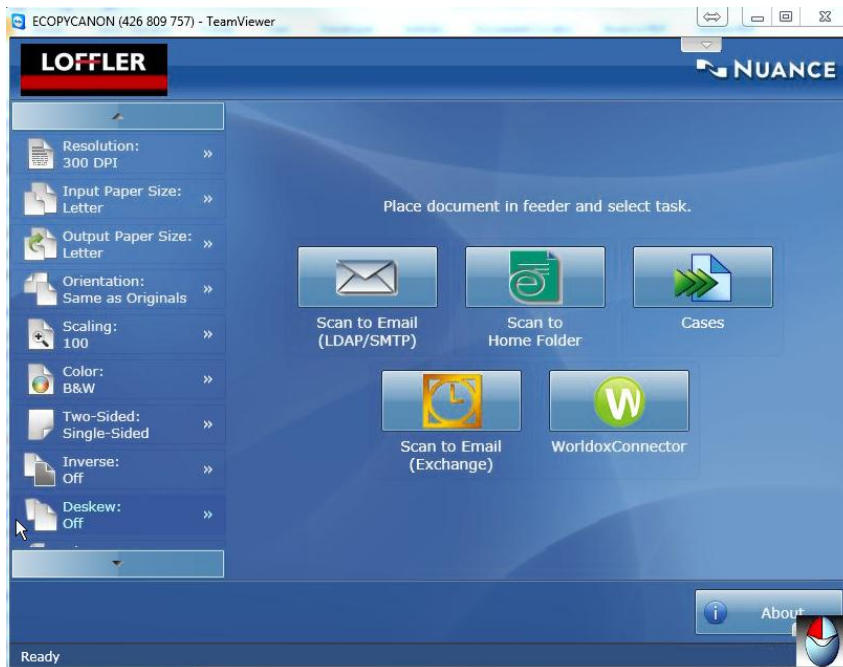
## Part 3 Using the Worldox eCopy Connector

Make sure you have both

- ✓ installed the Connector and
- ✓ configured the Connector in the ShareScan OP Administration

as described above. If you have not, the Connector will not function.

On the ShareScan client machine, start the ScanStation Client software.  
(**Programs > eCopy Applications > ScanStation Client**).

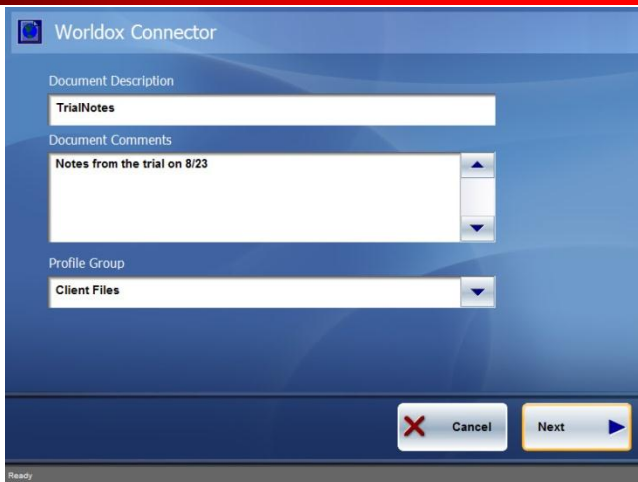


Place the document into the scanner and click on “Worldox Connector”.

**(Note:** if there is no Worldox Connector button, or there is but it is disabled, then the Connector either didn't install properly or wasn't configured properly. Please repeat the steps above under Installation and Configuration.)

The document will scan and bring up the following screen.



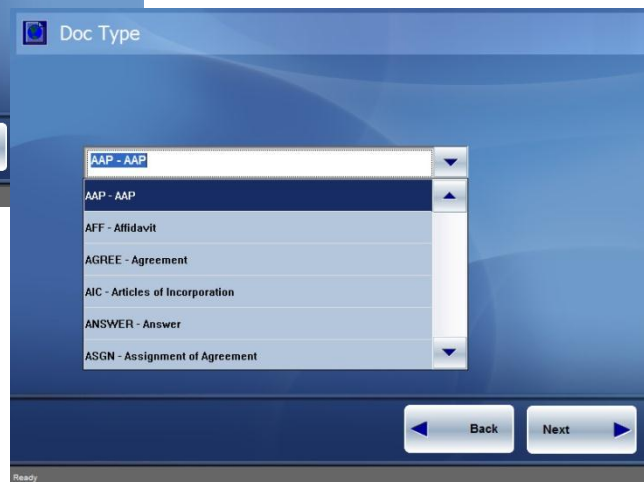
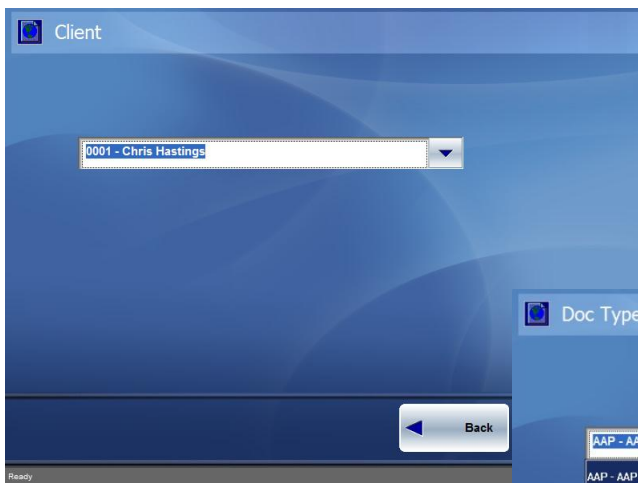


This is the initial Worldox Screen. Type in a Document Description and Document Comments and select a Profile Group. The Profile Group box will contain a list of the valid profiles from Worldox.

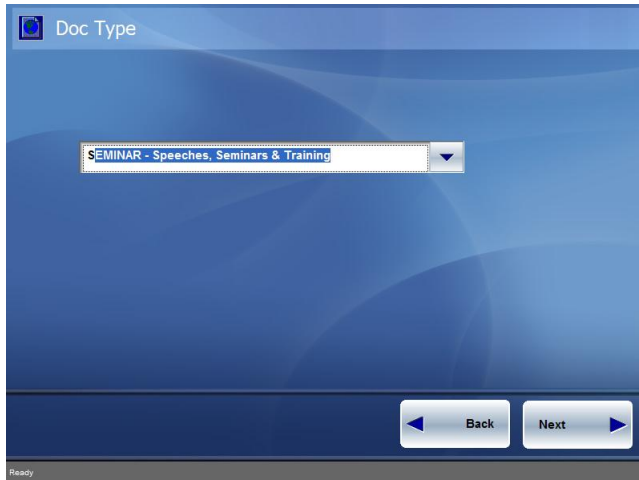
**(Note:** The Connector gets the list of Profile Groups from Worldox. If you don't see all of your profiles, you probably don't have the Worldox client configured properly on the ShareScan computer. To check this, go into Worldox and view the valid profiles. Make sure you have all of the drive mappings set up properly that any other Worldox user would need)

After you have selected the Profile Group, click on next. You will now enter in the Profile Field information for each profile field that you have setup in Worldox. There will be one screen for each Profile Field. If the Profile Field has an associated table, you will have a list to choose from, otherwise you can enter in the information in the box the same way you entered Document Description above.

Following are two examples of screens you will see.

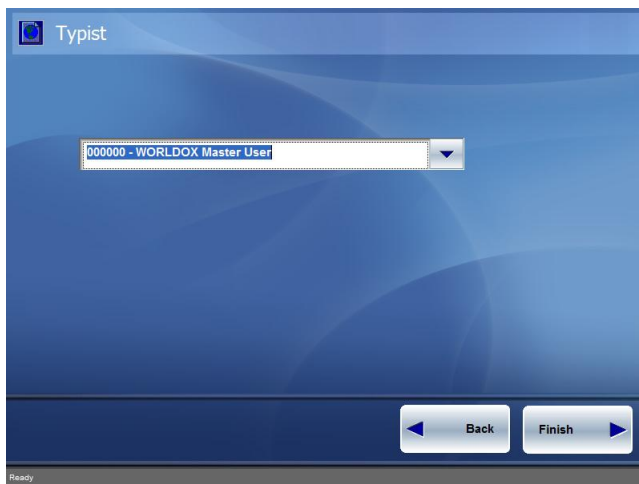


On each screen, you have the option to go back to the previous or next to the next Profile Field. On all lists you can drop down the list, as shown above, by clicking on the down arrow button to the right of the box. You can also scroll through the list by pressing the up or down arrows on the keyboard. These lists are also “type-ahead” lists. You can start typing in the code you want and the list will jump to the first item matching what you have typed in. Here is an example of the type-ahead list.



In the above list for Doc Type, I typed in an ‘S’ and the list moved to the first ‘S’ in the list. I could now type in a ‘T’, and the list would move to the first ‘ST’ in the list.

The last Profile Field will have a “Finish” button instead of a “Next” Button like the one following display.



Click on the “Finish” button, and you will get a summary of the information similar to the following display.

Remember, the Profile Fields will be different for each of your Profile Groups, so that information can be different than the above information. Review the information and if you need to change anything click on “Back”, otherwise click on “Send”. When you click on “Send” the file and all related information is saved in Worldox and you get the following screen.

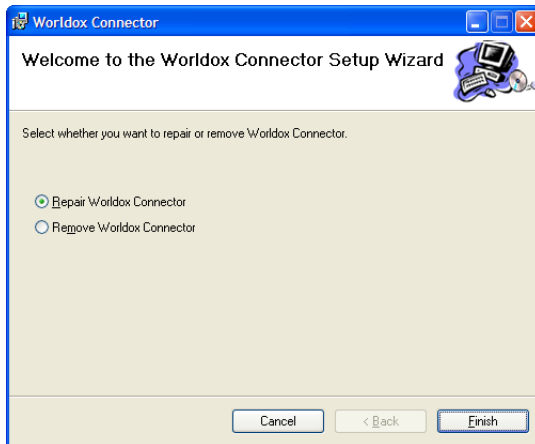
And that is it, you are done! You can scan more documents or send the same scanned document to another destination (e-mail, fax, some other document management system).

## Part 4 Troubleshooting

Wouldn't it be nice if everything always worked? Well, it doesn't, so if you encountered an error in the process, here are a few possible tips that may help you. Please try these troubleshooting ideas before contacting the Loffler Connector Support Group.

### Worldox Connector not listed in ShareScan Administration

If Worldox Connector is not listed with the connectors in the Administration program, the Connector didn't install properly. Try running the Worldox Connector Installation program again (Setup.exe on the eCopy Connector for Worldox CD). When you run this, you should get the following screen:



If you do not, then the Connector was not installed, so follow the instructions above for Installation (Part 1). If you get this screen, select "Remove Worldox Connector" and click on "Finished". That will uninstall the connector. Make sure that you are logged on to the ShareScan computer with a user with Administrator rights. Now run the installation again. If the Connector still does not show up, manually register the Connector with ShareScan by running the Register Connector program. From the eCopy ShareScan computer navigate to **Start > Programs > eCopy Worldox Connector > RegisterConnector**.

You should get a box that says the .dll was registered successfully. Restart the ShareScan OP Administration.

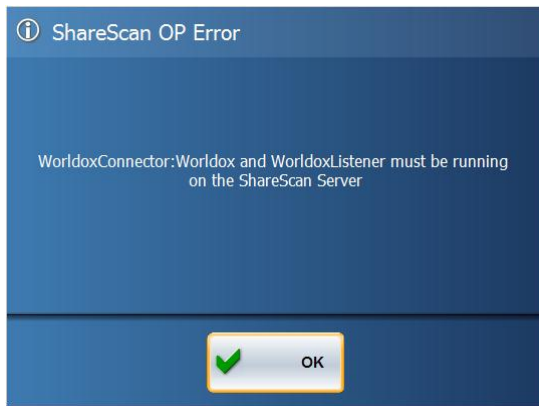
If you receive an error when you tried to run the regsvr32 or if the Connector still is not listed, please contact the Loffler Connector Support Group.

## Worldox Connector button not on the ScanStation Client

If there is no “Worldox Connector” button on the ScanStation computer, then the Connector was not configured properly. Go to the Configuration section above (Part 2) and make sure the Connector is listed and added to the device. If the Connector is not listed then follow the steps above in “Worldox Connector not listed in ShareScan Administration”. If it is listed and checked in the device, please the Loffler Connector Support Group.

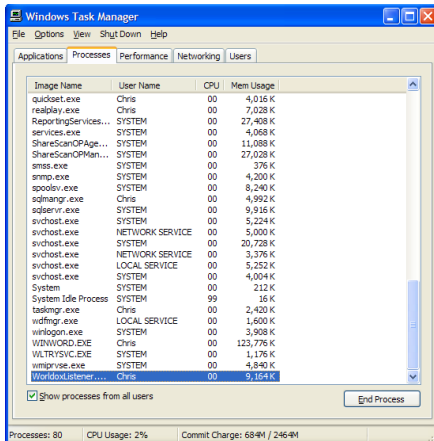
## ShareScan Error Worldox Connector: Worldox and WorldoxListener must be running on the ShareScan Server

If you receive the following error when you click on then Next Button from the scanned image screen:



This means the either Worldox isn't running or WorldoxListener (a Connector program that communicates with Worldox) is not running. First check that Worldox is in fact running on the share scan computer. Go into Worldox and make sure you can see profiles. If Worldox is running, then WorldoxListener must not be. Navigate to Start-Programs-eCopy Worldox Connector and select “WorldoxListener”.

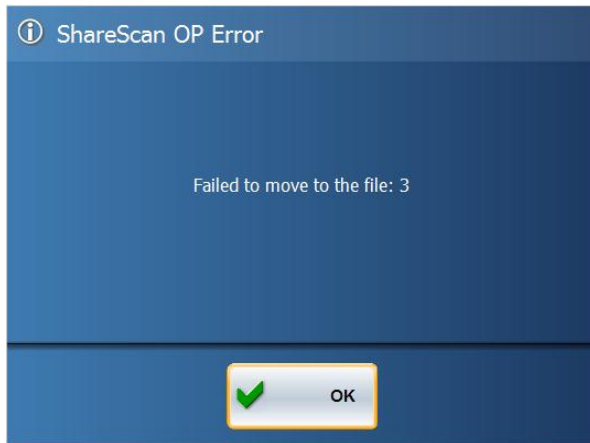
That should start the listener. Note that no screens will appear. To ensure that the listener is running go to your task manager (ctrl-alt-del) and go to the processes tab.



WorldoxListener should be listed there. If it is not, please the Loffler Connector Support Group.

## ShareScan Error Failed to move to the file: 3

If you receive the following error when trying to send to Worldox:



This means that you have an invalid “Destination” folder setup in the Configure Tab in ShareScan Administration for the WorldoxConnector. Either create the folder that you have setup or change the folder to a valid folder. Review Part 2 for correct setup.

## .NET Framework Error

A .NET Framework error could indicate that eCopy and/or the Connector are using an incorrect version of the Microsoft .net framework. Ensure that the framework v2.0 is installed, and then open the following file using notepad.

“E:\Program Files\eCopy\ShareScan OP\ShareScanOPManager\Bin\ShareScanOPManager.exe.config”

The file should read. Change the version and save as an xml file.

```
<configuration>
  <startup>
    <supportedRuntime version="v2.0.50727"/>
  </startup>
</configuration>
```

## Loffler Connector Support Group

To contact Loffler support, access the Loffler Connector web site at <http://connectors.loffler.com> and open a Connector ticket.

Have you rebooted the computer?

# Appendix A

## Support for your eCopy installation

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:

What to have	What it is
eCopy serial number	This number is used for eCopy ScanStations, eCopy ShareScan, and eCopy Desktop. It is 10 alpha-numeric digits long. The serial number is printed on stickers located in the following areas: on the eCopy ScanStation PC, on the shipping box, on the inside packaging box, and on the inside cover of the user manuals.
eCopy software version	The version and release of the eCopy software currently being used. You can find the version and release number of your installed eCopy software in the 'About...' selection in the application Help menu.
Operating System	The operating system version of the computer that the eCopy software is running on along with any network information that can be provided.
3rd Party Products	A list of 3rd party applications that are used in conjunction with eCopy products, such as Microsoft Exchange/Outlook, Lotus Notes, Captaris RightFax, Worldox, Domino.Doc, etc.
Problem Description	A detailed description of the problem, steps to reproduce it, and exact wording of any error messages.
Contact Information	Dealer contact information as well as your contact information for follow up including name, e-mail address, and telephone number.

US/North America:

Technical Support hours are Monday through Friday, 8:30AM to 5:30PM EST.

E-mail Support: [support@ecopy.com](mailto:support@ecopy.com)

Phone Support: +1 (603) 881-4450

Outside North America: Please contact your local dealer or National Canon Sales Organization.