

Loffler's WORLDOX Connector for eCopy ShareScan OP

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 OP v4, and Worldox version GX or higher. It is assumed that you already have eCopy ShareScan OP installed and configured and that you have the Worldox client installed on the ShareScan computer.

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 an 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.

Support for your eCopy Connector for Worldox

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 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

Phone Support: +1 (603) 881-4450

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

Part 2 Setting up the Connector

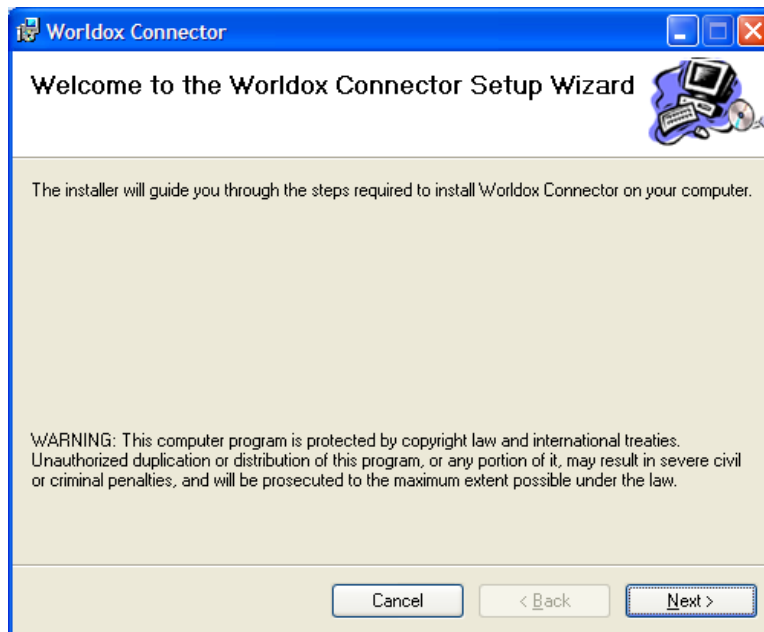
Installation Prerequisites

- eCopy ScanStation with ShareScan OP 4.x
- eCopy Connector for Worldox
- Worldox client GX or higher
- Microsoft .NET Framework 2.0
- Logged on to ScanStation computer with a user with Administrator rights to that machine.

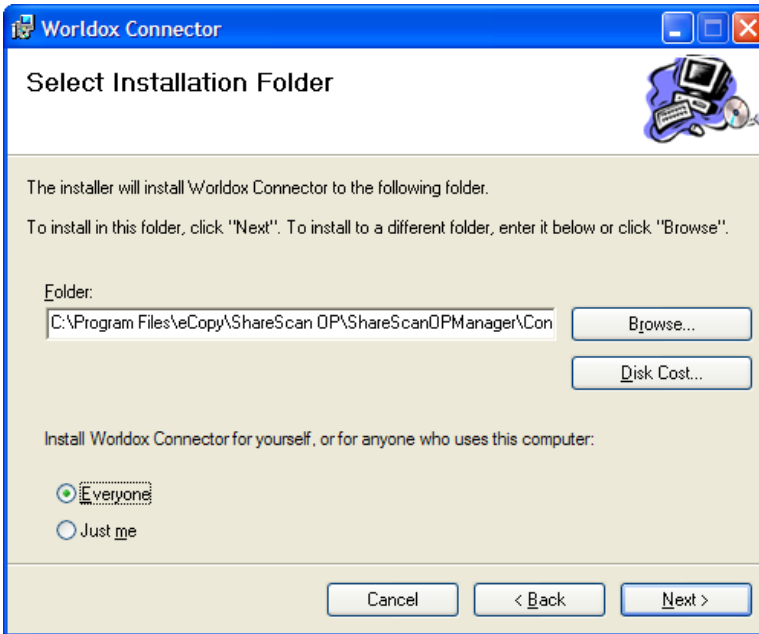
Note: You must install the Worldox client software on the ScanStation. The Worldox Connector communicates with the Worldox Client for communication with the Worldox server.

Installation

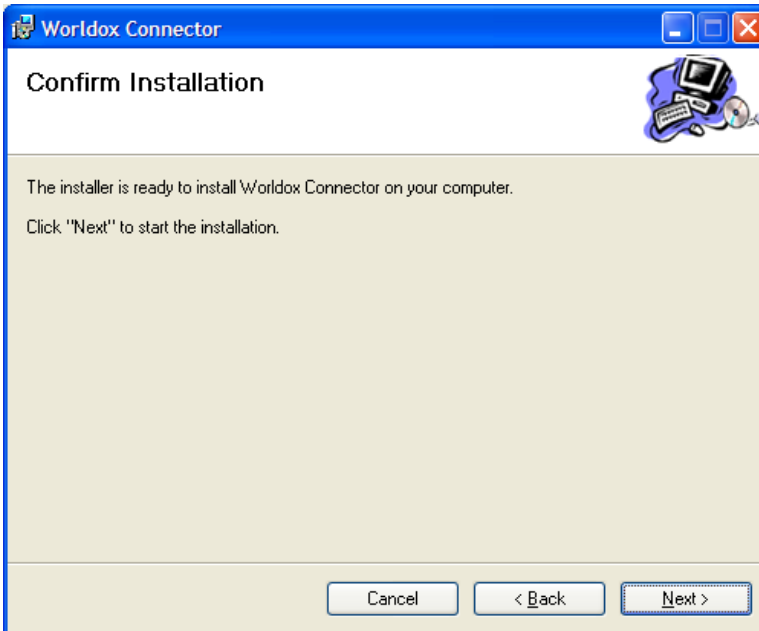
Insert the eCopy Connector for Worldox in the CD drive (or if you downloaded, go to the download directory) and click on Setup.exe. This will launch the Setup program for the Worldox Connector, which brings up the following screen:



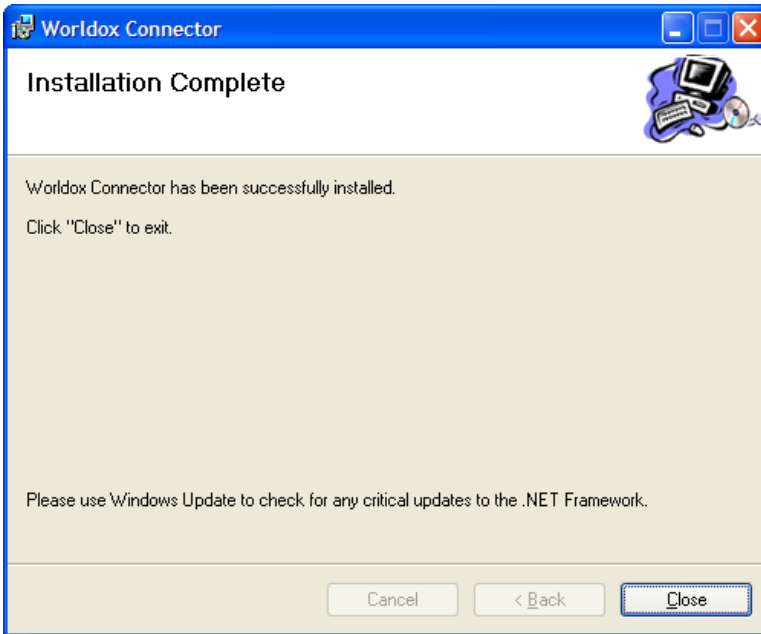
Click on "Next", which brings up the following screen:



Select the folder to install the Worldox Connector. The default is “C:\Program Files\veCopy\ShareScan OP\ShareScanOPManager\Connectors\Worldox Connector\” which 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:

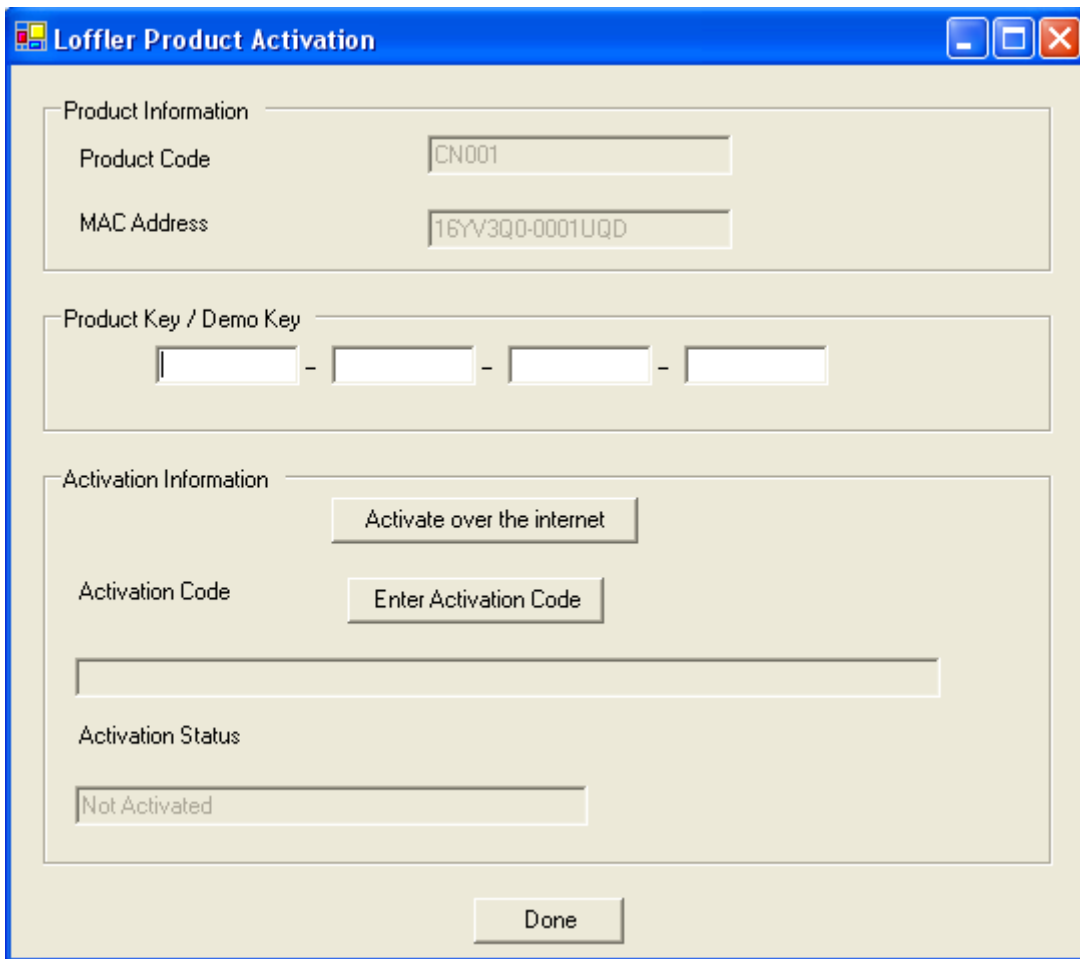


Click "Close" and you are done, the Worldox Connector is now installed on the ShareScan computer.

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.

Navigate to Start-Programs-eCopy Worldox Connector and select "ProductActivation". Enter the product key given to you at the time of order 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 call Loffler's Connector Support at 952-925-6800 to obtain an Activation Code.



The screenshot shows a Windows-style dialog box titled "Loffler Product Activation". It contains three main sections:

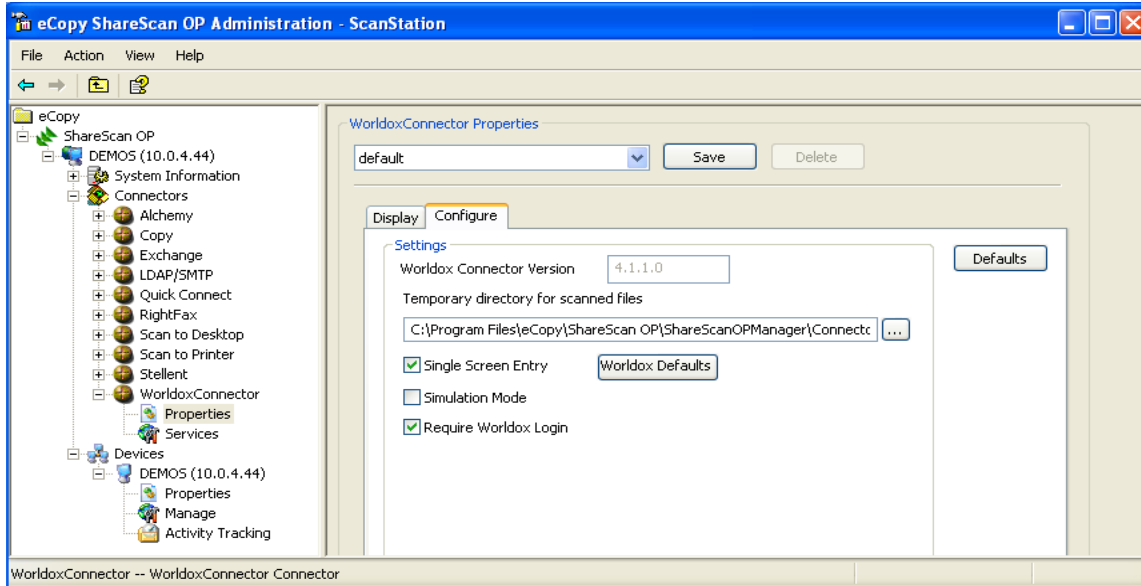
- Product Information:** A section with two text input fields. The first is labeled "Product Code" and contains the text "CN001". The second is labeled "MAC Address" and contains the text "16YV3Q0-0001UQD".
- Product Key / Demo Key:** A section with four small, empty text input boxes arranged horizontally, separated by hyphens.
- Activation Information:** A section containing a button labeled "Activate over the internet", a label "Activation Code" next to a button labeled "Enter Activation Code", a large empty text input field, a label "Activation Status" next to a text input field containing the text "Not Activated", and a "Done" button at the bottom center.

ShareScan OP Administrator Configuration

Now that the Connector is installed, you must configure it to run on your ShareScan client. You do this in the ShareScan OP Administrator Configuration program. Start the ShareScan Administration program (**Programs > eCopy Applications > ShareScan OP Administration**).

Click on “Connectors” to expand the list of connectors and then click on “WorldoxConnector”, followed by “Properties”. Then click on the “Configure” tab in the details pane on the right.

Your screen should look like this:



ShareScan copies the scanned image to a temporary folder. The default temp folder is “C:\Program Files\eCopy\ShareScan OP\ShareScanOPManager\Connectors\Worldox Connector\Temp”, 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.

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:

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.

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.

For Worldox v2.0/2002, leave this option unchecked.

Clicking on the “Worldox Defaults” button will bring up the following screen:

Field	Value	Reverse Fill	Set as Default	Clear Default
Profiles	Client Files		Set As Default	Clear Default
Client	<blank>	<input type="checkbox"/>	Set as Default	Clear Default
Matter	Chris's Matter	<input checked="" type="checkbox"/>	Set as Default	Clear Default
Doc Type	<blank>	<input type="checkbox"/>	Set as Default	Clear Default
Author		<input type="checkbox"/>	Set as Default	Clear Default
Typist		<input type="checkbox"/>	Set as Default	Clear Default
Rev By		<input type="checkbox"/>	Set as Default	Clear Default

The worldox server returns a list of available profiles and associated properties based on the currently logged in user to the sharescan computer.

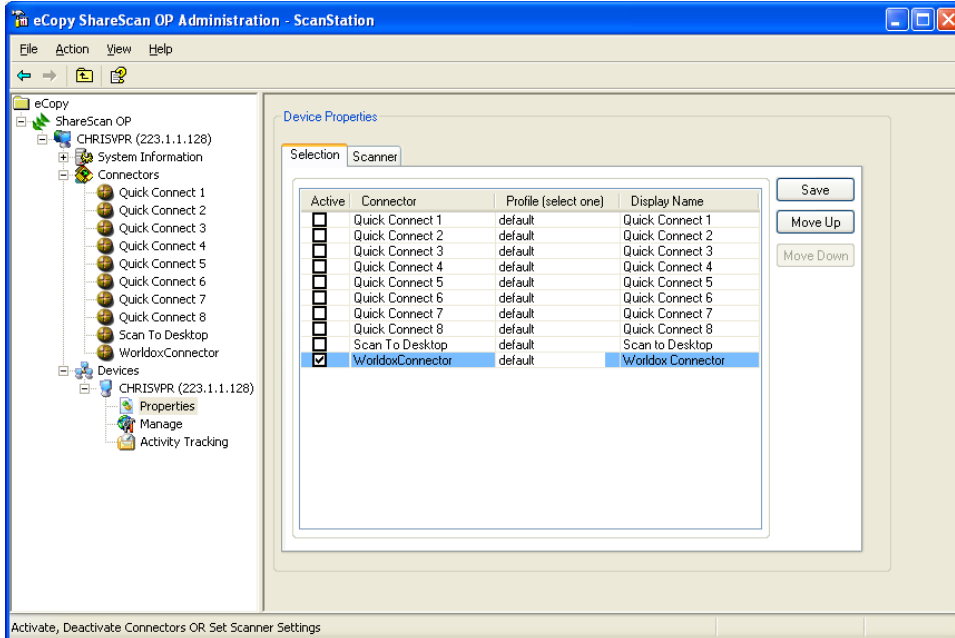
Selecting “Set As Default” will list the data in the associated field as default when scanning. The user will then have the option to change the field value. Likewise, selecting “Clear Default” will clear the default data associated to the field and use the first item in the dropdown list.

By default, linked fields are populated from the top down, however this behavior can be changed by enabling the the Reverse Fill checkbox. Looking at the screen shot above, the connector will list all clients linked to “Chris’s Matter”. Leaving the Reverse fill checkbox unchecked will list all matters linked with the selected client.

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 set the default to that. Remember, for each field, if you change something (like selecting ‘<blank>’) you have to click Set as Default to store the default, then when finished with a profile, click Save to save them to disk.

The default profile is the one everyone will use, so keep that and click “Save”.

Next you must tell the ShareScan device (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”.



In the “Device Properties” window, click on the checkbox to the left of “WorldDoxConnector” 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 do not, the connector will not function.

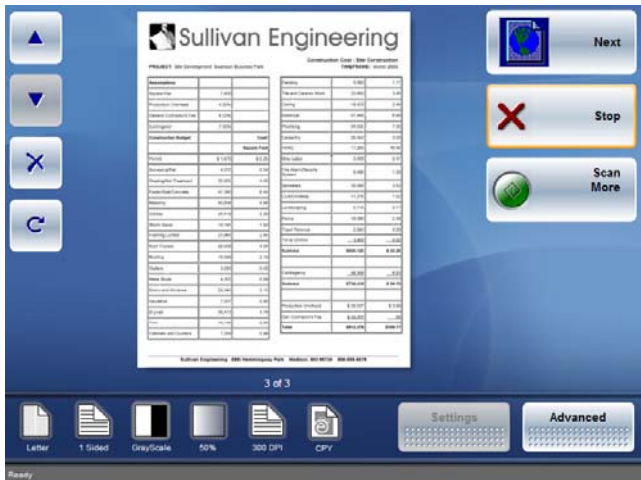
On the ShareScan client machine, start the ScanStation Client software.
(**Programs > eCopy Applications > ScanStation Client**).



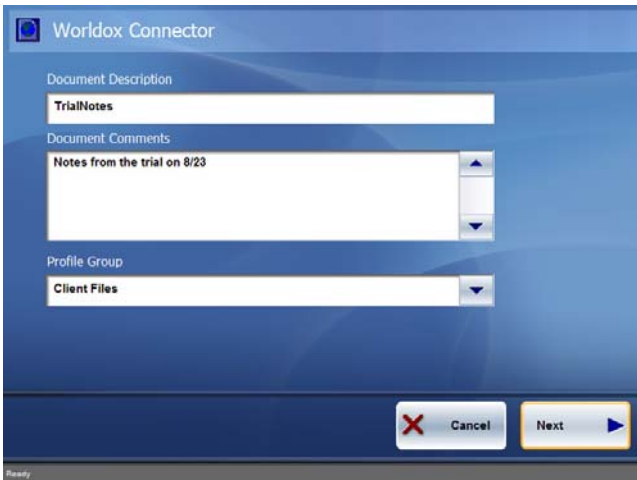
Place the document into the scanner and click on “Worldox Connector”.

(**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:



You can now either scan more documents, or when you have all of the documents to add to a PDF file, or if you have all that you need, click on “Next”

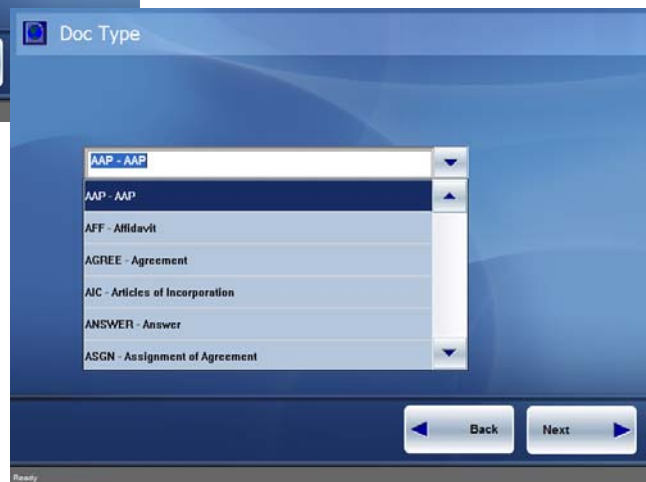
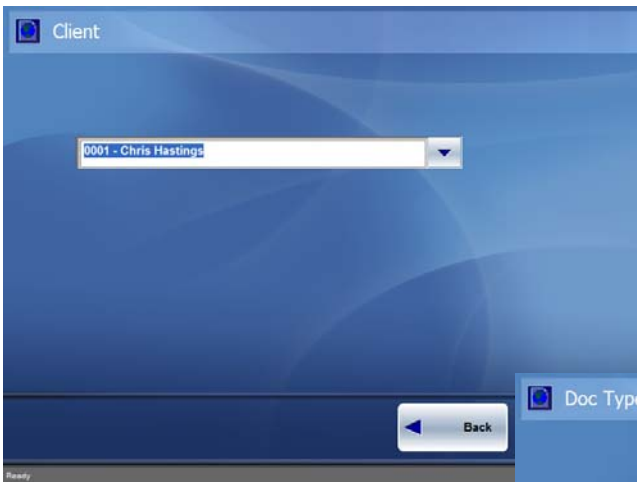


This is the initial Worldox Screen. Type in a Document Description and Document Comments and select a Profile Group. The Profile Group box will contain a list of the valid profiles from Worldox.

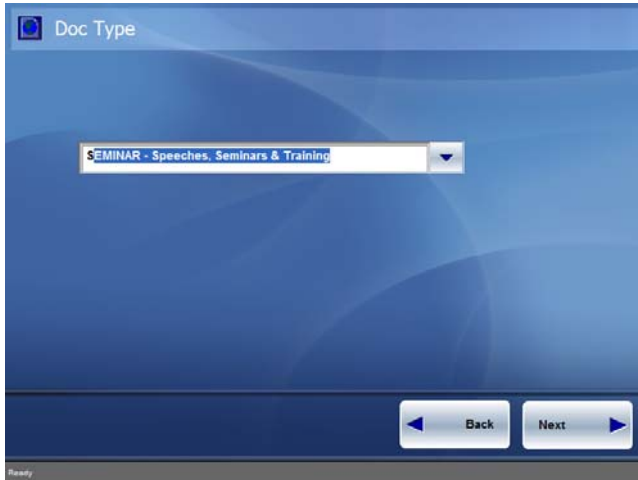
(Note: The Connector gets the list of Profile Groups from Worldox. If you don't see all of your profiles, you probably don't have the Worldox client configured properly on the ShareScan computer. To check this, go into Worldox and view the valid profiles. Make sure you have all of the drive mappings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

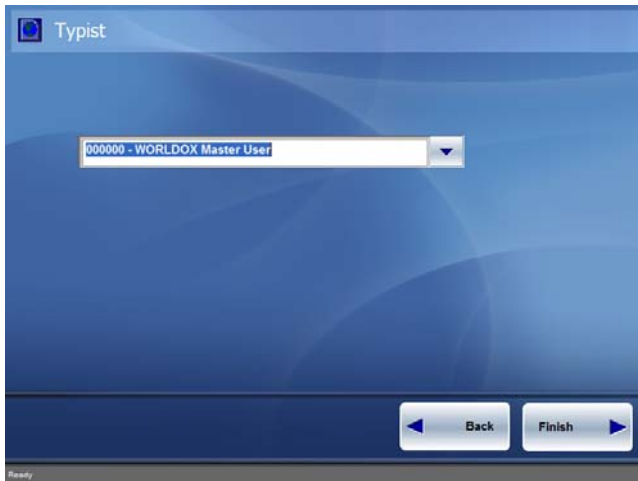


On each screen, you have the option to go back to the previous or next to the next Profile Field. On all lists you can drop down the list, as shown above, by clicking on the down arrow button to the right of the box. You can also scroll through the list by pressing the up or down arrows on the keyboard. 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:



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

Summary Information

Document Information

Document Description
TrialNotes

Comments
Notes from the trial on 8/23

Profile Group
Client Files

Profile Field Information

Client: 0001
Matter: 0001
Doc. Type: SEMINAR
Author: CJH
Typist: 000000

Back Send

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:

Document Sent Successfully!

What would you like to do next?

Done Job done

New Document Create a new document using the same "Worldox Connector" settings.

New Destination Send same document to ...

Dynamic Form Sample
Worldox Connector

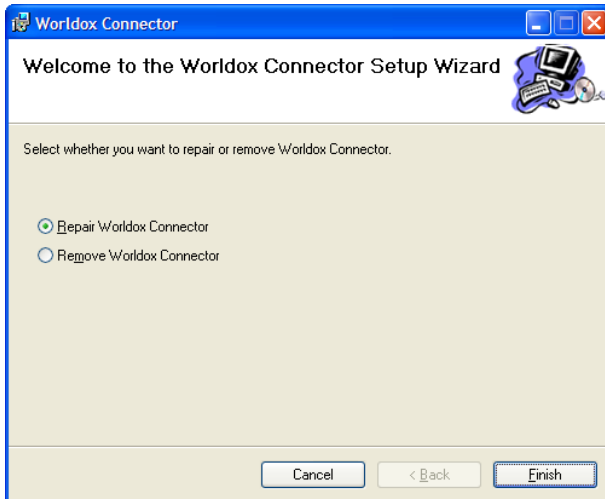
And that is it, you are done! You can scan more documents or send the same scanned document to another destination (e-mail, fax, some other document management system).

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.

Worldox Connector not listed in ShareScan OP 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.

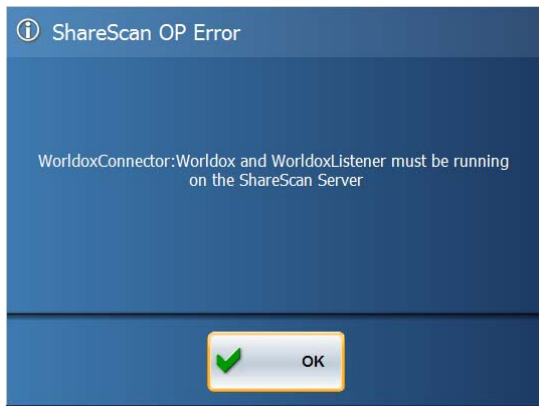
If you receive an error when you tried to run the regsvr32 or if the connector still is not listed, please contact support.

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 OP Administration”. If it is listed and checked in the device, please contact support.

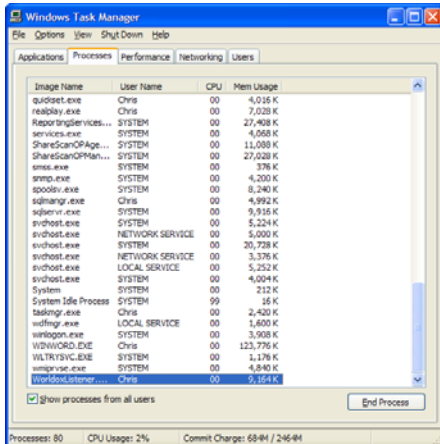
ShareScan OP Error Worldox Connector: Worldox and WorldoxListener must be running on the ShareScan Server

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”.

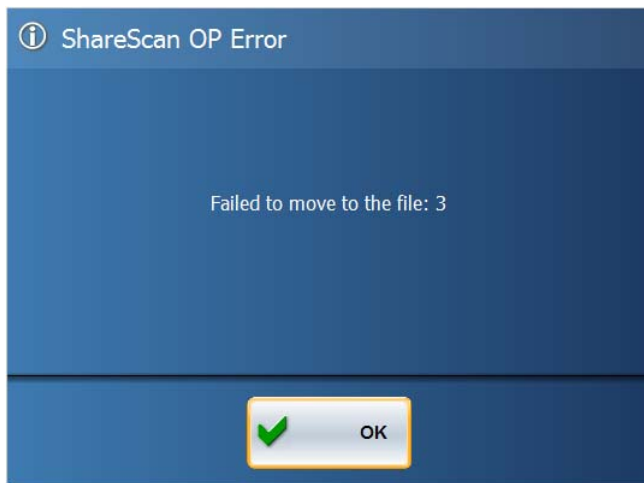
That should start the listener. Note that no screens will appear. To ensure that the listener is running go to your task manager (ctrl-alt-del) and go to the processes tab.



WorldoxListener should be listed there. If it is not, please contact support.

ShareScan OP 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 OP Administration for the WorldoxConnector. Either create the folder that you have setup or change the folder to a valid folder. See Part 2 above.

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>
```