ScanRouter DocumentServer Version 2

Management Guide

- 1 Overview of ScanRouter DocumentServer
- 2 Managing and Maintaining Document Management System
- (3) How to Use SRDS Manager
- 4 How to Use Authentication Manager
- 5 Appendix

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.

𝚱 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.

This symbol indicates a reference.

[]

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

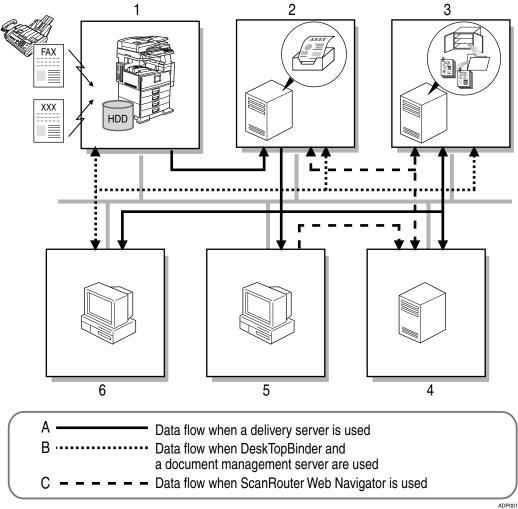
Overview of ScanRouter System

ScanRouter System is a group of software products that integrates various kinds of data, such as scanned-in/fax-received image data, and files made using different applications, to provide total document management.

In addition to DeskTopBinder, ScanRouter System includes ScanRouter V2 Lite/Professional, ScanRouter Enterprise, ScanRouter EX Professional/Enterprise, ScanRouter DocumentServer, ScanRouter Web Navigator, Web Document Viewer, and others. ScanRouter System reduces paper usage by storing and managing paper documents that accumulate daily as electronic data.

ScanRouter System documents can be searched, viewed, printed, and edited any time. They can also be sent by e-mail to a person who needs them. Furthermore, access rights can be configured to restrict user access and the operations individual users can perform. By configuring access rights, secure document management becomes possible.

The illustration below shows how ScanRouter System products connect. Depending on product combinations, connection or certain functions may not be possible.



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1. Network devices

You can input or output documents using network devices.

Documents scanned from a scanner or received by fax are sent to the delivery server.

If there is a hard disk drive (Document Server) on a network device, the Document Server receives documents read by network device or received by fax. Documents in the Document Server can be used with ScanRouter System software products.

2. ScanRouter V2 Lite/Professional, ScanRouter Enterprise, and Scan-Router EX Professional/Enterprise (delivery server)

The server works with other devices on the network to deliver documents. Documents received from network devices are delivered according to the delivery method configured for each destination.

Possible delivery methods include: saving in in-tray, sending by e-mail, and adding to a document management server folder.

3. ScanRouter DocumentServer (document management server)

Documents created in different kinds of application can be added from DeskTop-Binder, ScanRouter Web Navigator, and Web Document Viewer to the document management server. The server arranges, sorts, and manages these documents.

Configuring access rights for each cabinet and folder in the server restricts user/group access and operations they can perform, and prevents unwanted document tampering.

4. ScanRouter Web Navigator and Web Document Viewer (Web server)

ScanRouter Web Navigator and Web Document Viewer are portal applications enabling access from Web client to document management server and delivery server in-trays using a Web browser.

It is not necessary to install ScanRouter Web Navigator or Web Document Viewer on each client computer, since document operations can be performed using the Web browser on client computers.

5. Web Browser (client computer)

Client computers access the Web server through the Web browser to search, display, and download documents in an intray or in the document management server.

6. DeskTopBinder Lite/Professional (client computer)

On a client computer, DeskTopBinder Lite/Professional manages various kinds of data as documents.

Documents in the document management server or delivery server can be viewed and managed using DeskTop-Binder Lite/Professional.

When Document Server is used with a network device, documents in Document Server can be viewed from or copied to DeskTopBinder Lite/Professional to be edited or managed.

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1. Overview of ScanRouter DocumentServer

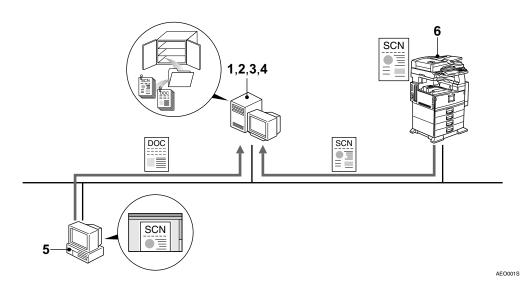
ScanRouter DocumentServer

ScanRouter DocumentServer can arrange, sort, and manage scanned documents and documents added from DeskTopBinder Professional, whatever the applications used to create those files. Added documents can be shared among multiple client computers to be edited, viewed, and searched using DeskTopBinder Professional or Web browser.

Installing ScanRouter DocumentServer also installs Authentication Management Service at the same time. Authentication Management Service manages the settings related to user authentication of ScanRouter DocumentServer, and can be processed through Authentication Manager. User authentication for the whole Scan-Router System can be centrally managed because Authentication Management Service can be used in conjunction wit other server products of ScanRouter System.

System Composition

ScanRouter System has the following system layout.



1. ScanRouter DocumentServer (Document Management Server)

Digitized documents are stored and managed. Stored documents can be shared among multiple client computers. Therefore, documents added to the document management server can be viewed and processed using DeskTopBinder Professional or a ScanRouter Web Navigator (Web browser).

2. Delivery Server

The delivery server is set up when Scan-Router EX Professional/Enterprise is installed. In conjunction with network devices, the delivery server delivers documents. It can also forward documents to folders in the document management server.

1

3. Web Server

Install ScanRouter Web Navigator on the Web server. In conjunction with the document management server and delivery server, documents stored in those servers can be viewed using a Web browser on a client computer.

4. Authentication Management Service

When ScanRouter DocumentServer is installed, Authentication Management Service is also installed. Authentication Manager is also automatically installed to manage Authentication Management Service.

ScanRouter System provides users with "Windows Authentication (NT compatible)" or "Windows Authentication (native)" that uses a Windows domain for user authentication, and "Basic Authentication" that uses unique user settings independent of domains.

If more than one ScanRouter System product is installed on a computer, they share a single Authentication Management Service. When installed on separate computers, although they use different Authentication Management Service, they can mutually recognize each other's Authentication Management Services.

Note

☐ Authentication Management Service is used in common for the following ScanRouter System server products: ScanRouter DocumentServer Ver. 2.xxx, ScanRouter Web Navigator Ver. 3.xxx, ScanRouter EX Professional, and ScanRouter EX Enterprise.

5. Client Computer

By using DeskTopBinder Professional or a ScanRouter Web Navigator (Web browser), the documents stored in document management server and delivery server can be viewed. (To view documents using a Web browser, ScanRouter Web Navigator must be installed on the Web server.) After installing SRDS Manager and Authentication Manager, you can manage and maintain the document management server and manage Authentication Management Service.

6. Network Device

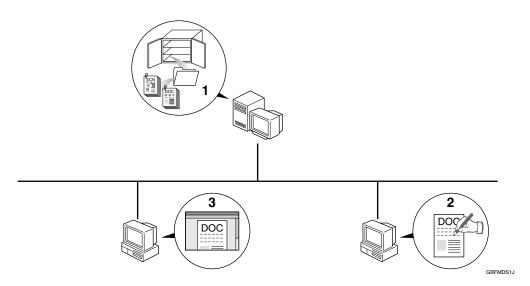
This device adds scanned documents to the server. In addition, the documents in the document management server can be printed directly from this device connected to the server.

Document Management with ScanRouter DocumentServer

With ScanRouter DocumentServer, documents can be added to the document management server making them available as shared data among client computers. The documents in the server can be viewed using DeskTopBinder Professional or a Web browser on a client computer. (To view documents using a Web browser or ScanRouter Web Navigator must be installed on the Web server.)

Outline of the document management system

In the document management system, documents are stored and managed in cabinets in the document management server. You can create folders in cabinets for sorting documents. You can also print stored documents directly from the server.



- 1. In the document management server, documents are stored in cabinets. Documents can be further organized by creating folders within cabinets.
- 2. Documents stored in the document management server can be viewed or process via DeskTop-Binder Professional on a client computer.
- 3. Documents stored in the document management server can be viewed and used from a Web browser on a client computer. (To view and process documents using a Web browser or ScanRouter Web Navigator must be installed on the Web server.)

Features of ScanRouter DocumentServer

The document management system has the following features to share documents among multiple users.

Various manageable data types

ScanRouter DocumentServer can integrate various kinds of data, such as files made with different applications, scanned image data, and existing image files for total document management. Files or image data created by applications are stored in cabinets or folders in the document management server and can be shared.

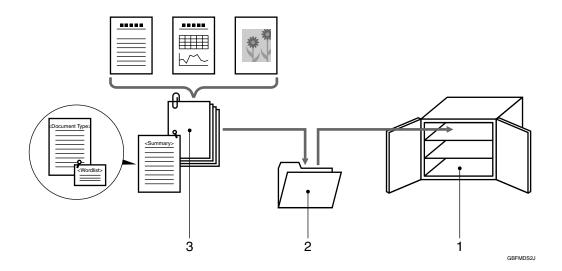
For the following jobs and tasks, the necessary applications must be installed in the document management server.

- Printing documents from the document management server
- Creating data for Web Viewer display
- Adding data from a Web browser to create a thumbnail

⇒ p.65 "File Formats Used with ScanRouter DocumentServer"

Organizing and managing documents

To organize documents for efficient management, folders and cabinets can be created in the document management server. Documents are added to folders and cabinets. Several files created in different applications can be put together as one document. Each document can have attached information such as a document name, number, and creator. Available information items are fixed by the document type configured for each document. A document can only be configured as one type. By storing documents of different types in separate cabinets, you make document management more efficient.



1. Cabinet

Cabinets, where documents are stored and managed, are created in the document management server by an administrator in advance.

2. Folder

Folders are created in cabinets as needed. Folders can be created using DeskTop-Binder Professional or ScanRouter Web Navigator.

3. Document

A document consists of multiple sections.

- Each file is called a section, and multiple sections make up a document.
- Information, such as document name and number, is attached to each document. The information is used when searching for particular documents or when listing documents in a particular order.
- Information items for each document type can be set with Document Type. You can create a wordlist for items that use character strings, and enter words directly from the wordlist.

Note

☐ Cabinet and folder document type can be set when adding documents.

Document type

A document type is a set of information items, such as a document name, number, and creator, that you can attach to each document. Since you can customize a document type with a variety of combinations of information items, you can attach necessary information for each document. In addition, since you can search for particular documents or list documents in order by type, creating and attaching a document type makes document management easier.

Available document types are as follows:

- Basic type (Basic)
- System preset type (Built-in)
- Custom type (Custom)

Ø Note

☐ Add or edit document types for each system using SRDS Manager. Use SRDS Manager or client software to specify the required document type for each cabinet. When a document is added from the client, the document type is specified. A default document type can also be specified for each cabinet or folder from the client software in advance so it can be set automatically when a document is added.

p.40 "Document Type Management"

Access control

Access rights can be set for each cabinet or folder. Set access rights to limit users to read-only document access, preventing unauthorized tampering or duplication. SRDS Manager allows you to set cabinet access rights for groups and users individually. Cabinet owners can change cabinet access rights and ownership.

p.35 "Cabinet Management"

Content text search

You can create text search data for a document, and use character strings in the document as search data.

p.35 "Cabinet Management"

Viewing Documents using a Web browser

By using a Web browser, documents can be added to the server and they can be viewed.

You can use ScanRouter Web Navigator to register and view documents also, and to make documents changes: such as adding/deleting sections, creating folders, and managing access rights.

Shortcut for document

By using DeskTopBinder Professional, shortcuts for documents can be created. If you create a shortcut for a frequently used document, you do not have to spend time looking for. Simply double-click the shortcut to display the document. Also, even shortcuts to documents stored in different folders can be collected in one folder.

Printing documents from the server

Documents in the document management server can be printed from the server. Print jobs are sent directly from the server so client computers will not be occupied by print jobs.

p.45 "Managing Print Jobs"

2. Managing and Maintaining Document Management System

Managing and Maintaining Document Management System

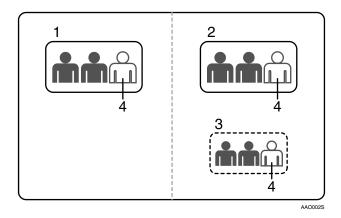
ScanRouter DocumentServer allows you to assign functions to individual administrators, instead of a single administrator managing all functions. This provides flexibility and efficiency.

Before starting ScanRouter DocumentServer operations, assign an administrator to each function and define the management style of ScanRouter Document-Server.

Consider the operation and management style of your system based on "Types of Administrator" and "Sample Settings of Administrator Right" described below.

Types of Administrator

ScanRouter DocumentServer utilizes the following types of administrator:



1. ScanRouter DocumentServer Administrator

This administrator is responsible for overall administration of ScanRouter DocumentServer servers.

This administrator uses SRDS Manager to manage and back up cabinets on a ScanRouter DocumentServer server.

p.16 "ScanRouter DocumentServer Administrator's Task"

2. Authentication Service Administrator

This administrator uses Authentication Manager to set up and manage Authentication Management Service, which controls general user authentication for the ScanRouter System.

₽ Reference

p.21 "Authentication Service Administrator's Task"

3. Users Administrator (Basic Authentication)

ScanRouter System provides users with "Windows Authentication (NT compatible)" or "Windows Authentication (native)" that uses Windows domain user authentication, and "Basic Authentication" that sets up unique users independent of domain. To use Basic Authentication, a Users Administrator registers and manages Basic Authentication users to maintain user information.

p.24 "Users Administrator's (Basic Authentication) Task"

4. Built-in User

This is an administrator account prepared by the system for making default settings. An administrator account is set up when ScanRouter DocumentServer is installed.

When you log on as a built-in user, you can perform every ScanRouter DocumentServer, SRDS Manager, and Authentication Manager operation.

After practical operation has started, be sure to change the built-in user password using Authentication Manager or SRDS Manager.

You can exclude built-in users from Scan-Router DocumentServer Administrators, Authentication Management Service Administrators, or User Administrators (Basic Authentication).

∰Important

☐ When you exclude built-in users from administrator members, if domain controller or Basic Authentication information is corrupted, administrator users cannot be identified and ScanRouter DocumentServer servers, Authentication Management Services, or Basic Authentication users cannot be managed.

Sample Settings of Administrator Right

The following shows sample settings of administrator rights. Make administrator settings according to your environment.

ScanRouter DocumentServer Administrator

This administrator is normally assigned to manage the ScanRouter DocumentServer computer.

You can include built-in users as administrator members.

Authentication Service Administrator

This administrator is normally assigned to administrator presiding and managing entire ScanRouter System.

You can include built-in users as administrator members.

Users Administrator (Basic Authentication)

This administrator is normally assigned to register and delete Basic Authentication users, and manage and maintain backed up of user information. You can include built-in users as administrator members.

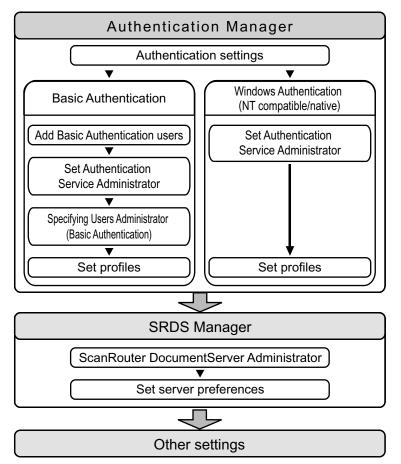
Preparing for Operation (Default)

Install ScanRouter DocumentServer, specify the management type, and then make default settings to start operation. A built-in user account is usually used for making default settings.

For details of how to make settings, see Authentication Manager Help and SRDS Manager Help respectively.

Flow of Default Settings

The procedure flow to make default settings is shown below.



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Setting Authentication Manager

Use Authentication Manager to make settings for the ScanRouter System's Authentication Management Service.

p.51 "About Authentication Manager"

Authentication settings

Make detailed authentication method settings. There are three types of authentication method available: Windows Authentication (NT compatible), Windows Authentication (native), and Basic Authentication.

Basic settings are complete at installation, but make settings about compositions of authentication methods using Authentication Manager in the following cases:

- If you want to directly specify the domain controller to use, when using Windows Authentication (NT compatible/native).
- If you want to obtain a user list of the domains to which the ScanRouter System server belongs and domains which have one-way trust relationship with the aforementioned domain, when using Windows Authentication (native).
- If you want to browse and use Authentication Service of another server (browsing another authentication).

∅ Note

- ☐ To use Windows Authentication (NT compatible) or Windows Authentication (native), create each type of domain and register domain users in advance.
- ☐ If ScanRouter EX Professional, ScanRouter EX Enterprise, or ScanRouter Web Navigator is installed on the same computer where ScanRouter Document-Server is installed, and authentication settings are already made by Authentication Manager, no settings are required here.

p.55 "Managing Authentication Settings"

Registering Basic Authentication user

When the authentication method is set to Basic Authentication, register a Basic Authentication user.

- ☐ Windows Authentication (NT compatible and native) does not require registration of Basic Authentication users.
- ☐ You can register users collectively from a CSV file created in advance using the import function of Basic Authentication users.

p.58 "Managing Basic Authentication User"

Setting Authentication Service Administrator

Make Authentication Service Administrator settings. Only the Authentication Service Administrator specified here can manage authentication settings, Authentication Service Administrators, and profiles.

p.53 "Adding and Removing Authentication Service Administrator"

Specifying Users Administrator (Basic Authentication)

When Basic Authentication is used as the authentication method, specify the administrator who adds or deletes users of Basic Authentication.

𝚱 Note

☐ Windows Authentication (NT compatible and native) does not require registration of Users Administrator (Basic Authentication).

₽ Reference

p.53 "Adding and Removing Users Administrator (Basic Authentication)"

Setting profiles

Make profile (e-mail address) settings and register the profile for a user of the selected authentication method.

Ø Note

☐ You must make profile settings to use ScanRouter EX Professional/Enterprise.

Preparation for the Whole System

Before starting document management system operations, server preference settings must be made for the whole system.

p.27 "About SRDS Manager"

Setting a ScanRouter DocumentServer Administrator

Make necessary settings for an administrator who manages all functions of ScanRouter DocumentServer including cabinet management and maintenance using SRDS Manager.

Note

 $\hfill \square$ Specify an administrator for each document management server.

p.31 "Specifying ScanRouter DocumentServer Administrator"

Making the server preference settings

Make the following server preference settings:

- Maximum OCR characters for Content Text Search
 Set the maximum number of characters per page when OCR is performed
 for content text search.
- Suspend relevant cabinets before performing scheduled task. Select whether or not to suspend relevant cabinets for a scheduled task if users are connected. If you select not to suspend cabinets, the task is reattempted the set number of times.
- Web Settings Make Web server settings.
- Settings of Time-Specific Normal Jobs
 To execute time-specific normal jobs, specify the start and complete times.

p.32 "Setting the Server Preference"

p.47 "Managing Schedule"

p.45 "Managing Time-Specific Normal Jobs"

Making backup settings

Make Schedule settings. Schedule allows the following tasks to be performed automatically:

- Cabinet backup
- System backup

- ☐ You can backup cabinets by specifying them individually or selecting all.
- ☐ For backup operations using other tools, see the manual provided.
- ☐ Data cannot be restored once lost. Be sure to back up all data regularly.

p.47 "Managing Schedule"

Preparation for Document Management

Make settings for cabinets, document types, and wordlist in preparation for document management.

Setting document types

Basic type is available as one of the preset document types. You can either use Basic type or create new document types by adding your own item settings. To set a new document type, make the information item settings, such as document name, number, and creator.

∅ Note

- ☐ Besides Basic type, the following system preset types are available:
 - Scan data
 - · Sent fax data
 - Copy data
 - Received fax data
 - Print data

p.35 "Cabinet Management"

Creating a wordlist

You can create wordlists. For document type items that take character strings, you can set a wordlist and enter words from it. The contents of a wordlist can be updated when required.

p.43 "Wordlist Management"

p.40 "Document Type Management"

Creating cabinets

You can create cabinets. For each cabinet, you can make owner settings.

Ø Note

☐ The administrator creates cabinets using SRDS Manager. Users can then use DeskTopBinder Professional or ScanRouter Web Navigator to create folders or documents in cabinets.

₽ Reference

p.40 "Document Type Management"

ScanRouter DocumentServer Administrator's Task

A ScanRouter DocumentServer Administrator must make preparations when the document management server can begin operation. Once the server is in operation, daily management and operation tasks are required. In addition, the administrator needs to change the server settings and maintain the server as necessary.

Proper management and settings for the preferences or purposes are necessary to ensure all clients can fully utilize the document management system.

Ø Note

Use SRDS Manager for settings, managing and operating the document management system.

Starting Up and Shutting Down the Document Management Server (Turning On/Off)

Follow the procedure below to start up or shut down the document management server.

Starting up the document management server

Turn the server on, and then start Windows. When the document management server starts, resume cabinets.

Shutting down the document management server

Before turning off or restarting the document server, make sure no users are connected to it. Suspend the cabinets, quit Windows, and then turn the document management server off.

Ø Note

☐ To check if there are users connected to the server, click [Server Information] on the [Server] menu.

⇒ p.33 "Displaying the Server Information"

Suspending or resuming cabinets

To suspend or resume cabinets, click [Suspend/Resume] on the [Operations] menu. When cabinets are resume, users can create folders and add documents.

Note

☐ You can resume a selected cabinet or all cabinets at the same time.

₽ Reference

p.30 "Suspending or Resuming Cabinets"

Daily Management and Operations

To manage and operate the document management system, an administrator is required to do the following tasks:

Checking free disk space in the server

Since the server hosts both document management system and operating system, when free space on the server's hard disk gets low, it may hinder system operations causing trouble such as inability to store documents and system instability. Check free disk space regularly, and try to reserve a certain amount of space by deleting unnecessary documents or moving documents to other media. Also, since creating data for Web Viewer display uses memory space, make sure there is free space not only when adding documents, but when creating data for Web Viewer display.

Checking server information

Check the number of folders and documents in the server, and the number of connected users regularly. When there are too many folders and documents, have users organize their folders or documents by putting them together, or delete unnecessary folders and documents. You can view the server information by clicking [Server Information] on the [Server] menu.

☐ To ensure documents are searchable, they should be sorted and stored in different folders.

p.33 "Displaying the Server Information"

p.67 "Limitations and Restrictions of ScanRouter DocumentServer"

Checking cabinet information

Check current settings for cabinets in the server and how they are being used, and, if necessary, change the settings or have users organize their folder and documents. You can view cabinet information by clicking [Display Cabinet Properties] on the [Operations] menu.

𝚱 Note

☐ Each cabinet can store up to 300,000 documents. When the number of documents exceeds 300,000, create another cabinet and divide the documents.

p.35 "Cabinet Management"

Checking jobs

You need to check job status regularly to make sure there are no unprocessed jobs remaining. There are two types of jobs: normal jobs and print jobs.

Normal jobs

A list of normal jobs, such as creating Content Text Search data or thumbnail data, in progress and queued is displayed. If any normal jobs remain unprocessed, start processing as needed. You can delete unnecessary jobs. The jobs deleted are not processed.

Time-specified normal jobs

A list of time-specific normal jobs, such as creating Content Text Search data or data for Web viewer display, is displayed. The jobs displayed in the list are processed at specified time.

Print jobs

A list of print jobs that are in progress or queued is displayed. When print jobs remain unprinted, check if any trouble occurred in the printer or if any communication error occurred.

p.44 "Managing Normal Jobs" p.45 "Managing Time-Specific Normal Jobs" p.45 "Managing Print Jobs"

Checking the system operating conditions

You can check the system operating conditions with logs. Every time a user accesses the document management system, a log is made. Each log includes access information such as date, user name, operation type, document name, and operation result. By checking logs, you will know the hours of heavy access, and which cabinets and documents are frequently used.

In the document management server, the following types of logs are kept.

❖ Access History

Access Log

System History

System Log

Note

☐ You can export the contents of logs into a CSV file.

p.46 "Managing Access Logs"p.47 "Managing System Logs"

Restarting the server

To keep the document management system stable, restart the document management server regularly.

Backing up

For safe operation of the document management system, backup the system and cabinets regularly. By using Schedule function, you can schedule automatic backup.

Backing up the system

You can back up the system information in a specified directory of the document management server.

Backing up cabinets

You can back up all data in cabinets in a specified directory of the document management server. You can backup a selected cabinet only, or all cabinets at a time.

Important

☐ Be sure to suspend relevant cabinets when backing up.

Note

Check backup status regularly to make sure backups are made normally.

p.33 "Backing Up or Restoring the System"

p.35 "Cabinet Management" p.47 "Managing Schedule"

Occasional Tasks Required

In the following circumstances, certain necessary tasks have to be performed:

When there are user changes

Perform the following tasks when there are any user changes, or when changing any settings such as cabinet settings and document type settings.

When adding a user

Perform the following task when there is a new user who will use the document management system.

- If a Basic Authentication user is being added, ask a Users Administrator (Basic Authentication) to register the new user.
- If adding a Windows Authentication (NT compatible or native) user, ask an administrator of the current domain to add the new user.
- Install DeskTopBinder Professional on the new user's computer if necessary.

When removing a user

Perform the following tasks when a user will not use the document management system anymore.

- If a Basic Authentication user is being removed, ask an administrator to remove the user.
- If there are any cabinets or folders for the user, delete or relocate the documents within them, and then delete their cabinets and folders.

When an administrator changes

To change management type and ScanRouter DocumentServer Administrator, use SRDS Manager to add or delete the administrator.

p.31 "Specifying ScanRouter DocumentServer Administrator"

When the server preference changes

Perform the following tasks when the server preference changes.

When the Web server changes

Change the Web server settings for the new Web server. See p.32 "Setting the Server Preference".

When the network environment changes If you have changed the network environment, the settings of the document management server have to be corrected using SRDS Manager and DeskTopBinder Professional.

Note

☐ Use the Environment Setting Tool to change the server's name. For the Environment Setting Tool, see the Readme file.

p.73 "Dial-up Connection"

Other occasional tasks

When changing a schedule

Change the start time of a scheduled task.

When changing the authentication method

You can change the authentication method using SRDS Manager.

∰Important

☐ Before you change the authentication method, add a built-in user as an administrator member in [Set Administrator]. After you change the authentication method, you must use a built-in user account to make administrator settings, etc. since the administrator right settings are lost. Note that you will not be able to manage ScanRouter DocumentServer if you do not add a built-in user to administrator members.

𝒯 Note

☐ When you change the authentication method, only the authentication method set by Authentication Service Administrator using Authentication Manager can be selected. For details, ask an Authentication Service Administrator. p.55 "Managing Authentication Settings"

Note

☐ The password entered for the installation account cannot be changed.

Troubleshooting

When errors or other problems occur, see p.71 "Troubleshooting" for the appropriate actions.

If the system is not operating normally such as when document or cabinet information is damaged or the system is unstable, restore the system with backup data.

p.71 "Troubleshooting"

p.33 "Backing Up or Restoring the System"

p.35 "Cabinet Management"

Authentication Service Administrator's Task

Once a server starts operating, Authentication Service Administrator performs general Authentication Management Service procedures, such as authentication settings, changing and adding Authentication Service Administrator, and backing up various Authentication Manager information.

Note

☐ Management of Authentication Management Service is performed by Authentication Manager.

Setting Authentication Service Administrator

Use Authentication Manager to change administrator settings for the Authentication Service Administrator or Users Administrator (Basic Authentication).

Use Authentication Manager to change administrator settings for Authentication Service Administrator.

p.53 "Setting and Managing Administrator"

Profile Management

Use Authentication Manager to manage user profile information for each authentication method used in Scan-Router System.

Using Authentication Manager, you can assign an e-mail address to a user (add a profile), delete a profile, or change an e-mail address.

Profile Management is required only when you use ScanRouter EX Professional or ScanRouter EX Enterprise.

Management of Authentication Settings

Use Authentication Manager to reset authentication method settings when the domain structure, authentication management server to be referenced, or authentication method is changed.

p.55 "Managing Authentication Settings"

Backing up Authentication Management Service Information

To restore Authentication Management Service when the server crashes or Authentication Management Service information is corrupted, regularly back up Authentication Management Service information using Authentication Manager. Use the backup schedule function, to perform regular automatic backup.

- Authentication Management Service information about the following:
 - Administrator rights
 - Profiles
 - Authentication settings

Note

☐ Backup of Basic Authentication information is the responsibility of a Basic Authentication Users Administrator.

p.60 "Backup and Restore" p.62 "Backup Schedule Management"

Backup Schedule Management

Add or change the backup schedule as required to perform routine backup of Authentication Management Service information.

p.62 "Backup Schedule Management"

Changing password for builtin user

When ScanRouter DocumentServer is installed, a built-in user account is prepared for making the default settings immediately after installation. The built-in user is granted all rights for ScanRouter DocumentServer Administrator, Authentication Service Administrator, and Users Administrator (Basic Authentication).

Since the built-in user has all administrator rights, change the built-in user password regularly once operation has started, to prevent misuse and security problems.

p.54 "Managing Password of Builtin User"

Other Occasional Tasks

In the following circumstances, certain necessary tasks must be performed:

When there are user changes

Perform the following tasks when there are changes to users of Scan-Router DocumentServer:

When adding a user

Perform the following when there is a new user.

- If the authentication method is Basic Authentication, ask a Users Administrator (Basic Authentication) to register the new user.
- If the authentication method is Windows Authentication (NT compatible or native), ask the administrator of the current domain to add the new user.

When removing a user

When the number of users decreases, remove the user from Basic Authentication users or domain users, if necessary. Ask a Users Administrator to remove the Basic Authentication user.

p.58 "Managing Basic Authentication User"

When the server preference changes

Perform the following when the server preference changes:

When the Authentication Management Service server is changed

When the authentication method currently in use refers Authentication Management Service to another server, and the server referred to changes, change the authentication settings using Authentication Manager.

p.55 "Managing Authentication Settings"

When the network environment changes When the network environment currently in use is changed, use Authentication Manager on a client computer to make the correct

Authentication Manager on a client computer to make the correct Authentication Management Service connection settings.

Troubleshooting

When errors or other problems occur, see p.71 "Troubleshooting" for the appropriate remedial actions.

If the system is not operating normally such as when information about administrator rights or authentication settings is corrupted, or the system is unstable, restore the system using backup data.

p.71 "Troubleshooting" p.60 "Backup and Restore"

Users Administrator's (Basic Authentication) Task

When Basic Authentication is used as the authentication method, a Users Administrator uses Authentication Manager to add or delete a user and back up user information.

Ø Note

Management of Basic Authentication users is performed using Authentication Manager.

Management of Users Administrator (Basic Authentication)

Use Authentication Manager to change settings when you need to add or delete a Users Administrator (Basic Authentication).

p.53 "Adding and Removing Users Administrator (Basic Authentication)"

Management of Basic Authentication User

When the number of Basic Authentication users, user information, or group membership is changed, you must use Authentication Manager to edit the registration information of Basic Authentication users.

You can import and register Basic Authentication users from a CSV format file and export registered Basic Authentication users to a CSV file so other Authentication Management Services on other servers may import them.

p.58 "Managing Basic Authentication User"

Backing Up Basic Authentication Information

To restore the Basic Authentication information when it is corrupted, use Authentication Manager to perform routine backup of Basic Authentication user information.

Using the backup schedule function, you can perform a regular and automatic backup.

Note

☐ To perform backup the Basic Authentication information using the backup schedule function, the user must have the authentication rights of both Authentication Service Administrator and Users Administrator.

p.60 "Backup and Restore"

⇒ p.62 "Backup Schedule Management"

Other occasional tasks

Under the following circumstances, certain necessary tasks must be performed:

When the server preference changes

Perform the following when the server preference changes.

When the network environment changes When the network environment currently in use is changed, use Authentication Manager of the client computer to make the correct settings of Authentication Manager Service connected.

Troubleshooting

When errors or other problems occur, see p.71 "Troubleshooting" for the appropriate actions.

If the system is not operating normally such as when the Basic Authentication information is corrupted or the system is unstable, restore the system using backup data.

p.71 "Troubleshooting" p.60 "Backup and Restore"

3. How to Use SRDS Manager

About SRDS Manager

What is SRDS Manager?

SRDS Manager is a tool for managing and operating the document management system. Administrators can perform all kinds of operations, such as making various types of settings, and managing cabinets and document types, using SRDS Manager. To use SRDS Manager, the right of Scan-Router DocumentServer Administrator is required.

Ø Note

- ☐ SRDS Manager is installed together with ScanRouter Document-Server when setting up the document management server. It can also be installed on client computers, and can be used by specifying the document management server to manage it.
- ☐ For how to install SRDS Manager on client computers, see *ScanRouter DocumentServer Setup Guide*.

Starting SRDS Manager

Start SRDS Manager.

The following procedures are for starting SRDS Manager for the first time. From the second time, the server that was the last selected is automatically selected.

Note

☐ Another server can always be selected after start-up.

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

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

- 2 Click the [Browse] button to select a server to manage. The server name can also be entered directly.

 The [Browse Servers] dialog box appears.
- 3 Select a server to be managed, and then click the [OK] button.

 The [Select Server] dialog box reappears.
- 4 Click the [OK] button.
 The [Login] dialog box appears.
- Enter [User name] and [Password] of the ScanRouter DocumentServer Administrator. You may have to enter [Domain] depending on the authentication method.

𝚱 Note

- ☐ When you start SRDS Manager for the first time, or you have not made settings for the administrator using SRDS Manager yet, enter a user name (Admin) and password of a built-in user to log on.
- ☐ When changing the document management server for administration, click [Select Another Server] to select the required server.
- Click the [OK] button to start SRDS Manager.

Quitting SRDS Manager

 $oldsymbol{1}$ On the [Server] menu, click [Exit].

Using Help

Help provides instructions on how to use SRDS Manager and making settings. Help also gives explanations of each item in the dialog boxes.

To get information about operating procedures

On the [Help] menu, click [Contents and Index]. Help for operating procedures is shown.

To get information about items in dialog boxes

Click **[Help]** in each dialog box. Help for the dialog box appears.

Search by a function name or keyword

On the [Help] menu, click [Contents and Index] to search Help topics by the function name or keyword.

Search by a function name

Click the **[Find]** tab on Help. Enter a character string or function name you want to find, and then click **[Find Now]**. Explanations related to the word you entered are displayed.

Search by a keyword

Click the **[Index]** tab on Help. Enter a keyword or select an index from the list, and then click **[Display]**. Explanations related to the keyword are displayed.

Version information

On the **[Help]** menu, click **[About ...]** to display version information of SRDS Manager.

Ø Note

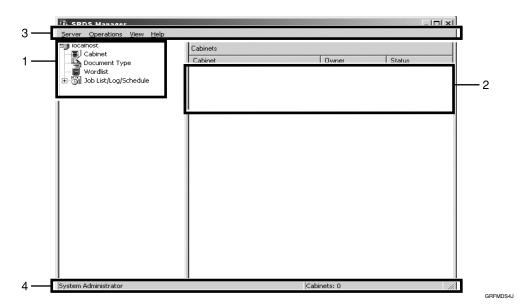
☐ To display version information of the document management server, click [Server Information] on the [Server] menu.

⇒ p.33 "Displaying the Server Information"

Viewing the Initial Window

The following is an explanation of the initial window of SRDS Manager.

Layout of the initial window



- 1. The list of manageable items (the tree pane)
- 2. The contents of the item selected in "1" (the list pane)
- 3. Available menus of SRDS Manager
- 4. The current condition of the document management server or information about the current display item

Selecting an item to manage

In the tree pane, select an item you want to manage. Available menus and contents of the list pane will vary depending on the selected server, cabinet, document type, and job.

Displaying or hiding the Status bar

On the [View] menu, click [Status Bar] to display or hide the Status bar.

Updating the information shown in the list pane.

On the **[View]** menu, click **[Refresh]** to update the information shown in the list pane.

Suspending or Resuming Cabinets

Before you make the following settings or perform the following operations with SRDS Manager, the relevant cabinets must be suspended. Suspend cabinets are not available for other operations.

- Backing up or restoring the system
- [Set Server Preferences] on the [Server] menu
- The following operations appear in the [Operations] menu when a cabinet is selected:
 - Edit Cabinet
 - Delete Cabinet
 - Back Up
 - Restore
 - Remove Cabinet from System
 - Export/Import Document Type Properties in CSV Format
 - Display Document being updated
- The following operations appear in the [Operations] menu when a document type is selected:
 - Edit Document Type
 - Delete Document Type
 - Customize Document Type Properties Display
- The following operations appear in the [Operations] menu when the wordlist is selected:
 - Edit Wordlist
 - Delete Wordlist

To suspend cabinets, select a cabinet, and then click [Suspend/Resume] on the [Operations] menu.

Be sure to resume suspended cabinets after finishing operations or making settings for them.

#Important

- ☐ Suspending a cabinet while a user is connected to it invalidates all tasks the user has done to the cabinet. Make sure that no user is connecting to a cabinet before suspending it. To check connected users, click [Server Information] on the [Server] menu.
- ☐ [Server Job] shown in the [Connected Users] dialog box means a job being processed in the server. If you suspend the cabinet, that job will be canceled.

⇒ p.35 "Cabinet Management"

Server Management

To manage the document management server, you need to make the following settings and perform the following management tasks that relate to the whole system.

Selecting a Document Management Server

If a document management server was not selected when starting SRDS Manager, or if you want to manage another server, select a document management server. To select a server, click [Select Server] on the [Server] menu.

Specifying Another Login User

Specify a user, other than the user currently logged in to SRDS Manager. On the [Server] menu, select [Login as another User] to specify another user.

Specifying ScanRouter DocumentServer Administrator

Add or delete the ScanRouter DocumentServer Administrator.

Select the administrator you want to add from the user group of the authentication method used in the document management server.

You can also specify whether to add a built-in user as an administrator of the document management server.

Make administrator settings in [Set Administrator] on the [Server] menu.

Changing Authentication Method

You can use SRDS Manager to change the authentication method currently used in the document management server to another authentication method.

To change the authentication method, use [Change Authentication Method] on the [Server] menu.

You can select an authentication method from the following three types:

- Windows Authentication (NT compatible)
- Windows Authentication (native)
- Basic Authentication

∰Important

☐ Before you change the authentication method, add a built-in user as an administrator member in [Set Administrator] of ScanRouter DocumentServer management tool. After you change the authentication method, you must use a built-in user account to make administrator settings, register ScanRouter DocumentServer users, and so on, since the administrator rights information is lost. Note that you will not be able to manage Scan-Router DocumentServer if you do not add a built-in user to administrator members.

Ø Note

☐ When you change the authentication method, only the authentication method set by Authentication Service Administrator using Authentication Manager can be selected. For details, ask an Authentication Service Administrator.

Changing Password for Builtin User

Change the password for the built-in user of the document management server.

To change the password of a built-in user, click [Change Built-In password] on the [Server] menu.

Note

- ☐ To change the password of a builtin user, you must have rights of Authentication Service Administrator.
- ☐ If you change the password of a built-in user at this point, the password of the built-in user managed by Authentication Management Service changes also.

Setting the Server Preference

Make the following preference settings to control document management system actions. On the [Server] menu, click [Set Server Preferences] to make the preference settings.

- General Make general settings for the server preference.
 - Suspending cabinets regardless of connected users
 Select whether or not to cut off connected users when suspending cabinets for scheduled tasks.
 - Relocate previous backup data for performing backup
 Specify a location previous backup data to be relocated before performing scheduled backup.
 - Web settings Make Web server settings.

- To use Web server, make address and virtual directory settings for it. If the document management server and Web server are installed in the same computer, select the [Use the same computer for the Web server and document management server.] check box.
- If you do not want to use Web server URL link, select the [Make URL hyperlinks inactive] check box.
- When SSL is set for the Web server to be used, select the [Use SSL] check box.

OCR

Make settings for using OCR. The following are available:

- Maximum OCR characters for Content Text Search
- Noise Reduction
- Shading Removal
- Skew Correction
- Color Recognition
- Low Resolution Correction

Job

Make settings for time-specific normal jobs. The following are available:

- Start time
- Complete time

Displaying the Server Information

Information is available about the document management server, such as number of cabinets and documents. To display this information, select [Server Information] from the [Server] menu.

The available information items in the **[Server Information]** dialog box are:

- Server name
- Server type
- Version
- Cabinets
- Folders
- Documents
- Shortcuts
- Connected users (number)
- Connected users (list)

Note

☐ In the **[Connected Users]** list, users currently connected to the document management server are displayed.

Backing Up or Restoring the System

You can make a backup file for the document management system information in any directory specified on the document management server. For safe operation of the document management system, make backups for the system and cabinets regularly. Scheduled backup for cabinets or the system overwrites current backup data.

To restore the system using backup data, use the Restore function.

Backup data consists of the following items:

- Cabinet information
 Cabinet settings information
- Document Type
- Wordlist
- Schedule information
- A system administrator password for the server
- Server preferences
- PDF direct print settings
- Administrator right settings

Backing up the system

On the [Server] menu, click [Back Up System], and then specify a save location for the backup data. You can assign a password for the backup data.

When backing up the system, be sure to back up all cabinets also.

Ø Note

☐ The folder for saving backup data must be empty. If there is no empty folder, you can create a new folder as the save location.

Using backup data to restore the system

On the [Server] menu, click [Restore System], and then specify the folder containing the backup data. If a password is assigned for the backup data, enter it.

When restoring the system, be sure to restart the computer.

∰Important

- ☐ All cabinets must be suspended before backing up or restoring the system.
- ☐ Restore is a function that should be used only when trouble occurs. Use Restore only when necessary.
- ☐ Restore returns the system to the condition at last backup by overwriting system data with backup data. Data changed or settings made after the last backup cannot be recovered.
- ☐ When restoring all cabinets using backup data, restore the system using its backup data also. This will avoid inconsistencies in data.
- ☐ After the system is restored, all cabinets are suspended. On the [Operations] menu, click [Suspend/Resume] to resume cabinets.
- ☐ Backup data created under the previous version of ScanRouter DocumentServer cannot be restored.

Cabinet Management

Cabinet Management

You can manage cabinets by selecting **[Cabinets]** in the tree pane. Cabinets are created in the document management server by an administrator for users to store or manage their documents in. When **[Cabinets]** is selected, all cabinets in the server are listed.

Available operations in the **[Operations]** menu when a cabinet is selected are:

- Creating a new cabinet
- Editing a cabinet
- Deleting a cabinet
- Suspending or resuming cabinets
- Displaying cabinet properties
- Displaying connected users
- Backing up and restoring cabinets
- Re-adding and removing cabinets
- Exporting or importing document type properties in CSV format
- Displaying documents during update

∅ Note

- ☐ The following are cabinet information items available in the [Cabinets] list:
 - Cabinet name
 - Owner
 - Work status

Creating a new cabinet

You can create a new cabinet.

Click [New Cabinet] on the [Operations] menu to make the following settings for the new cabinet:

- Cabinet name
- Owner

To make detail settings for the following items, click [Detailed Settings>>] in the [New Cabinet] dialog box.

Cabinet settings

Select the types of data you want to create for documents stored in the cabinet. The types of data that can be created are as follows:

- Thumbnail data
- Content Text Search data
- Data for Web Viewer display
- Creating PDF data
- Print settings for inserting text

Database

Specify the database location.

Document type

Set the document types to be used in the cabinet. You can also check the settings of each document type.

Access control

You can assign the following access rights for each cabinet. The cabinet owner can have full access rights.

- Full access Grants all access rights.
- Update
 Grants rights to view properties, create folders, create documents and shortcut, update, and read documents.
- Read
 Grants rights to view properties and read documents.
- View Grants the right to view properties.
- No access No access rights are granted.

Note

☐ If ScanRouter DocumentServer Administrator right is set for the built-in user, full access rights are granted for the user.

Note

- ☐ A cabinet name can contain up to 32 alphanumeric characters.
- ☐ Before creating a cabinet, document types should be created.
- ☐ Do not change the content of the folder specified as the database save location.
- ☐ Do not create a cabinet in a drive on a network.

Editing a cabinet

You can edit cabinet settings. Select a cabinet you want to edit in the [Cabinets] list, and then click [Edit Cabinet] on the [Operations] menu.

Note

- ☐ Before editing a cabinet, be sure to suspend it.
- ☐ Settings for database save location cannot be edited.
- ☐ The owner can be edited by the cabinet owner only.
- ☐ Access rights can be edited by the cabinet owner or administrators with full access rights.
- ☐ After editing the cabinet settings, be sure to back up the system.

Deleting a cabinet

You can delete a cabinet. Select the cabinet you want to delete in the [Cabinets] list, and then click [Delete Cabinet] on the [Operations] menu.

#Important

☐ Before deleting a cabinet, make sure that the cabinet to be deleted is connected properly.

- ☐ Before deleting a cabinet, be sure to suspend it.
- ☐ All documents in the cabinet being deleted will be lost.
- ☐ The cabinet can be deleted by ScanRouter DocumentServer Administrator only.
- ☐ After deleting a cabinet, be sure to back up the system.

Suspending or resuming cabinets

You can suspend or resume cabinets. Before you make any settings for cabinets, be sure to suspend the relevant cabinets. You can suspend or resume a selected cabinet only, or all cabinets at the same time.

∰Important

☐ Suspending a cabinet while a user is connected to it invalidates all tasks the user has done to the cabinet. Make sure no users are connected to the cabinet before suspending it.

Suspending cabinets

- Select the cabinet you want to suspend in the [Cabinets] list, and then from the [Operations] menu, point to [Suspend/Resume], and select [Suspend Cabinet].
- To suspend all cabinets, point to [Suspend/Resume] from the [Operations] menu, and then select [Suspend All Cabinets].

Note

☐ If there are connected users, the number of connected users and a list of those users appears in the [Suspend Cabinet] dialog box. Notify users that the cabinets will be suspended.

Resuming cabinets

- Select the cabinet you want to resume in the [Cabinets] list, and then on the [Operations] menu, point to [Suspend/Resume], and click [Resume Cabinet].
- To resume all cabinets, on the [Operations] menu, point to [Suspend/Resume], and then click [Resume All Cabinets].

Displaying cabinet properties

You can display cabinet properties information. Select a cabinet in the [Cabinets] list, and then click [Display Cabinet Properties] on the [Operations] menu.

The following information items are available in the **[Cabinet Settings]** dialog box:

- Data to be created for added documents
- Folders
- Documents
- Shortcuts
- Connected users
- Cabinet size
- Document type
- Database
- Access right

Ø Note

☐ Access rights are displayed only for users with full access rights.

Displaying connected users

You can display a list of users who are currently connected to a selected cabinet. Select a cabinet in the [Cabinets] list, and then click [Display Connected Users] on the [Operations] menu. The number of connected users and a list of those users appears.

- ☐ Update the information by clicking [Refresh].
- ☐ User names will appear in the **[Connected Users]** list.

Backing up and restoring cabinets

You can backup all data in a cabinet at a specified save location. Regular cabinet backup is recommended.

To restore a cabinet using backup data, use the Restore function.

Backing up cabinets

You can back up only a selected cabinet or all cabinets at the same time.

- To back up only one cabinet, select a cabinet in the [Cabinets] list. On the [Operations] menu, point to [Back Up], click [Selected Cabinet], and then specify the save location.
- To back up all cabinets, point to [Back Up] on the [Operations] menu, click [All Cabinets], and then specify the save location.

Note

- ☐ Before being backed up, the relevant cabinets must be suspended. If the cabinets to be backed up are in operation, backup cannot be carried out.
- ☐ Make sure that there is enough free disk space for backup.
- ☐ When backing up cabinets, be sure to backup the system also.
- ☐ You can assign a password for the backup data.

For details about backup using the schedule function, see p.47 "Managing Schedule".

Restoring a cabinet

Restoration is for only one cabinet at a time. After creating a new cabinet, on the **[Operations]** menu, click **[Restore]**, and then specify the location where the backup data you want to use is stored.

∰Important

☐ Restoration will overwrite current cabinet data with backup data. If the name of the cabinet to be overwritten is different to the name of the cabinet in the backup data, it will not be inherited. (For example, if the name of the cabinet in backup is "Specification 1", and the name of the cabinet being restored is "Specification 2", the new cabinet name will stay as "Specification 2" after restoration.)

Note

- ☐ Before restoring a cabinet, be sure to suspend the cabinet used as the restoration location.
- ☐ If any inconsistencies occur in the backup data while restoring, restoration will not be completed correctly.
- ☐ If a password is assigned for the backup data, enter it.

Limitation

☐ All cabinets cannot be restored at the same time.

Re-adding and removing cabinets

You can re-add or remove cabinets.

- To remove a cabinet, select the cabinet from the [Cabinets] list, and then select [Remove Cabinet from System] from the [Operations] menu.
- To re-add a cabinet, select [Re-add Cabinet to System] from the [Operations] menu, and then specify the cabinet to be re-added.

Note

☐ When a cabinet is removed, document types are edited by SRDS Manager. Document types used in the removed cabinet may be created as new document types when the cabinet is re-added.

Exporting or importing document type properties in CSV format

The information for all documents in a cabinet can be exported as a file for modification.

- To export document information as a file, on the [Operations] menu, point to [Export/Import Document Type Properties in CSV Format], click [Export], and then specify a save location.
- To import the information in the file back into the cabinet, on the [Operations] menu, point to [Export/Import Document Type Properties in CSV Format], click [Import], and then specify the file.

∅ Note

- You cannot add new information items to those that were exported. Even if you do, this information cannot be imported.
- ☐ Document type cannot be modified.

- ☐ Document information items that can be modified using this function are:
 - Name
 - Creator
 - Expires
 - Custom properties settings

Displaying documents under-edit

A list of documents currently being edited is displayed. You can cancel the under-edit status of a document displayed in [Documents Under-Edit List:].

Displaying the list of documents under-edit

Select a cabinet containing underedit documents in the [Cabinet] list, and then click [Display Documents Under-Edit] on the [Operations] menu.

Cancel under-edit status of documents

In [Documents Under-Edit List:], select a document to cancel its underedit status, and then click [Cancel Editing].

- ☐ In [Documents Under-Edit List:], the following items of information is displayed:
 - Document number
 - Updated by
 - Edit started
- ☐ When canceling under-edit status, make sure that the cabinet is being processed. Canceling is not possible if the cabinet is not being processed.

Document Type Management

Managing Document Types

You can manage document types by selecting [Document Types] in the tree pane. When you click [Document Type], all document types that were added are listed.

Available operations for Document Type are:

- Creating a new document type
- Editing a document type
- Deleting a document type
- Customizing document type properties display

Note

- ☐ The available information items in **[Document Types]** are:
 - Document name
 - Document type
- ☐ After creating, editing, or deleting a document type, be sure to back up the system.

Creating a new document type

Available document types are Basic type and those preset by the system. In addition to these, you can create your own document type for your own use, with a name of your choice. By using document types properly, you can organize documents to manage them efficiently.

There are two types of document type setting properties, system settings properties that are preset for all document types, and custom properties. To set a new document type, click [New Document Type] on the [Operations] menu, and then make the following settings:

Document type name

Enter a document type name using up to 32 alphanumeric characters.

Save-for period (years)

Make the save-for period initial setting for the document type by year. You can enter 1 to 99.

Custom Properties

You can add up to 20 items in any combination from the following setting items. Items to be added can be named according to your preference. Available setting items are Strings, Values, and Dates.

• Strings

Strings can be set for up to 20 items. Enter an item name using up to 20 alphanumeric characters. You can set a wordlist for this item. Character strings of up to 50 characters can be used for this item.

Values

Values can be set for up to 5 items. Enter an item name using up to 20 alphanumeric characters. Numbers of up to 9 digits can be used for this item.

Date

Date can be set for up to 5 items. Enter an item name using up to 20 alphanumeric characters. Date in the MM/DD/YYYY format can be used for this item.

• User-numbering type (Numbers follow alphanumeric characters, such as bar code or part number.)

User-numbering type can be set for only 1 item. Enter an item up to 90 characters and 8 alphanumeric characters.

Note

☐ Items to be added can be set as essential items. You can also set user defaults of items specified as essential.

Basic Properties

Basic Properties are property item, set in advance, and cannot be changed.

You can set a wordlist for [Document name] and [Creator]. When setting a wordlist, select whether only entries from the wordlist can be used or if users can directly make entries.

Assigned Cabinets

Cabinets for which the document type is to be assigned are shown.

Limitation

- ☐ The following are the limitations for entering document type names and item names.
 - The symbols, \, /, :, *, ?, ", <, >, |, cannot be used.
 - Not setting a name, or a name containing only spaces is not allowed.
 - Spaces are not allowed at the beginning or end of a name.

Editing a document type

You can edit the document type settings. Select a document type in the [Document Types] list, and then click [Edit Document Type] on the [Operations] menu.

#Important

☐ If you delete custom properties or change custom property types, the information set for documents in that item will be deleted.

Note

- ☐ Before editing a document type, be sure to suspend all cabinets.
- ☐ For Basic type and preset document types, you can only set wordlists.

Deleting a document type

Select the document type you want to delete in the [Document Types] list, and then click [Delete Document Type] on the [Operations] menu.

𝚱 Note

- ☐ Before deleting a document type, be sure to suspend all cabinets.
- ☐ Basic type and preset document types cannot be deleted.
- ☐ Document types assigned to any cabinet cannot be deleted.

Customizing document type properties display

You can edit a document item for the following types of view. Select the document type you want to edit in the [Document Types] list, and then click [Customize Document Type Properties Display] on the [Operations] menu.

Search View

You can set displayed items when searching.

❖ Properties View

You can select the display order of items when viewing properties.

Details View

You can select which items are displayed in the detail list.

- ☐ Before editing document type properties, be sure to suspend all cabinets.
- \square [Document name] must be set.
- ☐ These settings will be used when adding a document type.
- ☐ You cannot edit Basic type and preset document types.

Wordlist Management

Managing Wordlists

By selecting [Wordlists] in the tree pane, you can manage wordlists. When you select [Wordlist], all wordlists added are listed.

Available operations for Wordlist are:

- Creating a new wordlist
- Editing a wordlist
- Deleting a wordlist

Note

- ☐ The available information items in **[Wordlists]** are:
 - Name
- ☐ After creating, editing, or deleting a wordlist, be sure to backup the system.

Creating a new wordlist

You can create a new wordlist and add words to it. On the **[Operations]** menu, click **[New Wordlist]**, and then make the following setting.

- Name
 Enter a new wordlist name using up to 32 alphanumeric characters.
- Adding words
 Add words containing up to 50 characters.

Ø Note

- ☐ Select the [Allow addition of words by clients.] check box to allow users to add words to the wordlist.
- ☐ For words added, the following operations are available:
 - Deleting words
 - Making settings for the display order of words
 - Exporting and importing words

Editing a wordlist

You can edit the wordlist settings. Select a wordlist you want to edit in **[Wordlists]**. On the **[Operations]** menu, click **[Edit Wordlist]**, and then edit the settings.

Note

- ☐ A wordlist can be edited only when the relevant cabinets are suspended.
- ☐ The name of a wordlist set for any item of a document type cannot be edited.

Deleting a wordlist

Select a wordlist you want to delete in [Wordlists], and then click [Delete Wordlist] on the [Operations] menu.

Note

☐ A wordlist set for any item of a document type cannot be deleted.

3

Job List/Log/Schedule Management

With **[Job List/Log/Schedule]**, you can manage the following:

- Normal Jobs
- Time-specified Normal Jobs
- Print Jobs
- Access Logs
- System Logs
- Schedule

Managing Normal Jobs

With **[Normal Jobs]**, you can manage jobs processed by the document management server.

By selecting **[Normal Jobs]** in the tree pane, all jobs in progress and queued are listed.

The available operations for Normal Jobs are:

- Deleting normal jobs
- Suspending or resuming normal jobs

Note

- ☐ The available information items in [Normal Jobs] are:
 - Requested (time)
 - Requested by
 - Description
 - Document

Deleting normal jobs

You can delete normal jobs. You can delete one normal job or all normal jobs at the same time.

- To delete the selected normal job, select the normal job you want to delete in the [Normal Jobs] list, and then click [Delete Normal Job] on the [Operations] menu.
- To delete all normal jobs at the same time, click [Delete All Normal Jobs] on the [Operations] menu.



☐ Before deleting normal jobs, be sure to suspend them. When a normal job is in operation, you cannot delete it.

Suspending or resuming normal jobs

You can suspend or resume normal jobs.

- To suspend normal jobs, click [Suspend Normal Jobs] on the [Operations] menu.
- To resume normal jobs, click [Resume Normal Jobs] on the [Operations] menu.

Managing Time-Specific Normal Jobs

With **[Time-Specific Normal Jobs]**, jobs to be processed at specific time can be managed.

Select **[Time-Specific Normal Jobs]** to display a list of jobs to be processed at specific time.

Available operations for time-specific normal jobs are:

- Delete All Time-Specific Normal Jobs
- Suspend/Resume Time-Specific Normal Jobs

Ø Note

- ☐ The following information items are available in [Time-Specific Normal Jobs]:
 - Requested (time)
 - Requested by
 - Description
 - Document

Deleting time-specific normal jobs

Time-specific normal jobs can be deleted. Selected jobs or all jobs can be deleted as required.

- To delete the selected time-specific normal jobs, select the jobs to be deleted in the time-specific normal job list, and then click [Delete Time-Specific Normal Job] on the [Operations] menu.
- To delete all time-specific normal jobs collectively, click [Delete All Time-Specific Normal Jobs] on the [Operations] menu.

Note

☐ Before deleting time-specific normal jobs, be sure to suspend them. When a time-specific normal job is being processed, it cannot be deleted.

Suspending or resuming time-specific normal jobs

Time-specific normal jobs can be suspended or resumed.

- To suspend time-specific normal jobs, click [Suspend Time-Specific Normal Jobs] on the [Operations] menu.
- To resume time-specific normal jobs, click [Suspend Time-Specific Normal Jobs] on the [Operations] menu.

Note

☐ When time-specific normal jobs are suspended or resumed, normal jobs are also suspended or resumed.

Managing Print Jobs

You can manage all print jobs sent from the document management server using [Print Jobs].

When selecting **[Print Jobs]** in the tree pane, a list of print jobs in progress and queued is displayed.

Available operations for print jobs are:

- Deleting print jobs
- Suspending or resuming print jobs
- Selecting a printer
- Set printer (PDF direct print)
- Print Job Save Settings

- ☐ To view all print jobs in progress or queued, click [Select Printer] on the [Operations] menu. All print jobs are listed in [Print Jobs List].
- ☐ The available information items in [Print Jobs List] are:
 - Requested (time)
 - Requested by
 - Document
- ☐ You cannot move print jobs from one printer to another.

Deleting print jobs

You can delete only one print job or all at the same time.

- To delete only one print job, select the print job you want to delete in the [Print Jobs] list, and then click [Delete Print Job] on the [Operations] menu.
- To delete all print jobs in the [Print Jobs] list at the same time, click [Delete All Print Jobs] on the [Operations] menu.

Suspending or resuming print jobs

You can suspend or resume print jobs.

- To suspend print jobs, click [Suspend Print Jobs] on the [Operations] menu.
- To resume print jobs, click [Resume Print Jobs] on the [Operations] menu.

Selecting a printer

On the **[Operations]** menu, select **[Select Printer]**, and then click a printer. All print jobs in progress or queued for that printer are listed.

Note

☐ To make settings for a server supported printer, see *ScanRouter DocumentServer Setup Guide*.

Set printer

On the **[Operations]** menu, click **[Set Printer]** to make settings for printers supporting PDF direct print.

Print job save settings

On the [Operations] menu, click [Print Job Save Settings], and specify the number of logs for jobs to be saved.

Managing Access Logs

With [Access Log], you can manage access logs. In an access log, information about users' access of the document management server is stored.

When **[Access Log]** in the tree pane is selected, a list of access logs appears.

Available operations for access logs are:

- Exporting access logs
- Making settings for saving access logs

Ø Note

- ☐ The available information items in **[Access Log]** are:
 - Access time
 - User name
 - Computer name
 - Operations
 - Cabinet name
 - Object
 - Additional information

Exporting access logs

You can export access logs into a file for saving. On the **[Operations]** menu, click **[Export Access Log]**, and then specify a save location.

Settings for saving access logs

You can make settings for saving access logs. On the [Operations] menu, click [Access Log Save Settings], and then specify the size and number of log files to be saved.

Note

- ☐ Specify the log file size between 1,000 to 5,000 KB.
- ☐ Specify the number of files between 2 to 99.

Managing System Logs

With **[System Log]**, you can manage system logs. In a system log, information including errors that occurred is recorded.

Available operations for system logs are:

- Exporting system logs
- Making settings for saving system logs

∅ Note

- ☐ The available information items in [System Log] are:
 - Logged (time)
 - User name
 - Computer name
 - Cause
 - Actions Taken
 - Additional Information

☐ When ScanRouter Web Navigator is installed on the same computer as ScanRouter DocumentServer, ScanRouter Web Navigator system logs are also displayed.

Exporting system logs

You can export system logs into a file for saving. On the **[Operations]** menu, click **[Export System Log]**, and then specify a save location.

Settings for saving system logs

You can make settings for saving system logs. On the **[Operations]** menu, click **[System Log Save Settings]** to specify the size and number of log files.



- ☐ Specify the log file size from 1,000 to 5,000 KB.
- ☐ Specify the number of files from 2 to 99.

Managing Schedule

With **[Schedule]**, you can manage the Schedule function. When **[Schedule]** is selected, set schedules are listed.

Available operations for Schedule are:

- Setting a new scheduled task
- Deleting a scheduled task
- Suspending or resuming a scheduled task
- Editing a scheduled task

Note

- ☐ The Schedule function automatically performs the following operations regularly:
 - Cabinet backup
 - System backup
- When backing up cabinets or the system using the Schedule function, current backup data is overwritten.
- ☐ Create a folder exclusively for saving the backup data.
- ☐ The available information items in **[Schedule]** are:
 - Next Scheduled
 - Task
 - Object
 - Status
 - Last Result
 - Server type (only when Scan-Router DocumentServer and ScanRouter Web Navigator are installed in the same computer)

New scheduled task

Set a schedule for a new task. On the **[Operations]** menu, click **[New Scheduled Task]**, and then make the necessary settings.

- Backing up a selected cabinet Specify a day of the week and time, a backup data password to backup each cabinet.
- Backing up all cabinets
 Specify a day of the week and time,
 a backup data password to backup all cabinets.
- System backup
 Specify a day of the week and time,
 a backup data password to backup
 the system.

Note

- ☐ Before backing up, make sure there is enough free disk space for backup.
- ☐ You can also specify the number of attempts to complete a task when the relevant cabinets are being used. However, if the settings in the [Set Server Preferences] dialog box are made to suspend the relevant cabinets at a scheduled time, the number of attempts cannot be specified.
- ☐ The schedule times for each task must not overlap.
- ☐ If the document management server is off at the scheduled time, the task will not be performed.
- ☐ If the scheduled time for tasks that cannot be processed simultaneously overlaps, the tasks will be attempted for the number of times specified. If all attempts fail, the scheduled task will not be performed.

p.32 "Setting the Server Preference"

Deleting a scheduled task

You can delete scheduled tasks one by one. Select a scheduled task you want to delete in the [Schedule] list, and click [Delete Scheduled Task] on the [Operations] menu.

𝚱 Note

☐ Before deleting a scheduled task, be sure to suspend the scheduled task.

Suspending or resuming a scheduled task

You can suspend or resume a scheduled task.

- To suspend a scheduled task, select a scheduled task you want to suspend in the [Schedule] list, and then click [Suspend Scheduled Task] on the [Operations] menu.
- To resume a scheduled task, select the scheduled task you want to resume in the [Schedule] list, and then click [Resume Scheduled Task] on the [Operations] menu.

Editing a scheduled task

You can change the scheduled task settings. Select the scheduled task you want to edit in the [Schedule] list, and then click [Edit Scheduled Task] on the [Operations] menu.

4. How to Use Authentication Manager

About Authentication Manager

What is Authentication Manager?

Authentication Manager is a tool for connecting to Authentication Management Service and manage settings centrally, providing user authentication consistency.

You can use Authentication Management Service to perform user authentication with ScanRouter System using the Windows domain in the current network environment. In a non-Windows domain environment, you can also use Basic Authentication for user authentication independent of specific domains.

Use Authentication Manager to set the ScanRouter System authentication method, manage administrator rights, and back up Authentication Management Service information. Types of setting that can be made by Authentication Manger vary depending on administrator rights.

Starting and Quitting Authentication Manager

The following describes starting and quitting Authentication Manager, connecting to another Authentication Management Service, and the procedure for logging on to Authentication Manager under another user name.

Starting

Start Authentication Manager.

1 Click [Start], point to [Programs], point to [ScanRouter System], and then click [Authentication Manager].

The [Select Authentication Management Service] dialog box appears.

Ø Note

- □ When Authentication Manager starts on a server where Authentication Management Service is installed, the [Select Authentication Management Service] dialog box does not appear. If this is the case, proceed to step ■.
- ☐ If you have successfully logged on once and try to log on in a second time or more, the authentication management server selected last time is automatically selected, and the [Select Authentication Management Service] dialog box does not appear. If this is the case, proceed to step 5.
- ☐ If the [Select Authentication Management Service] dialog box does not appear, and you want to manage Authentication Management Services on other servers, select another service in the login dialog box of step **E**, or select a Authentication Management Service after Authentication Manager has started. See p.52 "Reconnection to other service"

In the [Select Authentication Management Service] dialog box, click the [Browse] button to select the Authentication Management Service you want to manage from [Authentication Management Service List:].

You can enter the server name or IP address in [Authentication Management Service:] to specify an Authentication Management Service.

- Click [OK].
- In the [Login] dialog box, select [Authentication:], enter a user and password of the Authentication Service Administrator. You must also enter a domain depending on the type of authentication method.

Ø Note

- ☐ When you start Authentication Manager for the first time, or have not made settings for the administrator using Authentication Manager yet, enter a user ("Admin") and password of a built-in user to log on.
- ☐ To log on as a built-in user, enter a user ("Admin") and password.
- ☐ To change the Authentication Management Service to be managed, click [Another Service], and then select another service.
- Click [OK] to start Authentication Manager.

Quitting

In the main window of Authentication Manager, click [Exit].

Reconnection to other service

To manage Authentication Management Service on another server after you have started Authentication Manager, click [Reconnect] in the main window of Authentication Manager Authentication Manager to select an Authentication Management Service.

Login again as another user

To log on again as another user after you have started Authentication Manager, click [Login Again] in the main window of Authentication Manager to log on under another user account.

Using Help

Authentication Manager provides the user with Help. Help explains how to use Authentication Manager and make settings. Help also gives explanations of every dialog box item.

To get information about operating procedures

In the main window of Authentication Manager, click **[HELP]**. Help for operating procedures is displayed.

To get information about items in dialog boxes

Click **[HELP]** in each dialog box. Help for the dialog box appears.

Search by a function name or keyword

On the Help displayed by clicking **[HELP]** in the main window, you can search for Help topics by function name or keyword.

Setting and Managing Administrator

You can set and manage the Authentication Service Administrator who manages Authentication Management Service with Authentication Manager, and a Users Administrator. You can also change the password for the built-in user.

Adding and Removing Authentication Service Administrator

You can add or remove Authentication Service Administrator. You can also add a built-in user as an Authentication Service Administrator.

To add or remove an Authentication Service Administrator, click [Select Administrator] in the main window of Authentication Manager. In the [Set Administrator] dialog box, add or delete an Authentication Service Administrator.

Ø Note

- ☐ This operation is available only for the user who has the Authentication Service Administrator right.
- □ When Basic Authentication is selected as the authentication method and the user has the authentication rights of both Authentication Service Administrator and Users Administrator, the [Select Administrator Type] dialog box appears. Click [Authentication Service Administrator].
- Only users with the authentication method selected when log on to Authentication Manager is added as an administrator.

Users added as Authentication Service Administrators are allowed to perform the following operations:

- Setting Authentication Service Administrator
- Profile management
- Management of authentication settings
- Changing password for built-in user
- Backup and restore administrator rights, profiles, or system information)
- Management of backup schedule

Adding and Removing Users Administrator (Basic Authentication)

When Basic Authentication is used as the authentication method, you can assign a Users Administrator of Basic Authentication.

To add or remove an administrator, click [Select Administrator] in the main window of Authentication Manager. In the [Set Administrator] dialog box, add or delete an administrator.

- ☐ This operation is available only for the user who has the Users Administrator right.
- ☐ Only Basic Authentication users can be added as the administrator.
- □ When the user has the authentication rights of both Users Administrator and Authentication Service Administrator, the [Select Administrator Type] dialog box appears. Click [Users Administrator].

Users added as a Users Administrator are allowed to perform the following operations:

- Setting Users Administrator
- Adding or deleting Basic Authentication users
- Backup and restore (Basic Authentication information)
- Importing and exporting Basic Authentication users

Managing Password of Built-in User

To change the password of the builtin user, click [Set/Change Password] in the main window.

We recommend you change the password of the built-in user regularly to avoid misuse.

- ☐ When several ScanRouter System and server products share the Authentication Management Service, the password for the built-in user is the same for all.
- ☐ The built-in user password can be changed using the management tool of each server product. The password does not change for each server product, but for the built-in user managed by the Authentication Management Service.

Managing Authentication Settings

You can specify, change, and display contents of authentication method used in ScanRouter System.

Note

☐ The authentication methods used in each server product of Scan-Router System is selected when that product is installed. To change the selected authentication method, use the administration tool of that product.

Setting Contents of Authentication Method

To set the contents of the authentication method, click [Authentication Settings] in the main window to open the [Authentication System] dialog box. Actual settings vary depending on authentication method

Note

- ☐ This operation is available only for the Authentication Service Administrator.
- ☐ When Windows Authentication (NT compatible) or Windows Authentication (native) is used, available domains are as follows: domains to which the ScanRouter System server belongs and domains which have trust relationship with the aforementioned domain.
- When several ScanRouter Document-Server products are installed on one server computer

Authentication Management Service is used by both. You must configure the authentication method on this server (Set own authentication).

When several ScanRouter Document-Server products are installed on different server computers

Authentication Management Services are installed separately on different server computers. If this is the case, configure the authentication method using Authentication Management Service on one of the servers (Set own authentication). Authentication Management Services on other servers can be set so that the Authentication Management Service set as own authentication can be referred to (Browse another authentication).

Basic Authentication

Use Basic Authentication to add and manage individual authentication users. You can construct a user authentication environment without a Windows domain.

- Set own authentication
 Set Basic Authentication for the
 currently managing Authentication Management Service.
 In this case, you need to register
 Basic Authentication users to the
 currently managing Authentication Management Service.
 Using the [Servers Utilizing Auth. Service] button, you can check a list of
 servers utilizing this Basic Authentication settings.
- Browse another authentication
 Browse Authentication Management Service (Basic Authentication) of another server.
 In this case, click [Browse] to select the Authentication Management Service of another server utilizing Basic Authentication. You can directly enter the server name of Authentication Management Service.

Windows Authentication (NT compatible)

Under Windows Authentication (NT compatible), use a user account configured on the Windows NT domain, the Windows 2000 Active Directory domain (mixed or NT compatible access permission mode), or the Windows Server 2003 Active Directory domain (mixed mode).

Note

- ☐ If there is one or more native mode in trust relationship domains, select Windows Authentication (native).
- Set own authentication
 Set Windows Authentication (NT
 compatible) for the currently managing Authentication Management Service.

To select a Domain Controller directly, click [Set Domain Controller] to set the correspondence between the domain used for user query and the domain controller.

Click [Servers Utilizing Auth. Service] to view list of servers using this authentication method.

 Browse another authentication Browse Authentication Management Service (Windows Authentication (NT compatible)) of another server.

In this case, click [Browse] to select the Authentication Management Service of another server utilizing Windows Authentication (NT compatible). You can directly enter the server name of Authentication Management Service.

Windows Authentication (native)

Under Windows Authentication (native), use a user account configured on the Windows 2000 Active Directory domain (native access permission mode of Windows 2000), or the Windows Server 2003 Active Directory domain (native mode).

- Set own authentication
 Set Windows Authentication (native) for the currently managing Authentication Management Service.
 - Accessing the domain to which the login user belongs In [Domain:], [Domain user name:], and [Password:], enter the domain name and information of a user allowed to access.
 - Directly specifying the domain controller of the domain to be used
 Click [Set Domain Controller] to make settings of correspondence between the domain of trust relationship and the domain controller.
 - Accessing the domain with which to configure a one-way trust relationship Click [Set Domain Account] to enter the qualified user information for the domain registered in the [Set Domain Controller] dialog box.

𝚱 Note

□ To access the following domains, use user information which is used "Accessing the domain to which the login user belongs" in the common forest with the domain to which the login user belongs, domains with both-way trust relationship, and domains with trust relationship among forests in Windows 2003. If settings are made for those domains in [Set Domain Account], a priority is given to user information set in this step.

Click [Servers Utilizing Auth. Service] to view a list of servers using this authentication method.

 Browse another authentication Browse Authentication Management Service (Windows Authentication (NT compatible)) of another server.

In this case, click **[Browse]** to select the Authentication Management Service of another server utilizing Windows Authentication (native). You can directly enter the server name of Authentication Management Service.

Displaying Authentication Information

Displays the settings of authentication methods. Click [View Authentication Information] in the main window to display authentication settings information. Only information about used settings is displayed.

Managing Basic Authentication User

When the Basic Authentication is used as the authentication method, you can add or delete Basic Authentication user accounts and change their properties.

To manage Basic Authentication users, click [Add/Delete Basic Auth. User] in the main window to open the [Add/Delete User] dialog box.



☐ A Users Administrator is responsible for this operation.

Add Users

Add a new Basic Authentication user or group.

Note

☐ You can use a CSV file of user information to collectively add users

Add User

In the [Add/Delete User] dialog box, click [Add User...] to set a user name and password.

Add Group

In the [Add/Delete User] dialog box, click [Add group...] to set the name and members of a new group.



☐ As a member of the group, you can select only Basic Authentication users already registered.

Delete Users

Delete a Basic Authentication user or group.

In the [Add/Delete User] dialog box, select the user or group to delete, and then click [Delete].

Change User Property

Change the settings of registered users or groups.

In the [Add/Delete User] dialog box, select the user or group whose settings you want to change, and then click [Properties...].

Preferences

You can set the minimum number of characters required to identify a user password. In the [Add/Delete User] dialog box, click [Set Preferences].

☐ The minimum number of characters for user passwords specified here applies only to the user and password specified after the preference settings.

Exporting Basic Authentication User

You can export information of currently registered Basic Authentication users to a CSV file. To export Basic Authentication users, click [Basic Auth. User Export] in the main window, and then specify the name and format of CSV file you want to export.

CSV files exported in Authentication Manager format can be corrected and reimported, or imported to Authentication Management Service of another server. CSV files exported in a format allowing operation with SmartDeviceMonitor for Admin can be used as user information for connected devices.

₽ Reference

For details about CSV file format, see Authentication Manager Help.

Importing Basic Authentication User

You can import Basic Authentication users from CSV files. You can also import a CSV file of Basic Authentication users, which is exported from Authentication Manager or from network devices.

To import Basic Authentication users, click [Basic Auth. User Import] in the main window, and then specify the name and format of CSV file you want to import.

For details about CSV file format, see Authentication Manager Help.

Backup and Restore

You can back up Authentication Management Service information in a specified directory on a server that is using Authentication Management Service. For safe operation of the system, make backups regularly.

When Authentication Management Service crashes or Authentication Management Service information is corrupted, you can use backup data to recover Authentication Management Service.

∰Important

When performing a backup or restore operation, be sure to check that no user is connected to Authentication Manager.

The following procedures explain how to back up and restore Authentication Management Service information. Use the Schedule function, to schedule automatic backup. Scheduled backup overwrites current backup data.

p.62 "Backup Schedule Management"

Back Up

You can back up data managed in Authentication Management Service. You can set a password for backup data.

To perform backup, in the main window, click [Backup], select data to back up in the [Select Backup Object] dialog box, and then specify a folder to save the backup data in.

𝚱 Note

☐ The folder for saving backup data must be empty.

Types of data which can be backed up vary depending on the types of administrator right.

Authentication Service Administrator

- Administrator information
- Profile information
- System information Includes authentication settings, schedules, and passwords of built-in users

Users Administrator

Basic Authentication information

- ☐ You cannot use Authentication Manager to back up the following system information (use other tools)
 - Domain user information used in Windows Authentication (NT compatible or native)
 - Installation folders or files of Authentication Manager
 - Installation folders and files of ScanRouter DocumentServer
 - Registry information

Restore

You can use backup data to restore Authentication Management Service information to the status it was when backed up.

To restore the system, click [Restore] in the main window, and then select a backup folder in the [Restore] dialog box. If a password is assigned to the backup data, enter it.

∰Important

- ☐ Use the Restore function in emergency only.
- ☐ Restore returns the system to the condition at last backup by overwriting system data with backup data. Data changed or settings made after last backup cannot be recovered.

Backup Schedule Management

You can add or delete backup schedules, and change schedule contents.

𝚱 Note

☐ This operation is available only for the Authentication Service Administrator.

To manage backup schedules, click [Backup Schedule] in the main window to open the [Backup Schedules] dialog box.

Available operations for Schedule are:

- Adding a new schedule
- Deleting a scheduled task
- Suspending and resuming a scheduled task
- Editing a scheduled task

Ø Note

- ☐ Scheduled backup overwrites current backup data.
- ☐ Prepare a backup folder to save backup data in.
- ☐ Available information items in Schedule are:
 - Job name
 - Date and time of next execution
 - Status
 - Last backup result

You can set backup schedule for the following data items:

- Administrator type information
- System information Includes authentication settings, schedules, and passwords of builtin users.
- Basic Authentication information

Note

☐ To set schedule for Basic Authentication information backup, the authentication rights of both Authentication Service Administrator and Users Administrator are required.

Adding a New Schedule

You can set a schedule for a new task. Click [Add...], and then enter required items in the [Set Backup Schedule] dialog box.

- ☐ Before backing up, make sure there is enough free disk space for backup.
- ☐ You can also specify the number of attempts to complete a task when Authentication Manager is being used.
- ☐ When you set more than one schedule, be sure to avoid overlaps in schedule time periods for each task. If schedule times overlap, the tasks will be attempted for the specified number of times. If a task cannot be started within the specified number of retry attempts, it cannot be performed.
- ☐ If the server where Authentication Management Service is installed is off at the scheduled time, the task cannot be performed.

Deleting a Scheduled Task

You can delete scheduled tasks one by one. In the [Backup Schedules] dialog box, select the schedule to delete, and then click [Delete].

𝚱 Note

☐ Before deleting a scheduled task, be sure to suspend the scheduled task to be deleted.

Suspending and Resuming a Scheduled Task

You can suspend or resume a scheduled task.

Suspend

In the [Backup Schedules] dialog box, select the schedule to suspend, and then click [Suspend/Resume].

Resume

In the **[Backup Schedules]** dialog box, select the schedule to resume, and then click **[Suspend/Resume]**.

Editing a Scheduled Task

You can edit scheduled task settings. In the [Backup Schedules] dialog box, select a schedule to edit, and then click [Edit]. Edit required items in the [Set Backup Schedule] dialog box.

Note

☐ Before editing a scheduled task, be sure to suspend the scheduled task to be edited.

5. Appendix

File Formats Used with ScanRouter DocumentServer

The following file formats can be used with ScanRouter DocumentServer.

Files Created by Applications

Files with the following extensions can be used with ScanRouter DocumentServer. When performing the following operations, the proper application for each operation must be installed.

Operations that require particular applications:

- Creating thumbnails and data for Web Viewer display
- Creating Content Text Search data
- Printing from the server
- .txt

Microsoft[®] Word 2000, or Microsoft[®] Word version 2002, or Microsoft[®] Word 2003 must be installed.

- .doc (files created with Microsoft® Word 97, Microsoft® Word 98, Microsoft® Word 2000, Microsoft® Word Version 2002, or Microsoft® Word 2003)
 - Microsoft[®] Word 2000, Microsoft[®] Word Version 2002, or Microsoft[®] Word 2003 must be installed.
- ❖ .rtf (files created with Microsoft® Word 97, Microsoft® Word 98, Microsoft® Word 2000, Microsoft® Word Version 2002, or Microsoft® Word 2003)

Microsoft[®] Word 2000, Microsoft[®] Word Version 2002, or Microsoft[®] Word 2003 must be installed.

- ❖ .ppt (files created with Microsoft® PowerPoint® 2000, Microsoft® PowerPoint® Version 2002, or Microsoft® PowerPoint® Version 2003)
 - Microsoft[®] PowerPoint[®] 2000, Microsoft[®] PowerPoint[®] Version 2002, or Microsoft[®] PowerPoint[®] Version 2003 must be installed.
- ❖ .xls (files created with Microsoft® Excel 97, Microsoft® Excel 2000, Microsoft® Excel Version 2002, or Microsoft® Excel 2003)

Microsoft[®] Excel 2000, Microsoft[®] Excel version 2002, or Microsoft[®] Excel 2003 must be installed.

◆ .pdf (files created with Acrobat 3.0/4.0/5.0/6.0)

When printing PDF files, use PDF Direct Print function.

Note

☐ Thumbnails may be created differently depending on the Windows or applications settings. For example, the background color of thumbnails differs depending on the settings made in [Appearance] of the Windows dialog box properties .

Image Files

For scanned documents or the image file types below, thumbnails are displayed in the list view. Image files other than the types below will be considered as another type of file.

♦ BMP (Noncompressed)

Monochrome (1 bit), 256 colors (8 bit), Gray scale (8 bit), Full colors (24 bit)

Multi-page TIFF (Noncompressed)

Monochrome (1 bit), 256 colors (8 bit), Gray scale (8 bit), Full colors (24 bit)

♦ Multi-page TIFF (ITU-T G3 FaxMH, ITU-T G3 FaxMR, ITU-T G4 FaxMMR, or Huffman (MH))

Monochrome (1 bit)

Multi-page TIFF (JPEG (JFIF)-YCbCr)

Gray scale (8 bit), Full colors (24 bit)

- Multi-page TIFF Class F (ITU-T G3 FaxMH, ITU-T G3 FaxMR, ITU-T G4 FaxMMR) Monochrome (1 bit)
- **❖ JPEG (Normal, Progressive)**

Gray scale (8 bit), Full colors (24 bit)

PNG

Monochrome (1 bit), 256 colors (8 bit), Gray scale (8 bit), Full colors (24 bit)

Limitations and Restrictions of ScanRouter DocumentServer

The following are limitations and restrictions of ScanRouter DocumentServer. Check the information below when necessary.

* Recommended number of cabinets, documents, and sections

DocumentServer Pro functions best when the following limits on cabinets, documents, and sections are heeded:

- Recommended number of cabinets Less than 20 cabinets per system
- Recommended number of documents Less than 300,000 documents per cabinet Less than 5,000 documents per folder
- Recommended number of sections Less than 1,200,000 sections per cabinet Less than 200 sections per document

Restrictions on folders

The following are restrictions on folders in ScanRouter DocumentServer:

Folder name

Up to 32 alphanumeric characters

Documents in folders cannot have the same name as the folder.

Upper case and lower case letters cannot be differentiated.

Restrictions on documents

The following are restrictions on document information setting items in Scan-Router DocumentServer:

- Document name
 Up to 120 alphanumeric characters
- Creator
 Up to 100 alphanumeric characters

Restrictions on sections

The following is a restriction on sections in ScanRouter DocumentServer:

• Section name Up to 225 alphanumeric characters

Restrictions on shortcuts

The following is a restriction on shortcuts in ScanRouter DocumentServer:

• Shortcuts
Up to 120 alphanumeric characters

Note

- ☐ The following are restrictions on folder names, document names, and section names:
 - A name must be set.
 - A name consisting of only spaces cannot be set.
 - Spaces at the beginning and end of a name will be automatically deleted.
 - A name starting with a period cannot be used.
 - These symbols are unusable in names: $\,/,:,*,?,",<,>,$

Security

To limit access to ScanRouter DocumentServer, the access control list (ACL) can supply a definition for each object. The ACL defines rights of individual users and groups for each object. If any cabinet or folder of a certain user is not added to the ACL, that object does not appear.

- Users and groups managed by domains can be added to the ACL of objects.
- An owner is specified for each object. The owner can change access rights even if they are not specified by the ACL.
- The cabinet owner has the right to change access rights and view properties for all objects in the cabinet.
- "Deny access" users have no access rights for objects. Furthermore, "Deny access" has priority over any other access rights. For example, if a user in a group which has the right to view properties is separately set to "Deny access", the right to view properties is not granted to that user.
- Users included in multiple groups have all access rights for objects available for those groups. For example, if Group A has the right to read data and Group B has the right to update data in a certain folder, users included in both Groups A and B have rights to read and update data in the folder. However, "Deny access" has priority over all other access rights.

Cabinet Access Rights

Types of Access Rights

Type	Description/Contents
Deny access	No access rights granted.
Browse	 The following rights are available: Viewing cabinet properties Viewing documents directly under a cabinet Access rights for viewing document short-cut properties directly under a cabinet
Read	 The following rights are available: Administrate rights for viewing documents Printing, moving or copying documents directly under a cabinet
Write	 The following rights are available: Administrate rights for reading documents Creating/deleting documents and document shortcuts Creating folders
Full access	All access rights granted

Folder Access Rights

❖ Types of Access Rights

Type	Description		
Deny access	No access rights granted.		
Browse	The following rights are available:		
	Viewing folder properties		
	Viewing documents directly under a folder		
	Access rights for viewing document short- cut properties directly under a folder		
Read	The following rights are available:		
	Administrate rights for viewing		
	Printing, moving or copying documents directly under a folder		
Write	The following rights are available:		
	Administrate rights for reading		
	Creating/deleting documents directly under a folder		
	Creating subfolder		
Full access	All access rights granted.		

Troubleshooting

Problems	Causes and Solutions		
A server name is not shown when selecting a server with SRDS Manager or DeskTop- Binder Professional.	 Check the network environment settings, such as whether the server is operating properly and the computer name or IP address was entered correctly. Check the server computer or the client computer is connected to the network. 		
	Check the network segment of the client computer is the same as SRDS Manager.		
When you select a server from SRDS Manager, the message, "The selected server cannot be	• Check the network environment settings, such as whether the server is operating properly and the computer name or IP address was entered correctly.		
administrated by this utility. Specify a valid document management server." appears.	You are logging on to Windows with an account that is not authorized to manage the server. Check the logon account.		
When creating a cabinet, the message "The specified path(s) are not empty." appears.	The folder specified when the cabinet was created contains files. In Windows, check the folder by displaying all files in it, and delete unnecessary files. Otherwise specify another empty folder. As an initial setting, a folder where a cabinet is created will have the same name as the cabinet. If the folder is being used for another cabinet, specify another folder.		
Backup cannot be carried out with the specified schedule settings.	Scheduled tasks cannot be carried out if any client computer is connecting to the cabinet to be backed up. To suspend relevant cabinets, with SRDS Manager, select a cabinet, and then click [Set Server Preferences] on the [Operations] menu. Select the [General] tab in the dialog box that appears, and then select the [Suspend relevant cabinets before performing scheduled task.] check box.		
Backup fails when carried out on a network drive.	 The server computer must be logged on to Windows with the same account as that used when installing the document management server. Also, a configuration must be made to connect to a network drive without entering a password. Backup fails when the document management server was disconnected from the network drive while carrying out a 		
	backup or a scheduled backup task. Check the environment for the network or the computer designated as the network drive.		
Backup of a cabinet takes a long time when it is carried out on a network drive.	Backup time depends on the volume of documents or the network environment. Making backups on a local drive is recommended.		
After importing with [Export/Import Document Type Properties in CSV Format], the message "Failed to import document properties for some documents." appears.	There are documents whose properties information failed to be imported. To check the documents, see the CSV file written out in the location where the imported CSV file is located. (XXXX.BiblioReadError.csv: XXXX represents the name of the CSV file imported)		

Problems Causes and Solutions When accessing the document Check the network environment settings, such as whethmanagement server using er the specified document management server is turned DeskTopBinder Professional, on or whether the computer name or IP address was enthe message "Unable to connect tered correctly. to the server." appears. Name resolution between the document management server and the client computer may not be carried out properly. When registration for the hosts file is used for name resolution, check the settings or the contents of the reg-When settings for the name resolution are not made, register the host names and IP address to the host file. When the server computer is Be sure to apply the following to the client computer when working as both document you use the same server as document management server and file server: management server and file server, a client computer stops Allocate a shared folder that is used with the document its operation when trying to acmanagement server and the file server, as a network drive cess the server using DeskTopwithin My Computer. Binder Professional installed in Use the shared folder from My Computer. Windows 9X. When any one of the following Check the operation of the listed cabinets. problems occurs: After restoring the system, be sure to restore the cabinet When trying to access a cabdata backed up all at once. inet in the SRDS Manager Delete cabinets in the cabinet list if necessary. cabinet list, it is impossible to connect using DeskTop-Binder Professional or a Web browser. When selecting [Edit Cabinet] in SRDS Manager, the "Failed to read cabinet information." message appears. In [Edit Cabinet], settings such as [Create PDF file] on the [Cabinet Settings] tab are unavailable. A default account name such as "System", "creator owner", or An added account does not dis-"everyone" might be set as the account name. Change the acplay in the ACL list. count name.

Dial-up Connection

When you are using dial-up devices, take note of the following:

When a Dial-Up Router is Connected to the ScanRouter DocumentServer Environment

#Important

☐ If the connection to the document management server uses a dial-up router, connection fees may accrue.

With SRDS Manager or DeskTop-Binder Professional installed on client computers, make the proper settings for the document management server you are connecting to.

When you change the network environment settings, also change the settings of the document management server using SRDS Manager or Desk-TopBinder Professional.

When Using Dial-Up Connection

When you use SRDS Manager or DeskTopBinder Professional on a computer with a dial-up connection, the connection to the document management server may be made by dialup.

∰Important

☐ If a computer is set to automatically connect to the Internet, the connection is made without a confirmation message appearing. To avoid unnecessary dial-up connections, make settings to display a connection confirmation message. Also, check whether any unintended connections are being made or not while using this software.

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Some of illustrations or explanations in this guide may differ from your product due to improvements or changes in the product.					
Note	• • • • • •	• • • • • • • • •	• • • • • • • • •		

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∰Important

- ☐ It is possible that any document or data stored in the PC will be damaged or lost by user error during operation or software error. Be sure to back up of all important data beforehand. Important documents and data should always be copied or backed up. Documents and data can be lost because of malfunction or human error. Furthermore, the customer is responsible for protection measures against computer viruses, worms, and other harmful software.
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