### ScanRouter EX Professional Version 3

### **Setup Guide**

- 1 System Requirements
- 2 Server Setup
- 3 ScanRouter EX Professional Setup
- 4 After Installation
- 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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- The product name of Windows® 98 is Microsoft® Windows® 98.
- The product name of Windows® Me is Microsoft® Windows® Millennium Edition (Windows Me).
- The product names of Windows® 2000 are as follows:

Microsoft® Windows® 2000 Advanced Server

Microsoft® Windows® 2000 Server

Microsoft® Windows® 2000 Professional

• The product names of Windows® XP are as follows:

Microsoft® Windows® XP Professional Microsoft® Windows® XP Home Edition

The product names of Windows Server<sup>™</sup> 2003 are as follows:

Microsoft® Windows Server™ 2003 Standard Edition

Microsoft® Windows Server™ 2003 Enterprise Edition

Microsoft® Windows Server™ 2003 Web Edition

### **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.

#### **𝒯** 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.

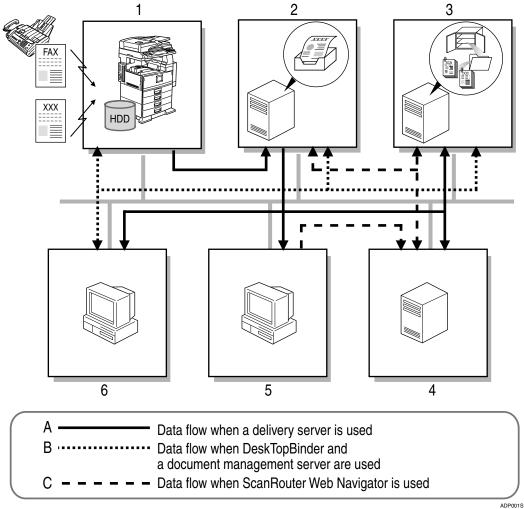
### Overview of ScanRouter System

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.



#### 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. System Requirements

To use ScanRouter EX Professional, the computer must meet the following system requirements:

#### Limitation

- ☐ ScanRouter EX Professional will not operate correctly if installed on the following environments:
  - Computer used as a mail server or database
  - Primary or backup domain controller
- ☐ Do not install ScanRouter EX Professional in a computer used as a database or a mail server.
- ☐ You cannot connect to ScanRouter EX Professional from the following:
  - DeskTopBinder (Ver.2.xxx or earlier)
  - ScanRouter Client Software
  - ScanRouter Browser
- ☐ When this software is used in a network environment, if it is installed and used on client server type operating systems such as Windows 2000 Professional and Windows XP Professional, the use of which is not permitted, you may be in breach of the license to use the products of Microsoft Corporation.
- ☐ For the latest restrictions, see the Readme file.

# System Requirements of the Delivery Server

#### Computer

#### Main unit

PC/AT compatible

#### CPU

Pentium III 500 MHz or faster (Pentium III 1 GHz or faster recommended)

#### Operating Systems

- Microsoft Windows 2000 Server + Service Pack 4 or later
- Microsoft Windows 2000 Professional + Service Pack 4 or later
- Microsoft Windows XP Professional + Service Pack 1 or later
- Microsoft Windows Server 2003 Standard Edition
- Microsoft Windows Server 2003 Enterprise Edition

#### Note

☐ Install ScanRouter EX Professional in the stand-alone server. Do not install it in the primary domain controller or backup domain controller.

#### Web Server

- Microsoft Internet Information Services 5.0 or later
- Apache HTTP Server 2.0 or later

#### Note

- ☐ Microsoft Internet Information Services 5.0 can be installed from the CD-ROM of Windows 2000 Server/Advanced Server. Microsoft Internet Information Services 6.0 can be installed from the CD-ROM of Windows Server 2003.
- □ Apache HTTP Server is automatically installed by selecting **[Apache]** in the dialog box for selecting a Web server that appears during installation of this system.

#### ◆ RAM

256 MB or more (512 MB or more recommended)

#### ♦ Hard Disk Space

At least 600 MB of disk space is required for installation.

#### Note

☐ In addition to the disk space for installation, reserve 500 MB or more to save documents.

#### ❖ Network Protocol

TCP/IP protocol

#### Communication Port

To communicate using a Web server, the following TCP/IP ports must be available.

- Port for HTTP
   Required to set a port number when ScanRouter EX Professional is installed.
- Port for HTTPS
   Required to set a port number when ScanRouter EX Professional is installed.
- Port for discovery "50109" must be reserved.

#### **∰**Important

☐ To avoid port conflicts, select a port for ScanRouter EX Professional that is not used by another Web server.

#### **𝚱** Note

- ☐ If there is a firewall between server and clients, set it to make the TCP/IP port available.
- ☐ If another ScanRouter System server product is already installed before ScanRouter EX Professional is installed and the settings for Web server and port number are complete, you do not need to reserve another TCP/IP port. Common Web server and TCP/IP port with another ScanRouter System server product installed on the same computer are used.

# Products that can be installed on the same server computer as ScanRouter EX Professional

- Auto Document Link
- ScanRouter Web Navigator
   ScanRouter Web Navigator Conversion Option
- ScanRouter DocumentServer (Ver.2.xx)
- DeskTopBinder Professional (Ver.4.xxx)/DeskTopBinder Lite
- SRDS Manager

#### Note

☐ ScanRouter Web Navigator Conversion Option is option products of Scan-Router Web Navigator respectively. You cannot connect those options to ScanRouter EX Professional independently.

#### Connecting to the delivery server and network devices

- TCP/IP (network protocol)
- IP over IEEE 1394

#### **∅** Note

☐ For information about the network devices that can be used with IP over IEEE 1394, see the Readme file.

#### Limitation

- ☐ Do not install ScanRouter EX Professional in a dial-up connection computer.
- ☐ The processing of some images sent to ScanRouter EX Professional may take time. These include grayscale images, color images, large images, and images with a resolution of 400 dpi or more. Processing takes a long time if the capture function is used continuously for many documents, or for multiple high-resolution documents. If you normally use such images, we recommend you increase the capacity of the CPU, memory, and hard disk of your computer.
- ☐ ScanRouter EX Professional (Ver.3.xxx) cannot be managed from ScanRouter V2 Administration Utility.
- ☐ ScanRouter EX Professional cannot be installed on computers where SR Manager or Authentication Manager is separately installed.
- ☐ ScanRouter V2 Professional (Ver.2.xxx or earlier) cannot be installed on the same computer.

#### **Device**

Document delivery requires a network device that supports ScanRouter EX Professional. For information about network devices, see the Readme file.

#### **Before Installation**

If you upgrade to ScanRouter EX Professional, follow the appropriate procedure below to install ScanRouter EX Professional.

# Upgrade from ScanRouter V2 Professional (Ver.1.xxx, Ver.2.xxx) to ScanRouter EX Professional

Destination and sender information and document data saved in the in-tray can be inherited. Be sure to back these up using ScanRouter V2 Professional (Ver.1.xxx, Ver.2.xxx) before starting work. See the ScanRouter V2 Professional *Setup Guide* for information about uninstallation.

- ① Uninstall ScanRouter V2 Professional (Ver.1.xxx, Ver.2.xxx). To use document data or destination settings of ScanRouter V2 Professional (Ver.1.xxx, Ver.2.xxx) with ScanRouter EX Professional, do not delete setting information during uninstallation.
- ② Install ScanRouter EX Professional. Make the necessary settings to use data from ScanRouter V2 Professional (Ver.1.xxx, Ver.2.xxx).

#### **𝚱** Note

- ☐ If you do not want to inherit destination and sender information and document data saved in the in-tray, delete the setting data/content data during uninstallation ScanRouter V2 Professional (Ver.1.xxx, Ver.2.xxx), delete the folders below, and install ScanRouter EX Professional.
  - ScanRouter V2 Professional (Ver.1.xxx):
     The [DR] and [DRTmp] folders in the [RDCab] folder.
  - ScanRouter V2 Professional (Ver.2.xxx or later): The [DR], [DRDB] and [DRTmp] folders in the [RDCab] folder.

#### Upgrade from ScanRouter V2 Lite to ScanRouter EX Professional

Document data and destinations can be inherited. Be sure to back them up using ScanRouter V2 Lite before starting work.

See the ScanRouter V2 Lite Setup Guide for uninstallation information.

- ① Uninstall ScanRouter V2 Lite. If you want ScanRouter EX Professional to inherit the ScanRouter V2 Lite document data and destinations, do not delete the settings data/content data during uninstallation.
- ② Install ScanRouter EX Professional. Make settings to inherit the data from ScanRouter V2 Lite.

#### Upgrade from ScanRouter to ScanRouter EX Professional

Only the Address Book can be inherited. Document data cannot be inherited and used.

- ① Download all ScanRouter documents in advance using client software.
- ② Back up the documents with ScanRouter.
- ③ Install ScanRouter EX Professional. At this time, set a new data path for use in ScanRouter EX Professional.
- Convert the Address Book, and then uninstall ScanRouter automatically.
- ⑤ Delete the data for ScanRouter if necessary. See the manual for ScanRouter for how to delete the data.

#### **♦** Upgrade from ScanRouter Professional to ScanRouter EX Professional

The Address Book and document data can be inherited.

- ① Copy the ScanRouter conversion check tool to a write-enabled hard disk and start it.
  - See the Readme file for details on operating the ScanRouter conversion check tool.
- ② Back up the data with ScanRouter Professional.
- ③ Install ScanRouter EX Professional. At this time, set a new data path for use in ScanRouter EX Professional.
- 4 Convert the Address Book and document data, and then uninstall Scan-Router Professional automatically.
- ⑤ Delete the data for ScanRouter Professional if necessary. See the manual for ScanRouter Professional for how to delete the data.

### **Mailing Environment**

In ScanRouter EX Professional, the following can be done by using mail:

- Deliver with documents attached.
- Notify by mail that documents were delivered.
- Notify the administrator of an error or a shortage of disk capacity.
- Notify the sender that documents were saved in the undelivered data tray.

In ScanRouter EX Professional, the following three types of mail can be used:

- SMTP mail
- Notes R5 mail
- MAPI mail

To use mail, a mail server is required on the computer that differs from the delivery server.

Set up the mail server in advance. To use mail, mail environment setup and mail client software are required even on the delivery server. The environment required for the delivery server differs with the type of mail used.

#### 

- ☐ Setup an e-mail account for ScanRouter EX Professional in each mail server.
- ☐ Use SMTP mail for Internet mail.

#### **Using SMTP Mail**

- Mail Server
  - POP/SMTP Server
- Mail client software required for the delivery server

No software is particularly required.

#### **Using Notes R5 Mail**

- Mail Server
  - Lotus Domino R5
  - Lotus Domino R6 (Release 6.03 or later)
- Mail client software required for the delivery server
  - Lotus Notes R5 (Release 5.03 or later)
  - Lotus Notes R6 (Release 6.03 or later)

#### Note

6

- ☐ To use Notes R4 mail, use MAPI mail.
- ☐ Mail delivery to Notes R5 or later and to Notes R4 cannot be used at the same time.

### **Using MAPI Mail**

The mail server type used in the delivery server and the combination of software required for a delivery server are as shown below.

Type of mail server	Software required for the delivery server	
	MAPI mail environment	Mail client
Microsoft Exchange Server 5.0/5.5/2000	Microsoft Outlook 2000	Microsoft Outlook 2000
Lotus Domino R4	Microsoft Outlook 2000	Lotus Notes Release 5.03 or later
Microsoft Mail Server	Microsoft Outlook 2000	-

#### **❖** Microsoft Outlook



☐ Since Microsoft Outlook 2000 is not included in this product, obtain it separately.

#### Lotus Notes/Domino

- Lotus Domino R4 (Release 4.5x or later except for R4.56 and R4.57)
- Lotus Notes R5 (Release 5.03 or later. However, this software may not operate correctly, depending on its version.)
- Lotus Notes R6 (Release 6.03 or later. However, this software may not operate correctly, depending on its version.)

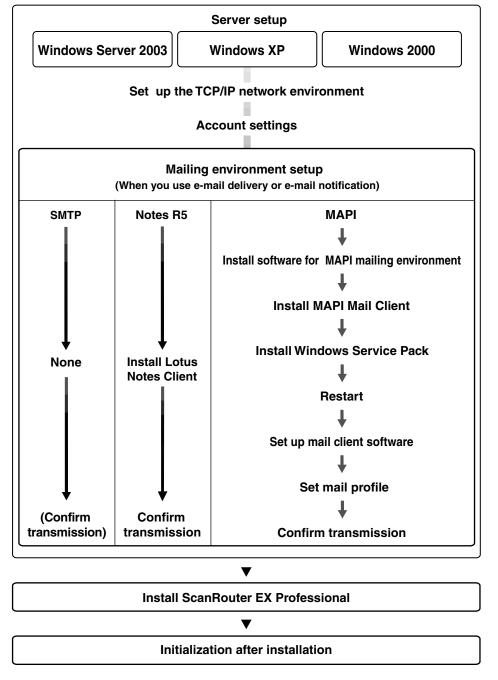
# 2. Server Setup

The following provides information on preparing a delivery server.

First, set up the TCP/IP environment. For information about setting up TCP/IP, ask the network administrator.

Next, set up the computer as the delivery server, then install ScanRouter EX Professional.

#### **Setup flow**



#### 

☐ Use Windows 2000 for the procedure described below. If another operating system is used, the procedure may be different.

# Account Settings

Create an account for launching Scan-Router EX Professional in Windows and give the Administrator permission. You can use the existing account; however, we recommend that you create an account for ScanRouter EX Professional.

The procedure for setting an account differs when a server is a member of a domain and when it is not.

#### **心**Important

- ☐ When ScanRouter EX Professional is installed on the same computer as ScanRouter DocumentServer, the account for ScanRouter DocumentServer installation must be the same as that for ScanRouter EX Professional launching.
- A password must be set for the launching account.
- ☐ Do not use double-byte characters in the launching account name.

#### Note

☐ The account for launching Scan-Router EX Professional is also used when ScanRouter EX Professional is installed.

### **Windows Authentication (NT** compatible/native)

#### Preparation

If you want to create a new account, ask the network administrator to add an account in the domain server exclusively for ScanRouter EX Professional. You must specify a password for the account created at this time.

Add the account added in the domain server to the Administrators group of the computer in which ScanRouter EX Professional will be installed.

- Log on as a member of the Administrators group.
- Right-click [My Computer], and then click [Manage].
- Select the [Groups] folder of [Local Users and Groups] from the console tree. Select [Administrators], and then click [Properties] on the [Action] menu.
- 4 Click [Add].

The [Select Users or Groups] dialog box appears, and a list of the users and groups which belong to the domain appears.

From the upper box, select the launching account, and then click [Add].

If the account is not displayed, check if the correct domain server is selected from the [Look in] dropdown menu.

- 6 After the launching account is added to the lower box, click [OK].
- Make sure that the launching account has been added to [Members], and then click [OK].
- 8 Close Computer Management.

#### **Basic Authentication**

Add a new account to the computer in which ScanRouter EX Professional will be installed.

- 1 Log on as a member of the Administrators group.
- Right-click [My Computer], and then click [Manage].
- Select the [Users] folder of [Local Users and Groups] from the console tree, and then click [New User] on the [Action] menu.

The [New User] dialog box appears.

Click to clear the check box for [User Must Change Password at Next Logon], and then enter the other items.

You must specify a password.

- Select [Create], and then click [Close].
- 6 Select [Groups] of [Local Users and Groups] from the console tree.
- Click [Administrators] from the window area in detailed information, and then click [Properties] on the [Action] menu.
- 8 Click [Add].

The [Select Users or Groups] dialog box appears, and a list of the users and groups appears.

- Select to highlight the launching account from the upper box, and then click [Add].
- After the launching account is added to the lower box, click [OK].
- Make sure that the launching account has been added to [Members], and then click [OK].
- **1** Close Computer Management.

### **Mailing Environment Setup**

To deliver documents by mail and to send notification, three types of mail are used: SMTP, Notes R5, and MAPI.

#### **∰**Important

- ☐ For delivery by e-mail, obtain the e-mail account in each mail server exclusively for ScanRouter EX Professional from the network administrator.
- ☐ Be sure to log on with a launching account for ScanRouter EX Professional. Documents cannot be delivered properly by e-mail with other accounts.

#### **SMTP Mail**

Separate software need not be installed. Create an e-mail account for SMTP/POP in advance.

#### **Notes R5 Mail**

When you want to deliver documents by Notes R5 mail, the following mail client must be installed.

- Lotus Notes R5 (Release 5.03 or later)
- Lotus Notes R6 (Release 6.03 or later)

#### Note

☐ To install the Notes client, use the Notes ID prepared for the computer on which the delivery server is to be installed.

#### **MAPI** Mail

When you want to deliver documents by MAPI mail, the following software must be installed:

- Software for the MAPI Mailing Environment
- MAPI Mail Client

# Installing software for the MAPI mailing environment

- ① Log on with a launching account. If you log on with another account, log off and then log on again with the launching account.
- ② Install Microsoft Outlook 2000.

#### Note

☐ To deliver documents using Notes R4, you must install Notes Client after Microsoft Outlook is installed. If Notes Client is already installed, uninstall it temporarily. In this case, since the user ID file, desktop.dsk, desktop5.dsk, and names.nsf are used after reinstallation, back them up.

#### Installing MAPI Mail Client software

Install a necessary MAPI mail client, according to the mail server to be used.

- ① Microsoft Exchange Server 5.0/5.5/2000
  - Microsoft Outlook 2000 (See p.12 "Installing software for the MAPI mailing environment")
- ② Lotus Domino Server
  - Lotus Notes R5 (Release 5.03 or later)
  - Lotus Notes R6 (Release 6.03 or later)

# Installing Service Pack and Restarting Windows

Install Windows 2000 Service Pack 4 or later, and then restart Windows.

# Setting Up Mail Client Software and Confirming Transmission

Use the account for launching set in p.10 "Account Settings" to log on to Windows, and then set up the mail client and confirm transmission.

#### **#Important**

- ☐ When Microsoft Outlook 2000 is used, select [Corporate or Workgroup] in [E-mail Service Options].
- ☐ If the dialog box to check if Outlook is set up as a default manager is displayed, click [Yes].

#### Ø Note

- ☐ Be sure to log on with a launching account.
- ☐ When using e-mail for delivery, specify each e-mail account that was obtained for ScanRouter EX Professional.
- ☐ The settings depend on the e-mail program to be used. Ask the mail administrator before making settings.

#### When Internet Explorer and Outlook 2000 are used

- ① Select the [Programs] tab in [Internet Options] in Control Panel.
- ② Select [Microsoft Outlook] from the [E-mail] list.

# When Notes is used in the MAPI mailing environment

Install Notes Client to deliver documents by mail using Notes, and then set up using the following procedure.

- (1) Launch Notes Client.
- ② On the **[File]** menu, point to **[Tool]**, and then click **[User ID]**.
- 3 Click [Menu].
- ④ Enter the password.
- ⑤ Click to select [Don't prompt for a password from other Notes-based programs].

Check the transmission of e-mail for each client computer.

Delete the received mail after confirmation.

### Profile Setting in the MAPI Mailing Environment

To use MAPI mail, set the mail profile in advance.

### **Microsoft Outlook 2000 Setup**

**1** Double-click [Mail] in Control Panel. The [Mail] dialog box appears.

#### Ø Note

- ☐ When one or more profiles have already been prepared, the property dialog box of the profile to be used during startup is displayed. Display the [Mail] dialog box by clicking [Show Profiles].
- 2 Click [Add].

The setup wizard is displayed.

**3** Select the e-mail to be used with ScanRouter EX Professional.

Select all services to be used.

#### **∰**Important

☐ Be sure to select the [Use the following information services] check box. Do not select the [Manually configure information services] check box.

#### **𝒯** Note

- □ For mail delivery or notification, select a service according to the mail server to be used. E-mail services usable in ScanRouter EX Professional are displayed as follows:
  - Microsoft Exchange Server... Microsoft Exchange Server
  - Lotus Domino...Lotus Notes Mail
- ☐ [Microsoft Mail] is not displayed. It will be set in Step ②.

4 Click [Next].

#### Note

- ☐ If another profile has already been created, instructions for entering a new profile name appear. When this happens, enter "ScanRouterEX Profile" in the [Profile Name] box, and then click [Next]. You can use uppercase and lowercase letters to enter "ScanRouterEX Profile", but a space is necessary between "ScanRouter EX" and "Profile".
- The setting dialog box is displayed. Make the necessary settings.

Specify the account obtained for ScanRouter EX Professional for email accounts. Follow the displayed instructions to set up the mail server and password.

The settings depend on the mailing environment. Ask the mail administrator before making settings.

After setup, a profile is saved automatically. The profile name is usually [MS Exchange Settings].

#### Note

- ☐ If "ScanRouterEX Profile" is entered in Step ♠, a profile named "ScanRouterEX Profile" is saved. In this case, proceed to Step ❸.
- 6 Click [Copy].

Tenter "ScanRouterEX Profile" in the [New Profile Name] box, and then click [OK].

You can use uppercase and lower-case letters to enter "ScanRouterEX Profile", but a space is necessary between "ScanRouter EX" and "Profile".

[ScanRouterEX Profile] is newly created.

- Add "Personal Address Book" service to [ScanRouterEX Profile].
  - Click to highlight [ScanRouter-EX Profile], and then click [Properties].
  - 2 Click [Add].
  - 3 Click to highlight [Personal Address Book] in [Available information services], and then click [OK].
  - After the [Personal Address Book] dialog box is displayed, click [OK].
  - 6 Confirm that [Personal Address Book] has been added to [The following information services are set up in this profile] on the [Services] tab.
- If documents are delivered by "Microsoft Mail", add "Microsoft Mail" service.
  - Note
  - ☐ If "Microsoft Mail" is not used, proceed to Step ①.
  - Click [Add] in the [Services] tab.
  - Click to highlight [Microsoft Mail] in [Available information services], and then click [OK].

**3** Follow the displayed instructions.

After the "Microsoft Mail" setup dialog box is displayed, make the necessary settings.

After making settings, the Properties of ScanRouterEX Profile will return.

- 4 Confirm that [Microsoft Mail] has been added to [The following information services are set up in this profile] on the [Services] tab.
- Click the [Delivery] tab.
- Click [Personal Folders] in the [Deliver new mail to the following location] box.

If there is no [Personal Folders] in the list, add [Personal Folders] on the [Services] tab.

- Set the order for the names in the address list on the [Addressing] tab.
- Click [OK] to close the Properties of ScanRouterEX Profile.
- Click [ScanRouterEX Profile] in the [When starting Microsoft Outlook, use this profile] box.
- Click [Close] to close the [Mail] dialog box.
  - Note
  - ☐ To confirm that the profile has been set properly, before operating ScanRouter EX Professional, use Microsoft Outlook 2000 to send test mail to each mail client.

#### **Microsoft Outlook 2002 Setup**

1 Double-click [Mail] in Control Panel.

The [Mail] dialog box appears.

When one or more profiles have been prepared, display the [Mail] dialog box by clicking [Show Profiles] in the [Mail Setup] dialog box.

2 Click [Add].

The [New Profile] dialog box appears.

Enter "ScanRouterEX Profile" in the [Profile Name] box, and click [OK].

You can use uppercase and lowercase letters to enter "ScanRouterEX Profile ", but a space is necessary between "ScanRouter EX" and "Profile".

"ScanRouterEX Profile" is newly created, and the **[E-mail Accounts]** dialog box appears.

4 Click to select [Add a new e-mail account], and then click [Next].

- Note
- ☐ If MAPI mail is not used, proceed to Step ③ ③.
- When the server type selection dialog box is displayed, click the type of mail server to be used, and then click [Next].
- The setting dialog box is displayed. Make the necessary settings.

Specify the account obtained for ScanRouter EX Professional for e-mail accounts.

Follow the displayed instructions to set up the mail server and password. The settings depend on the mailing environment. Ask the mail administrator before making settings.

When you finished setting the mail account, click [Finish] in the [congratulations! E-mail Accounts] dialog box.

The [Mail] dialog box appears.

- Add "Personal Address Book" service to [ScanRouterEX Profile].
  - Click to highlight [ScanRouter-EX Profile] in the [Mail] dialog box, and then click [Properties].

The [Mail Setup - ScanRouterEX Profile] dialog box appears.

- **2** Click [E-mail Accounts].

  The [E-mail Accounts] dialog box appears.
- 3 Click [Add a new directory or address book], and then click [Next].

The **[E-mail Accounts, Directory or Address Book Type]** dialog box appears.

Click [Additional Address Books], and then click [Next].

The [E-mail Accounts, Other Address Book Types] dialog box appears.

6 Click to highlight [Personal Address Book], and then click [Next].

The [Personal Address Book] dialog box appears.

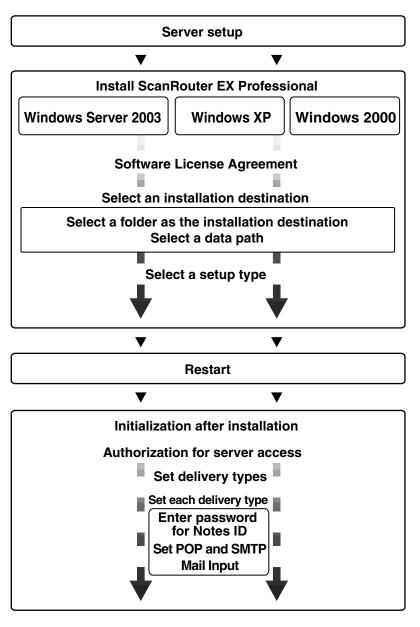
6 Setup the address book, and then click [OK].

After the [Mail Setup - ScanRouter-EX Profile] dialog box is displayed, click [Close].

- 9 Set "Mailbox" as the delivery place for newly arrived e-mail of "Scan-RouterEX Profile".
  - Click [E-mail Accounts] in the [Mail Setup ScanRouterEX Profile] dialog box.
    - The **[E-mail Accounts]** dialog box appears.
  - Click [View or change existing email accounts], and then click [Next].
  - 3 Set [Deliver new e-mail to the following location] to "Mailbox".
    - If there is no "Mailbox", add it on the [Service] tab.
- In the [Mail Setup ScanRouterEX Profile] dialog box, click [Close].
- In the [Mail] dialog box, click [OK].

# 3. ScanRouter EX Professional Setup

Use the flowchart below to set up ScanRouter EX Professional.



AEB002S

# **Installing ScanRouter EX Professional**

Install ScanRouter EX Professional according to the procedure below.

Make sure that you have finished preparing the server where ScanRouter EX Professional is to be installed.

#### **∰**Important

- ☐ After installation is complete, be sure to restart the computer. If ScanRouter EX Professional is launched before restarting the computer, it does not work normally. In this case, reinstall Scan-Router EX Professional.
- ☐ If you need the document data or Address Book when ScanRouter V2 Lite, ScanRouter or ScanRouter Professional is installed, back them up.

#### 

- ☐ To install ScanRouter EX Professional, be sure to log on to Windows with the launching account which was set in p.10 "Account Settings" (Windows 2000)
- ☐ You cannot install ScanRouter EX Professional in a computer in which SR Manager or Authentication Manager is installed.
- **1** Insert the CD-ROM for this product into the CD-ROM drive.

The [ScanRouter EX Professional Setup] dialog box is displayed.

- 2 Click [ScanRouter EX Professional].
- If ScanRouter or ScanRouter V2 Lite/Professional is installed, select whether the data is used.

#### **𝚱** Note

☐ For how to upgrade from other products, see p.4 "Before Installation".

The installation start confirmation dialog box is displayed.

- 4 Click [Yes].
- Click [Next] in the displayed dialog box.
- 6 Confirm the Software License Agreement, and then click [Yes].
- **7** Enter customer information, and then click [Next].

The [Select Install Location] dialog box appears.

Specify the installation destination.

#### Note

- ☐ If DeskTopBinder or ScanRouter DocumentServer, etc. is already installed, you cannot specify the installation destination. The destination will be a folder common to them.
- Enter a folder as the installation destination, and then click [Next].

#### Note

- ☐ You cannot specify the following locations:
  - destinations within system folders
  - destinations in the Root directory
  - destinations in removable media (such as MO disks)
- Enter a data path, and then click [Next].

You can specify a location for saving data used in the Desk-TopBinder or Auto Document Link.

#### Note

- ☐ You cannot specify the following locations:
  - destinations within system folders
  - destinations in the Root directory
  - destinations in removable media (such as MO disks)
  - Within a Program Files folder

# Select a setup type, and then click [Next].

You can select the method of starting the delivery server.

- Start from Program Folder
   After you log on to Windows
   with the account used for
   launching the delivery server,
   click [Start]. In the [Programs],
   point to [ScanRouter EX Professional] (depending on the settings during installation), and
   then click [SR Manager] to start
   the delivery server.
- Start at Startup
   After you log on to Windows
   with the account used for
   launching the delivery server,
   the delivery server starts automatically.
- Run in service mode
   The delivery server starts in the
   background regardless of the
   account used to log on.

#### Note

☐ The delivery type that can be used differs according to the launching method. The MAPI mail delivery cannot be used in service mode:

- ☐ If another ScanRouter System server product is already installed before ScanRouter EX Professional is installed and the settings for Web server and port number are complete, you do not need to perform steps ② and ③. Proceed to step ②. Common Web server and port number with another ScanRouter System server product installed on the same computer are used.
- Select a display language for SR Manager Manager and Authentication Manager, and a language for manuals. Click [Next].
- Select a Web server to be used, and then click [Next].

#### Note

- ☐ To specify "Internet Information Services" as the Web server, Internet Information Services must be installed in the computer on which ScanRouter EX Professional is to be installed.
- ☐ When [Apache] is selected as the Web server, Apache HTTP Server is also installed with ScanRouter EX Professional.

# Specify the Web server port number to be used, and then click [Next].

Specify the HTTP and HTTPS port numbers.

#### **∰**Important

- ☐ The HTTP and HTTPS port numbers cannot be changed once it is set.
- ☐ If another Web server has been installed, do not specify the port number being used for that Web server.

# Confirm the settings, and then click [Next].

ScanRouter EX Professional is installed. Click [Finish] in the [Install Shield Wizard Complete] dialog box.

#### **𝚱** Note

☐ If ScanRouter is installed, a message to uninstall it appears before completing the installation.

# Click [Exit Setup] in the [ScanRouter EX Professional Setup] dialog box.

The message that prompts you to restart the computer is displayed.

### Click [OK].

The computer restarts. When you log on to Windows using the account for launching, the dialog box to complete ScanRouter EX Professional settings appears.

#### **𝚱** Note

☐ Be sure to log on to Windows with the account for launching. If you log on using another account, you cannot complete the final settings correctly.

# **Initialization After Restarting**

1 Enter the password for launching in the [Password] and [Confirm Password] boxes, and then click [OK].

The Windows settings required to operate ScanRouter EX Professional change automatically.

- In the [Authentication Method Settings] dialog box, select a method used for user authentication of ScanRouter EX Professional from the followings, and then click [OK].
  - Basic Authentication
     With Basic Authentication, you
     can add and manage unique au thentication users. You can es tablish a user authentication
     environment without an envi ronment of Windows domain
     or Notes domain.
  - Windows Authentication (NT compatible)
     Using the user account such as the Windows NT domain and Windows 2000 Active Directory domain (mixed mode / NT compatible access authorization mode) established on the network, establish a user authentication environment.
  - Windows Authentication (native)
     Using the user account of the

Windows 2000 Active Directory domain (native mode / access authorization mode only for Windows 2000) and Windows Server 2003 Active Directory domain established on the network, establish a user authentication environment.

In [Domain name:], [Domain user name:], and [Password:], enter the domain name and the information of accessible users.

Notes authentication
 Using the user account of the
 Notes domain established on
 the network, establish a user au thentication environment.

In [Server Name:], [Domain name:], [Domain user name:], and [Password:], enter the Notes domino server name, the domain name, and the information of accessible users.

#### **∅** Note

- ☐ For the Basic Authentication, the user account recorded in Authentication Manager is used. For other authentication methods, the user account recorded in each domain is used for the authentication.
- In the [Set Password] dialog box, enter the password of the built-in user, and then click [OK].

The **[Set Delivery Types]** dialog box appears.

- Select the delivery type to be used, and then click [OK].
- When Notes R5 mail is selected, enter the password of the Notes ID used to install Notes.

#### **∰**Important

☐ Do not change the Notes ID to another.

6 When SMTP mail is selected, set up mail delivery. Follow the instructions in the dialog box and set POP and SMTP.

Set the following:

- Host name of the SMTP and POP servers
- Prepared mail account and password for ScanRouter EX Professional

#### **𝚱** Note

- ☐ POP and SMTP authentication can be set in advance.
- When Mail Input is selected, make settings for related mail accounts. Follows the instructions in the dialog box to select POP. Enter the mail account and password specified for ScanRouter EX Professional.
- When the completion message is displayed, click [Finish].
- **9** Restart the computer.

#### Ø Note

- ☐ Until the server is restarted, you cannot connect it from a cilent computer or from SR Manager on a remote computer.
- ☐ Make any other necessary settings required for ScanRouter EX Professional.

#### 

p.31 "Basic Settings" p.34 "Adding Printer" p.36 "Setting up MAPI Mail/Fax Delivery Later" p.37 "SSL Settings"

# **Installing Managers in a Client Computer**

You can install SR Manager and Authentication Manager in a client computer to remotely manage the delivery server and Authentication Management Service.

#### Limitation

- ☐ If the MAPI mailing environment is set up, you cannot suspend and resume service remotely using SR Manager. Suspend and resume service using SR Manager installed in the delivery server.
- ☐ If SR Manager and Authentication Management Service are already installed, the [Modify, Repair, or Remove program] dialog box will appear. To proceed with installation, select [Repair].

#### **System Requirements**

#### Operating Systems

- Microsoft Windows 98 Second Edition
- Microsoft Windows Me
- Microsoft Windows XP Professional + Service Pack 1 or later
- Microsoft Windows XP Home Edition + Service Pack 1 or later
- Microsoft Windows 2000 Server
   + Service Pack 4 or later
- Microsoft Windows 2000 Professional + Service Pack 4 or later
- Microsoft Windows Server 2003 Standard Edition
- Microsoft Windows Server 2003 Enterprise Edition

#### **Installing SR Manager**

#### **#**Important

☐ Do not install SR Manager in the dial-up connection computer if possible.

#### Note

- ☐ You cannot install SR Manager separately in a delivery server where ScanRouter EX Professional is already installed.
- ☐ ScanRouter EX Professional (Ver.3.xxx) cannot be managed using Scan-Router V2 Administration Utility.
- Insert the CD-ROM for this product into the CD-ROM drive. Display the [ScanRouter EX Professional Setup] dialog box.
- 2 Click [Administration Utility] of Scan-Router EX Professional.

A confirmation message about starting installation appears.

- 3 Click [Yes].
- 4 Click [Next] in the displayed dialog box.
- Confirm the Software License Agreement, and then click [Yes].
- 6 Enter user information, and then click [Next].
- Tenter a folder as the installation destination, and then click [Next].

  Installation will start.

#### Note

- ☐ If any products of ScanRouter System have already been installed, you cannot specify the installation destination. The destination will be a folder common to them. The [Select Installation Destination] dialog box does not appear.
- ☐ You cannot specify the following destinations:
  - Within a system folder
  - Root directory
  - Within removal media such as the MO disk
- Confirm the settings, and then click [Next].

Installation of SR Manager starts.

- 9 Click [Finish].
- **10** Restart the computer.

# **Installing Authentication Manager**

- Insert the CD-ROM for this product into the CD-ROM drive. Display the [ScanRouter EX Professional Setup] dialog box.
- Click [Authentication Manager].

A confirmation message about starting the installation appears.

- Click [Yes].
- Click [Next] in the displayed dialog box.
- Confirm the Software License Agreement, and then click [Yes].

The installation destination selection dialog box appears.

- 6 Enter user information, and then click [OK].
- Tenter a folder as the installation destination, and then click [Next].

  Starts to install Authentication Manager.

#### **𝚱** Note

- ☐ If any product of ScanRouter System have already been installed, you cannot specify the installation destination. The destination will be a folder common to them. The installation destination selection dialog box does not appear.
- ☐ The following destinations cannot be specified:
  - Within a system folder
  - Root directory
  - Within removal media
- Confirm the settings, and then click [Next].

Installation of SR Manager starts.

- 9 Click [Finish].
- **1** Restart the computer.

# **Uninstalling ScanRouter EX Professional**

This section explains how to uninstall ScanRouter EX Professional.

#### **∰**Important

☐ Before uninstallation, be sure to back up the system and other information.

#### Note

- Before uninstallation, delete all network devices in the I/O device settings.
- 1 Suspend the delivery server using SR Manager.
- 2 Close SR Manager.
- Select ScanRouter EX Professional in [Add/Remove Programs] in Control Panel, and then click [Add/Remove] or [Change/Remove].

The [ScanRouter EX Professional Setup] dialog box appears.

- 4 Click [Remove], and then click [Next]. A confirmation dialog box appears.
- **5** Click [**0**K].
- 6 Select whether the setting information is kept.

ScanRouter EX Professional is uninstalled.

#### Ø Note

- ☐ If you are asked to delete a file that may be shared with other programs, click [No].
- ☐ If a locked file is displayed, click [Remove after Restart].
- 7 Click [Finish].

#### #Important

☐ If the setting information is not kept, document data and destination setting are all deleted and cannot be used with the next installation.

#### Note

☐ If only ScanRouter EX Professional is installed in the computer, you can delete the "RDCab" folder (or the folder specified as the data path). See p.20 "Installing ScanRouter EX Professional" If the data path is shared with DeskTopBinder or ScanRouter DocumentServer and so on, do not delete the "RDCab" folder (or the folder specified as the data path). If you want to delete the Scan-Router EX Professional data, delete only the "DR", "DRDB" and "DRTmp" folders in the "RDCab" folder (or the folder specified as the data path).

# **Uninstalling Managers**

This section explains how to uninstall SR Manager or Authentication Manager when it is installed in the client computer.

#### **∰**Important

☐ Before uninstallation, be sure to back up the system and other information.

#### Note

- ☐ If SR Manager or Authentication Manager is installed together with ScanRouter EX Professional, each Manager cannot be uninstalled separately.
- 1 Suspend the delivery server using SR Manager.

#### **𝚱** Note

- ☐ If Authentication Manager is uninstalled, this step is unnecessary.
- **2** Close SR Manager or Authentication Manager.
- Select SR Manager or Authentication Manager in [Add/Remove Programs] in Control Panel, and then click [Add/Remove] or [Change/Remove].

The [SR Manager Setup] or [Authentication Manager Setup] dialog box appears.

4 Click [Remove], and then click [Next].

The confirmation dialog box appears.

### Click [OK].

SR Manager or Authentication Manager is uninstalled and the [Maintenance Complete] dialog box appears.

#### Note

- ☐ If you are asked to delete a file that may be shared with other programs, click **[No]**.
- ☐ If a locked file is displayed, select [Remove after Restart].
- 6 Click [Finish].

# 4. After Installation

# **Device Setup**

Make the delivery server settings on the operation panel of a device. For more information, see the operating instructions for the device to be used.

### Start Menu

On the [Start] menu, point to [Programs], and then point to the [Scan-Router System] folder. The items below appear:

#### ScanRouter EX Professional

When this is selected, the following menu items appear:

- Compatible Device List
- Introduction Guide Displays the Introduction Guide. This explains delivery basics.
- Setup Guide
   Displays the Setup Guide. This
   explains delivery server setup.
- Operating Instructions <Capture Function>
   Displays the Operating Instructions <Capture Function>. This explains the capture function of delivery server.
- SR Manager Starts SR Manager.
- Management Guide
   Displays the Management
   Guide. This explains ScanRouter EX Professional procedures.
- Readme Displays product information.
- Starts Delivery Services (server only)
- Suspends Delivery Services (server only)

#### ♦ Authentication Manager Starts Authentication Manager.

#### **❖** Environment Setting Tool

Use this when you change computer name of delivery server, domain environment, or log-in account.

#### Ø Note

- ☐ For details about Environment Setting Tool, see the Readme file
- ❖ Readme (Environment Setting Tool)
  Displays information about how to
  use the Environment Setting Tool.
- ♦ SSL Setting Tool
  Starts the setting tool for operating
  ScanRouter System using SSL.

#### Note

☐ To close the delivery server, click [Suspend Delivery Services] on the [Server] menu of SR Manager.

# **Setting Authentication Management Service**

Make these settings using Authentication Manager. These settings include configuring an Authentication Management Service administrator and authentication method details, etc. For more information, see *Management Guide* or Help on the **[Start]** menu.

# **Basic Settings**

To operate the delivery server, the administrator, destination, and device must be set. First, turn on the device's power. Some devices do not require settings. For more information, see *Management Guide*, the Readme file, or Help. To display Help, click **[Help]** in the operation dialog box.

### **1** Start SR Manager.

Click [Start], point to [Programs] > [ScanRouter System] > [ScanRouter EX Professional], and then click [SR Manager].

SR Manager starts and a dialog box for entering login information appears.

2 Enter "Admin" as the user name, and then enter the builtin user password specified during installation.

The **[SR Manager]** dialog box appears.

## **2** Set the administrator.

Set the administrator in SR Manager so that the settings are not changed by mistake.

• Click [Set Administrator] on the [Server] menu.

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

2 Add a user/group to be specified as an administrator.

When the [Include builtin user in members] check box is selected, a built-in user can be set as an administrator.

#### Click [OK].

The administrator has been set.

### 3 Add a user as a destination.

Documents are delivered and saved for each destination. When users are registered and added to the standard destination list in SR Manager, they can be specified as document destinations.

#### Note

☐ If the same document is delivered to multiple users, you should create a group.

#### Limitation

- ☐ The combined number of users and groups is limited to 2,000.
- Open the [Delivery Server] tree on the left side of the window, and then select [Main Destination List] in [Delivery Table].

The **[Operations]** menu appears on the menu bar.

2 On the [Operations] menu, point to [Add New Destination], and then click [User].

The [Add New Destination - User] dialog box appears.

- 3 Enter a destination name in the [Name] box.
- 4 Enter a destination ID.

Enter a destination ID. Any ID already set cannot be entered.

#### **5** Set a delivery type.

 To deliver documents to the in-tray, click [Deliver to In-Tray].

The client computer can automatically receive them using Auto Document Link.

② Select the delivery type in the [Delivery type selection:] list, and then click [Add].  Save as Windows file Delivered documents are saved in a specified location as a file. Multiple locations can be specified.

#### Note

- ☐ Only a folder that can be confirmed by the delivery server can be specified as the save destination.
- Save in Shared Network Folder Documents are saved as files in a specified folder on the network.
- Send by SMTP mail
   Documents are delivered by
   SMTP mail. You can attach
   documents and document
   links to e-mail for delivery
   and notify clients of documents sent to the in-tray.
- Send by MAPI mail
   Documents are delivered by MAPI mail. You can attach documents and document links to e-mail for delivery and notify clients of documents sent to the in-tray.
- Send by Notes R5 mail
   Documents are delivered by
   Notes R5/R6 mail. You can
   attach documents and docu ment links to e-mail for deliv ery and notify clients of
   documents sent to the in-tray.
- Add as document
   Documents are delivered for
   adding to the document
   management server of Scan Router DocumentServer.
- Add to Web Document Management
   Documents are delivered for adding to the document management server of a Personal Cabinet folder on Scan-Router Web Navigator.

- FTP Delivery Documents are delivered to folders in FTP server, and then registered.
- **6** Enter the fax delivering ID.

Enter the number for delivering a received fax documents using up to 20 digits. Depending on the connected device, up to four digits only may be available.

Select a mail type in the [Default Mail Type] box, and then enter the default mail address.

This box is not displayed if the mail transmission is not selected in [Set Delivery Types].

- 8 Click [OK].
- **9** The user is added to [Main Destination List].
- Repeat the operation from Stepto add another user.
- Add the registered destination to the destination list.

A document can be delivered and saved to the registered destination by adding that destination to the destination list. Add the destination to [Standard Destination List] or [Standard Sender List] of the destination list.

Open the [Delivery Server] tree on the left of the screen, and then click [Standard Destination List] or [Standard Sender List] in [Destination List] in [Delivery Table].

The **[Operations]** menu is displayed on the menu bar.

② On the [Operations] menu, click [Add Destination].

The **[Add Destination]** dialog box appears.

- 3 Select all destinations to be added in [Main Destination List].
- 4 Click [OK].

These destinations are added to the destination list.

- **5** Set up a device if necessary.
  - Open the [Delivery Server] tree on the left side of the window, and then click [I/O Device List:]. The menu appears on the menu bar.
  - Select [Add] on the [Operations] menu.

The [Add I/O Device] dialog box appears.

3 Enter the host name or IP address of the device to be used for delivery, and then click [OK].

#### **𝚱** Note

- ☐ You can click [Browse] to select a device.
- ☐ If network device usage requires user account authentication, the dialog box for setting login information appears. Enter the user name and password, and then click [OK].

The **[I/O Device Properties]** dialog box appears.

Make necessary settings for device properties, and then click [OK].

# 6 Start the delivery server.

Perform the operation below only if you start the delivery server manually when the type of starting the delivery service is set to such as when **[Program Folder]** is set as the type of starting during installation.

• On the [Server] menu, click [Resume Services].

The delivery server starts.

# **Adding Printer**

For document printing, RTIFF direct printing, and PDF direct printing using the printing function of delivery server, add a dedicated printer port to delivery server, and then make the necessary printer settings.

#### **∰**Important

☐ Before adding a printer, you must prepare the printer driver in advance.

#### **𝚱** Note

☐ If an application which was used to create the target data is not installed on the document management server, the printing function may not be available.

The following procedure to add a printer is for Windows 2000. The procedure may differ depending on the operating systems.

1 Click [Start], point to [Settings], and then click [Printer].

The [Printer] dialog box appears.

- **2** Double-click the [Add Printer] icon. The Add Printer wizard starts.
- 3 Click [Next].

The **[Local/Network Printer]** dialog box appears.

Select [Local Printer] to clear the [Auto-search/Install Plug-and-play Printer] check box.

The [Select Printer Port] dialog box appears.

- Select [Add New Port], specify [Port Type].
  - RPCS printer
     If the printer to be added is RPCS, specify [DS Print Service Port] from the list.

- Other printers
   For other printers, specify port types other than [DS Print Service Port].
- 6 Click [Next].

The [Add Port] dialog box appears.

Click [Obtain List] button. Select a displayed printer in the [Addable Printers] list or specify a printer directly with the IP address, and then click [OK].

#### 

- ☐ Only the printers in the same segment on the network are displayed in the list. When adding a printer other than those in the list, specify it directly with the IP address.
- Select a printer driver to be added, and then click [Next].
- Enter the name of the printer to be added, and then click [Next].
- Select whether you share the printer or not, and then click [Next].
- Select whether you print a test page or not, and then click [Next].

  The dialog box about completing

The dialog box about completing the Add Printer wizard appears.

12 Click [Finish].

The Installation of the printer driver starts.

According to the instructions on the displayed dialog box, install the printer driver.

The printer is added to the **[Printer]** dialog box.

# Precautions when RPCS Printer is added

When the RPCS printer is added after creating the port (DS Print Service Port), observe the following precautions.

- The printer name cannot be changed after the printer was added.
- Adding one printer under several different names is unavailable.
   One port must always be assigned to one printer (1:1).
- When adding printer is canceled after creating the port (DS Print Service Port), only the port still remains. When adding a printer again, delete the port in [Print Server Properties].

#### When deleting a printer and port

When deleting a printer, select and delete it in the [Printer] dialog box. In addition, you must delete the printer port (DS Print Service Port).

- Right-click and open the menu, and then click [Server Properties].
- ② On the [Port] tab in the [Print Server Properties], delete [DS Print Service Port].

#### **𝚱** Note

☐ When you delete printers other than RPCS, you do not need to delete the port.

# Setting up MAPI Mail/Fax Delivery Later

Follow the procedure below to set up MAPI mail delivery after ScanRouter EX Professional is set up.

1 Set up MAPI mail.

### 

p.12 "Mailing Environment Setup" (Windows 2000)

2 Start SR Manager, and then click [Set Delivery Types] on the [Server] menu to reset the delivery type.

### 

p.23 "Initialization After Restarting"

# **SSL Settings**

To make a Web server SSL compatible and use SSL for communication among servers such as ScanRouter EX, ScanRouter Web Navigator, and ScanRouter DocumentServer, or between ScanRouter Web Navigator and clients (Web browser), you can use the SSL setting tool to make the following settings:

#### Note

- ☐ The SSL setting tool is installed only when one of the following software systems is installed:
  - ScanRouter EX Professional
  - ScanRouter EX Enterprise
  - ScanRouter Web Navigator
  - Document Management Connection Program (Packaged with ScanRouter Web Navigator)
  - Delivery Connection Program (Packaged with ScanRouter Web Navigator)
  - ScanRouter Web Navigator Conversion Option
  - ScanRouter DocumentServer (Ver.2.xxx or later)
- ☐ When the communication with SSL is used between a client computer and a server, SSL settings on the server are required as described below. Also, SSL settings on the client computer connected to that server are required. For details about SSL settings on the client computer, see the Readme file.
- ☐ When importing certificate or changing SSL settings, be sure to restart the computer after all settings are complete.

☐ When you use "Internet Information Services" as the Web serverand communicate with SSL, there are some necessary settings after importing the certificate by performing the operation below.For details about the settings, see the Readme file.

### Setting CA Server

A CA server is a server used to issue an electronic certificate that permits to perform SSL communication. Any computer where the SSL setting tool is installed can be used as a CA server.

Before making SSL settings, you need to configure a server as a CA server. SSL communication among servers can be enabled provided that the other servers have imported the certificate.

### **Issuing Certificate**

A CA server is used to issue a certificate. A certificate specific to each server that attends SSL communication is issued.

Certificates for a CA server and another server (for one unit) are issued at first issue. If you want more than one unit of other servers to utilize SSL communication, separately issue another certificate following the procedure described in p.39 "Issuing Certificates (at second issue or later)".

After a certificate specific to each server is issued, it can be imported to an appropriate server.

#### Issuing Certificates (at first issue)

At first issue of certificates from the SSL setting tool, certificates for a CA server and another server (for one unit) are issued.

#### Note

- ☐ At second issue or later, only the certificate for SSL communication server is issued.
- 1 On the [Start] menu, point to [Programs], point to [ScanRouter System], and then click [SSL Settings].

The dialog box to select options of SSL settings appears.

2 Click [Issue Certificate], and then click [Next].

The [Create CA Server Certificate 1/3] dialog box appears.

Enter area information. Enter the country, area, and city, and then click [Next].

### 

- ☐ **[Country:]** should be filled in with single-byte 2 character strings.
- 4 Enter company information. Enter the company name and organization name, and then click [Next].
- Enter network information. Enter the server name and e-mail address, and then click [Next].
  - Server Name:
     Enter a server name at random.
  - Email Address:
     Enter an e-mail address. It appears when the certificate is displayed in a Web browser.

The [Create Server Certificate 1/3] dialog box appears.

6 Enter area information. Enter the country, area, and city, and then click [Next].

#### Note

- ☐ **[Country:]** should be filled in with single-byte 2 character strings.
- 2 Enter company information. Enter a company name and an organization name, and then click [Next].
- Enter network information. Enter the server name and e-mail address, and then click [Next].
  - Server Name: Enter a server name that will import the server name certificate in the format of a host name with a domain name. (e.g., www.rds.co.jp)
  - Email Address:
     Enter an e-mail address. It appears when the certificate is displayed in a Web browser.
- Enter a folder name to which the certificate for another server is placed, and then click [Next].
- In the confirmation dialog box, click [OK].

The certificate is placed in the specified folder.

#### Note

☐ The file name "server.p12" is given to all certificates for other servers.

# Issuing Certificates (at second issue or later)

Certificates for other SSL communication servers are issued when certificates are issued from the SSL setting tool for the second time or later.

1 On the [Start] menu, point to [Program], point to [ScanRouter System], and then click [SSL Settings].

The dialog box to select options of SSL settings appears.

2 Click [Issue Certificate], and then click [Next].

The [Create Server Certificate 1/3] dialog box appears.

- Enter area information. Enter the country, area, and city, and then click [Next].
  - **𝚱** Note
  - ☐ **[Country:]** should be filled in with single-byte 2 character strings.
- 4 Enter company information. Enter a company name and an organization name, and then click [Next].
- Enter network information. Enter the server name and e-mail address, and then click [Next].
  - Server Name: Enter a server name that will import the server name certificate in the format of a host name with a domain name. (e.g., www.rds.co.jp)
  - Email Address:
     Enter an e-mail address. It appears when the certificate is displayed in a Web browser.

- 6 Enter a folder name to which the certificate for another server is placed, and then click [Next].
- In the confirmation dialog box, click [OK].

The certificate is placed in the specified folder.

- Note
- ☐ The file name "server.p12" is given to all certificates for other servers.

### **Importing Certificate**

A certificate issued from the CA server is imported to each server. Every server, including the CA server, which performs SSL communication should import its own certificate.

On the [Start] menu, point to [Progams], point to [ScanRouter System], and then click [SSL Settings].

The dialog box to select options of SSL settings appears.

2 Click [Import Certificate], and then click [Next].

The dialog box to select an appropriate certificate appears.

- Specify the folder in which a certificate for another server (server.p12) is placed, and then click [OK].
- In the confirmation dialog box, click [OK].

### **Changing SSL Settings**

You can make settings for SSL communication. This procedure is needed when a practical operation of SSL communication is started or changed.

You can make settings for every server, including the CA server, which performs SSL communication.

1 On the [Start] menu, point to [Progams], point to [ScanRouter System], and then click [SSL Settings].

The dialog box to select options of SSL settings appears.

- 2 Click [Change SSL method], and then click [Next].
  - All SSL Connections SSL is used for all communications including those between ScanRouter Web Navigator and a Web browser, and between the currently used server and other ScanRouter Document-Servers.
  - Use SSL between Web Browser and Server Connections SSL is used only for the communication between ScanRouter Web Navigator and a Web browser.
  - Do not use SSL
     You can quit operations of SSL
     on the server currently in use.

#### Note

- ☐ If you quit operations of SSL at this point, you will not be able to communicate with a server that uses SSL. Make changes to the SSL settings of related servers, as needed.
- In the confirmation dialog box, click [OK].

# 5. Appendix

# **Related Application Setup**

Install and set up the application used for server printing.

#### **∰**Important

- ☐ When installing the applications below under Windows 2003, Windows XP, or Windows 2000, be sure to log on to Windows with an account for launching ScanRouter EX Professional.
- ☐ Before using ScanRouter EX Professional, be sure to start each installed application to confirm that the print function works normally.

#### **𝚱** Note

☐ If the application that the print data was created with is not installed in the delivery server, server printing may not be possible.

#### **Microsoft Office 2000**

Insert the CD-ROM of Microsoft Office 2000. The setup dialog box automatically appears. According to the instructions on the dialog box, install each application.

The hard disk must have sufficient free space. Make the necessary settings not to install unused applications as much as possible.

#### Note

☐ Among the Office2000 functions, all of the [Office Tool] and [Converter and Filter] functions are recommended to be installed including the subcomponents.

#### **Setting Word 2000**

- 1 Start Word 2000.
- After the "Welcome to Microsoft Word!" message appears, click [Use Microsoft Word Now].

#### Note

- ☐ If the [Office2000 Registration Wizard] dialog box appears, click [No]. For the user registration, perform it later as required.
- Quit Word 2000.

#### **Setting Excel 2000**

- 1 Start Excel 2000.
- 2 After the "Welcome to Microsoft Excel!" message appears, click [Use Microsoft Excel Now].

#### **𝚱** Note

- ☐ If the [Office2000 Registration Wizard] dialog box appears, click [No]. For the user registration, perform it later as required.
- **3** Quit Excel 2000.

#### **Setting PowerPoint 2000**

- 1 Start PowerPoint 2000.
- 2 After the "Welcome to Microsoft PowerPoint!" message appears, click [Use Microsoft PowerPoint Now].
  - **∅** Note
  - ☐ If the [Office2000 Registration Wizard] dialog box appears, click [No]. For the user registration, perform it later as required.
- On the [Create New Presentation] dialog box, click [Cancel].
- 4 On the [Tools] menu, click [Options].
- In [View Settings] on the [View] tab, clear the check box of [Startup Dialog] and [[New Slide] Dialog], and then click [OK].
- **6** Quit PowerPoint 2000.

Restart PowerPoint 2000, and then confirm that the [Create New Presentation] and [New Slide] dialog boxes do not appear.

#### Microsoft Office XP

Insert the CD-ROM of Microsoft Office XP. The setup dialog box automatically appears. According to the instructions on the dialog box, install each application.

The hard disk must have sufficient free space. Make the necessary settings not to install unused applications as much as possible.

When installing Office XP, make the necessary settings as follows:

 Dialog box to select the installation type
 Click [Custom] in Installation Type Selection.

- Dialog box to select applications to be installed
   Click Unstall by Selecting Ontions for
  - Click [Install by Selecting Options for Each Application].
- Dialog box to select the options to be installed
  - On [Office Common Functions], point to [Extend Input System], and then set [IME] not to be installed.

#### Note

☐ If IME included in Office XP is installed, creating PDF of the Office applications may fail.

#### Setting Word/Excel/PowerPoint 2002

When using Microsoft Office XP, be sure to undergo authentication.

Unless you undergo the authentication, note that the functions such as printing and creating PDF do not operate correctly.

- 1 Start Word/Excel/PowerPoint 2002.
- 2 Through the Microsoft Office XP license authentication wizard, undergo the authentication according to the displayed messages.

#### Note

- ☐ If the license authentication wizard does not appear, the authentication is already completed.
- **3** Quit Word/Excel/PowerPoint 2002.

#### **Microsoft Office 2003**

When the setup dialog box appears, install an application with following the instructions on the dialog box.

The hard disk must have sufficient free space. Uninstall any unnecessary applications.

#### Word / Excel / PowerPoint 2003

- 1 Start Word / Excel / PowerPoint 2003.
- In [Macro] on the [Tool] menu, click [Security].
- Check that the security level is [High], and then click [OK].
- 4 Quit Word / Excel / PowerPoint 2003.

# **Troubleshooting**

Problems	Causes and solutions		
The following message appears: "The specified name or IP address is not valid. Please specify another name or address".	Check the server's power is turned on, the network cable is connected properly, and the IP address is specified correctly.		
When the password is entered in the [Authorization for Server Access] dialog box, "The password may be wrong. If the password is correct, press [Cancel] in the [Enter Password] dialog box and close." appears.	The password for the Windows logon account for launching the delivery server may be wrong or the account's rights may have changed. Make sure that the password and account's rights are correct, and then re-enter the password. After the password is entered, restart the computer.		
MAPI mail is unavailable when making a destination setting using SR Manager.	The MAPI mailing environment may not be set up properly. If <b>[Run in service mode]</b> is set as the setup type, documents cannot be delivered by MAPI mail.		
The "Profile is invalid." message appears when launching.	The profile name created for sending by MAPI mail may not be <b>[ScanRouterEX Profile]</b> . Follow the procedure below to create a profile.		
	1. Open [Control Panel], and then click [Mail].		
	2. Click [Show Profiles], and then create a profile with the name [ScanRouterEX Profile].		
When the delivery service is started, the message that the mail client is not set properly appears.	The reason is as follows: if IE (Ver5.0 or later) is installed after ScanRouter EX Professional is set up, Outlook Express is set as the default client.		
	If the "E-mail" setting in the "Program" tab of IE "Internet Options" is "Outlook Express", set it to "None" (blank) or "Microsoft Outlook".		
	The MAPI module (Messaging/Outlook) setting may be omitted.		
	Set the MAPI module and create the profile.		
When the delivery service is started, a message that prompts quitting all applications provided with the messaging function and retry appears.	Notes service may have been added at the end of the profile during the profile setting.		
	Delete non-Notes services (for example, ScanRouter FAX) from the profile and add them again.		
When the delivery service is started, a message prompting you for the Notes password appears.	Notes settings must be made to stop other Notes-based programs from prompting for a password. In Notes, in the [File] menu, point to [Tools], and then click [User ID]. Enter the password in the dialog box that appears. In the [User ID - Func Mix] dialog box, click [Basics], and then select the [Don't prompt for a password from other Notes-based programs.] check box.		

Problems	Causes and solutions
When an attempt is made to add the "Lotus Notes Mail" service to "ScanRouter Profile", the message "- Notes MAPI Service Provider - Can't Read ID File" appears.	Notes may not be set up. If this is the case, set it up.
[Standard Destination List] and [Standard Sender List] do not appear in the destination list.	ScanRouter EX Professional may not be installed properly. If this is the case, suspend the delivery service. On the [Maintenance] menu of SR Manager, click [Return to Installation Defaults] to initialize the delivery server.
The delivery server does not operate normally.	When logging on to make the last settings after installation, the account for ScanRouter EX Professional was not used, so that these settings were not correctly applied. Uninstall the application, and then re-install it. Then, make the last settings using the correct account.

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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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