CentreWare™

**NETWORK SCANNING SERVICES
USER GUIDE**

*Using Network
Scanning Services*

Release 5.2 SP1

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Introduction

What is CentreWare?

CentreWare is a suite of applications and printer/fax drivers that support the Xerox Document Centre line of products. With an array of Administrator and user tools, CentreWare is used for installing, maintaining, and using the Xerox Document Centres.

CentreWare Services consists of:

- **Network Admin Services**

    For installing and configuring Document Centres for printing/faxing in NetWare, TCP/IP, Microsoft Networking, and Banyan VINES network environments. AppleTalk environments are supported by the Mac Printer Utility.

- **Network Print/Fax Services**

    For installing, configuring, and using Document Centre printer and fax drivers. Also includes network printing and productivity tools like the Conductor, Fax Phonebook, and TIFF Submission Tool.

- **Network Scanning Services**

    Used to scan documents to file, fax, E-Mail, and other third-party applications, such as PaperPort and TextBridge.

CentreWare Internet Services is the embedded HTTP server application that allows you to access printing/faxing/scanning, connectivity, and maintenance tools using a web browser. It has features that parallel the Administrator and user tools of CentreWare Network Services, but it uses the browser interface instead of the standard Windows interface.

Network Admin Services

- **Device Admin Wizard**
- **Device Discovery Wizard**
- **Mac Printer Utility**
- **Help Centre**

Network Scanning Services

- **Add Network Scanner Wizard**
- **Distribution Templates**
- **Watch Services**
- **Help Centre**

Scan to PC Desktop™

- **Includes:**
  - PaperPort
  - Textbridge Pro
  - Xerox Document Centre Image Retriever

Network Print and Fax Services

- **Print/Fax Drivers**
- **Conductor**
- **Fax Phonebook**
- **TIFF Submission Tool**
- **Help Centre**

CentreWare®

Internet Services (Embedded HTTP Server)

- **Services Pages**
- **Jobs Page**
- **Status Pages**
- **Properties Pages**
- **Maintenance Pages**
- **Support Page**
- **HTML Help**

This application software is provided within the Document Centre. The documentation is provided in the support kit.

Figure I-1: CentreWare Network and Internet Services

Who Should Use This Guide

This guide provides *network scanning users* with information on how to create scan templates, use watch services, and scan documents. To use this guide effectively, users must possess a basic understanding of Microsoft Windows software and of their network environment.

What's New in This Release?

The CentreWare 5.20 Network Scanning Services software and documentation include the following updates and revisions:

- Support has been added for Document Centres 420/432/440 and 460/470.

- A new service module which can be installed to support scanning to Microsoft Exchange folders.

- Template features have been updated to support new options.

- The documentation and help have been updated.

How To Use the Documentation Set

The documentation for Network Scanning Services includes the *CentreWare Network Scanning Services Guide,* the *CentreWare Network Scanning Services User Guide*, the *CentreWare Network Scanning Services Help Centre*, and context-sensitive Help.

CentreWare Network Scanning Services Guide

The *CentreWare Network Scanning Services Guide* provides Network Administrators and scan users with information about using the CentreWare Network Scanning software on Microsoft Windows workstations. It includes step-by-step instructions for performing both Administrator and user tasks.

A hard-copy version of this guide is included in the product package. An electronic .PDF version can be found on the Network Scanning Services CD.

NOTE: The Adobe Acrobat Reader is required to view and print the PDF files. Readers for all environments are provided on the CentreWare Network Admin Services CD in the \ACROREAD directory. Acrobat readers are also available free of charge from Adobe at *www.adobe.com*.

CentreWare Network Scanning Services User Guide

The *CentreWare Network Scanning Services User Guide* provides scan users with information about using the CentreWare Network Scanning software on Microsoft Windows workstations. It also includes step-by-step instructions for performing user tasks. The User Guide is provided in .PDF format *only* and can be found on the Network Scanning Services CD.

NOTE: Information about network scanning from non-Microsoft Windows workstations can be found in the *CentreWare Internet Services Guide*.

Network Scanning Services Help Centre

The Network Scanning Services Help Centre is the central online source for scanning information. It includes feature descriptions, step-by-step procedures, problem solving information, a glossary, and support information.

The Network Scanning Services Help Centre is automatically installed on the workstation during the software installation. The Help Centre can be accessed in the *Xerox CentreWare* programs list on the desktop.
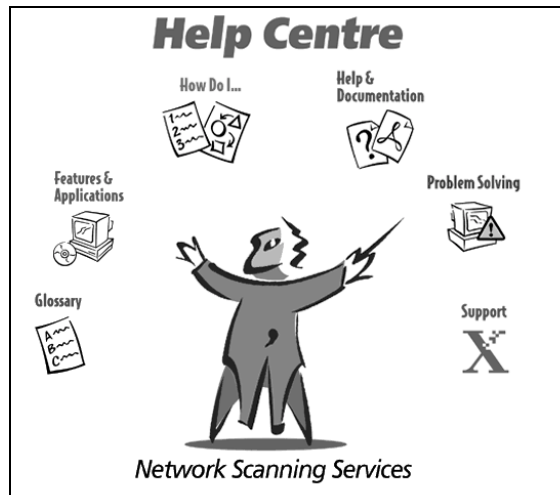
Figure I-2: Network Scanning Services Help Centre

Help

Context-sensitive Help contains feature information about the Network Scanning Services software and detailed instructions on how to use it. Help can be accessed by using either the *Help* buttons or menus in the scanning software.

Where to Get CentreWare Support

Internet Support

Visit CentreWare on the Internet at *www.centreware.com*. Our web site contains product support information, product demonstrations, and the latest information about CentreWare updates and new releases.

Telephone Support

For additional assistance, you may contact the *Xerox Welcome Center* by telephone. Locate your Document Centre serial number, and record it in the space below before you make your call.

Document Centre Serial Number:

The Xerox Welcome Center telephone numbers are listed in the following table. If the Welcome Center telephone number for your country is not listed, it will be provided to you when your Document Centre is installed. For future reference, please record the telephone number in the space provided below.

Welcome Center Telephone Numbers:	
UNITED STATES	800-821-2797
CANADA	800-939-3769 (800-93-XEROX)

Introducing Network Scanning Services

This chapter explains the concept of network scanning versus traditional scanning and introduces the CentreWare Network Scanning Services software. It also contains a section to help users of previous software versions adapt more quickly to the new software.

What is Network Scanning?

Traditionally, scanning a document meant that you could place a paper document on a scanner attached directly to your PC and obtain an electronic image of that document on your PC desktop.
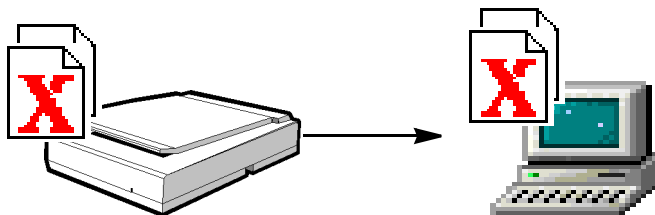
Figure 1-1: Traditional Scanning

CentreWare Network Scanning Services enables you to scan documents at the Document Centre and create electronic TIFF files which are sent to a document folder (a specific directory) on a file server. These files can then be:

- automatically sent to a user's workstation and opened with an application that is capable of reading TIFF files.

- moved to a user's PC or another server location for storage.

- kept in the document folder with notice sent to the user that the scanned documents are available.

- distributed to other people via E-Mail.

- converted to another file format such as .RTF, .PDF, .HTML, .TXT, etc.

- automatically faxed to others.

- scanned directly into PaperPort on a user's desktop. (You must first install the companion *Scan to PC Desktop*™ package.)
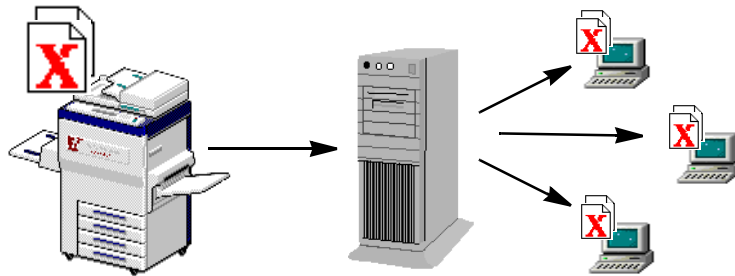
Figure 1-2: Network Scanning

How Can Network Scanning Help You?

CentreWare Network Scanning Services combines the power of Xerox Document Centre scanning with the software applications you use every day. Network scanning enables you to improve your work processes and save time and money.

Here are some of the ways network scanning can help you:

- *Scan to your desktop*—Scan paper documents and retrieve them automatically at your desktop with PaperPort software. (Requires *Scan to PC Desktop*™ software package.)

- *Scan to E-Mail*—Scan documents directly to your E-Mail system. Reduce the cost of overnight mail delivery.

- *Redesign your records storage*—Eliminate paper piles and walls of filing cabinets. Now you can store your documents online.

- *Eliminate time-consuming retyping efforts*—Stop retyping older documents or recreating complicated graphics. Simply scan the paper copy, convert your document to Microsoft Word, HTML, .PDF, ASCII, or many other popular formats, and make your changes.

- *Share documents and information quickly and easily*—Store scanned documents in a common directory folder where co-workers can easily access them.

- *Quickly prepare time-critical proposals and presentations*—Include data from different sources and incorporate it into a common format to create professional presentations and proposals!

Features At A Glance

Network Scanning Services is composed of several different elements that work together to create and deliver the scanned document to its final destination.

Xerox Network Scanners Window

The Xerox Network Scanners (XNS) Window is your starting point for all network scanning activities. When you open the XNS window, the names of all scan-enabled Document Centres that can be accessed from your workstation appear in the list. If no Document Centres are enabled for scanning, only the *Add Network Scanner* icon appears in the window.
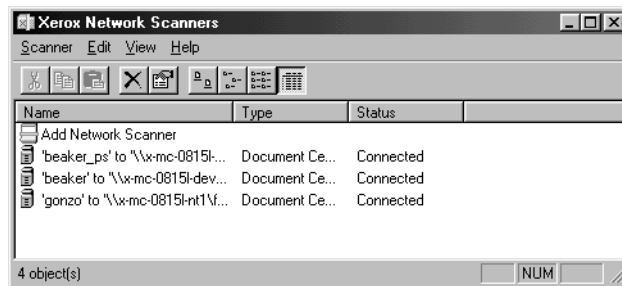
Figure 1-3: Xerox Network Scanners Window

Add Network Scanner Wizard

The *Add Network Scanner Wizard* is both an administrative and user tool. Network Administrators who possess *Supervisor* or *Administrator* rights on the network can use the Wizard to install and set up Network Scanning Services. Scan users can automatically locate configured scanners on the network. Some of the tasks that can be performed with the Wizard include:

- installing the scanning software on a network file server.

- enabling the Document Centre to log on to the scan server and access distribution templates and document folders.

- granting network users access to network scanning and creating default scan templates for each user.

- optionally creating scanning groups which allow several users access to the same Document Folder (NetWare and NTFS networks only).

- automatically locating scanners on a network.

Distribution Templates

Distribution templates control the manner in which a scanned document is processed. They contain specific instructions that define the electronic document's format and details about how to file, fax, or distribute a scanned document. A default distribution template is created for each scan user at the time Network Scanning Services is installed.

Distribution templates are stored in a *template pool* on a network server. Templates can be created once and used repeatedly. The Add Network Scanner Wizard can configure each Document Centre to download distribution templates from a networked template pool. More than one Document Centre can access a single template pool; however, this practice is not recommended. If a template is modified or deleted, the changes will impact the template's use from all machines.

Document Size
Send to.....
Increase Contrast
Decrease Brightness
Print Confirmation
OCR Text
Multi-page TIFF
etc.....

Template Pool

Distribution Template

Network Server
(the *scan* server)
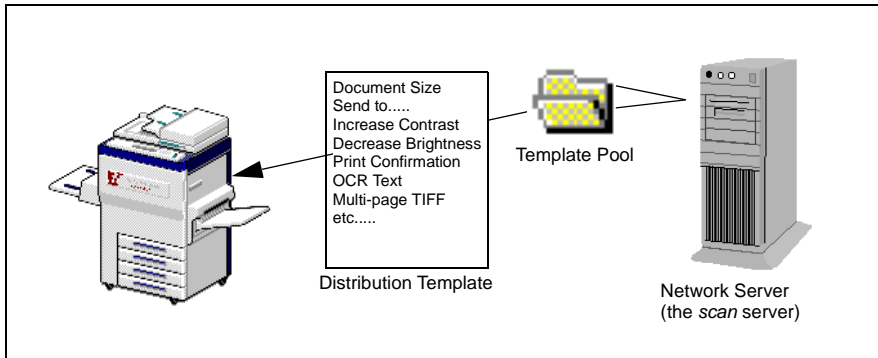
Figure 1-4: Distribution Templates

Refer to Chapter 2, *Distribution Templates*, for more information.

Watch Services

Watch Services (also called the *Watcher*) enable you to monitor a network directory (document folder) for the arrival of new scanned documents. You can also specify how the document will be processed once it appears. A document can be:

■   moved to another directory or folder.

■   opened on your PC desktop with any application able to read TIFF images.

■   stored in the document folder with notice of its arrival sent to your desktop.

A Watch Service is automatically established to monitor each scan user's document folder when Network Scanning Services is installed.

Refer to Chapter 3, *Watch Services*, for more details.

History

The *View History* option available from the Xerox Network Scanners Window enables scan users to view a summary of the activity performed by the CentreWare distribution server.

Refer to Chapter 5, *History*, for more information.

Properties

Scanner Properties

The *Scanner* properties are available from the Scanner menu in the Xerox Network Scanners window. Scan users may *view* scanner properties. Administrators can quickly *view* or *modify* scanner properties. Use scanner properties to access:

- network scanner status
- distribution information
- Document Centre network login, password, and advanced Document Centre settings
- completed jobs information

Distribution Template Properties

Distribution Template properties can be accessed from the distribution template window. Templates can be modified by anyone with Write access to the *template pool*. By default, all enabled scan users have Read/Write access to templates.

Getting Started

The Xerox Network Scanners (XNS) Window is your starting point for all network scanning activities.

Opening the Xerox Network Scanners Window

You can open the XNS window in either of the following ways:

■   From your desktop, select:
    Start > Programs > Xerox CentreWare > Xerox Network Scanners

adds scanner icon to taskbar and initiates scanning applications running in background

- OR -

■   Double-click the Scanning icon in the Windows taskbar.
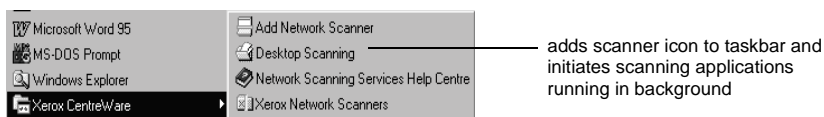
scanning icon in Windows taskbar
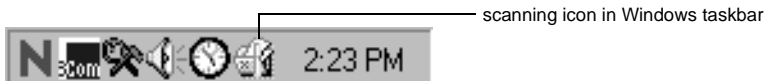
Understanding the Xerox Network Scanners Window

When you open the XNS window, the names of all scan-enabled Document Centres that can be accessed from your workstation appear in the list. If no Document Centres are enabled for scanning, only the *Add Network Scanner* icon appears in the window.
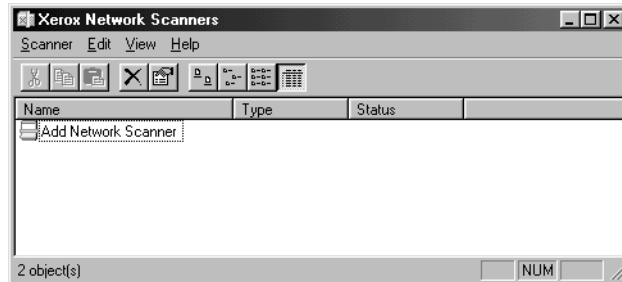
Figure 1-5: Xerox Network Scanners Window

NOTE: Refer to Chapter 7, *Problem Solving*, if you have scan-enabled Document Centre scanners installed on your network that do not appear in the Xerox Network Scanners window.

Scanner Menu

The **Scanner** Menu contains all of the menu functions specific to network scanning:

Add Network Scanner. Enables Network Administrators to configure Document Centres for network scanning.

Uninstall Scan Server. Uninstalls scanning software and document folders from scan server.

Watch Folder. Opens a dialog displaying document folders for monitoring. This item is disabled unless a network scanner icon is selected.

Open Templates. Opens a window which lists the templates associated with a particular Document Centre. This item is disabled unless a network scanner icon is selected.
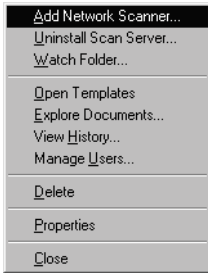
Explore Documents. Opens an Explorer window of your document folder on the scan server. If you are logged in with access to multiple document folders, *Explore Documents* opens the `\data\users` directory on the scan server. From there, you can select the desired document folder and examine the documents inside. This item is disabled unless a network scanner icon is selected.

View History. Opens a window which displays a record of distribution scan jobs and their status (*processing, completed, completed with errors, or failed*). Jobs for all users are displayed in the window.

Manage Users. Enables Network Administrators to quickly add or remove new scan users or scan groups.

Delete. Removes the selected scanner from the displayed list and local cache. It *does not* delete the scan server or any information contained on the server. This item is disabled unless a network scanner icon is selected. For Network Administrators only, *Delete* also prompts you to uninstall the scan server and restore Document Centre settings to factory defaults.

Properties. Allows all users to view device-specific scan settings. Also allows Network Administrators to establish the distribution server or to modify device-specific scan settings**.**

Close. Closes the Xerox Network Scanners Window.

The **Edit**, **View**, and **Help** menus all contain standard Windows options.

Transitioning to the 5.20 Software

If you have been using release versions 3.2 or 4.1 of the CentreWare Network Scanning Services software, this section is for you. (If you are currently running release 5.1 software, you do not need to read this section.) You will notice several changes which have been implemented to make the scanning software easier to use:

- **New Look and Feel**

  The scanning software has been redesigned so you don't have to open several different software applications to perform the scanning tasks. Every task is started from the *Xerox Network Scanners* window.

- **What Are Distribution Templates?**

  Distribution Templates are what were previously referred to as *templates* or *scan templates*. The name has been changed to better convey the functionality.

- **How Can I Change Template Settings?**

  The former Template Utility functionality has been incorporated into the process of creating or modifying distribution templates. Distribution templates can be accessed from the Distribution Template Window.

- **What Do I Do with My Existing Templates?**

  Existing Scan-to-File and Scan-to Fax templates can be used *as is*. Since CentreWare 5.20 uses an "Inbox" directory for all distribution processing, E-Mail templates and templates that include Optical Character Recognition (OCR) require special attention. These templates can be handled in two different ways:

  - Use the CentreWare 5.20 *Watch* and *Move* features to move documents from your existing E-Mail and OCR directories to the CentreWare Inbox directory on the scan server.

    - OR -

  - Open the templates from the CentreWare 5.20 Distribution Template Window, save, and close the templates again. The software updates the templates to file to the CentreWare Inbox. Once there, distribution is managed by the CentreWare 5.20 distribution server. The distribution server must be set up by the Network Administrator during installation.

■ **How Do I Set the Document Management Agent?**

The functionality of the Document Management Agent has been replaced by *Watch Services* and *Distribution Services*. When the scanning software is installed on your workstation, a service is automatically set to monitor or "watch" your document folder on the scan server. The Watch Folder Wizard offers enhanced functionality compared to that of the former Document Management Agent because it enables you to watch multiple folders on a network and to choose among three different functions to perform after a document is detected in the folder. See Chapter 3, *Watch Services,* for more details.

Distribution Services have been simplified as well. Scanned documents requiring distribution services such as OCR or E-Mail are sent from the Document Centre directly to the Inbox directory on the Scan Server. Once there, the CentreWare distribution server picks up the document and performs the necessary services.

■ **How Do I Create Remote Repositories?**

Creating remote repositories is no longer an Administrator's task. Because the flexibility of setting scan destinations has been greatly enhanced in this version of CentreWare, you can now simply create a distribution template with a "scan to other" destination. The *other* destination can be any location to which you have access. See *Distribution Templates* on page 2-1 for more information.

Distribution Templates

This chapter describes what scan distribution templates are and how they are used. It also contains detailed instructions for creating, editing, renaming, and deleting distribution templates.

About Distribution Templates

Distribution templates control the processing of scanned documents. Just as a word processing template controls the way a document looks, a distribution template contains specific details on how documents are processed. Templates can automatically control characteristics such as:

■ the scan destination (a *document folder*, *fax*, *E-Mail, Microsoft Exchange folders*)

■ the output format for a scanned document (*TIFF, Multi-page TIFF, PDF*)

■ lightness, darkness, and contrast settings

■ scan resolution and auto exposure

■ whether the TIFF file needs to be converted to editable text—Optical Character Recognition (OCR)

■ fax delayed send options

Distribution templates are stored in a directory folder on the scan server known as the *template pool*. The Network Administrator configures each Document Centre scanner to communicate with a specific template pool. More than one Document Centre can access a single template pool; however, this practice is not recommended. If a template is modified or deleted, the changes will impact the template's use from all machines. The scanner can download up to 250 templates from the template pool. Distribution Templates can be created once and used repeatedly.
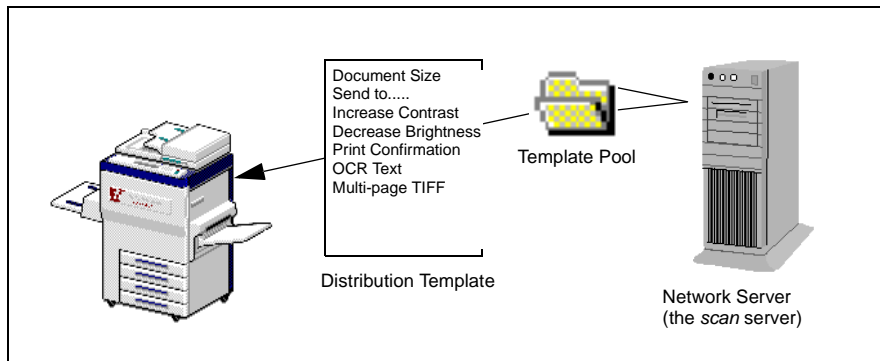
Figure 2-1: Distribution Templates

User Templates

A distribution template is created for each scan user when the Administrator sets up Scanning Services on the network. A user's template is identified by the network user name followed by an *.xst* file extension. For example, *elukas.xst* is the default template name for the network user, *elukas*.

A *user's* default template will scan documents to his or her document folder on the scan server.

Default Template

When Network Scanning Services is installed, a *general* default template is created on the scan server. This template is called *default.xst.* Documents scanned with this template are stored on the scan server in a separate document folder known as the *Network Scanning Public Repository.* All enabled scan users have Read/Write access to the public repository. The diagram below illustrates different document destinations based on the type of template used to scan the job.

elukas.xst
(template)

elukas document folder

default.xst
(template)

Public Repository

Network Server
(the *scan* server)
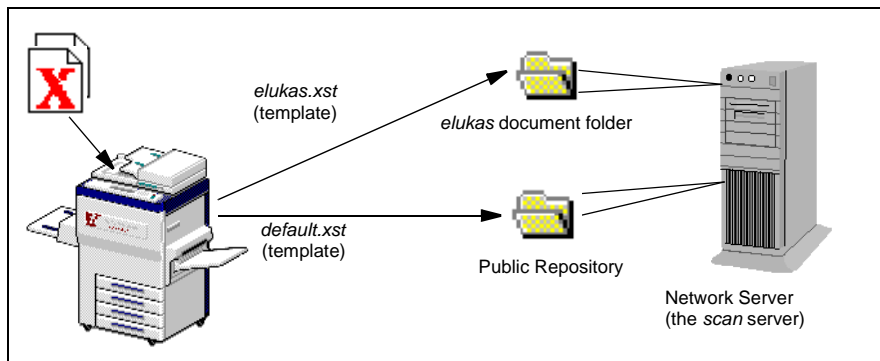
Figure 2-2: Default Template Destinations

The Distribution Template Window

The Distribution Template Window is very similar in appearance to the Xerox Network Scanners Window; however, instead of displaying a list of scanners, it lists the names of any available distribution templates on the scan server.
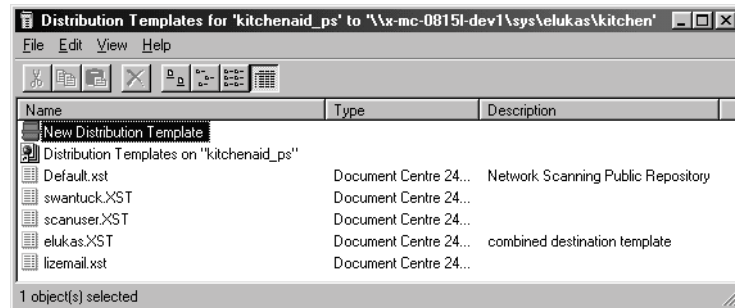
Figure 2-3: Distribution Template Window

Opening the Distribution Template Window

▶ **To open the Distribution Template Window:**

1   From the Xerox Network Scanners Window, select a *connected* Document Centre in the list of available scanners.

2   Double-click the scanner name.

- OR -

Select **Scanner > Open Templates**.

The Distribution Template Window opens.

Opening Template Files

▶ **To view the Properties for an individual template:**

1   Select a template from the list of distribution templates.

2   Double-click the template name.

    - OR -

    From the File Menu, select **Open**.

The Template Properties appear.
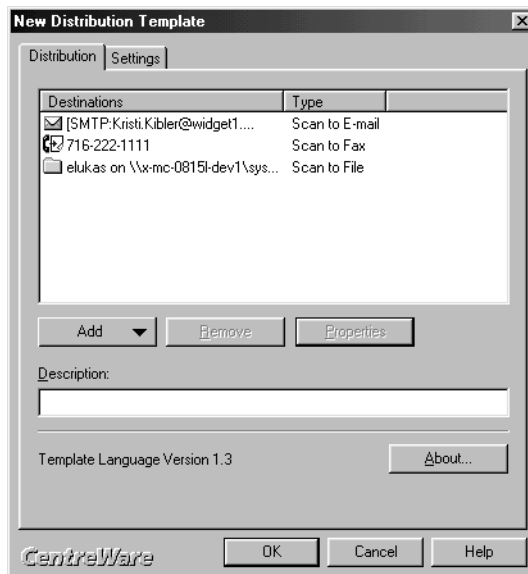
Figure 2-4: The Template Properties dialog

Creating and Editing Distribution Templates

Creating Distribution Templates involves selecting your preferences in four primary areas:

- Choosing the Template Destination (the *Distribution* tab)
- Enabling Optical Character Recognition (OCR) (the *General Folders* tab or *General E-Mail* tab)
- Setting Scan Processing Options (the *Scan Settings* tab)
- Setting Document and Image Options (the *Advanced Options* tabs)

Each category is explained in detail on the following pages.

> **NOTE:** When you create scan templates, you can start with a completely new template (as these instructions will describe) or you can select an existing template, rename it, and simply edit the current settings. For more information on renaming templates, see *Renaming Distribution Templates* on page 2-34.

Choosing the Template Destination

The *Distribution* tab appears first when you open a distribution template. Template destinations can be added, deleted, or edited from the Distribution dialog.

Scan to E-Mail

Scan to Fax

Scan to Folder

Destination Options

The roll-out list shows up to 8 of your most-recent destinations. It does not appear until after the first time you create a template.

Use the *Other* selection on the roll-out list to open the General Destinations tab.
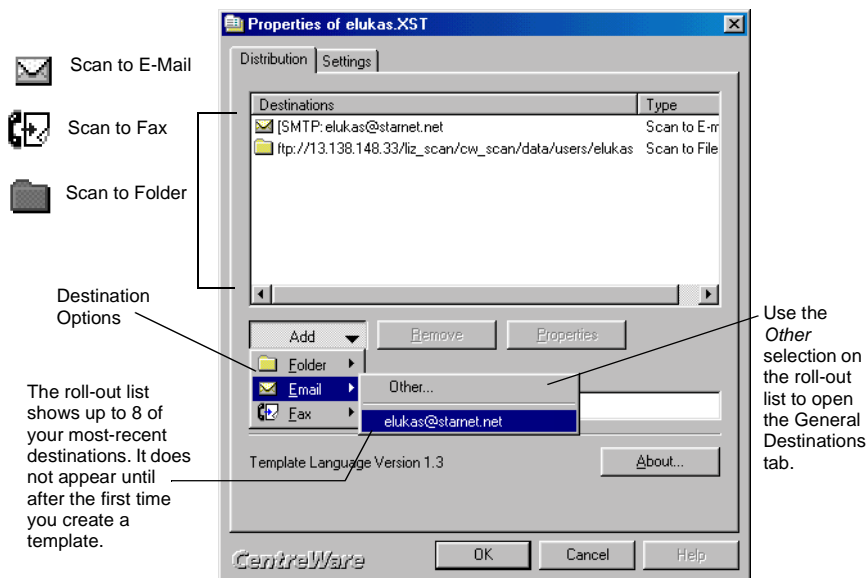
Figure 2-5: The Distribution tab

The *Destinations* list shows any destinations to which the template is currently set to scan. A single distribution template can scan to multiple destinations. Beside each destination is an icon representing the destination type. The first time you open the *Distribution* tab, it shows only your default template destination—typically your document folder on the scan server. As you add more destinations to the template, they appear in the Destinations list.

When you create a scan template, you have several scan destination options:

- *Folder*—scan a document and store the electronic version in a specific document folder (directory) on a network file server. (See *Creating a Scan-to-Folder Template* below.)

- *E-Mail*—scan a document and E-Mail it directly to any names you include in the E-mail distribution list. You can mail the TIFF file or an editable text version. (See *Creating a Scan-to-E-Mail Template* on page 2-12.)

- *Fax*—scan a document and fax it directly to any people you include in the fax distribution list. (See *Creating a Scan-to-Fax Template* on page 2-14.)

- *Exchange Public Folders*—scan a document and send the electronic version directly to a specific Microsoft Exchange Public Folder. (See *Creating a Scan-to-Exchange Public Folder Template* on page 2-16.)

Creating a Scan-to-Folder Template

Scan-to-Folder templates enable you to store scanned images or converted text (OCR) in a specific directory on a file server.

▶ **To create a Scan-to-Folder template:**

1 From the Distribution Template window, double-click **New Distribution Template**. A new template opens.

2 On the template Distribution tab, do one of the following:

- Select **Add > Folder** for the first template you create.

  - OR -

- Select **Add > Folder > Other** for any subsequent templates.

The General Folders tab appears. The Destinations list shows the user name for all network users and groups that have access to network scanning.
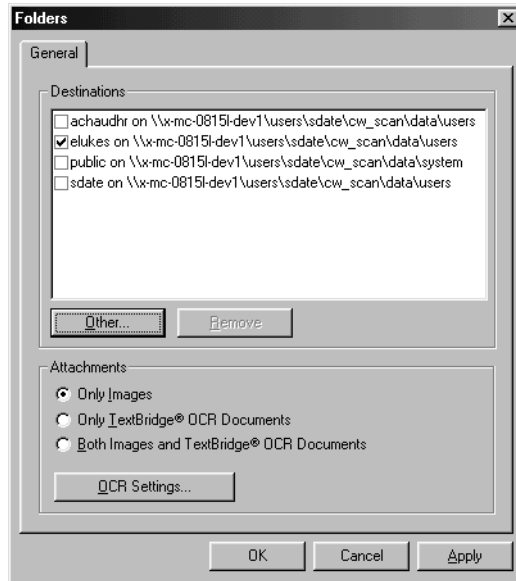
Figure 2-6: Distribution Template—General Folders tab

3 Select a document folder or several folders in the Destinations list. Each folder is typically identified by the network user name of the scan user. For example, the document folder for network user *elukas* would be named:

elukas on \\<*server name*> <*directory name*>.....

Continue with Step 4 to specify a destination not shown in the Destinations list or skip to Step 5.

4   To choose an alternate destination, click **Other**. The Other Destination dialog appears.

View changes based on Network Operating System selected.
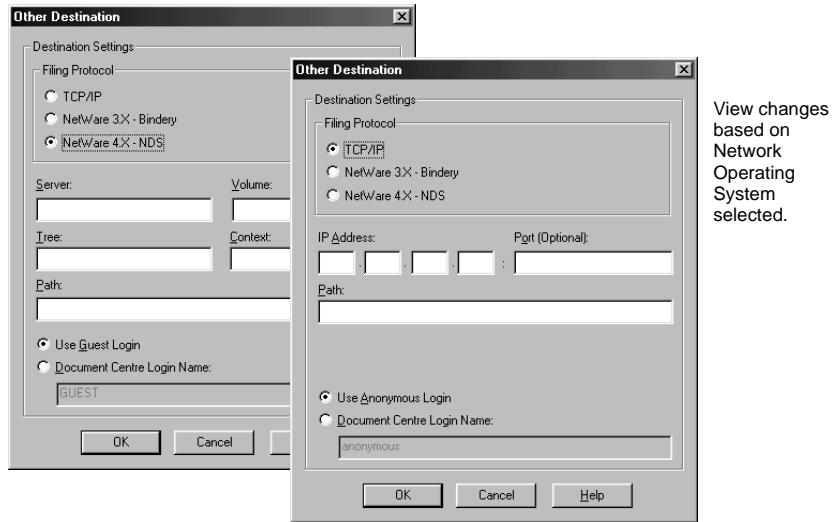
Figure 2-7: Other Destination dialog—TCP/IP and NetWare NDS

a) Select the protocol or Network Operating System of the server to which you will be scanning.

For NetWare: You must know either the *Server Name* or the *NDS Tree* and *Context* for the destination server as well as the Server Volume and network path to the directory folder.

For all other Operating Systems: You must know the IP address of the destination server and the network path to the document folder.

b) Indicate how the Document Centre will log on to the destination server.

Select **Guest** or **Anonymous** Login if you don't have a specific user ID for the Document Centre.

Select **Document Centre Login Name** and type the name if a specific user ID has been created for the Document Centre.

> **NOTE:** To scan to more than one location at a time or to use additional services such as OCR, you must have guest access to the destination server.
>
> You can specify a Document Centre Login Name only if you are scanning to a single destination without using additional services.

c) Click **OK** to save the settings and return to the *General Destinations* list. The new destination appears in the list.

5 In the *Attachments* list, indicate whether you want to produce only graphic images of the scanned document, editable text, or a combination of both.

Refer to *Enabling Optical Character Recognition* on page 2-19, or click **Help** for more detailed instructions.

6 Continue with *Setting Scan Processing Options* on page 2-21, or click **OK** to close the template properties.

7 Type a name for the template that will help you identify it in the future. Click **OK**.

Creating a Scan-to-E-Mail Template

Scan to E-Mail templates enable you to send scanned documents via E-Mail directly to any names you include in the E-Mail Recipients list. You can mail the TIFF file, an editable text version, or both.

▶ **To create a Scan-to-E-Mail template:**

1 From the Distribution Template window, double-click **New Distribution Template**. A new template opens.

2 On the template Distribution tab, do one of the following:

▪ Select **Add > E-Mail** for the first template you create.

- OR -

▪ Select **Add > E-Mail > Other** for any subsequent templates.
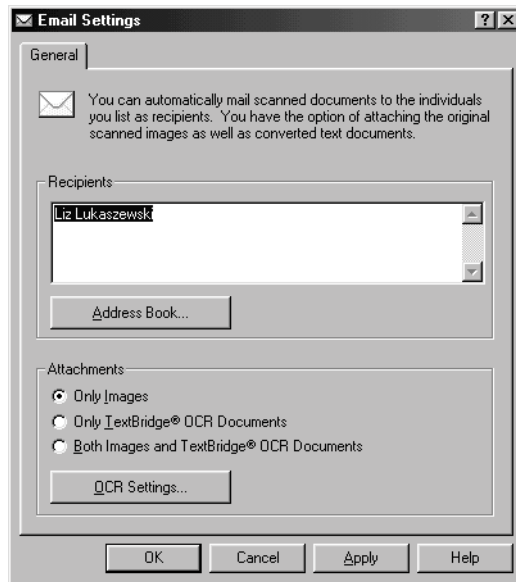
The General E-Mail Settings tab appears.

Figure 2-8: Distribution Template—General E-Mail Settings tab

3   Click **Address Book** to access your E-mail address book. Select the name or names you want to add to the template.

> **NOTE:** The use of personal groups or distribution lists is not supported by the scanning software; however, you can mail to global distribution lists.

If you don't have the correct name and address in your address book, follow the procedures specific to your mail system to add a new recipient.

Close your address book to return to the template General E-Mail Settings tab.

4   In the *Attachments* list, indicate whether you want to mail only graphic images of the scanned document, editable text, or a combination of both.

Refer to *Enabling Optical Character Recognition* on page 2-19 or click *Help* for more detailed instructions.

5   Click **OK** to return to the Distribution tab. The E-Mail addresses and/or names of anyone you added to this template will appear in the Destinations list.

6   Click the **Scan Settings** tab to continue creating your template, or click **OK** to close the template properties.

7   A message appears reminding you that a distribution server must be enabled on your network before you can use this type of template. If you are not sure if a distribution server has been enabled, check with your Network Administrator. Click **OK** to continue.

8   Type a new name that will help you identify the template in the list of templates at the scanner. Click **OK**.

Creating a Scan-to-Fax Template

Scan-to-Fax templates enable you to scan documents and fax them directly to any fax number you include in the fax distribution list.

▶ **To create a Scan-to-Fax template:**

1 From the Distribution Template window, double-click **New Distribution Template**. A new template opens.

2 On the template Distribution tab, do one of the following:

- Select **Add > Fax** for the first template you create.

   - OR -

- Select **Add > Fax > Other** for any subsequent templates.

   The Fax Setup dialog appears.
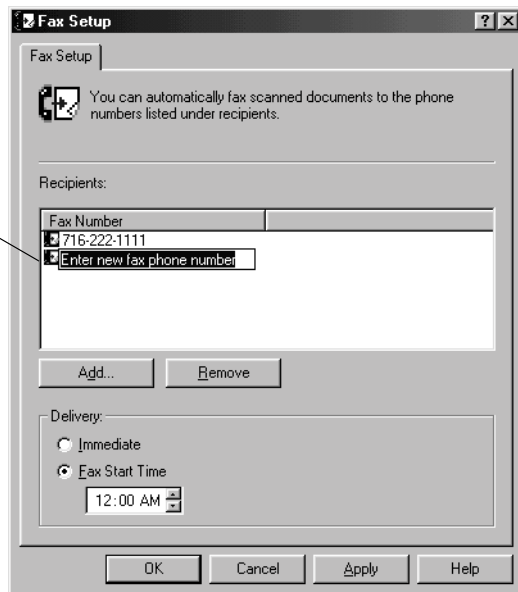
This field appears when you click Add.

Figure 2-9: Distribution Template—Fax Setup tab

3   Click **Add** to add a number to the fax Recipients list. The *Enter new fax phone number* field appears.

4   Type the phone number of the intended fax recipient. If you wish to add more phone numbers, click **Add** again and repeat the process.

5   Select the appropriate Delivery option.

  ■   *Immediate*—The fax is sent immediately when a document is scanned with this template.

  ■   *Fax Start Time*—Regardless of the time a document is scanned, it will not be faxed until the specified time. Place the cursor in the time field and type the desired time to send a fax. Use the Up or Down arrows to select AM or PM.

6   Click **OK** to close the Fax Setup dialog.

7   Continue with *Setting Scan Processing Options* on page 2-21, or click **OK** to close the template properties.

8   Type a name for the template that will help you identify it in the future. Click **OK**.

Creating a Scan-to-Exchange Public Folder Template

Scan-to-Exchange Public Folder templates enable you to scan documents and store the files in a specific Microsoft Exchange Public Folder on your network.

▶ To create a Scan-to-Exchange Public Folder template:

1 From the Distribution Template window, double-click **New Distribution Template**. A new template opens.

2 On the template Distribution tab, do one of the following:

- Select **Add > Exchange Public Folder** for the first template you create.

  - OR -

- Select **Add > Exchange Public Folder > Other** for any subsequent templates.

3 The General Exchange Public Folder Settings dialog appears.
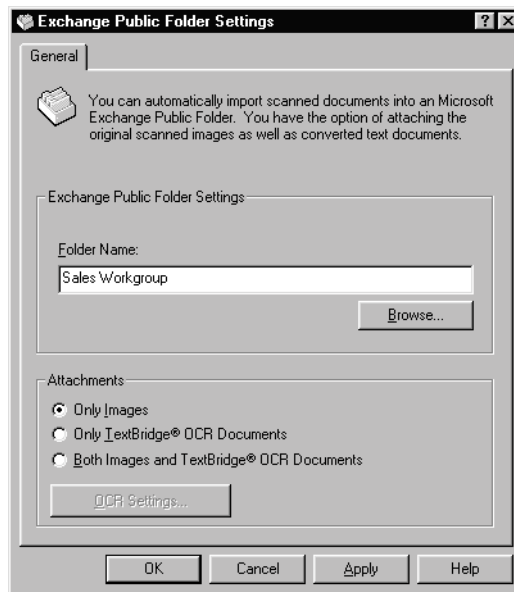
Figure 2-10: Exchange Public Folder Settings

4   Type the name of the public folder in which you wish to stored scanned documents or click **Browse** and locate the folder on the network.

5   In the *Attachments* list, indicate whether you want to produce only graphic images of the scanned document, editable text, or a combination of both.

Refer to *Enabling Optical Character Recognition* on page 2-19, or click **Help** for more detailed instructions.

6   Continue with *Setting Scan Processing Options* on page 2-21, or click **OK** to close the template properties.

7   Type a name for the template that will help you identify it in the future. Click **OK**.

Removing a Destination

Once you have created a template, the information is saved until you modify the template. At some point, you may wish to change the distribution list and may need to remove some destinations.

▶ **To remove a destination from a distribution template:**

1 From the Distribution Template window, double-click the template you wish to modify.

2 Select the destination(s) you want to delete in the Destinations list.

3 Click **Remove**. The destination is removed from the list.

4 Click **OK** when you are finished.

Enabling Optical Character Recognition

Optical Character Recognition (OCR) enables you to turn TIFF image files into text documents which can then be edited in many word processing programs. The OCR options within the Network Scanning Services software enable you to specify what type of document you are scanning (graphic and/or text) and in what common file format the OCR'd document should be saved.
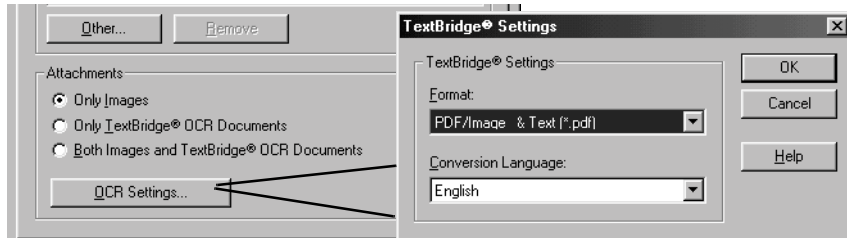
Figure 2-11: Network Scanning OCR Options on Destinations Dialog

NOTE: Before you can automatically OCR a document, a distribution server must have been installed and enabled on your network. Check with your Network Administrator to be sure this has been done.

▶ To set OCR options in a distribution template:

1 In the *Attachments* list, indicate whether you want to produce only graphic images of the scanned document, editable text, or a combination of both:

   - *Only Images*—Select this option for graphics or text files that won't require editing. The scanned document is converted to a TIFF. You can further specify TIFF or multi-page TIFF on the Document Options dialog. OCR is not available with this option.

   - *Only TextBridge® OCR Documents*—The scanned document is converted to a file format (such as .RTF) which can later be edited.

   - *Both Images and TextBridge® OCR Documents*—The scanned document contains both images and a converted file format which can later be edited.

2   Click **OCR Settings** and select the file format in which to save the completed document. The OCR settings give you numerous format options to choose from, including several .PDF combinations, different versions of Microsoft Word, etc.

Also select the language that should be used for OCR processing.

Click **OK**.

3   Click **OK** to close the Distribution template dialog, or select the **Scan Settings** tab to continue creating your template.

Setting Scan Processing Options

The *Scan Settings* tab allows you to control basic processing characteristics about the document you're scanning.

> **NOTE:** Not all options are available for all Document Centres. If an item is not displayed on the tab or is grayed, it is not available for your system.

Not all options are available for all models.
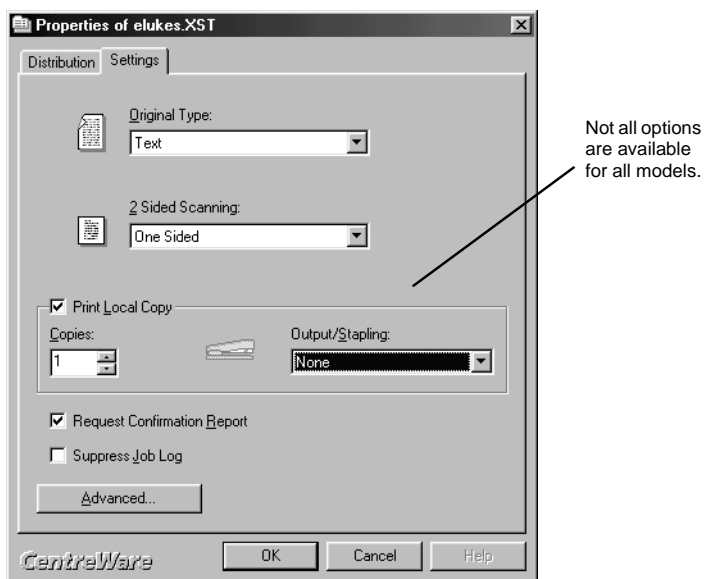
Figure 2-12: Distribution Template Scan Settings tab
Document Centres 220/230, 332/340, and 420/432/440 only

From the Scan Settings tab you can make any of the following selections:

- *Original Type*—indicate whether the original document is primarily text, graphics, or a combination of both. The halftone option is used to generate the best quality on scanned photographic images. Color and shade differences are represented with varying shades of gray.

- *2 Sided Scanning*—select whether the original document is one-sided or two-sided.

- *Print Local Copy*—automatically print an extra copy of the document.

- *Copies*—indicate the number of additional document sets to print at the Document Centre.

- *Output/Stapling*—indicate whether the additional printed document should be stapled or not.

- *Request Confirmation Report*—prints a report at the Document Centre indicating the status of the scan job.

- *Suppress Job Log*—When this option is *enabled*, only the scanned images will be filed in the document folder. When the option is *disabled*, both the scanned images and a job log file (.xst) will be filed in the document folder.

- *Advanced*—opens the Advanced Settings tabs and provides access to Document Options, Image Options, and Image Adjustment Options.

For more information on available options, click **Help**.

Setting Document and Image Options

The *Document Options*, *Image Options*, and *Image Adjustment Options* tabs are grouped together under a category called *Advanced* options. These Advanced options give you the opportunity to fine tune the manner in which your document will be scanned.

▶ To access scanning Advanced options:

1   Open a scan template and choose the **Scan Settings** tab.

2   Click **Advanced**. The *Document Options*, *Image Options,* and *Image Adjustment Options* tabs appear.

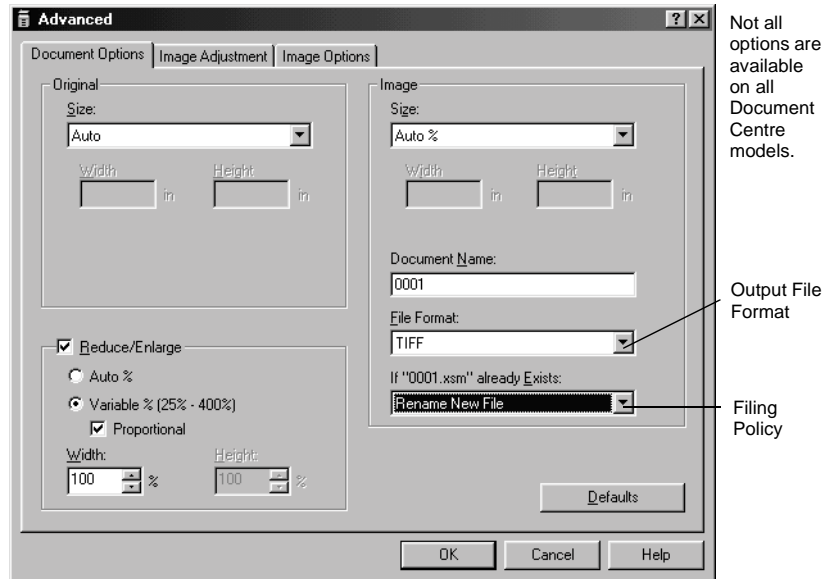Not all options are available on all Document Centre models.

Output File Format

Filing Policy

Figure 2-13: Distribution Template Document Options tab
Document Centres 220/230, 332/340, and 420/432/440 only

Defining the Original Document Size

The Document Centre scanner has the ability to automatically detect the size of the document you are scanning, or you can specify a particular paper size.

▶ **To specify the Original Document Size in a distribution template:**

1   Click **Advanced** on the template Scan Settings tab to access the Document Options tab.

2   From the Original Size box, select the size of the paper document you will be scanning, or:

   ■   To have the scanner automatically detect the size of the document, select **Auto**.

   ■   To specify a document size not currently listed, select **Custom** and type the dimensions in the *Width* and *Height* fields.

> **NOTE:** Custom paper sizes are available only for documents scanned from the document glass at the Document Centre. They cannot be specified for documents scanned from the automatic document feeder.

Reducing or Enlarging Document Size

A document image can be scaled between 25 and 400 percent of its original size. However, if the document is fed through the document feeder, the scaling range is limited to from 50 to 200 percent of the original size. Reducing or enlarging an image does not change the paper size.

> **NOTE:** Not all options are available for all Document Centres. If an item is not displayed on the tab or is grayed, it is not available for your system.
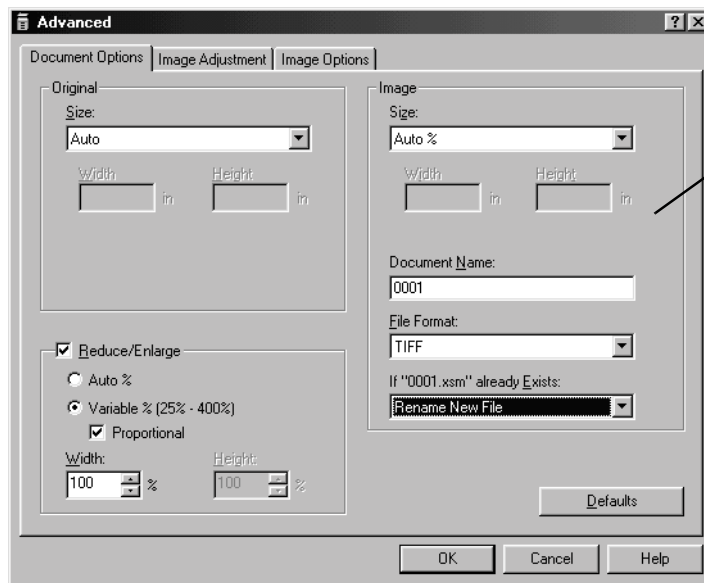
Not all options are available for all models.

Figure 2-14: Distribution Template Scan Settings tab
Document Centres 220/230, 332/340, and 420/432/440 only

► **To reduce or enlarge a document image in a template:**

1 Click **Advanced** on the template Scan Settings tab to access the Document Options tab. (See Figure 2-13 on page 2-23.)

2 Select **Reduce/Enlarge**.

3 Select **Auto %** or **Variable %** and enter a percentage to reduce or enlarge the image.

- *Auto %*—the document image will automatically be scaled to fit the selected paper size.

- *Variable %*—the document image will be resized in direct or varying proportion based on the percentage you enter in the width and height fields.

Specifying the Output File Format

The *File Format* determines the type of file that will be created from the scanned document.

▶ **To specify the output file format in a template:**

1   Click **Advanced** on the template Scan Settings tab to access the Document Options tab. (See Figure 2-13 on page 2-23.)

2   Select one of the following from the File Format list box:

- *TIFF*—each page of the document will be stored as a separate TIFF image file.

- *Multi-Page TIFF*—multi-page documents will be stored as a single TIFF image file. This format is useful for Scan to File or Scan to E-Mail operations.

> **NOTE:** Documents can also be saved to PDF and numerous other document formats by selecting the appropriate option in the TextBridge OCR settings. See *Enabling Optical Character Recognition* on page 2-19 for more information.

Setting the Filing Policy

Although there are many important aspects to a scan template, the filing policy is one of the most crucial to understand. The filing policy specifies the method used to store scanned documents in a document folder.

▶ **To specify the document filing policy in a template:**

1 Click **Advanced** on the template Scan Settings tab to access the Document Options tab.

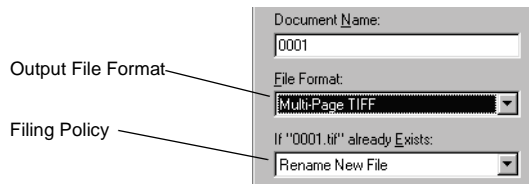2 Select the desired filing policy from the list of available options.

Figure 2-15: Document Options Filing Policy

The four filing options are described below.

■ *Overwrite Existing File*—deletes any TIFF files stored in the document folder before sending the newly scanned files of the same name. All deleted files are lost.

■ *Append to Existing File*—adds data from newly scanned files to the existing files (of the same name) in the document folder. Existing files are not deleted. Delete old files on a regular basis to conserve server space.

■ *Do Not Save*—determines if any files with the same name already exist in the document folder. If no files exist, the newly scanned files are sent to the folder. If files with the same name already exist in the folder, the scan job is aborted.

■ *Rename New File*—behavior varies based on your Document Centre model. Although this is the safest filing policy, it requires a large amount of disk space. (This is the default setting.)

   ■ *Document Centres 220, 230, 332, 340, 420, 432, and 440*—a new .xsm folder is created (based on the time and date of creation) into which the TIFF images are filed.

- *Document Centres 240, 255, 265, 460, and 470*—an alphanumeric name (limited to 8 characters) is generated for the .xsm folder based on the document name specified in the template. The folder names increment sequentially when additional documents are scanned to this location. For example, if the document name specified in the template was *scanning,* the first document folder would be called *scanning.xsm*. Any subsequent jobs scanned with the same template to the same destination would be named *scann000.xsm* and *scann001*.xsm, respectively.

Editing Image Darkness, Contrast, and Sharpness

The degree to which you are able to control image settings is dependent on the type of Document Centre scanner you own. Some scanners enable you to modify lightness and darkness, contrast, and sharpen or soften the image, while others allow you to adjust lightness and darkness only.
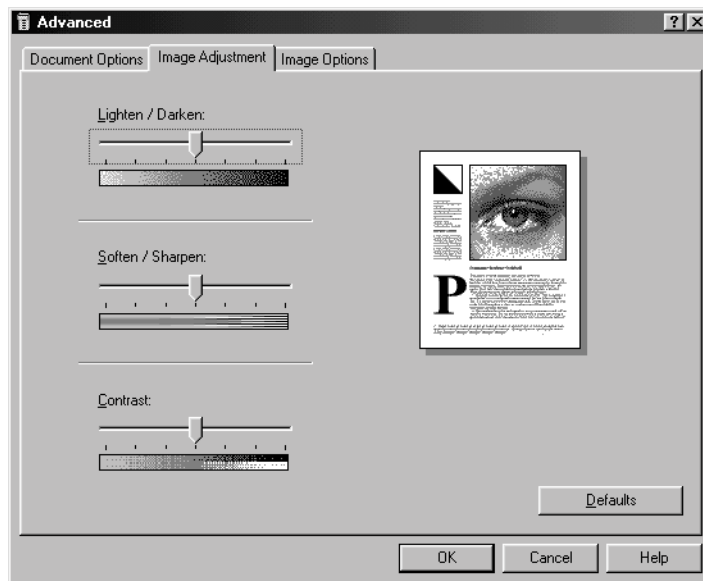

Figure 2-16: Distribution Template Image Adjustment tab
Document Centres 240, 255, 265, 460, and 470 only

To modify template image settings:

1   From the distribution template Scan Settings tab, click **Advanced**.

2   Choose the **Image Adjustment** tab.

3   Use the sliding scales to adjust each of the available settings:

- *Lightness/Darkness*—Move the scale to the left to lighten the image. Move it to the right to darken the image.

- *Contrast*—Move the scale to the left to lessen the contrast. Move the scale to the right to increase contrast.

- *Sharpen/Soften*—Move the scale to the left to make the edges of the image appear darker or more pronounced. Move the scale to the right to make the image edges appear softer or less defined in the scanned document.

> **NOTE:** Not all options are available for all Document Centres. If an item is not displayed on the tab or is grayed, it is not available for your system.

Setting the Scan Resolution

Use the *Resolution Mode/Resolution* setting to set the resolution of the output document. This setting does not need to match the resolution at which the original document was printed. A 600 dpi image produces a finer, higher quality image than a 300 dpi setting. However, a 600 dpi resolution will result in a larger file size. Consider these factors when you make your selection.
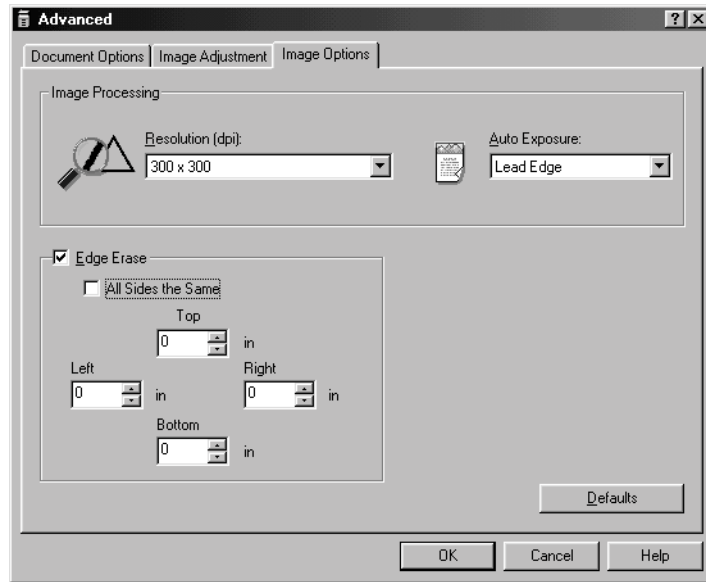

Figure 2-17: Document Centres 220, 230, 332, and 340 Image Options tab

➤ To set the resolution of the scanned document:

1 From the distribution template Scan Settings tab, click **Advanced**.

2 Choose the **Image Options** tab.

3 Choose the desired resolution from the available options.

Using Auto Exposure

Auto Exposure enables you to enhance the output of documents that have color backgrounds. When Auto Exposure is *enabled*, the scanner automatically selects an exposure level that is appropriate for the original document. When Auto Exposure is *off*, the scanner uses the template's Lightness/Darkness settings to control the exposure level of the produced image.

▶ **To enable Auto Exposure:**

1 From the distribution template Scan Settings tab, click **Advanced**.

2 Choose the **Image Options** tab. (See Figure 2-17 on page 2-31.)

3 From the Auto Exposure list box, choose one of the following:

- *Off*—The auto exposure feature will not be used in this template.

- *Lead Edge*—The scanner bases the auto exposure on the characteristics of the first few lines of whichever side of the page is fed into the scanner first.

Erasing Lines Around the Edge of a Page

The *Edge Erase* option enables you to erase spots, punch holes, staple marks, or any other dark marks that may appear around the edge of your original document. You can erase marks which appear in the outer 0 to 50 mm of the page, or up to 2 inches.

> **NOTE:** Not all options are available for all Document Centres. If an item is not displayed on the tab or is grayed, it is not available for your system.

To erase lines and marks around the outer edges of a document:

1 From the distribution template Scan Settings tab, click **Advanced**.

2 Choose the **Image Options** tab.

3 Select **Edge Erase** and do one of the following:

- Select **All Sides the Same** to indicate that all edges should be erased proportionately.

   - OR -

- Ensure that **All Sides the Same** is *not* selected, and type the appropriate space to erase around each edge of the document.

Renaming Distribution Templates

Network Scanning Services enables you to easily rename distribution templates.

▶ **To rename a distribution template using the Network Scanning Services software:**

1 In the Distribution Template window, select the template you want to rename.

2 Select **File > Rename** and type the new template name.

> **NOTE:** Template names cannot exceed 20 characters. For compatibility with the Document Centre, do not include spaces or "@" in the name.

Deleting Distribution Templates

If you no longer need a distribution template, you can delete it from the list of scan templates. To do so, you must possess *Write* access to the template pool.

▶ **To delete scan templates:**

1 Open the Distribution Template window.

2 Select the template you want to delete and do one of the following:

■ Click the **Delete** icon on the toolbar.

   - OR -

■ Press **Delete** on the keyboard.

The template is deleted from the template pool on the scan server.

Watch Services

This chapter describes watch services and their use. It also contains detailed instructions for creating, editing, and removing a watch service.

About Watch Services

When documents are scanned at the Document Centre, the electronic files are sent to a document folder on the scan server. A document folder is created for each scan user at the time the Administrator installs Network Scanning Services. Each user's folder name matches his or her network login name. When the network scanning software is installed on a user's workstation, a *watch service* is automatically established to monitor any activity that occurs in that user's document folder on the scan server.
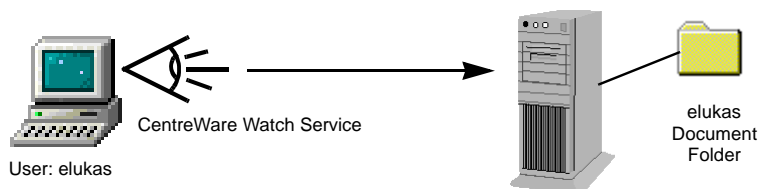

Figure 3-1: Watching a Document Folder

Each user can watch more than one document folder. If the scan server is running on a NetWare or Windows NT server, a watch service is established for all document folders to which the user has Read/Write privileges under the current network name. This means that if your workstation and network login are both *elukas*, a watch is automatically established for any document folders to which you have Read/Write access. However, if your workstation login was *ekibler* and your network login was *elukas*, the scanning software will *not* automatically watch for documents in your document folder. In this circumstance, you should use the *Add Watch Wizard* to set up a watch on the document folder.

For all other network operating systems, you must *always* use the *Add Watch Wizard* to establish a watch. See *Working With Watch Services* on page 3-6 for additional information.

When to Use CentreWare Watch Services

The scanning software distributed with the Document Centre scanner actually includes two different software packages: *CentreWare Network Scanning Services* software and a supplemental *Scan to PC Desktop™* kit. Each software package contains a watch utility to monitor document folders for activity. If you install both the Network Scanning Services software and the Scan to PC Desktop™ software, you must understand which "Watcher" to use to accomplish your goals.

■ The *CentreWare Watch Service* monitors your document folder and offers you the flexibility to choose among three different processing options which are automatically performed when a scanned document appears in the folder. (See *Adding a Watch Service* on page 3-6 for more information.)

■ The *Xerox Document Centre Image Retriever* (included in the *Scan to PC Desktop™* kit) is designed specifically to enable scanning to your PaperPort desktop. This utility monitors your document folder and automatically moves any scanned documents into PaperPort on your PC desktop.

Although the CentreWare Watcher can be configured to scan to PaperPort, it only supports the multi-page TIFF file format. The Xerox Document Centre Image Retriever supports single-page TIFF, multi-page TIFF, and PDF formats. See *Appendix B* for more information on configuring the CentreWare Watcher to scan to PaperPort.

> **NOTE:** CentreWare Watch Services and the Document Centre Image Retriever must be installed and set up separately. You cannot monitor the same document folder with both utilities.

The Watch Folder Window

The Watch Folder Window displays the names of, and network path to, any document folders currently being watched from your PC. The Watch Folder Window can be opened from either the Xerox Network Scanners (XNS) Window or from the Windows taskbar.

▶ **To open the Watch Folder Window:**

- From the Xerox Network Scanners Folder, click **Scanner > Watch Folder**.

  - OR -

- Right-click the scanning icon in the Windows taskbar, and choose **Watch Folder**.
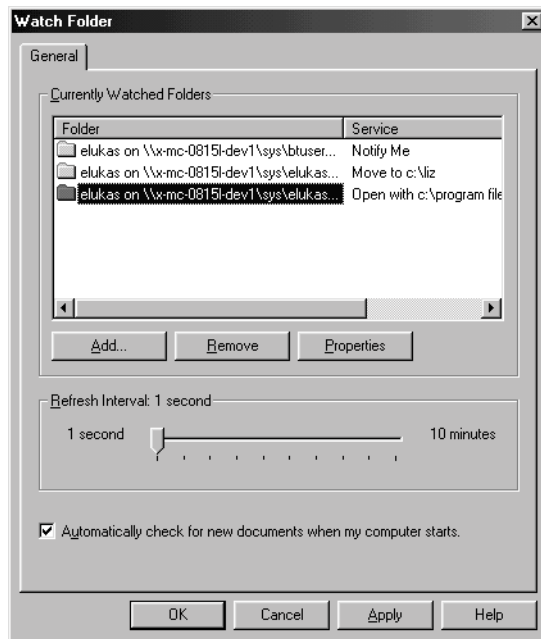
The Watch Folder Window opens.

Figure 3-2: The Watch Folder Window

The Watch Folder Window contains the following features:

- *Folders*—lists the names of any document folders currently being watched by this PC.

- *Add*—launches the Add Watch Wizard so you can add a new watch service or watch new document folders.

- *Remove*—deletes a folder from the watch list.

- *Properties*—displays the current settings for the selected document folder.

- *Refresh Interval*—changes the frequency at which any document folders you are currently watching are polled for activity.

- *Automatically check for new documents when my computer starts*—checks the document folder for scanned documents each time the PC is started.

Working With Watch Services

Adding a Watch Service

Use the *Add Watch Wizard* to add new folders to monitor for the arrival of scanned documents. The wizard enables you to set one of three different service options:

- *Display a message when documents arrive*—sends a message to your PC desktop when a scanned document appears in the folder. (This is the default.)

- *Move to another directory or folder*—automatically moves the scanned document to a new location that you specify. You can use this option to move documents from the network server onto your workstation.

- *Open with an application*—automatically opens the scanned document for viewing on your PC desktop, using any application you specify that is capable of reading TIFF images. When you use this option, the scanned image remains in the document folder on the scan server.

Figure 3-3: Watch Folder Wizard

> **NOTE:** For information on using watch services with PaperPort, see *When to Use CentreWare Watch Services* on page 3-3.

Receive Notification When Documents Arrive in a Watch Folder

▶ **To receive a message on your desktop when files appear in your Watch folder:**

1   Open the Watch Folder window, and click **Add**. The Add Watch Wizard opens.

2   Type the path of the folder to watch, or click **Browse** and locate the folder on your network.

   Click **Next** once the correct path is listed.

3   Select **Display a message when documents arrive** and click **Next**.

4   Confirm that the correct service is displayed on the dialog. Click **Finish** to complete the setup.

When documents are scanned to this document folder, a message similar to the following is displayed.
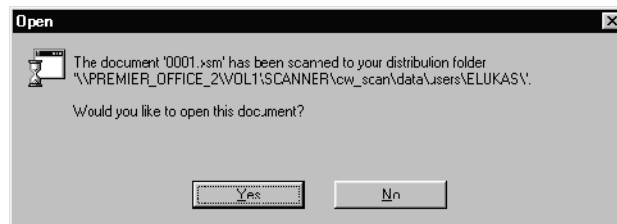

Figure 3-4: Message Generated with "Notify Me" option

Move Scanned Documents to Another Directory or Folder

▶ **To automatically move scanned documents from your document folder to another directory:**

1 Open the Watch Folder window, and click **Add**. The Add Watch Wizard opens.

2 Type the path of the folder to watch, or click **Browse** and locate the folder on your network.

   Click **Next** once the correct path is listed.

3 Select **Move to another directory or folder** and click **Next**.

4 Type the path to the directory where you want to save scanned documents or click **Browse** and locate the directory.

   Click **Next** on the *Move Documents to* dialog.

5 Confirm that the correct path is displayed on the dialog. Click **Finish** to complete the setup.

When documents are scanned to this document folder, they are automatically moved to the new location.

Open Scanned Documents With a Program

▶ **To open scanned documents with a specific program:**

1 Open the Watch Folder window, and click **Add**. The Add Watch Wizard opens.

2 Type the path of the folder to watch, or click **Browse** and locate the folder on your network.

   Click **Next** once the correct path is listed.

3 Select **Open with an application** and click **Next**.

4   Type the path to (or browse to the location of) the directory on your hard drive that contains the executable (.exe file) you wish to use to automatically open any scanned documents that appear in the Watch folder. You must use an application capable of reading TIFF images or one that can open TIFF files using command line arguments. (Refer to *Help* for more information.)
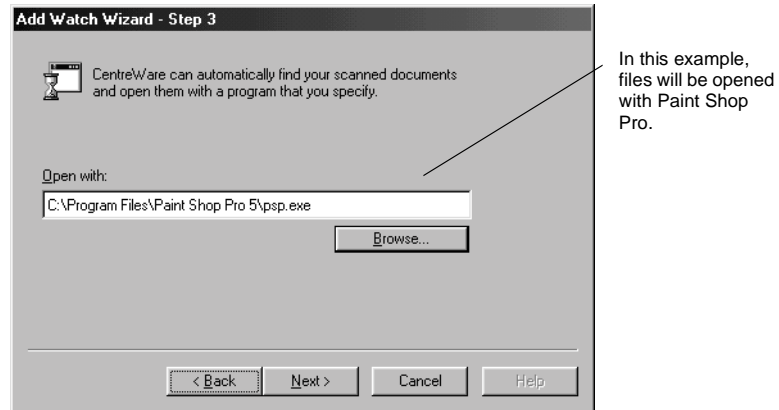

Figure 3-5: The "Open With" Watch Service

5   Click **Next**.

6   Confirm that the correct path is displayed on the dialog. Click **Finish** to complete the setup.

When documents are scanned to this document folder, they are automatically opened on your desktop using the specified program. The files remain in the scan document folder unless you move or copy them to a new location.

Modifying a Watch Service

You can modify an existing watch service by running the Watch Folder Wizard and changing current settings.

▶ **To modify a watch service:**

1   Open the Watch Folder window.

2   Select a folder in the list of folders currently being watched.

3   Click **Properties**. The Add Watch Wizard opens and shows the current settings for the existing Watch.

4   Move through the Wizard screens and make any desired changes.

5   Confirm that the correct service is displayed on the dialog. Click **Finish** to complete the setup.

Removing a Watch Service

▶ **To stop watching a specific document folder:**

1   Open the Watch Folder window.

2   Select a folder in the list of folders currently being watched.

3   Click **Delete**. The folder name is removed from the list of Watch folders and will no longer be monitored for scan activity.

Scanning A Document

This chapter contains basic instructions for scanning a document from the following Document Centre models:

- Document Centres 220 and 230 ST

- Document Centres 332 and 340 ST

- Document Centres 240, 255, and 265 ST

- Document Centres 420, 432, and 440

- Document Centres 460 and 470

More detailed information can be obtained in your Document Centre user guide.

Scanning from DC 220/230 ST, DC 332/340 ST, or DC 420/432/440

▶ **To scan a document:**

1   At the Document Centre, load the document just as you would to make a copy. If you use the document feeder, place the document in the tray so the top of the page feeds in first.

**Correct**   **Incorrect**
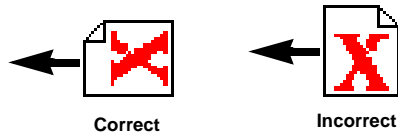
Document Feeder Paper Orientation

2   Press **Features** and choose **Scan** on the Touch Screen. Select **Refresh List** to update the list of templates. If you've modified a specific template, select **Update Template**.

3   Scroll down the list and select the template associated with your network user name (your default template) or another template you have created.

4   Press **Start**.

> **NOTE:** Templates with the "@" symbol in the beginning of the name are created with Internet Services. These templates cannot take advantage of the distribution capabilities of Network Scanning Services.

Scanning from DC 240/255/265 ST or DC 460/470

▶ **To scan a document:**

1 At the Document Centre, load the document face up in the automatic document feeder.

default orientation

scanner can also be programmed to accept this orientation
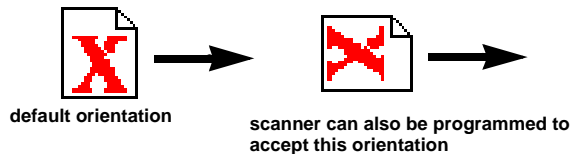
Document Feeder Paper Orientation

2 On the Touch Screen, press **Features** and select **Network Scanning**. A list of scan templates is displayed.

3 Press **More Scan Features** and select **Update Template List**.

4 Press **Update Template List** again and **Confirm**.

5 Press **Basic Scanning** and scroll down the list of scan templates to choose the desired template.

6 Press **Start**.

> **NOTE:** Templates with the "@" symbol in the beginning of the name are created with Internet Services. These templates cannot take advantage of the distribution capabilities of Network Scanning Services.

History

This chapter contains information about the Network Scanning Services History Window. It instructs scan users on how to use the history window to check the processing status of their distribution scan jobs and includes instructions for Network Administrators on how to set History Properties.

About the History Window

The History Window allows network administrators and scan users to *view* the history and status of scan jobs. It displays a summary of any scan-to-distribution jobs (such as scan to E-Mail, scan to a document folder with OCR, or scan to other applications) and information on their success or failure. History information can be retained for a maximum of 30 days.

Opening the History Window

▶ **To open the history window:**

1 Open the Xerox Network Scanners Window.

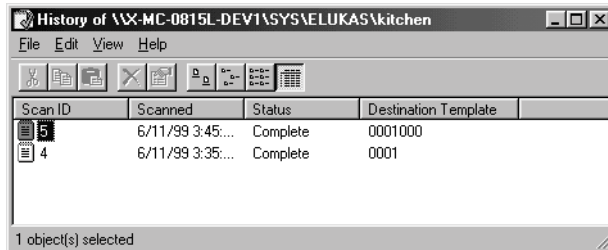2 From the Scanner menu, choose **View History**. The History Window opens.

Figure 5-1: The History Window

Checking the Status of a Scan Job

The scan job history tracks scan processing as it relates to CentreWare software. If your scan templates are designed to interact with other software applications, the History window cannot verify the success or failure of that software.

▶ **To open the history properties dialog:**

■ Double-click the Scan ID icon for the job whose history you want to view. The history properties dialog opens.
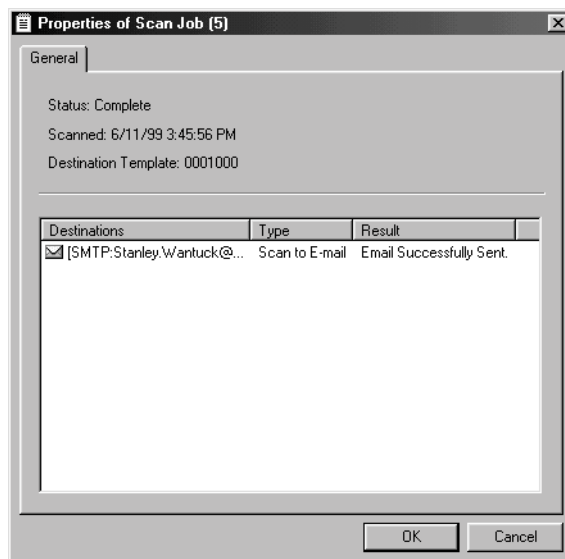

Figure 5-2: History Properties

There are four possible processing states that may display in the history window:

- *Processing*—the scan job processing is still in progress.
- *Completed*—the scan job was completed successfully and was delivered to all destinations.
- *Completed with Errors*—the scan job was completed, but could not be delivered to one or more destinations. Some destinations were processed successfully.
- *Failed*—the scan job could not be processed; all destinations failed.

The Job Log

When a scan job is processed, the distribution template is filed in the document *.xsm* folder along with any TIFF images, converted (OCR'd) files, and other configuration files. After processing is completed, the distribution template file (*.xst*) becomes the *job log*. The job log contains information about the original template characteristics as well as additional information about how the job was actually processed.

> **NOTE:** The job log may be helpful for problem solving, but you should first check the Document Centre Configuration Report or the History record (for distribution scan jobs).

Uninstalling Network Scanning Services

Use the following procedure to uninstall Network Scanning Services from the workstation.

Uninstalling the Workstation Software

▶ **To uninstall the Scanning Services software from your workstation:**

1   If the desktop scanning icon appears in the Windows taskbar, right-click the icon and select **Exit** to close Network Scanning Services.

   Although you may not have any active windows open, the icon in the taskbar indicates that scanning applications are still running in the background on your PC.

2   On the Windows desktop select **Start > Settings > Control Panel**.

3   Double-click **Add/Remove Programs**.

4   On the Install/Uninstall tab, select **Xerox CentreWare Network Scanning Services** from the list of installed software.

5   Click **Add/Remove**.

6   Click **Yes** to confirm that you want to remove Scanning Services software from the workstation.

7   You may be prompted to uninstall *Shared Files*. These are files that are also used by other CentreWare applications. If you are using other CentreWare applications, *do not* uninstall the shared files. If you won't be using any CentreWare software, click **Yes to All** and **Yes to Proceed**.

   The software is uninstalled.

8   Click **OK** to close the uninstallation program.

Problem Solving

This chapter provides solutions to common problems that you may encounter while installing or using the Network Scanning Services software. The chapter also contains a section which highlights some common error messages that may appear on the scanning Confirmation Report and provides a brief explanation for each.

For Scan Users

■ **Why does it take a long time for the Xerox Network Scanners Window to open or refresh?**

The Xerox Network Scanners Window may take a long time to open if the server is running slow or is offline.

If no scanners are currently installed or configured, the software could take a long time to search the network and determine no scanners are installed.

If there are many scanners on your network, the search could take a long time because the software needs to obtain the status of each scanner. To reduce the search time frame, remove any unused scanners from your scanners list.

■ **Why can't I see the scanner I need in the Xerox Network Scanners Window?**

Try to refresh the window display. Doing so updates the list of available scanners.

If that is not successful, you can use the Add Network Scanner Wizard to search for a specific scanner on the network.

Otherwise, check with your Network Administrator. You may not possess proper access rights on the network.

■ **Why don't I see anything when I open the Distribution Template Window?**

If you have recently uninstalled other CentreWare applications, you may have uninstalled some shared files which are required for the scanning operation. If not, the original installation may have failed for some reason. Try reinstalling the software.

If you are still unable to see the necessary files, consult your Network Administrator to ensure that you have the proper access rights.

■ **Why can't I see jobs in the History window?**

Access to the History record is controlled by the Network Administrator. You may not have access to it. Check with your Network Administrator.

The History window only displays jobs that are processed through the scanning distribution server—Scan to E-Mail jobs, any jobs which include OCR processing, and jobs scanned to other application's Inboxes.

■ **I selected some TextBridge OCR options in my template, but the OCR didn't work. Why?**

Any automated OCR capability requires the use of a distribution server. Check with your Network Administrator to ensure that your network scanning configuration includes a distribution server.

■ **When I selected TextBridge OCR options in my template, I got a message indicating that I must be using a distribution server. Why did this message appear?**

This message is simply a reminder that no OCR functionality can complete unless your Network Administrator has enabled a distribution server.

■ **Why won't my scan job complete when I try to select .PDF or .HTML formats (TextBridge options) in my distribution template?**

TextBridge has added some new file format options (.PDF, .HTML, and newer versions of Microsoft Word) that were not previously supported by older Document Centre models. A software upgrade patch for Document Centres 220/ 230 ST and 332/340 ST is available to anyone who might need such support. Contact your Xerox representative to obtain the upgrade.

■ **Why can't I scan to personal E-Mail groups?**

The use of personal E-Mail groups or distribution lists is not supported by the scanning software; however, you can mail to global distribution lists.

- **We've been using the 4.1 Network Scanning Services software and have several templates already created. If we upgrade to the 5.20 release, do we have to recreate all of our templates?**

  No. The 5.20 Network Scanning Services software allows you to edit and use distribution templates created with release 4.1 software. However, once templates are used with the 5.x software, they are upgraded to release 5.x compatibility only.

- **When I open the Xerox Network Scanners Window, I see the message "Unsupported Installation" beside my scanner name. What does this mean?**

  This means that your workstation software was upgraded to the 5.20 software release before your Network Administrator updated the scan server software. The scan server (which is the center of all scan processing) is currently still using a previous version. Check with your Administrator for more information.

- **When I tried to update the list of templates at the Document Centre scanner, I received a message indicating that the scanner was only able to retrieve a partial list of templates. What should I do?**

  Check with your Network Administrator. He or she will need to verify that the Document Centre has sufficient network access.

- **Why can't I delete a template from the template pool?**

  To delete a distribution template, you must have *Write* access to the template pool. Write access is assigned to each enabled scan user during the installation. Check with your Network Administrator to be sure your rights have not been changed.

- **I can never remember the path to my document folder on the scan server. How can I quickly check its contents?**

  Use the *Explore Documents* option in the Scanner menu of the Xerox Network Scanners window. It opens an Explorer Window which takes you right to your document folder on the server.

- **Why isn't a Watch Service automatically created to monitor my document folder? I thought this was always supposed to happen.**

  A Watch Service is automatically set to watch your document folder (and any other document folders to which you possess *Read/Write* access) as long as your PC login and network login names are identical and you are using a NetWare or Windows NTFS network. If your login names are different, or if you work in a different network environment, you can set up a watch folder using the Watch Folder Wizard.

- **If I use the "Move To" watch service to move a document out of my document folder, the next job I scan appears in my document folder with the same name as the first job. Why?**

  Once you move a document out of the document folder, the scan service is not able to detect that the scan job ever existed. It will use the same name for the next job that is scanned to the same document folder.

  For example, if a job named 0001.xsm is scanned and moved to your PC desktop, the scan service can no longer determine that 0001.xsm ever existed in the document folder. Therefore, the next job scanned to the document folder will be named 0001.xsm.

- **I tried to uninstall the Network Scanning Services software from my desktop, but it didn't seem to work. What did I do wrong?**

  During the uninstallation, you may see a message indicating that *cwscan32.exe* is still running. If you do not have any active windows open, you may still have the scanning desktop icon running in the Windows taskbar. Right-click the icon and choose **Exit**.

  At this point you have not yet uninstalled the scanning software. Return to the **Add/Remove** dialog and complete the network scanning software uninstallation.

- **Why won't my scanning software run after I uninstalled some other CentreWare applications?**

  During the uninstallation, you are prompted to uninstall *shared files*. These shared files enable several different CentreWare applications. If you uninstall the shared files, other CentreWare applications may not work. To fix the problem, reinstall the Network Scanning Services software on the workstation.

Common Error Messages

The following list summarizes some of the most common Confirmation Report error messages and their possible causes:

- **Login failure. Check user, password, and/or setups.**

    - If this is an FTP setup, the machine may be logging in to the wrong location. Ensure that FTP is set up correctly.

    - User name/account is invalid/incorrect.

    - Password is invalid/incorrect.

    - Server name is invalid/incorrect.

    - NDS Tree (NetWare only) is invalid/incorrect.

    - NDS Context (NetWare only) is invalid/incorrect.

- **File transfer failed.**

    - This is a miscellaneous file transfer failure. It can only occur if the network or destination server goes down at the exact time file transfer is occurring.

    - Destination disk is full.

- **Remote directory lock failed.**

    Document folders need to be accessed by various components of the Network Scanning software. Only one of these components can access a repository at any time.

    When a scanned document is being processed, a folder with a .LCK is placed in the document folder to prevent any simultaneous processing from taking place. The .LCK folder has the same name as the scan job folder. For example, while the job MYSCAN is being processed, a MYSCAN.LCK folder is placed in the document folder at the same level as MYSCAN.XSM.

    Normally, the .LCK folder is deleted once all processing is completed. However, if the .LCK folder is not deleted, it may indicate that the document directory was in use at the time the scanner attempted to lock it.

For example, if a scanner is shut down right in the middle of a scan job, the lock would remain. A scanner knows if it created a lock, so it should recover from its own crashes. If a .LCK folder remains in the document folder after a crash, you should delete it manually to eliminate this error message.

- **Specified filing Volume name is invalid/incorrect (Netware only).**

  - Specified filing destination (path) is invalid/incorrect.

  - Destination disk is full (preventing the creation of the directory).

  - User does not have Create rights.

- **Protocol not running.**

  The user specified the *Scan to Folder* operation to a Netware Server, but the Netware protocol has not been enabled. (This cannot happen with FTP since the TCP/IP protocol currently cannot be disabled.)

- **File delete, replace failed.**

  This can occur when the *Overwrite Existing File* filing policy is requested. During the overwrite operation, attempts to remove files from the document folder failed. This can be caused by insufficient access rights or "read only" file attributes.

- **Filing directory already exists.**

  This can only occur when the *Do Not Save* filing policy is used and a document is scanned to a document folder which already contains a document of the same name. This is the typical behavior of the *Do Not Save* policy. The scan job is aborted.

- **Filing service not requested.**

  A user requests a particular service that is not specified in the distribution template. For example, a user submits a fax job but there is no fax filing service in the template.

- **Miscellaneous filing error.**

  This is caused only by failure to read the internal scan to file job TIFF file listing.

- **Protocol invalid or not specified.**

  Retrieval of the network protocol fails. The template properties and the local UI should prevent this from occurring. This may occur if the user manually edits a job template file and removes or does not specify the filing protocol.

- **Login name not specified.**

  Similar to Protocol invalid or not specified.

- **Invalid Netware volume.**

  Similar to Protocol invalid or not specified.

- **Unknown or Invalid.**

  This should never occur. This is the catch-all error for unexpected occurrences, results, or events.

> **NOTE:** The Job list on the Document Centre can also be used to track the progress of the Scan Job. Error messages are not displayed, but it does indicate if the job has been filed and completed.

Using CentreWare Watch Services to Scan to PaperPort

This section contains instructions on how to use the CentreWare Watcher to automatically scan to PaperPort. The recommended method for scanning to PaperPort is to use the Xerox Document Centre Image Retriever which is included in the supplemental *Scan to PC Desktop™* software package. However, if you wish to use CentreWare Watch Services, follow the instructions below.

> **NOTE:** The Xerox Document Centre Image Retriever supports single-page TIFF, multi-page TIFF, and PDF formats when scanning to PaperPort.
>
> The CentreWare Watcher only supports multi-page TIFF. You must select multi-page TIFF as the output format in the scan distribution template.

To use the CentreWare Watcher to Scan to the PaperPort desktop:

1   Open the Watch Folder window:

   ■   From the Xerox Network Scanners Folder, click **Scanner > Watch Folder**.

       - OR -

   ■   Right-click the scanning icon in the Windows taskbar, and choose **Watch Folder**.

2   Click **Add** to open the Add Watch Wizard.

3   Type the path of the folder to watch for scanned documents, and click **Next**.

   - OR -

   Click **Browse** and locate the folder on the network. Click **OK** to close the Browse dialog and **Next** to continue.

4   Select **Open with an application** and click **Next**.

5   Browse to the location of the directory in which PaperPort is installed and select the PaperPort executable (paprport.exe). If you performed the typical PaperPort installation, the path is:

       C:\Program Files\ScanSoft\PaperPort

6   Click **Open**. The path and the executable file name appear in the *Open With* field.

7   Place your cursor at the end of the path in the *Open With* field. Add a space and type /IMPORT or /IMPORTD.

/IMPORT—imports the scanned documents into PaperPort and also retains the files in the document folder.

/IMPORTD—imports the scanned documents into PaperPort and deletes the files from the document folder.

Your entry should look like one of the following:

```
C:\Program Files\ScanSoft\PaperPort\Paprport.exe /IMPORT
C:\Program Files\ScanSoft\PaperPort\Paprport.exe /IMPORTD
```

8   Click **Next**.

9   Click **Finish** to complete the setup.

10   Click **OK** to close the Watch Folder dialog.

Glossary

Add Network Scanner Wizard. A Network Scanning Services software application which enables Network Administrators to set up a server to support network scanning, manage access to various scanning services, and set up a Document Centre to "communicate" with the scan server. Scan users can also use the Wizard to automatically discover scanners available to them on the network.

Add Watch Wizard. A Network Scanning Services software component which enables users to monitor a document folder for activity. See *Watch Services*.

\CW_SCAN. The scanning configuration directory structure created on the scan server when the Administrator installs Network Scanning Services on a network file server. All document folders, the template pool, and associated scanning files are contained within the \CW_SCAN directory.

Distribution. A Network Scanning Services term which describes the software's ability to automatically send scanned images or OCR'd documents to E-Mail and document management systems.

Distribution Server. A Windows 95, 98, or NT client, or NT 4.0 server set up to host automated document processing. The type of processing that takes place is based on the services specified in a distribution template. The distribution server manages automated Scan to E-Mail, OCR processing, and scanning to document management systems.

Distribution Template. A distribution template is a component of the Network Scanning Services software which contains specific instructions on how to create, process, or store a network scan job. The information in the template defines various scan, OCR, fax, and E-Mail settings that may be required to complete the scan job. Templates are stored in a template pool on a network file server. Each user is assigned a default template when the Administrator sets up access to network scanning.

Document Centre. A multi-function networked machine that is capable of providing copying, printing, scanning, and faxing services. Most services can be accessed and administered from networked personal computers.

Document Folder. A document folder is a filing directory on a network server in which scanned documents are stored. The scanned documents remain in the document folder until they are processed automatically by the *Distribution Service* or until they are retrieved or moved by the *Watch Service*. A document folder can be monitored by only one Network Scanning Services application at a time.

Document Repository. See *Document Folder*.

Filing Policy. The Filing Policy specifies the method used to store the TIFF images in a document folder. The four possible options are outlined below:

- *Overwrite Existing File*—deletes any TIFF files stored in the document folder before sending the newly scanned files of the same name. All deleted files are lost.

- *Append to Existing File*—adds data from newly scanned files to the existing files (of the same name) in the document folder. Existing files are not deleted. Delete old files on a regular basis to conserve server space.

- *Do Not Save*—determines if any files with the same name already exist in the document folder. If no files exist, the newly scanned files are sent to the folder. If files with the same name already exist in the folder, the scan job is aborted.

- *Rename New File*—creates a new directory structure (based on the time and date of creation) into which the TIFF images are filed. Although this is the safest filing policy, it requires a large amount of disk space. (This is the default setting.)

FTP Installations. A term used throughout this book to designate scanning installations to an FTP server. Installations to Windows NT FAT partitions, OS/2 Warp servers, and SUN OS, HP-UX, or AIX systems are all considered FTP Installations.

History. The history functionality allows network administrators and scan users to view the history and status of scan jobs. The History window displays a summary of any scan-to-distribution jobs (such as scan to E-Mail, scan to a document folder with OCR, or scan to other applications) and information on their status.

MAPI/MAPI32. An acronym for Microsoft Messaging Application Program Interface. MAPI is an electronic mail standard supported by many E-Mail applications. MAPI32 refers to 32-bit environments.

Only MAPI32-compliant E-Mail applications, such as *Microsoft Exchange*, *Outlook*, *cc:Mail (version 8+)*, or *MS Internet Mail,* are compatible with Network Scanning Services. *Outlook Express* is not MAPI-32 compliant and is *not* supported.

Multi-page TIFF. See *.tif (TIFF)*.

Network Scanning Services. A group of CentreWare software applications that enable users to convert paper documents to an electronic format. These documents can later be stored on a file server, OCR'd, distributed via E-Mail, faxed, or sent directly to a PC desktop application without requiring the use of a dedicated scanner for each PC.

Optical Character Recognition. A technology that analyzes binary (black and white) images of character shapes, identifies them as particular alphanumeric characters, and outputs them to a text data stream, either in computer memory or to a computer file.

PaperPort. An easy-to-use, intuitive interface which enables users to annotate, organize, file, and locate scanned documents. PaperPort's document communication features use links to applications which enable users to fax and E-Mail scanned documents without leaving PaperPort.

Remote Repository. A remote repository is a scanning file directory, or document folder, located outside the scanning directory structure (\CW_SCAN) on the scan server. It may be located on the same physical server or on a different server altogether. See Also *Document Folder*.

Repository. See *Document Folder*.

Scan Server. The network server on which the Network Scanning Services software (\CW_SCAN directory) is installed. It typically hosts the scan template pool, a document folder for each scan user, a default scanning repository (document folder), and group repositories (if groups are supported by the network configuration).

Service (scanning). An automated process or type of function performed within network scanning. Services are "programmed" or specified within a scan template. Available services vary based on the capabilities of your Document Centre scanner and which services are installed and enabled on your network.

Template Pool. A directory location on a network file server (the scan server) in which scan templates are stored. Templates created with Network Scanning Services are automatically stored to the template pool.

TextBridge Pro. Optical Character Recognition (OCR) software used to "read" a scanned image by analyzing and identifying the text from it. The text is output to an electronic file which can later be edited using various word-processing programs. Text documents that are scanned but are not processed through OCR become image files and cannot be modified.

.tif (TIFF). A file extension for files which contain page images in Tagged Image File Format (TIFF), a format commonly used for scanned images. Single-page TIFF is the default for Network Scanning Services and must be used for scanning to PaperPort. Each page of the original scanned document is transformed into a single TIFF image. Multi-page TIFF is available for Scan to E-Mail processing.

.xst (file). The file extension used to denote a Xerox Scan Template file.

.xsm (file). A Xerox document storage format designed to simplify integration with third-party applications. The .xsm folder contains a collection of TIFF image files, data files, and the template file. The .xsm typically contains files such as the following:

- XSMDESC.DAT - An ASCII file which contains the long document name (0 - 50 characters).

- <directory name>.DAT - An ASCII list of ordered TIFF file names for the job, one name per page. This file has the same name as the .XSM directory.

- NEXTNAME.DATE - An ASCII file which contains the next available TIFF file name. The next name is dependent on the Document Filing Policy designated in the scan template.

- 00000001.TIF, 00000002.TIF (etc.) - The collection of TIFF files from the job. The exact name of the file is dependent on the scanning setup.

- <directory name>.xst - The template used to scan the document. This file has the same name as the .XSM directory.

Watch Services. A component of the Network Scanning Services software which enables users to monitor document folders for activity. By using the *Add Watch Wizard*, users can choose from three different automated services that will occur once a scanned image is detected in the document folder. The service options include: moving the document to another directory, opening the document with a specific application, or sending a message to the user's desktop indicating that a document has appeared in the folder.

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