CentreWare™

NETWORK SCANNING SERVICES GUIDE

Installing and Using Network Scanning Services

Release 5.2 SP1

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NETWORK SCANNING SERVICES GUIDE

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**

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 is written for *Network Administrators* who need to install, set up, and manage Release 5.20 CentreWare Network Scanning Services software on their networks. To use the procedures in this guide effectively, Network Administrators must have previous experience working in a network environment and must possess *Supervisor*, *Administrator*, or equivalent rights to the network. They must also have prior knowledge of how to create and manage network user accounts.

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.
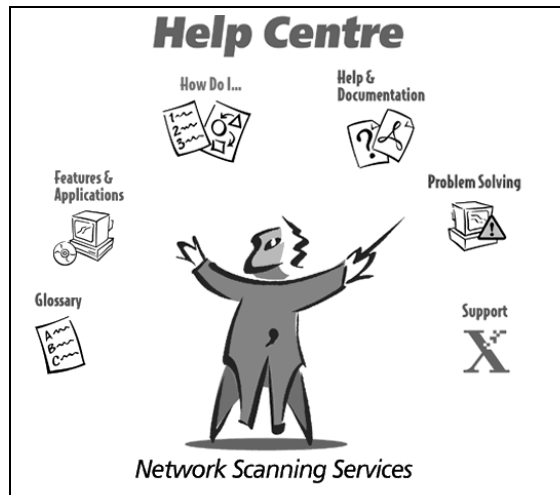
Figure I-2: Network Scanning Services Help Centre

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.
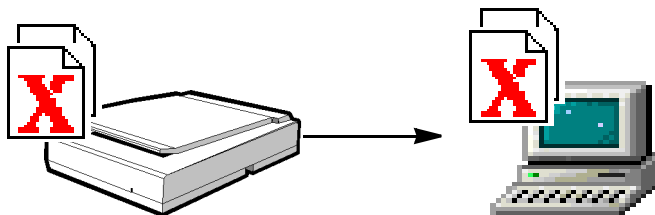
Figure 1-1: Traditional Scanning

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.)
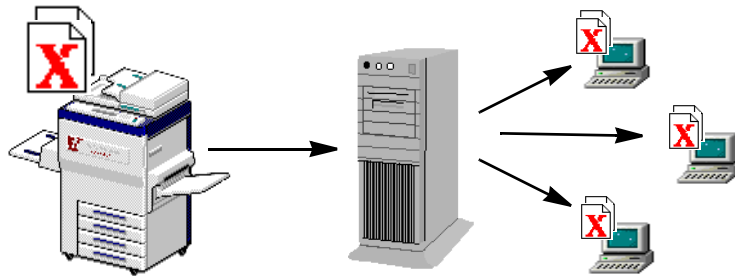
Figure 1-2: Network Scanning

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.

Refer to the installation chapter for your network environment to obtain more information on using the Add Network Scanner Wizard.

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.
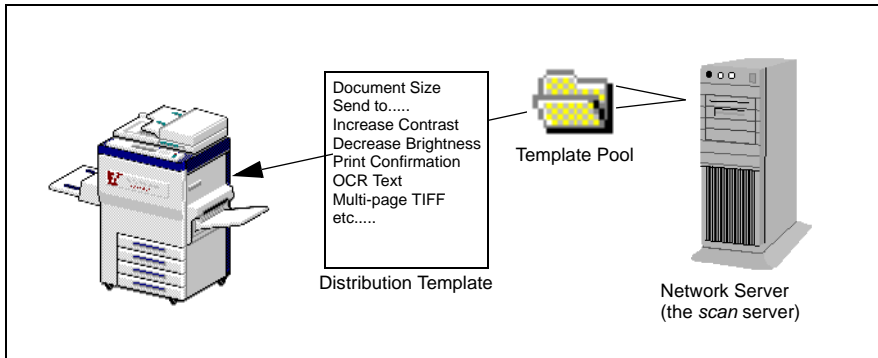
Figure 1-4: Distribution Templates

Refer to Chapter 7, *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 8, *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 10, *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

Refer to Chapter 6, *Managing Scanner Properties*, for more 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.

Refer to Chapter 5, *Managing Scan User Access*, for more information.

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.
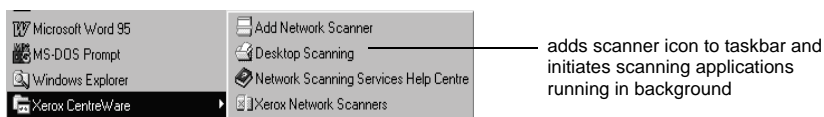
scanning icon in Windows taskbar
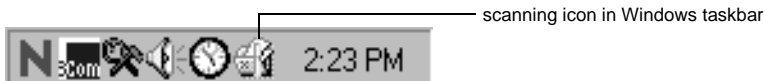
Understanding the Xerox Network Scanners Window

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.
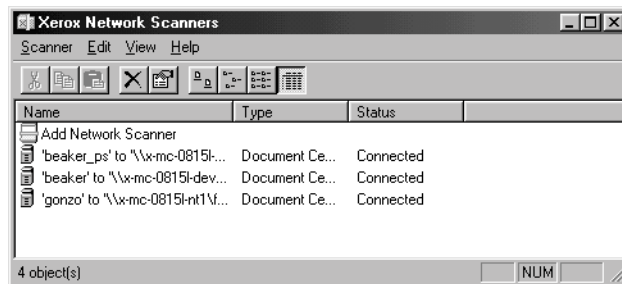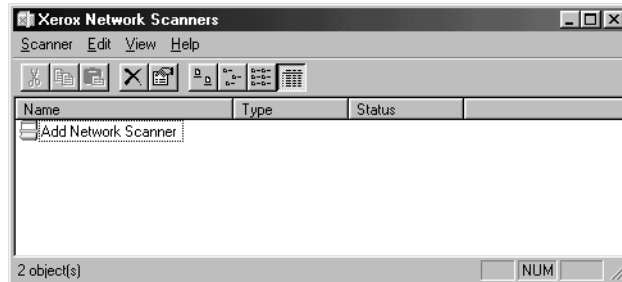

Figure 1-5: Xerox Network Scanners Window

NOTE: Refer to Chapter 12, *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:
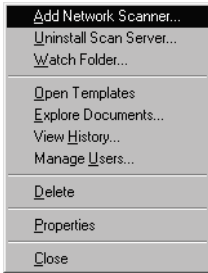
Add Network Scanner. Enables Network Administrators to configure Document Centres for network scanning.

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 8, *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.

For more information, see Chapter 4, *Enabling Scan to E-Mail and Distribution*.

■ **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 7-1 for more information.

Installing Network Scanning Services on NetWare Networks

This chapter contains system requirements, information to help you plan your installation, an installation overview, and detailed procedures for installing the Network Scanning Services software on NetWare networks.

A complete installation involves installing and running administrative software to set up the scan server, enabling the Document Centre to communicate with network scanning software, and installing applications on the user workstations.

To enable Scanning to E-Mail or distribution, you must also set up a distribution server. See Chapter 4, *Enabling Scan to E-Mail and Distribution*, for more information on installing distribution services.

Key Terms

Understanding the following terms will better enable you to perform the Network Scanning Services installation:

Distribution Server. A Windows 95/98 or Windows NT 4.0 client, Windows 2000 Professional or a Windows NT 4.0 or Windows 2000 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 other distribution services.

Distribution Template. A distribution template is a component of the Network Scanning Services software which contains specific instructions on how to 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. Each user is assigned a default template when the Administrator sets up access to network scanning.

Document Folder. A document folder is a filing directory on a network server in which scanned files are stored.

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

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

Installation Requirements

Document Centre Configuration Requirements

- The Document Centre is connected, configured, and functioning as a network printer.
- The scanning option kit is installed on the Document Centre.

Workstation Configuration Requirements

Network Scanning Services software is available for 32-bit environments. The minimum recommended workstation configuration is:

Microsoft Windows 95 and Windows 98 Workstations

- 486DX, 66 MHz or higher processor.
- At least 10 MB of available hard-disk space.
- 16 MB of memory or higher.
- CD-ROM drive.
- VGA (or higher-resolution) display adapter.

Microsoft Windows NT 4.0 and Windows 2000 Workstations

- Intel-based systems—Pentium or faster; RISC-based systems—workstation with Alpha AXP, MIPS R4X00, or PowerPC processor.
- At least 10 MB of available hard-disk space.
- 32 MB of memory (minimum), 64 MB (recommended).
- CD-ROM drive.
- VGA (or higher-resolution) display adapter.

> **NOTE:** If you are using Windows 2000, check the ReadMe files or the CentreWare website for the latest information on compatibility or support.

Network Configuration Requirements

Scan Server Requirements

The configuration requirements for the scan server in a NetWare environment include:

- any of the following servers:
    - NetWare Bindery server (3.1, 4.x, or 5.x (IPX only))
    - NetWare NDS server (4.x or 5.x (IPX only))
- a minimum of 2.5 MB available disk space, plus sufficient space to store TIFF/PDF files. The minimum requirements will vary based on the number of scan users.

Connectivity Requirements

During scan processing, the Document Centre must make a connection and transmit document images to folders on a file server. On NetWare networks, Network Scanning Services files scanned images using the NetWare Core Protocol (NCP) via IPX over Ethernet or Token Ring. Filing via IP is not supported.

Security Requirements

Network Administrators

Network Administrators must possess the following network rights to configure the scan server with the *Add Network Scanner Wizard*:

Network Server Type	Required Access Rights
NetWare Bindery	*Supervisor* rights on the target file server.
NetWare NDS	*Read/Write/Create* rights in the target NDS Name Context and NDS Volume Object.

Table 2-1: Summary of Rights Required to perform installation on NetWare networks

Scan Users

Scan users require network access to the \CW_SCAN directory on the scan server. Refer to *How Will You Manage Network Security?* on page 2-9 and the *Summary of Access Rights* on page A-4 for more information on scanning access rights.

Document Centre Scanner

The Document Centre scanner requires a valid network login name and password to gain access to the scanning directory structure on the scan server. You must create this account prior to installation using your network administration tools. Necessary rights will be granted to the Document Centre account during setup with the Add Network Scanner Wizard.

Planning the Installation

Before you begin the Network Scanning Services installation, you should take a few minutes to consider how your organization will use the scanning software and determine the optimal configuration for your network. Some basic issues to consider are outlined below.

What Scanning Functionality Do You Need?

Network Scanning Services gives you the ability to install and configure different scanning capabilities based on your organization's needs. You can perform four basic scanning functions:

- *Scan to File (Document Folder)*—Scan a document and store the electronic version in a specific document folder (directory) on a network file server. This functionality also enables you to scan to other applications' "Inboxes".

- *Scan to PC Desktop™*—Scan a document and have the file automatically retrieved by PaperPort on the user's desktop (requires supplemental *Scan to PC Desktop™* kit).

- *Scan to E-Mail*—Scan a document and E-Mail it directly to any individuals whose names are included in the template's E-Mail distribution list.

- *Scan to Fax*—Scan a document and fax it directly to any individuals whose names are included in the template's fax distribution list.

- *Scan to Microsoft Exchange Folders*—Scan a document and send the electronic version directly to a specific Microsoft Exchange Public Folder.

The installation process varies slightly based on your scanning needs. The following table outlines which types of software need to be installed to support each type of scanning.

If you want to enable...	You need to install.....			
	Admin Workstation[†]	Network Server[†]	Distribution Server[†]	User Workstation
Scan to File	•CentreWare (CW) Network Scanning	•Scan Server software[1]	•CW Network Scanning (optional)[2] •TextBridge OCR (optional)[2]	•CW Network Scanning (optional)[3] •TextBridge OCR (optional)[4]
Scan to PC Desktop™	•CW Network Scanning	•Scan Server software[1]		•PaperPort •TextBridge OCR (optional) •CW Network Scanning (optional)[3]
Scan to E-Mail and Distribution	•CW Network Scanning	•Scan Server software[1]	•CW Network Scanning •TextBridge OCR •E-Mail Client[5]	•CW Network Scanning (optional)[3] •E-Mail Client[5]
Scan to Fax	•CW Network Scanning	•Scan Server software[1]		•CW Network Scanning (optional)[3]
Scan to Microsoft Exchange Folders	•CW Network Scanning	•Scan Server software[1]	•Microsoft Outlook Client •CW Network Scanning •TextBridge OCR (optional)[2]	•CW Network Scanning (optional)[3] •Microsoft Outlook Client

Table 2-2: Software Required to Support Varied Scanning Functionality

[†]In some network environments, the Admin Workstation, the scan server, and the distribution server can be the same machine.

[1]Installed with CentreWare *Add Network Scanner Wizard.*

[2]CW Network Scanning and/or TextBridge OCR installed on Distribution Server only if users desire the ability to automatically OCR documents.

[3]CW Network Scanning required only if users need the ability to create and edit distribution templates.

[4]TextBridge only required if users desire the ability to OCR documents after they are scanned.

[5]Not distributed with CentreWare software.

Determining Your Optimal Network Configuration

When you install Network Scanning Services, you create a configuration similar to the one shown in Figure 2-1. However, because of the flexibility provided in the scanning software, in some network environments you can choose a physical server to host the *scan server*, *distribution server*, and *Administrative software*. Or you can choose to utilize two or three separate machines. Review the guidelines and considerations in the following sections to help determine which configuration might work best for your network environment.
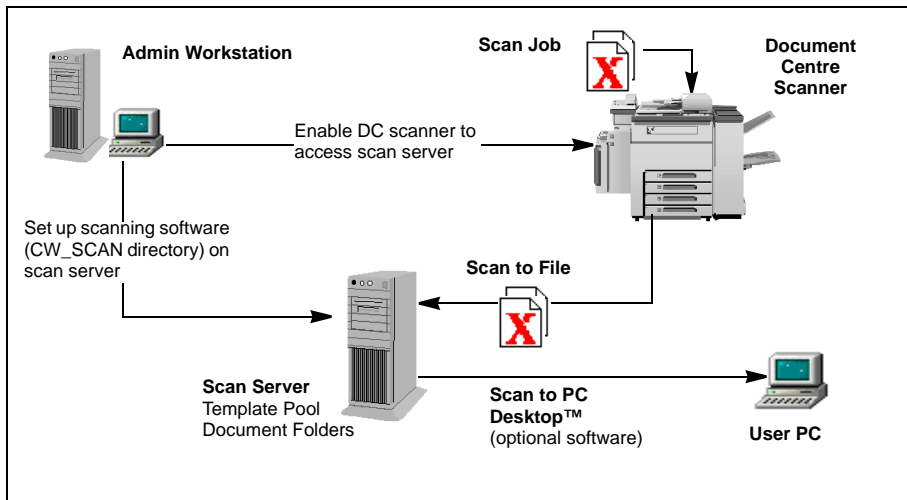
Figure 2-1: Network Scanning Distribution Services

NetWare Networks

Because administrative tasks are performed remotely, you will need a workstation to perform administrative tasks and a network server. The administrative workstation can also be used as the distribution server for processing scan jobs. This machine *can* be your regular workstation; however, because the TextBridge application opens each time a file is converted to text, you may want to designate a separate machine.

If you use a Windows NT workstation, it must be using a NetWare network client such as Novell's *Internetworking Client for NetWare*.

In NetWare environments, the scan server software is installed on the NetWare server.

How Will You Manage Network Security?

The *Add Network Scanner Wizard* works in conjunction with NetWare operating systems to grant and verify user access to network scanning. Therefore, user access rights are automatically assigned during the scanning installation.

Updating from a Previous Version

If you are currently using Release 3.2 or 4.1 of the Network Scanning Services software, follow the instructions below to update your software to the 5.20 release.

▶ **To update release version 3.2 or 4.1 software versions to the 5.20 release:**

1 Uninstall the previous version of the network scanning software from your administrative workstation.

2 Assuming you have already created the required network accounts for the Document Centre, follow the instructions for installing the administrator's software on page 2-15.

3 Open the Xerox Network Scanners Window. Do one of the following based on the behavior you observe.

   ■ If the CentreWare software is able to automatically detect your configured Document Centre, the Document Centre will appear in the list of scanners. Double-click the scanner icon. You will be prompted to upgrade your software.

      - OR -

   ■ If the CentreWare software does not automatically detect your scanner, use the Add Network Scanner Wizard to identify the configured Document Centre.

      Follow the steps in the Wizard, choosing the server location where network scanning is currently installed for the scan server installation directory.

      A message will appear explaining that the scanning software will be upgraded and no data will be lost.

      Finish the steps in the Add Network Scanner Wizard. The server update is complete.

4   Uninstall the previous version of the network scanning software at each user's workstation. Install the Release 5.20 software and reboot the workstation. Network scanners will be detected automatically.

5   Follow the instructions for *Setting Up Distribution Services* on page 4-5 if you wish to enable *Scan to E-Mail* processing.

> **NOTE:** Do not run different release versions of network scanning software at the same time. Release 4.1 distribution templates will work automatically with the CentreWare 5.20 release, but they will be modified to run with 5.x series software *only.* Templates created with different software versions are not interchangeable.

Installation Overview

The following diagram illustrates an overview of the Network Scanning Services installation process.

**Part 1: Create Network User Account
for the Scanner**

Part 2: Install Administrator's Software

Part 3: Run the Add Network Scanner Wizard

**Part 4: Test the Document Centre
Configuration**

**Part 5: Install Network Scanning
on User's Workstations**

Installation Worksheet

The following table contains information you will need or will determine during the Network Scanning Services installation. You may find it helpful to copy this page and use it to record data as you proceed through the installation.

Required Information	Record Your Network Data Here
Document Centre Scanner User Name	
Document Centre Scanner Password	
E-Mail Account User Name for Scanner (if enabling Scan to E-Mail)	
Scan Server Name/Computer Name	
Server Volume/Directory	
NDS Context (if applicable)	
NDS Tree (if applicable)	

Table 2-3: Network Scanning Services Installation Worksheet

Installing Network Scanning Services

Part 1: Create a Network User Account for the Scanner

The Document Centre Scanner requires *Read/Filescan* access to the scan Template Pool and the user's document folders on the scan server.

1 Use your network administrative software to create a network user account and password (if desired) for the Document Centre scanner. The account must contain the following (or equivalent) settings:

- User Cannot Change Password
- Password Never Expires

2 Record the Scanner user name and password on your installation worksheet. You will use this information when you run the Add Network Scanner Wizard.

Part 2: Install Administrator's Software

The specific location in which you choose to install the scanning administrative software is dependent on your overall network scanning configuration. Several configuration considerations and suggestions are included in *Determining Your Optimal Network Configuration* on page 2-8. Be sure you have reviewed this material before you continue.

1 Insert the **Network Scanning Services CD** into the appropriate drive at the Administrative workstation. The AutoPlay program displays the available selections.

   If AutoPlay is not enabled on your workstation, locate and double-click the **Setup.exe** file at the CD root.

2 Select a language.

3 Click **Network Scanning Services** and **Install Network Scanning Services** to start the Setup program.

4 Click **Next** on the Welcome screen.

5 Select **Yes** to accept the terms in the Software License Agreement screen. This screen appears only during the first CentreWare installation.

6 Enter your name and company on the Registration screen. Click **Next**.

   If you currently have no CentreWare software installed on your machine, continue with Step 7.

   If the following message appears, click **OK** and skip to Step 9:

   A previous installation of CentreWare has been detected. New Services will be added to this directory to enable optimum performance.

7   Click **Next** on the Choose Destination Location dialog to accept the default installation directory. *Installing to the default directory is recommended.*

8   Click **Next** on the Select Program Folder dialog to add the scanning software to the Xerox CentreWare program folder.

9   Click **Next** on the Start Copying Files dialog to copy the scanning software to the hard drive.

10 Click **Yes** on the Modify Startup Folder dialog to add a desktop scanning icon to the Windows taskbar. This icon enables you to start Scanning Services directly from the taskbar.

11 On the Setup Complete dialog, do one of the following:

- If prompted to reboot, select **Yes, I want to restart my computer now**. Click **Finish** to complete the installation.

  - OR -

- If you are not prompted to reboot, click **Finish**. Click **Exit** to close the AutoPlay program.

> **NOTE:** The software prompts you to reboot only if system files require updating. Typically this occurs if you have no other current CentreWare software installed on the workstation.

The scanning software searches your network and automatically detects any scanners that are accessible from the workstation. The search may take several minutes on large networks. The scanning desktop icon also appears in the taskbar.

Part 3: Run the Add Network Scanner Wizard

The Add Network Scanner Wizard enables network administrators to install the scanning software on the scan server, create document folders, grant user access to network scanning, and enable the Document Centre scanner to communicate with the scan server.

> **NOTE:** If you are installing Network Scanning Services on an NDS server, your workstation must be configured as an NDS client. Otherwise, you cannot browse the NDS tree.

1 **Start the Add Network Scanner Wizard**.

At the machine on which you installed the Administrative software, select:
Start > Programs > Xerox CentreWare > Add Network Scanner.

The Add Network Scanner wizard opens.
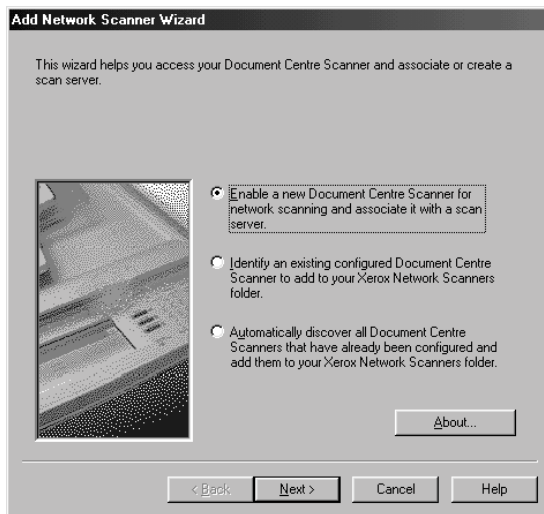
Figure 2-2: Add Network Scanner Wizard

2   **Choose an installation option.**

The first screen of the Add Network Scanner Wizard gives you three different options:

- *Enable a new Document Centre Scanner—*enables you to install the scanning software on the *scan server* and configure a Document Centre for network scanning (*for Administrator use*).

- *Identify an existing configured Document Centre*—enables you to search the network for *a specific* Document Centre that has already been configured for network scanning and list that machine in the Xerox Network Scanners folder on the PC (*for Administrator or users*).

- *Automatically discover all Document Centre Scanners—*enables you to search the network for *all* Document Centres configured for network scanning and list those machines in the Xerox Network Scanners folder on the PC (*for Administrator or users*).

For a first-time installation, choose **Enable a new Document Centre Scanner** and click **Next**.

3 **Choose a method to detect the Document Centre you are configuring for scanning.**

- To browse the network using NetWare, select *I want to browse to find a device over* and select **NetWare** from the drop-down box.

- If you know the machine's IP Address, TCP/IP Hostname, or IPX Address, you can directly access the Document Centre. Select the appropriate option and type the machine address or hostname.

Figure 2-3: Choose A Detection Method

Click **Next**. The Wizard searches the network. A list of available Document Centres appears.

4 **Select a Document Centre to configure.**

Select the Document Centre you wish to configure from the *Devices Found* list and click **Next**.

Show Devices enables you to limit the number of Document Centres displayed in the list.

Figure 2-4: Result of Network Search for Document Centres

NOTE: CentreWare supports two versions of the Document Centre 230 ST—the original Power PC-based version, and the upgraded Intel version. The Add Network Scanner Wizard currently lists both versions as "Document Centre 230 ST" in the Show Devices list box. Therefore, you may need to try the second selection if your first 230 ST selection does not display the correct Document Centre model.

5   **Enter the Document Centre machine password.**

Type the appropriate password to access the Document Centre, and click **OK**.

Figure 2-5: Document Centre Password dialog

NOTE: Consult your Document Centre Administrative documentation if you don't know your machine password.

6 **Select your server operating system and browse to the scan server installation directory.**

Select the operating system of the server you are using for Network Scanning Services and type the network path to the directory in which you are installing the scan server software. Click **Browse** if you wish to search your network and locate a specific directory or create a new directory folder.
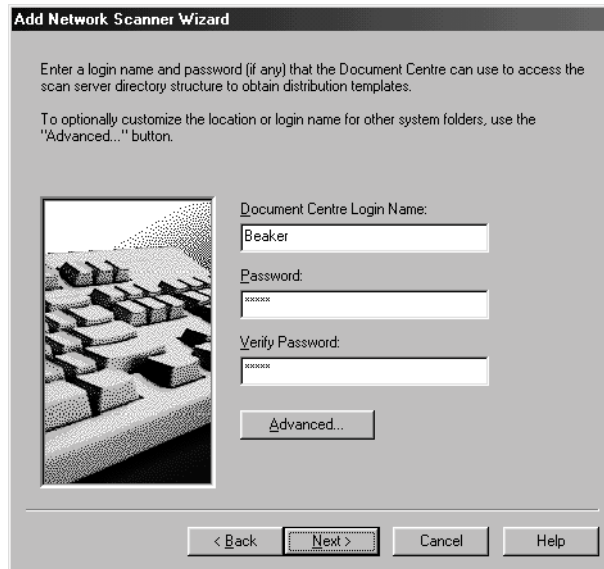
In the example below, the scan server software (\CW_SCAN) will be installed in the *elukas* directory on a NetWare Bindery server.
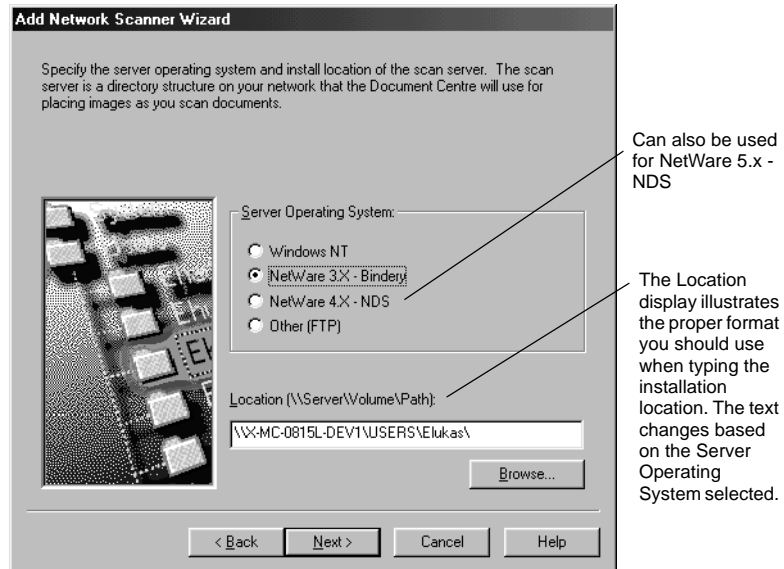
Figure 2-6: Select the Server Operating System

Click **Next**. The Document Centre Login dialog appears.

7   **Enter the Document Centre network user name and password you created in *Part 1*. (See page 2-14.)**

Figure 2-7: Document Centre Network Login

During this step, a default repository (document folder) is automatically created within the \CW_SCAN directory. The default repository is the location where documents whose distribution templates don't specify a destination are stored. All enabled scan users are granted *Read/Write* access to the default repository.

> **NOTE:** The *Advanced* button enables you to modify default and alternate repository settings. It is not necessary to modify these settings during the initial installation.
>
> If you wish to change repository settings at a later time, you can access this information from the **Scanner > Properties** menu. For more information, refer to *Managing Scanner Properties* on page 6-2.

Click **Next**.

8   **Create scan user accounts.**

The following process enables you to grant scanning access to network users.
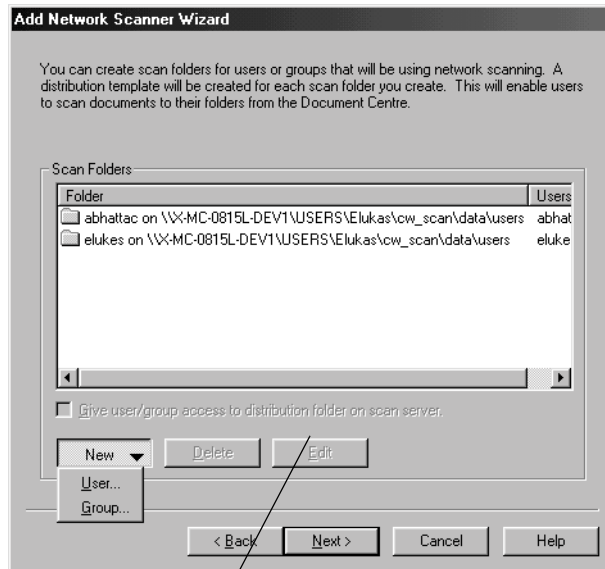
Refer to *If you are not prompted to reboot, click Finish.* on page 2-27 for an explanation of when to use this selection.

Figure 2-8: Add Scan Users and Groups

a)   Click **New > User** to begin adding scan users. The Add User dialog appears.

b) Select the names of all network users who should be given access to network scanning. (Refer to *Help* for tips on selecting multiple names at once.) Click **OK**.
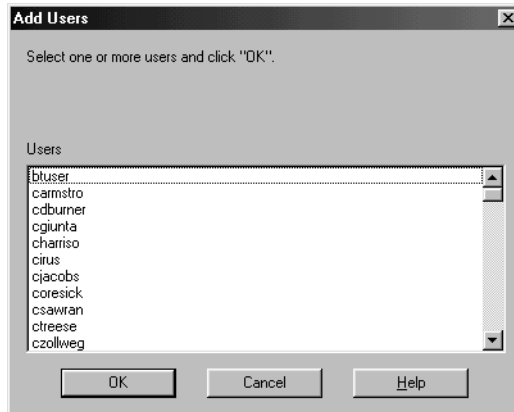
Figure 2-9: Add Users Dialog

> **NOTE:** Do not add the Document Centre account as a user on this screen. Access rights for the scanner are set up separately.
>
> You may also create scan groups which enable multiple users to scan to a common document folder. Click *Help* or see *Managing Scan Users* on page 5-2 for more information on adding scan users and groups.

c) Click **Next** on the Scan Folders dialog.

9   **Complete scan server installation and configuration.**

Click **Finish** on the final Wizard dialog to configure your network scanner. Scanning data is transferred to the Document Centre. Document folders and default templates are created on the scan server for each scan user or group.

Part 4: Test the Document Centre Configuration

Go to the Document Centre scanner, update the list of scan templates, and scan a sample document to confirm that your scanning installation worked correctly.

> **NOTE:** See Chapter 9, *Scanning A Document*, for more information on updating scan templates and scanning documents.
>
> If you are unable to scan, see Chapter 12, *Problem Solving*.

Part 5: Install Network Scanning Services on User's Workstations

1 Insert the **Network Scanning Services CD** into the appropriate drive. The AutoPlay program displays the available CD selections.

If AutoPlay is not enabled on your workstation, locate and double-click the **Setup.exe** file at the CD root.

2 Select a language.

3 Click **Network Scanning Services** and **Install Network Scanning Services** to start the Setup program.

4 Follow the instructions in the Setup program.

For step-by-step instructions, follow the steps for installing Network Scanning Services on the Administrator's workstation on page 2-15.

5 Click **Yes** on the Modify Startup Folder screen to add a desktop scanning icon to the Windows taskbar. Adding this icon enables you to start Scanning Services directly from the taskbar.

6 On the Setup Complete dialog, do one of the following:

■ If prompted to reboot, select **Yes, I want to restart my computer now**. Click **Finish** to complete the installation.

- OR -

■ If you are not prompted to reboot, click **Finish**.

> **NOTE:** The software prompts you to reboot only if system files require updating. Typically this occurs if you have no other current CentreWare software installed on the workstation.

Installing Network Scanning Services on Non-NetWare Networks

This chapter contains system requirements, information to help you plan your installation, an installation overview, and detailed procedures for installing the Network Scanning Services software on Windows NT and OS/2 Warp servers as well as SUN OS, HP-UX, or AIX systems.

A complete installation involves installing and running administrative software to set up the scan server, enabling the Document Centre to communicate with network scanning software, and installing applications on the user workstations.

To enable Scanning to E-Mail or distribution, you must also set up a distribution server. See Chapter 4, *Enabling Scan to E-Mail and Distribution*, for more information on installing distribution services.

Key Terms

Understanding the following terms will better enable you to perform the Network Scanning Services installation:

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.

Distribution Server. A Windows 95/98 or Windows NT 4.0 client, Windows 2000 Professional or a Windows NT 4.0 or Windows 2000 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 other distribution services.

Distribution Template. A distribution template is a component of the Network Scanning Services software which contains specific instructions on how to 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. Each user is assigned a default template when the Administrator sets up access to network scanning.

Document Folder. A document folder is a filing directory on a network server in which scanned files are stored.

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

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

Installation Requirements

Document Centre Configuration Requirements

- The Document Centre is connected, configured, and functioning as a network printer.
- The scanning option kit is installed on the Document Centre.

Workstation Configuration Requirements

Network Scanning Services software is available for 32-bit environments. The minimum recommended workstation configuration is:

Microsoft Windows 95 and Windows 98 Workstations

- 486DX, 66 MHz or higher processor.
- At least 10 MB of available hard-disk space.
- 16 MB of memory or higher.
- CD-ROM drive.
- VGA (or higher-resolution) display adapter.

Microsoft Windows NT 4.0 and Windows 2000 Workstations

- Intel-based systems—Pentium or faster; RISC-based systems—workstation with Alpha AXP, MIPS R4X00, or PowerPC processor.
- At least 10 MB of available hard-disk space.
- 32 MB of memory (minimum), 64 MB (recommended).
- CD-ROM drive.
- VGA (or higher-resolution) display adapter.

> **NOTE:** If you are using Windows 2000, check the ReadMe files or the CentreWare website for the latest information on compatibility or support.

Network Configuration Requirements

Scan Server Requirements

The configuration requirements for the scan server include:

- any of the following servers or workstations:
    - Windows NT 3.51, 4.0, or Windows 2000 server
    - Windows 95, Windows 98, or Windows 2000 Professional, with installed FTP server
    - SunOS 2.x, HP-UX 11.0, or AIX 4.0, with installed FTP server
    - OS/2 Warp Server 4.0, with installed FTP server
- a minimum of 2.5 MB available disk space, plus sufficient space to store TIFF/PDF files. The minimum requirements will vary based on the number of scan users.
- a CD-ROM drive if the installation is performed directly at the server.

Connectivity Requirements

During scan processing, the Document Centre must make a connection and transmit document images to folders on a file server. On non-NetWare networks, Network Scanning Services uses File Transfer Protocol (FTP) filing via IP over Ethernet or Token Ring.

SNMP Community Names

If you are using SNMP Community Names other than the default GET/SET names *Public* and *Private* for device management, the CentreWare software will not be able to automatically discover and maintain communication with the Document Centre. To re-establish communication, you must run the CentreWare Device Discovery Wizard (found on the *Network Admin Services* CD) before you install Network Scanning Services. The Device Discovery Wizard enables you to discover the Document Centre on the network and creates a discovery update file (.mts) containing the device address/community name associations for each Document Centre.

The discovery update file must be distributed to and executed by all scanning users before they can view and interact with any Document Centres whose Community Names have been changed from their default values.

> **NOTE:** Users must have Network Scanning Services installed on their workstations before they can perform the device discovery update. Then they can simply double-click the .mts file on the workstation to execute the file update.

Security Requirements

Network Administrators

Network Administrators must possess the following network rights to configure the scan server with the *Add Network Scanner Wizard*:

Network Server Type	Required Access Rights
Windows NT	*Administrator/Domain Administrator* rights in the domain in which network scanning will be installed.
	Account Operators can also perform installations; however, the Administrator must first modify account policies to enable the Account Operator to complete the installation.
All Others	A minimum of *Read/Write* access to the directory in which network scanning will be installed.

Table 3-1: Summary of Required Rights

Scan Users

Scan users require network access to the \CW_SCAN directory on the scan server. Refer to *How Will You Manage Network Security?* on page 3-12 and the *Summary of Access Rights* on page A-4 for more information on scanning access rights.

Document Centre Scanner

The Document Centre scanner requires a valid network login name and password to gain access to the scanning directory structure on the scan server. You must create this account prior to installation using your network administration tools.

The method you will use to assign access rights varies based on your network type:

■ *Windows NTFS Partitions—*Necessary rights will be granted to the Document Centre account during setup with the Add Network Scanner Wizard.

■ *For Windows NT FAT partitions and all Other Network Types*—The account established for the Document Centre scanner requires *Read/Execute* access to the template pool on the scan server and *Read/Write* access to file scan jobs to various document folders.

Planning the Installation

Before you begin the Network Scanning Services installation, you should take a few minutes to consider how your organization will use the scanning software and determine the optimal configuration for your network. Some basic issues to consider are outlined below.

What Scanning Functionality Do You Need?

Network Scanning Services gives you the ability to install and configure different scanning capabilities based on your organization's needs. You can perform four basic scanning functions:

- *Scan to File (Document Folder)*—Scan a document and store the electronic version in a specific document folder (directory) on a network file server. This functionality also enables you to scan to other applications' "Inboxes".

- *Scan to PC Desktop™*—Scan a document and have the file automatically retrieved by PaperPort on the user's desktop (requires supplemental *Scan to PC Desktop™* kit).

- *Scan to E-Mail*—Scan a document and E-Mail it directly to any individuals whose names are included in the template's E-Mail distribution list.

- *Scan to Fax*—Scan a document and fax it directly to any individuals whose names are included in the template's fax distribution list.

- *Scan to Microsoft Exchange Folders*—Scan a document and send the electronic version directly to a specific Microsoft Exchange Public Folder.

The installation process varies slightly based on your scanning needs. The following table outlines which types of software need to be installed to support each type of scanning.

If you want to enable...	You need to install.....			
	Admin Workstation[†]	Network Server[†]	Distribution Server[†]	User Workstation
Scan to File	• CentreWare (CW) Network Scanning	• Scan Server software[1]	• CW Network Scanning[2] • TextBridge OCR (optional)[2]	• CW Network Scanning (optional)[3] • TextBridge OCR (optional)[4]
Scan to PC Desktop™	• CW Network Scanning	• Scan Server software[1]		• PaperPort • TextBridge OCR (optional) • CW Network Scanning (optional)[3]
Scan to E-Mail and Distribution	• CW Network Scanning	• Scan Server software[1]	• CW Network Scanning • TextBridge OCR • E-Mail Client[5]	• CW Network Scanning (optional)[3] • E-Mail Client[5]
Scan to Fax	• CW Network Scanning	• Scan Server software[1]		• CW Network Scanning (optional)[3]
Scan to Microsoft Exchange Folders	• CW Network Scanning	• Scan Server software[1]	• Microsoft Outlook Client • CW Network Scanning • TextBridge OCR (optional)[2]	• CW Network Scanning (optional)[3]

Table 3-2: Software Required to Support Varied Scanning Functionality

[†]In some network environments, the Admin Workstation, the scan server, and the distribution server can be the same machine.

[1]Installed with CentreWare *Add Network Scanner Wizard*.

[2]CW Network Scanning and/or TextBridge OCR installed on Distribution Server only if users desire the ability to automatically OCR documents.

[3]CW Network Scanning required only if users need the ability to create and edit distribution templates.

[4]TextBridge only required if users desire the ability to OCR documents after they are scanned.

[5]Not distributed with CentreWare software.

Determining Your Optimal Network Configuration

When you install Network Scanning Services, you create a configuration similar to the one shown in Figure 3-1. However, because of the flexibility provided in the scanning software, in some network environments you can choose a single server to function as the *scan server*, *distribution server*, and *Administrative workstation*. Or you can choose to utilize two or three separate machines. Review the guidelines and considerations in the following sections to help determine which configuration might work best for your network environment.
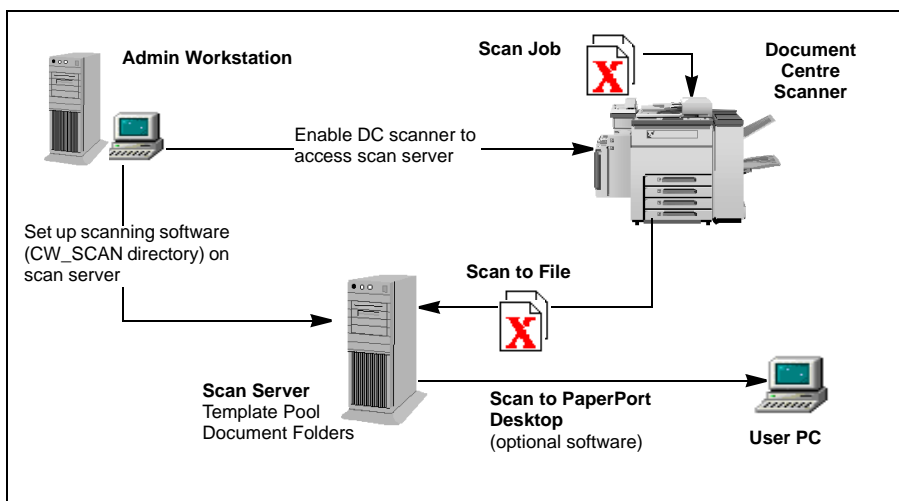
Figure 3-1: Network Scanning Distribution Services

Windows NT Networks

The use of a Windows NT workstation or server enables the same PC or server to function as the Admin workstation, the scan server, and as the distribution server for processing scan jobs.

Other Networks (FTP Installations)

The network configuration and number of machines required will vary based on your network type. You must be using one of the server operating systems outlined in the *Scan Server Requirements* on page 3-4. You will need a network file-access utility (such as NFS) to connect to a specific drive letter, shared directory, or location of the scan server.

You must use Internet Explorer 3.0.1 (or higher). The CentreWare software uses some files distributed with Internet Explorer. If you are not running I.E. version 3.0.1 (or higher) the scanning software cannot automatically determine the path to the scan server, and users may need to enter the path manually.

How Will You Manage Network Security?

The *Add Network Scanner Wizard* works in conjunction with Microsoft Windows NTFS operating systems to grant and verify user access to network scanning. Therefore, in this network environment, user access rights are automatically assigned during the scanning installation.

For installations to Windows NT FAT partitions, OS/2 Warp servers, SUN OS, HP-UX, or AIX systems, you must control and manage access to scanning through your network server operating system. You may wish to create scanning access rights that mimic the rights assigned during installation for NetWare or Windows NTFS networks. Refer to the *Summary of Access Rights* on page A-4 for more information on scanning access rights.

Updating from a Previous Version

If you are currently using Release 3.2 or 4.1 of the Network Scanning Services software, follow the instructions below to update your software to the 5.20 release.

▶ **To update earlier versions of Network Scanning Services to the 5.20 release:**

1   Uninstall the previous version of the network scanning software from your administrative workstation.

2   Assuming you have already created the required network accounts for the Document Centre, follow the instructions for installing the administrator's software on page 3-22.

3   Open the Xerox Network Scanners Window. Do one of the following based on the behavior you observe.

   ■   If the CentreWare software is able to automatically detect your configured Document Centre, the Document Centre will appear in the list of scanners. Double-click the scanner icon. You will be prompted to upgrade your software.

       - OR -

   ■   If the CentreWare software does not automatically detect your scanner, use the Add Network Scanner Wizard to identify the configured Document Centre.

       Follow the steps in the Wizard, choosing the server location where network scanning is currently installed for the scan server installation directory.

       A message will appear explaining that the scanning software will be upgraded and no data will be lost.

       Finish the steps in the Add Network Scanner Wizard. The server update is complete.

4   Uninstall the previous version of the network scanning software at each user's workstation. Install the Release 5.20 software and reboot the workstation. Network scanners will be detected automatically.

5   Follow the instructions for *Setting Up Distribution Services* on page 4-5 if you wish to enable *Scan to E-Mail* processing.

> **NOTE:** Do not run different release versions of network scanning software at the same time. Release 4.1 distribution templates will work automatically with the CentreWare 5.20 release, but they will be modified to run with 5.x series software *only*. Templates created with different software versions are not interchangeable.

Installation Overview

The following diagram illustrates an overview of the Network Scanning Services installation process.

> **Part 1: Create Network User Account for the Scanner**
>
> **Part 2: Set Up Installation Directory and Enable FTP**
>
> **Part 3: Install Administrator's Software**
>
> **Part 4: Run the Add Network Scanner Wizard**
>
> **Part 5: Test the FTP Connection**
>
> **Part 6: Test the Document Centre Configuration**
>
> **Part 7: Install Network Scanning on User's Workstations**

Installation Worksheet

The following table contains information you will need or will determine during the Network Scanning Services installation. You may find it helpful to copy this page and use it to record data as you proceed through the installation.

Required Information	Record Your Network Data Here
Document Centre Scanner User Name	
Document Centre Scanner Password	
E-Mail Account User Name for Scanner (if enabling Scan to E-Mail)	
Scan Server Name/Computer Name	
Server Volume/Directory	
Shared Directory Name and Scanning Subdirectory Name (if applicable)	

Table 3-3: Network Scanning Services Installation Worksheet

Installing Network Scanning Services

Part 1: Create a Network User Account for the Scanner

The Document Centre Scanner requires *Read/Execute* access to the scan Template Pool and the user's document folders on the scan server.

1 Use your network administrative software to create a network user account and password (if desired) for the Document Centre scanner. The account must contain the following (or equivalent) settings:

■ User Cannot Change Password

■ Password Never Expires

■ Rights to **Log On Locally** assigned to the EVERYONE group. (Windows NT)
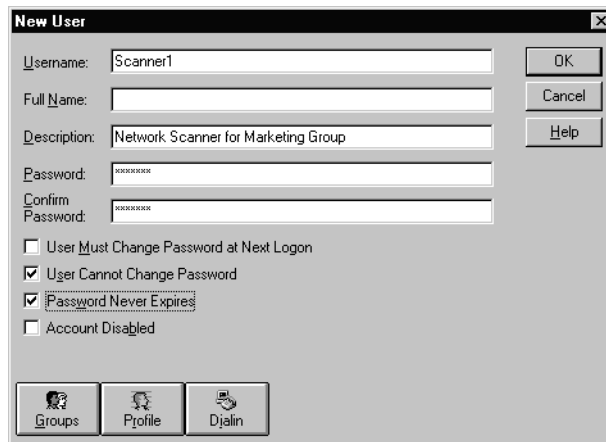
Figure 3-2: Example of Required Rights (from Windows NT User Manager)

2 Record the Scanner user name and password on your installation worksheet. You will use this information when you run the Add Network Scanner Wizard.

Part 2: Set Up Installation Directory and Enable FTP

Create a directory on the scan server in which the scanning software can be installed, and make that directory accessible to any machine that supports the scanning functionality. You can do this in either of two ways:

- enabling installation in the FTPROOT (home) directory

  - OR -

- setting up a virtual directory

Each option is outlined in the following sections.

> **NOTE:** The following sections use terms and examples specific to *Microsoft's Internet Information Server*. Terminology and procedures may vary with other FTP tools or in other network environments.

Enabling Installation in the FTPROOT Directory

If you don't need to restrict access to your default FTPROOT (home) directory, you can install Network Scanning Services directly within FTPROOT.

The following diagram illustrates a scanning installation in the FTPROOT directory.
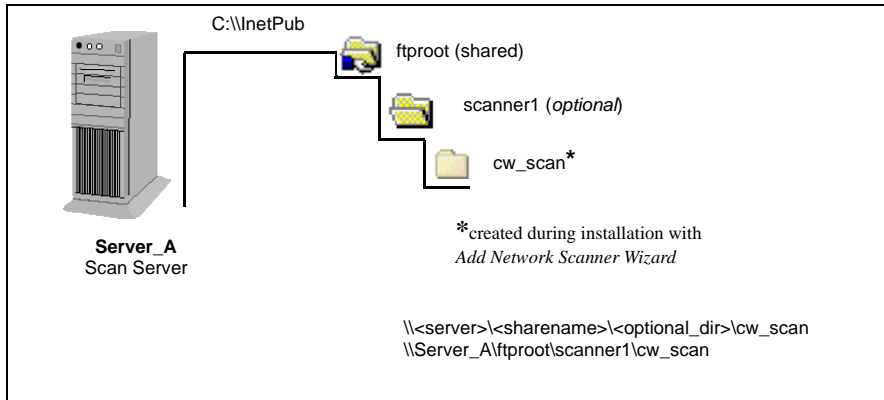
Figure 3-3: Network Scanning Installed in FTPROOT

1 Share the FTPROOT (home) directory, accepting the default rights.

2 Create a separate subdirectory within FTPROOT for each scanning installation. Creating separate installation subdirectories enables you to install, manage, and uninstall multiple scan servers without overwriting or deleting other installations.

3 Read *Assigning Shared Directory Permissions* on page 3-21 and continue with *Part 3: Install Administrator's Software* on page 3-22.

Setting Up a Virtual Directory

If you need to restrict access to the default FTPROOT directory, or if you are installing network scanning on a separate drive, you can create a virtual path to an installation directory (virtual directory) in which to install the scan server software. The virtual directory may reside inside or outside the default FTP home directory structure and is accessible from the FTP service. The virtual directory is identified by an *alias*. The use of an alias enables remote access to the directory. The following diagram illustrates a scanning installation using a virtual directory.
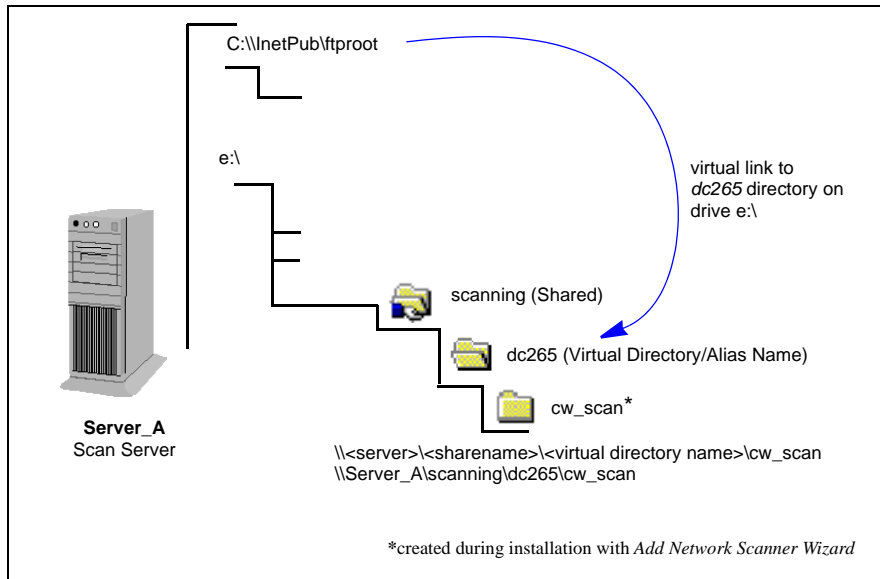
Figure 3-4: Required Virtual Directory Structure

1 Create a Shared Directory on the scan server, and accept the default access rights.

2 In the Shared Directory, create a separate subdirectory for each scanning installation. This is the directory into which the network scanning software can later be installed.

> **NOTE:** *Creating this subdirectory is essential to ensure that the proper FTP path is written to the Document Centre scanner during installation. Otherwise the Document Centre will not be able to access the network scanning software.*

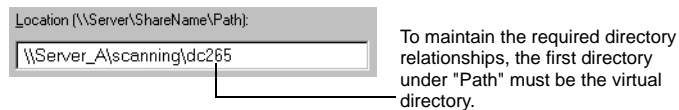3   Use your FTP server software to establish the virtual directory and assign an alias. Ensure that *Read* and *Write* access to the directory is enabled.

> **NOTE:** The virtual directory **must** be established one directory below the Shared Directory, and you **must** use the name of the virtual directory as the alias name.

4   Record the Shared Directory and virtual directory names on your installation worksheet.

In *Part 4* of the scanning installation, the Add Network Scanner Wizard requires you to enter the location in which the scanning software should be installed. The network location and path you supply on that dialog (see page 3-30) must correspond to the Shared and Virtual directories you established on the scan server.

Location (\\Server\ShareName\Path):

\\Server_A\scanning\dc265

To maintain the required directory relationships, the first directory under "Path" must be the virtual directory.

Figure 3-5: Add Network Scanner Wizard Server Operating System dialog

Assigning Shared Directory Permissions

User access rights are limited by the permissions of the shared directory. By default, when you created a share in Windows NT, the *EVERYONE* group is granted full access to the share. If you have no need to restrict user access to network scanning, you will not need to modify the default access rights.

If you wish to restrict access to network scanning, you should first complete the Network Scanning Services installation. Once the installation is completed, ensure that the *ENABLEDSCANUSERS* group (created during installation) has *Change* access at the Share level. (See *Windows NT Networks* on page A-5 for additional information.)

Part 3: Install Administrator's Software

The specific location in which you choose to install the scanning administrative software is dependent on your overall network scanning configuration. Several configuration considerations and suggestions are included in *Determining Your Optimal Network Configuration* on page 3-10. Be sure you have reviewed this material before you continue.

> **NOTE:** If you are installing Scanning Services on a Windows NTFS file partition, you must install the administrative software directly onto the server or on a Windows NT workstation. Otherwise, when you run the Add Network Scanner Wizard (in Part 4), you will not be able to use the Domain security features built into the network scanning software.

1   Insert the **Network Scanning Services CD** into the appropriate drive. The AutoPlay program displays the available selections.

   If AutoPlay is not enabled on your workstation, locate and double-click the **Setup.exe** file at the CD root.

2   Select a language.

3   Click **Network Scanning Services** and **Install Network Scanning Services** to start the Setup program.

4   Click **Next** on the Welcome screen.

5   Select **Yes** to accept the terms in the Software License Agreement screen. This screen appears only during the first CentreWare installation.

6   Enter your name and company on the Registration screen. Click **Next**.

   If you currently have no CentreWare software installed on your machine, continue with Step 7.

   If the following message appears, click **OK** and skip to Step 9:

   A previous installation of CentreWare has been detected. New Services will be added to this directory to enable optimum performance.

7   Click **Next** on the Choose Destination Location dialog to accept the default installation directory. *Installing to the default directory is recommended.*

8   Click **Next** on the Select Program Folder dialog to add the scanning software to the Xerox CentreWare program folder.

9   Click **Next** on the Start Copying Files dialog to copy the scanning software to the hard drive.

10 Click **Yes** on the Modify Startup Folder dialog to add a desktop scanning icon to the Windows taskbar. This icon enables you to start Scanning Services directly from the taskbar.

11 On the Setup Complete dialog, do one of the following:

  ■   If prompted to reboot, select **Yes, I want to restart my computer now**. Click **Finish** to complete the installation.

      - OR -

  ■   If you are not prompted to reboot, click **Finish**. Click **Exit** to close the AutoPlay program.

> **NOTE:** The software prompts you to reboot only if system files require updating. Typically this occurs if you have no other current CentreWare software installed on the workstation.

The scanning software searches your network and automatically detects any scanners that are accessible from the workstation. The search may take several minutes on large networks. The scanning desktop icon also appears in the taskbar.

Part 4: Run the Add Network Scanner Wizard

The Add Network Scanner Wizard enables network administrators to install the scanning software on the scan server, create document folders, grant user access to network scanning, and enable the Document Centre scanner to communicate with the scan server.

1 **Start the Add Network Scanner Wizard**.

At the machine on which you installed the Administrative software, select:
Start > Programs > Xerox CentreWare > Add Network Scanner.

The Add Network Scanner wizard opens.
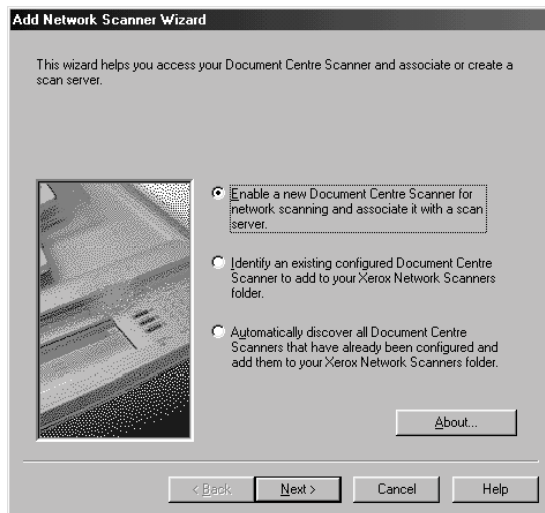
Figure 3-6: Add Network Scanner Wizard

2   **Choose an installation option.**

The first screen of the Add Network Scanner Wizard gives you three different options:

- *Enable a new Document Centre Scanner—*enables you to install the scanning software on the *scan server* and configure a Document Centre for network scanning (*for Administrator use*).

- *Identify an existing configured Document Centre*—enables you to search the network for *a specific* Document Centre that has already been configured for network scanning and list that machine in the Xerox Network Scanners folder on the PC (*for Administrator or users*).

- *Automatically discover all Document Centre Scanners—*enables you to search the network for *all* Document Centres configured for network scanning and list those machines in the Xerox Network Scanners folder on the PC (*for Administrator or users*).

For a first-time installation, choose **Enable a new Document Centre Scanner** and click **Next**.

3 **Choose a method to detect the Document Centre you are configuring for scanning**.

- To browse the network using TCP/IP or Microsoft Networking, select *I want to browse to find a device over* and select the network type from the drop-down box.

- If you know the machine's IP Address or TCP/IP Hostname, you can directly access the Document Centre. Select the appropriate option and type the machine address or hostname.

Click **Next**.
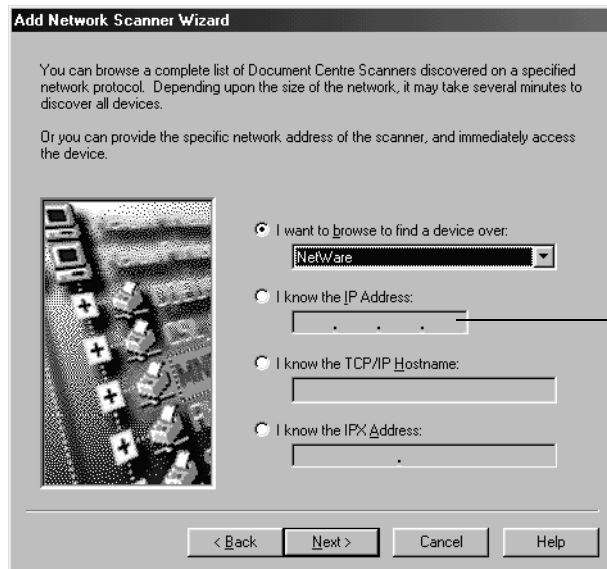
If a particular capability is not available in your network environment, the option will not appear in the dialog.

Use the arrow key to move to the next segment when the address contains less than 3 digits in a segment.

Figure 3-7: Choose A Detection Method

4   **Search subnets or workgroups.**

The scanning software automatically searches your local TCP/IP subnet or Microsoft workgroup for available Document Centres. You can expand or restrict the search by indicating specific subnets or workgroups to search.
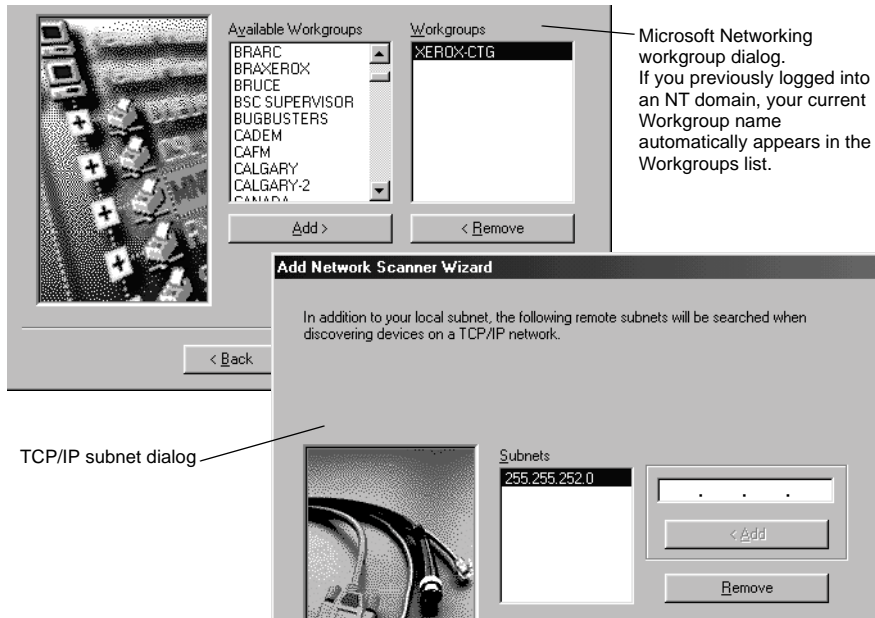
Figure 3-8: TCP/IP and MSN Search Methods

- **For TCP/IP**: Type a subnet address in the box and click **Add** to add it to the list of subnets to be searched.

- **For Microsoft Networks**: Scroll through the list of Available Workgroups. Select one or more workgroups and click **Add** to move them to the list of workgroups to be searched.

Click **Next**. The Wizard searches the network. A list of available Document Centres appears.

5   **Select a Document Centre to configure.**

Select the Document Centre you wish to configure from the *Devices Found* list and click **Next**.

Show Devices enables you to limit the number of Document Centres displayed in the list.

Add Network Scanner Wizard

Select the device that you want to configure.

Devices found using NetWare:

Name	Model	
ANIMAL_PS	Document Centre 230 ST	
BEAKER_PS	Document Centre 230 ST	
BUSBY_PS	Document Centre 240 ST	
GONZO_PS	Document Centre 230 ST	
HOTPOINT_PS	Document Centre 265 ST	
MAGICCHEF_PS	Document Centre 255 ST	

Show Devices:

All Devices

All Devices
Document Centre 220 ST
Document Centre 230 ST

ncel   Help
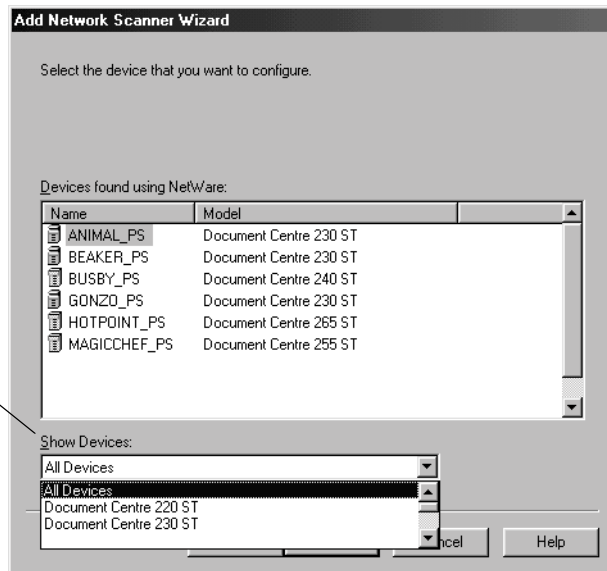
Figure 3-9: Result of Network Search for Document Centres

6 **Enter the Document Centre machine password.**

Type the appropriate password to access the Document Centre, and click **OK**.


Figure 3-10: Document Centre Password dialog

NOTE: Consult your Document Centre Administrative documentation if you don't know your machine password.

7 **Select your server operating system and browse to the scan server installation directory.**

Specify the operating system of the server you are using for Network Scanning Services and type the network path to the directory in which you are installing the scan server software. Click **Browse** if you wish to search your network and locate a specific directory or create a new directory folder.

In the example below, the scan server software (\CW_SCAN) will be installed on an FTP server.
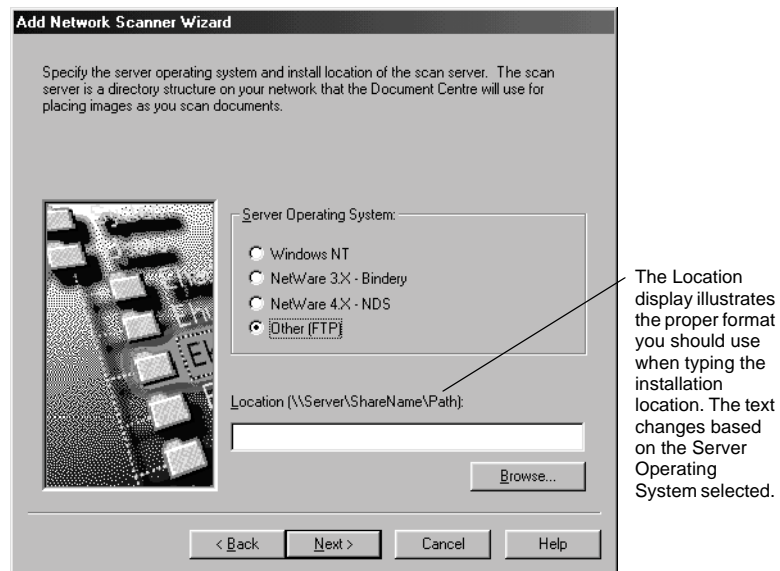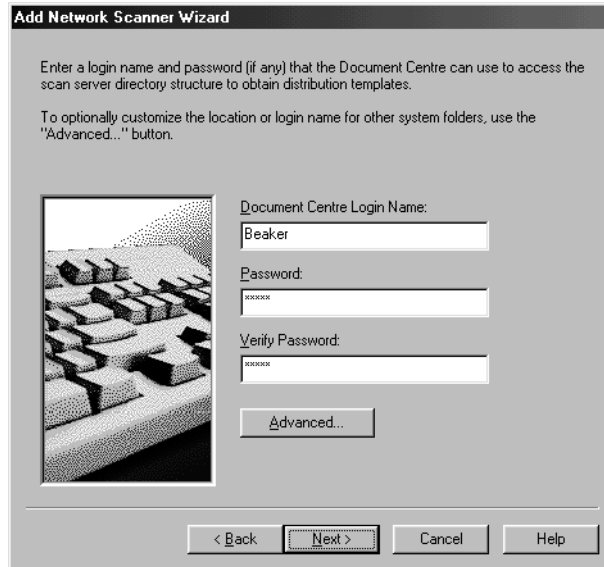

Figure 3-11: Select the Server Operating System

NOTE: For FTP installations, the network location and path you supply must correspond to the *Shared* and *Virtual* directories you previously created on the scan server. See *page 3-18* for additional information.

Click **Next**.

8 **Enter the Document Centre network user name and password you created in _Part 1_. (See page 3-17.)**

Figure 3-12: Document Centre Network Login

On the Document Centre Login Screen, type the network user name and password you created previously for the Document Centre.

During this step, a default repository (document folder) is automatically created within the \CW_SCAN directory. The default repository is the location where documents whose distribution templates don't specify a destination are stored. All enabled scan users are granted _Read/Write_ access to the default repository.

> **NOTE:** The _Advanced_ button enables you to modify default and alternate repository settings. It is not necessary to modify these settings during the initial installation.
>
> If you wish to change repository settings at a later time, you can access this information from the **Scanner > Properties** menu. For more information, refer to _Managing Scanner Properties_ on page 6-2.

Click **Next**.

9   **Create scan user accounts.**

This process enables you to grant scanning access to network users (Windows NTFS) and to create user document folders on the scan server (all environments).

Other (FTP) Installations
You must grant users specific network access after scanning is installed.

Windows NT (NTFS partitions). Scanning access rights assigned within Wizard.

Refer to *If you are not prompted to reboot, click Finish.* on page 3-36 for an explanation of when to use this selection.

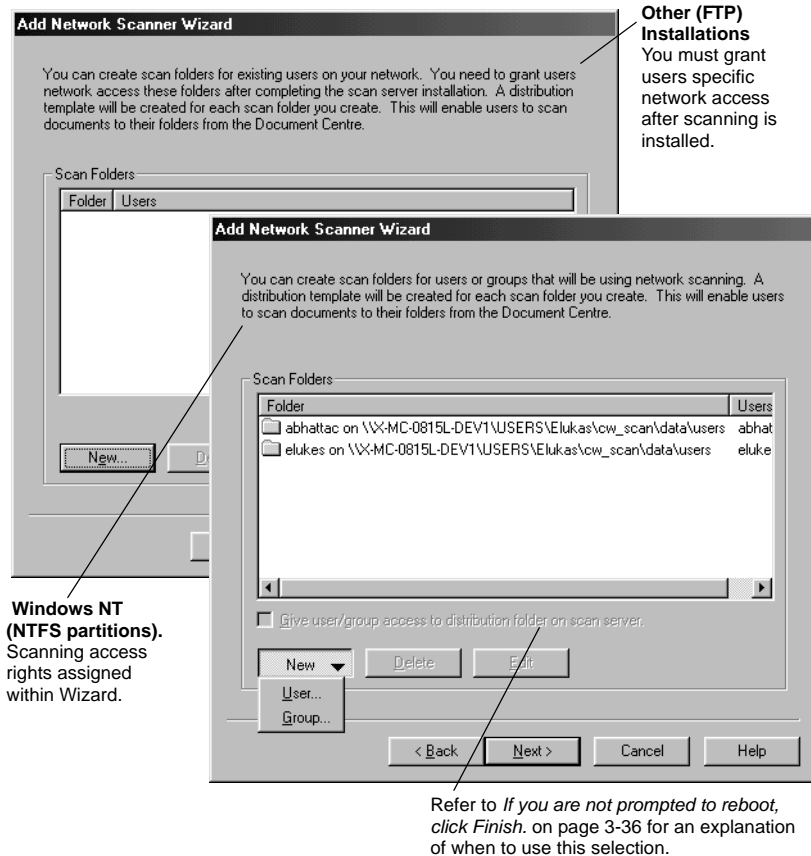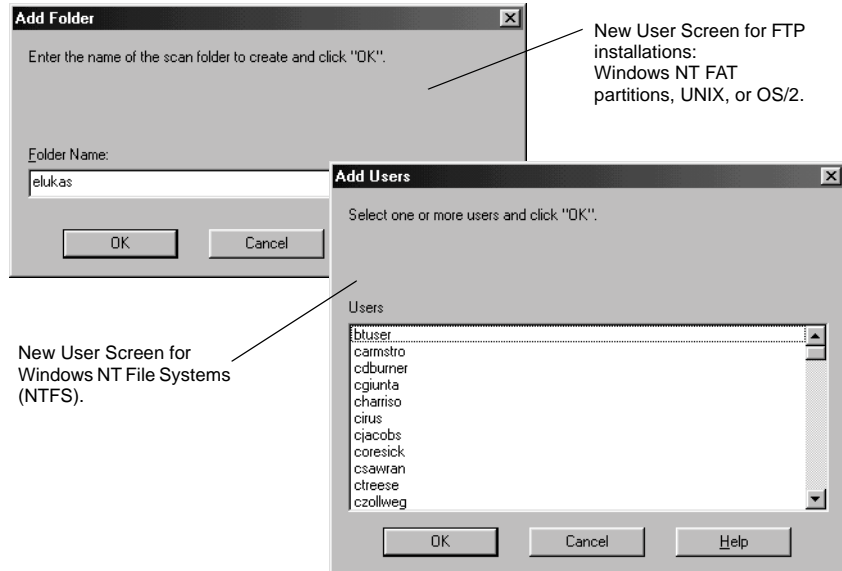**Figure 3-13: Add Scan Users and Groups**

a) Click **New** or **New > User** to begin adding scan users. The Add User dialog appears.

New User Screen for FTP installations:
Windows NT FAT partitions, UNIX, or OS/2.

New User Screen for Windows NT File Systems (NTFS).

Figure 3-14: Add User Dialogs

b) Do one of the following:

For Windows NT Files Systems (NTFS): Select the names of all network users who should be given access to network scanning. (Refer to *Help* for tips on selecting multiple names at once.) Click **OK**.

For FTP installations: Individual user names must be added separately. Type the network name of a user for whom a document folder should be created. Click **OK**. To add additional names, click **New > User** again and repeat the same process until all users are added.

No validation is performed on the names you type.

NOTE: Do not add the Document Centre account as a user on this screen. Access rights for the scanner are set up separately.

A distribution template is created for each scan user. These templates enable users to scan documents from the Document Centre to their document folders.

> **NOTE:** If you are working on a Windows NT network (NTFS partition), you may also create scan groups which enable multiple users to scan to a common document folder.
>
> Click *Help* or see *Managing Scan Users* on page 5-2 for more information on adding scan users and groups.

   c) Click **Next** on the Scan Folders dialog.

10 **Complete scan server installation and configuration.**

Click **Finish** on the final Wizard dialog to configure your network scanner. Scanning data is transferred to the Document Centre. Document folders and default templates are created on the scan server for each scan user.

Part 5: Test the FTP Connection

Now that you have installed the scanning software on the scan server, you need to test the FTP setup created in *Part 2: Set Up Installation Directory and Enable FTP*.

▶ **To test your FTP setup:**

1 From your workstation, open an FTP session and log in to the FTP server using the Document Centre's User Name and Password.

2 Ensure that you can log in and view the contents of the \CW_SCAN directory.

> **NOTE:** If you are unable to scan, re-read *Part 2: Set Up Installation Directory and Enable FTP* on page 3-18. Also refer to Chapter 12, *Problem Solving*.

Part 6: Test the Document Centre Configuration

Go to the Document Centre scanner, update the list of scan templates, and scan a sample document to confirm that your scanning installation worked correctly.

> **NOTE:** See *Scanning A Document* on page 9-1 for more information on updating scan templates and scanning documents.
>
> If you are unable to scan, see Chapter 12, *Problem Solving*.

Part 7: Install Network Scanning Services on User's Workstations

1 Insert the **Network Scanning Services CD** into the appropriate drive. The AutoPlay program displays the available CD selections.

   If AutoPlay is not enabled on your workstation, locate and double-click the **Setup.exe** file at the CD root.

2 Select a language.

3 Click **Network Scanning Services** and **Install Network Scanning Services** to start the Setup program.

4 Follow the instructions in the Setup program.

   For step-by-step instructions, follow the steps for installing Network Scanning Services on the Administrator's workstation on page 3-22.

5 Click **Yes** on the Modify Startup Folder screen to add a desktop scanning icon to the Windows taskbar. Adding this icon enables you to start Scanning Services directly from the taskbar.

6 On the Finish dialog, do one of the following:

   ■ If prompted to reboot, select **Yes, I want to restart my computer now**. Click **Finish** to complete the installation.

   - OR -

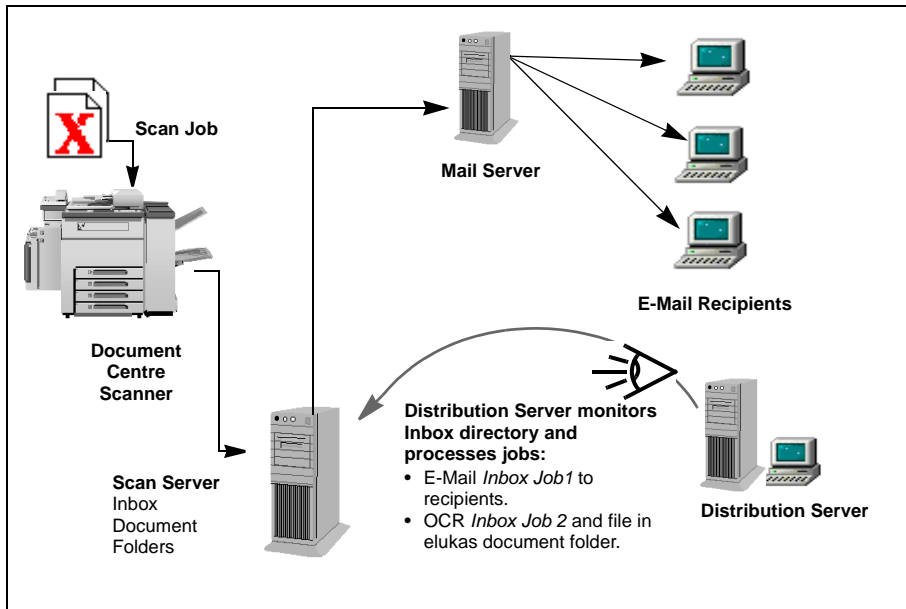   ■ If you are not prompted to reboot, click **Finish**.

   > **NOTE:** The software prompts you to reboot only if system files require updating. Typically this occurs if you have no other current CentreWare software installed on the workstation.

Enabling Scan to E-Mail and Distribution

CentreWare's scanning distribution capabilities enable users to scan documents directly to E-Mail without further manual processing. To enable Distribution Services, a workstation or server must be set up to host automated document processing. The distribution server manages E-Mail distribution as well as OCR processing.

The following diagram illustrates CentreWare's automated distribution capabilities.

Scan Job

Mail Server

E-Mail Recipients

Document Centre Scanner

Scan Server
Inbox
Document
Folders

Distribution Server monitors Inbox directory and processes jobs:
• E-Mail *Inbox Job1* to recipients.
• OCR *Inbox Job 2* and file in elukas document folder.

Distribution Server

Figure 4-1: Network Scanning Distribution Services

Distribution Server Requirements

Network Scanning Services offers you the flexibility to establish the distribution server on a network PC or server. This machine *can* be your regular workstation; however, because the TextBridge application opens each time a file is converted to text, you may want to designate a separate machine.

The distribution server should meet the following minimum requirements:

- a Windows 95, Windows 98, Windows NT, or Windows 2000 Professional client
- an installed MAPI-32 compliant E-Mail client (see below)
- a CD-ROM drive

To enable OCR, TextBridge must be also installed on the distribution server.

E-Mail Requirements

A MAPI-32 compliant E-Mail system such as *Microsoft Exchange*, *Outlook*, *cc:Mail (version 8+)*, or *MS Internet Mail* is required for Scan to E-Mail processing. *Outlook Express* is not MAPI-32 compliant and is *not* supported.
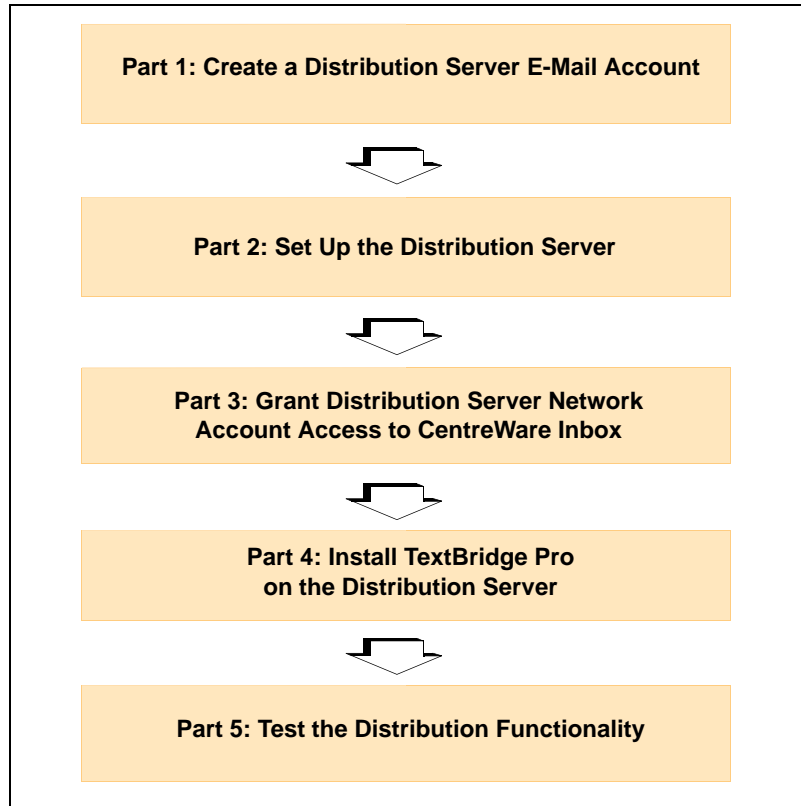
The E-Mail client must be installed and running on the distribution server with access to an active E-Mail account before Scan to E-Mail processing can occur. The scanning software interacts with E-Mail Address Books; therefore, E-Mail clients must be installed on user's workstations before they can create *Scan to E-Mail* Templates.

The Distribution Server and the E-Mail server can share the same machine, but you may be required to reboot the machine after you install the scanning software.

NOTE: To use an Outlook 2000 client with CentreWare's Scan to Exchange Public Folders functionality, you must install Outlook 2000 using the **custom** installation and select the **Collaboration Data Objects** optional component. In previous versions of the Outlook client, these data objects were installed automatically. In the Outlook 2000 software, they are optional.

Distribution Setup Overview

The following diagram illustrates an overview of the process required to enable distribution services.

Part 1: Create a Distribution Server E-Mail Account

Part 2: Set Up the Distribution Server

Part 3: Grant Distribution Server Network Account Access to CentreWare Inbox

Part 4: Install TextBridge Pro on the Distribution Server

Part 5: Test the Distribution Functionality

Setting Up Distribution Services

Setting up distribution services with the CentreWare software is a simple task. Once you coordinate a few key elements, you are ready to scan. Follow the steps below to enable distribution services.

> **NOTE:** Before you perform these steps, the scan server must have been installed on the network, and you must have Administrative rights to the server.

Part 1: Create a Distribution Server E-Mail Account

Create an E-Mail account, or assign an existing account, to be used as the Distribution Server account.

Part 2: Enable the Distribution Server

▶ **To designate a machine as a Distribution Server:**

1   If you have not already done so, install the Network Scanning Services software on the Distribution Server machine. Refer to the installation chapter for your network environment for further details.

2   Open the Xerox Network Scanners Window. Select:

   Start > Programs > Xerox CentreWare > Xerox Network Scanners.

3   Select a connected Document Centre from the list of available scanners.

4   From the Scanner Menu, choose **Properties**. The Properties dialog opens.

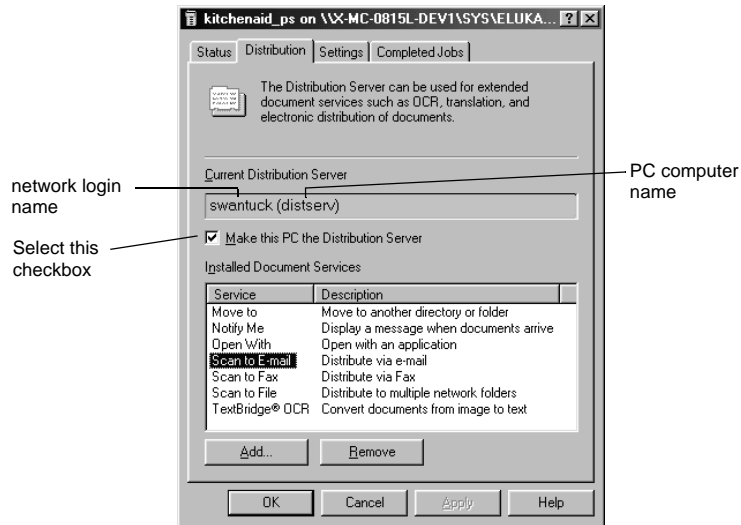5　Choose the **Distribution** tab and select **Make this PC the Distribution Server**.

network login name

PC computer name

Select this checkbox

Figure 4-2: Setting Up the Distribution Server

6　Click **OK**.

## Part 3: Grant Distribution Server Network Account Access to CentreWare Inbox

The network account used by the distribution server requires access to the CentreWare *Inbox*—a directory on the scan server where scanned documents are held for distribution. Granting access to the Inbox gives the distribution server account *Read/Write* permission to the Inbox and to each scan user's document folder on the scan server.

To assign the distribution server access to the CentreWare Inbox:

Do one of the following:

- Use the same network login account for the distribution server that you assigned to the Document Centre. By default, this account has access to the Inbox.

  - OR -

- Grant the distribution server network account access to the CentreWare Inbox.

  - Open the Xerox Network Scanners window and select the Document Centre.

  - From the Scanner Menu, choose **Manage Users**.

  - Add the distribution server network account to the list of enabled scan users.

  - Select the distribution server account in the list of network accounts. Then select **Grant user access to the CentreWare inbox for this scan server**.

  - Click **OK**.

In the example below *swantuck* is the distribution server account which has been given rights to watch the scan server Inbox.

The selected network user name (swantuck) has been granted access to the Inbox directory.
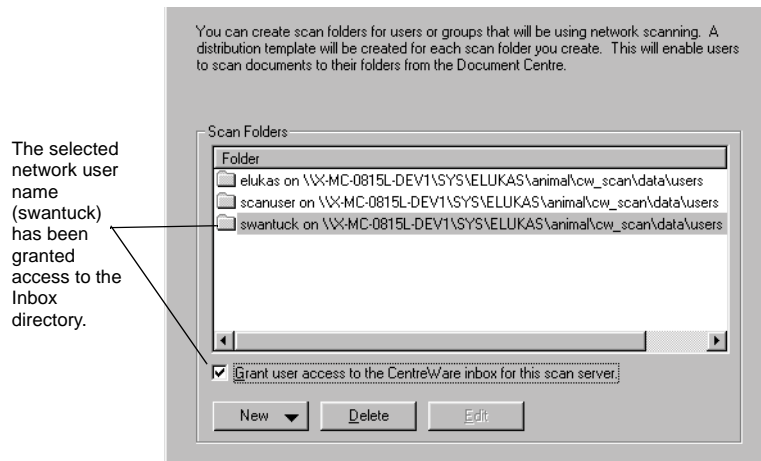
Figure 4-3: Scan folders dialog (Add Network Scanner Wizard or Manage Users)

Part 4: Install TextBridge Pro on the Distribution Server

To enable automated Optical Character Recognition for Scan-to-E-Mail or Scan-to-File (document folder) operations, TextBridge Pro must be installed on the distribution server.

Locate the installation CD in the *Scan to PC Desktop™* software package distributed with Network Scanning Services. Follow the automated installation program to install TextBridge Pro.

Part 5: Test the Distribution Functionality

Verify that the distribution services are functioning correctly.

▶ **To test distribution functionality:**

1 Create a scan to E-Mail template which includes OCR.

Open the Xerox Network Scanners window and double-click the Document Centre name. The Distribution Template window opens.

Use your own E-Mail address for the destination.

> **NOTE:** See *Creating a Scan-to-E-Mail Template* on page 7-12 for specific instructions on creating a test template.

2 Go to the Document Centre scanner, update the list of scan templates, and scan a sample document.

> **NOTE:** See Chapter 9, *Scanning A Document* for more information on how to update scan templates and how to scan documents.

3 Check your E-Mail to make sure you received the document.

If you are unable to scan, see Chapter 12, *Problem Solving*.

Managing Scan User Access

This chapter contains information which will enable network administrators to quickly and easily manage scan user accounts. Managing accounts involves adding, deleting, and modifying users' access to Network Scanning Services. In NetWare and Windows NTFS network environments, Administrators can also create scan groups in which many users have access to the same document folder.

Managing Scan Users

During the initial scanning installation, the *Add Network Scanner Wizard* allows network administrators to add, delete, and edit scan user properties. Once the scan server software has been installed, you don't need to run the Wizard again to modify properties; you can simply use the *Manage Users* option on the Scanner Menu of the Xerox Network Scanners (XNS) window. This option enables you go directly to user settings.
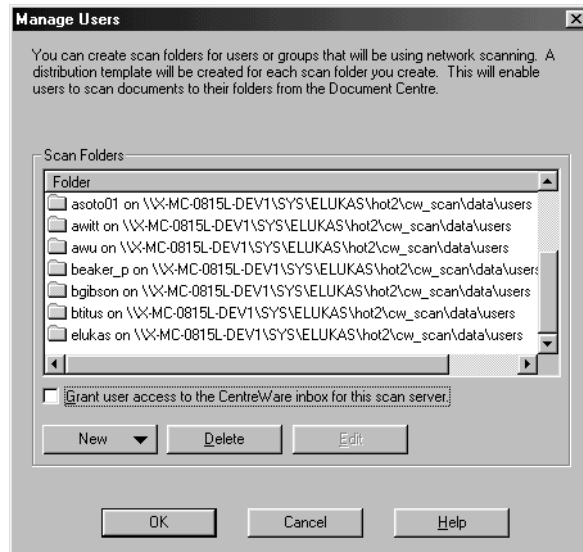
Figure 5-1: Manage Users dialog

NOTE: The procedures outlined below are the same whether you are working in the Add Network Scanner Wizard or in the Manage Users dialog.

Working with Users

Adding Scan Users

Adding a scan user involves granting a network user access to Network Scanning Services.

▶ **To add a scan user:**

1   If you are not currently working in the Add Network Scanner Wizard, open the Xerox Network Scanners (XNS) window.

2   Select a scanner and choose **Manage Users** from the Scanner menu.

3   Do one of the following:

   ■   **For NetWare environments or Windows NTFS partitions:** Click **New** and select **User** from the drop-down box.

   ■   **For all other operating systems (FTP installations):** Click **New**.

4   The Add Users dialog opens.
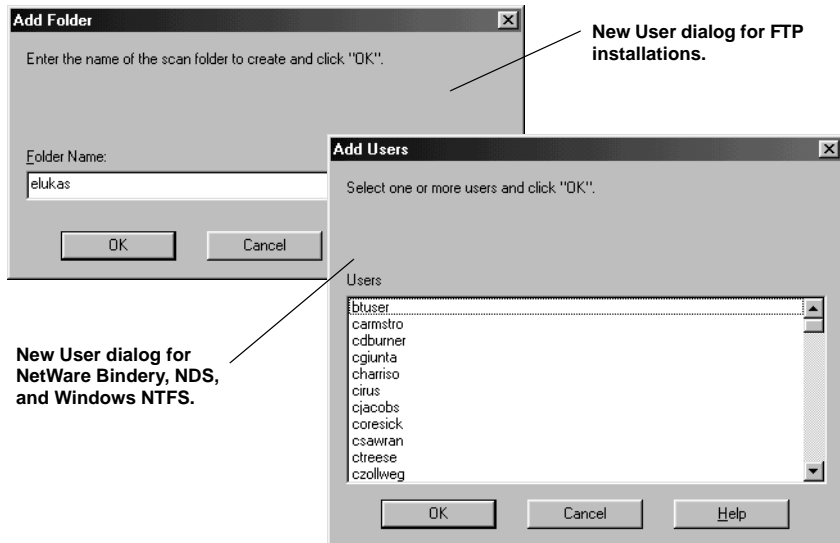
Figure 5-2: Add User dialog boxes

5   Do one of the following:

- **For NetWare environments or Windows NTFS partitions:** The names of all network users in the current workgroup, domain, server, or context are displayed.

  Scroll through the list and select the names of all users who should be granted access to network scanning.

  Use the default Windows functionality to select multiple names in a list:

  SHIFT-Click: enables you to highlight multiple names in sequence by selecting the first and last names in a series.

  CTRL-Click: enables you to select several individual names from a list, not in sequence.

  Click **OK** once all desired names are selected on the Add Users dialog.

- **For all other operating systems (FTP installations)**: Add each user individually. Type the user's network name and click **OK**. Continue until all names are entered. *The entries you type are not validated. You must grant users network access to their document folders once the installation is complete.*

6   Click **OK** on the Manage Users dialog to finish adding new scan users.

A document folder and a default template are created on the scan server for each enabled scan user. The folders and templates are contained within the \CW_SCAN directory on the scan server. See *Appendix A* for details on the scan server configuration.

Removing Scan Users

Remove scan users by deleting names from the user list in the Manage Users dialog. Doing so deletes the user's document folder (and its contents) from the scan server. It also deletes the user's default scan template.

▶ **To remove a network user's access to Network Scanning Services:**

1 Open the **Manage Users** dialog from the Scanner menu of the XNS window.

2 Select the name (or names) you wish to delete in the list of document folders.

3 Click **Delete**. The document folders and their contents are deleted from the scan server.

Working with Groups

If your organization uses a NetWare Bindery, NetWare NDS, or Windows NT (NTFS) network environment, you have the ability to create and organize scan groups. Creating groups enables multiple scan users to scan to the same document folder. Only one user will have access to monitor the folder. (See Chapter 8, *Watch Services* for more information on monitoring document folders.)

Creating a Group

▶ **To create a scan group:**

1 Open the **Manage Users** dialog from the Scanner menu of the XNS window.

2 Click **New** and select **Group** from the drop-down box. The Add Group dialog opens.
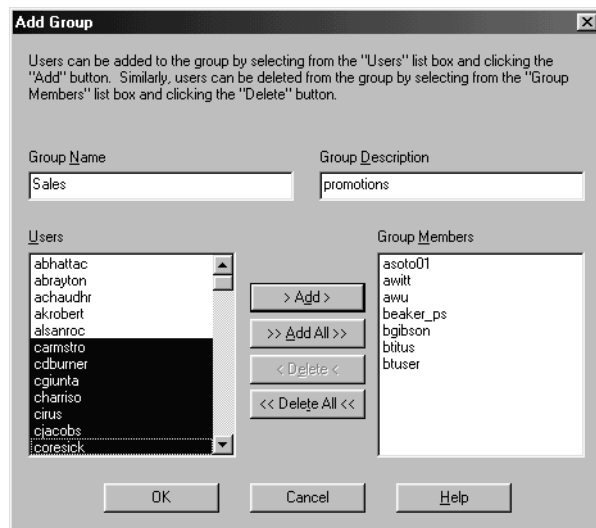
Figure 5-3: Add Group dialog

3   Type a name and description for the group. This information will help you identify the template at a later time.
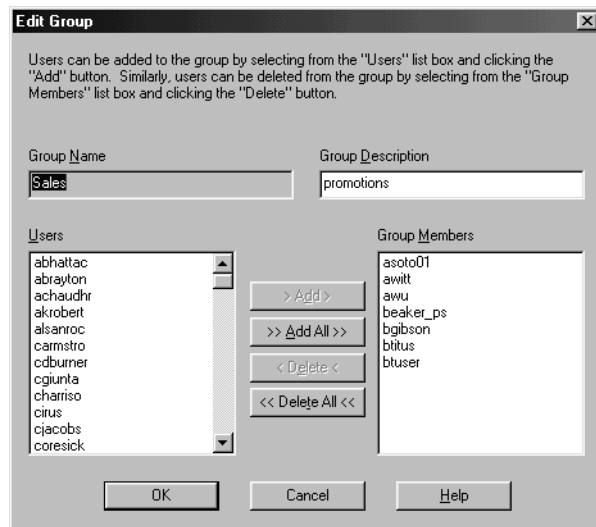
4   From the list of network users, select the names of all individuals to be added to the group. Click **Add** (or **Add All** to add all names at once). The names are transferred to the Group Members list.

5   Click **OK** when you finish creating the group. The Scan Folders dialog reappears. A group folder is added to the list, and individual folders are included for each member of the scan group.

When you use the template to scan from the Document Centre, select the name of the group template, not your individual user template.

Adding Users to Groups

▶ **To add users to existing scan groups:**

1 Open the **Manage Users** dialog from the Scanner menu of the XNS window.

2 Select the folder for the scan group you wish to edit. Click **Edit**. The Edit Group dialog appears. The Group Name and description cannot be edited.

Figure 5-4: Edit Group dialog

3 From the list of network users, select the names of the individuals to be added to the group. Click **Add** (or **Add All** to add all names at once). The names are transferred to the Group Members list.

4 Click **OK** when you finish editing the group. The Scan Folders dialog reappears. Folders for new group members are added to the Scan Folder list.

Removing Users From Groups

To delete/remove individual users from existing scan groups:

1 Open the **Manage Users** dialog from the Scanner menu of the XNS window.

2 Select the folder for the scan group you wish to modify. Click **Edit**. The Edit Group dialog appears. (The Group Name cannot be edited.)

3 In the Group Members list, select the names of the individuals you wish to delete from the group.

4 Click **Delete**. A confirmation appears.

5 Click **OK**. The names are removed from the Group Members list and transferred to the Users list.

6 Click **OK** when you finish modifying the group. The Scan Folders dialog reappears.

Each specified user's access to the group document folder will be removed. The user's individual document folders and templates are retained.

Deleting Groups

To delete scanning groups:

1 Open the **Manage Users** dialog from the Scanner menu of the XNS window.

2 Select the folder for the scan group you wish to delete. Click **Delete**.

The group document folder is deleted and individual user's access privileges to the document folder are removed.

Managing Scanner Properties

This chapter contains information which will enable network administrators to easily access and edit scanner properties with the network scanning software. The types of properties that can be edited include distribution properties, template pool settings, default repository settings, and the scanner login name and password.

Managing Scanner Properties

During the initial scanning installation with the *Add Network Scanner Wizard,* a default scan repository (document folder) and scan template pool are automatically created within the scanning configuration directory structure. (See *Appendix A* for details on the scanning configuration directory structure.) Generally, there is no need to change the default settings. However, if you wish to change the location of either directory or if you wish to add alternate repository locations, you can do so by clicking the *Advanced* button within the Wizard or by modifying scanner properties. The Properties dialog contains additional settings for the scanner status, scanner login name and password, distribution services, and completed jobs.

Accessing Scanner Properties

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

1   Open the Xerox Network Scanners window, and select a scanner.

2   From the Scanner menu, choose **Properties**.

- OR -

Right-click the scanner name, and choose **Properties**.

The Properties dialog appears.

The following sections describe how to set or change the Document Centre scanner properties.

Status Properties

The Status tab displays the current operating status of the scanner.
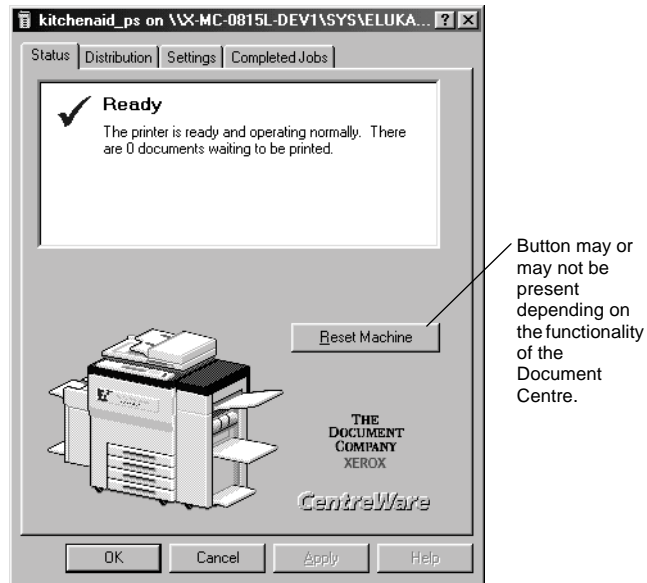

Button may or may not be present depending on the functionality of the Document Centre.

Figure 6-1: Document Centre Properties—Status tab

Checking the Scanner Status

▶ **To check the status of the Document Centre scanner:**

1   Open the scanner Properties dialog.

2   Click the **Status** tab. The current operating status of the scanner is displayed.

Distribution Properties

The Distribution tab contains information about the location of the scan distribution server and any installed scanning services.

The Add and Remove buttons enable you to install new service modules or remove existing services.
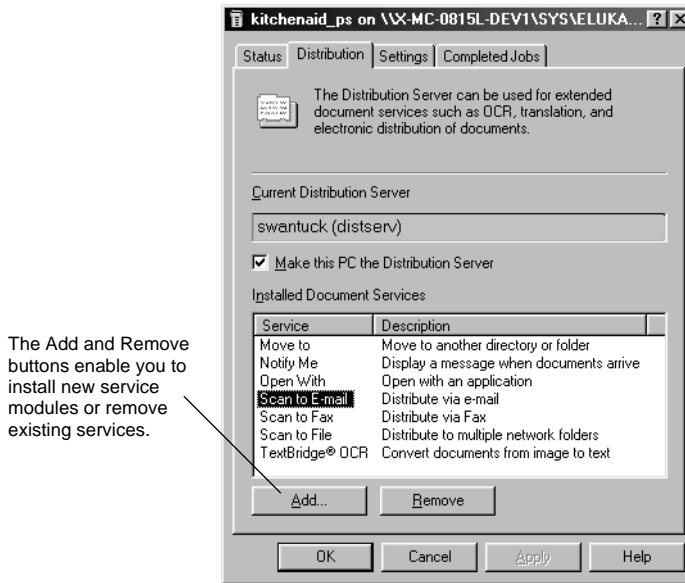
Figure 6-2: Document Centre Properties—Distribution tab

Establishing the Distribution Server

Select **Make this PC the Distribution Server** on the Distribution tab to turn the machine you are using into a Distribution Server for the scanning installation. The Distribution Server monitors the Inbox directory on the scan server for activity and manages the distribution of files to E-Mail, Fax, and other image-aware applications.

See Chapter 4, *Enabling Scan to E-Mail and Distribution* for more information.

Verifying Installed Services

The *Installed Document Services* field on the Distribution tab lists any Network Scanning Services supported by the current scanning installation. Check this field to verify which services you are currently supporting.

Scanner Settings

The Settings property tab displays the location of the scan template pool and enables you to set or modify the Document Centre Login name and Password for the template pool. The Settings tab also provides access to *Advanced Properties* which contain information about the Default Scan Repositories.
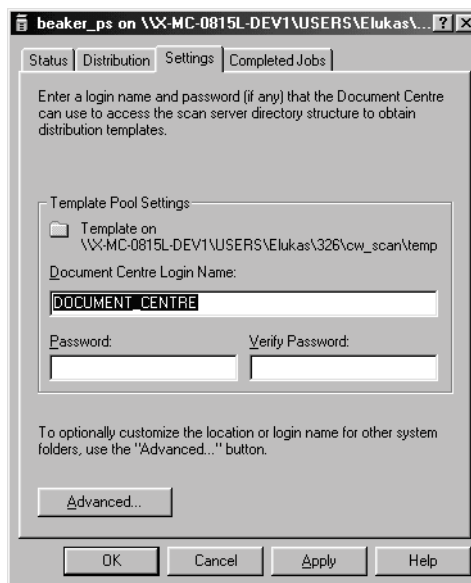
Figure 6-3: Document Centre Properties—Settings tab

Checking the Location of the Scan Template Pool

The template pool is the location where scan templates are stored on the scan server. The template pool is automatically created during the scan server installation.

▶ **To determine the location of the template pool:**

1   Open the scanner Properties dialog.

2   Click the **Settings** tab.

3   The template pool directory is identified under the *Template Pool Settings*.

Changing the Scanner Login Name and Password

The Document Centre scanner requires Read/Filescan access to the scan template pool and the user's document folders on the scan server. The scanner password is typically established during installation. However, you can quickly change the password or login within the Properties dialog. (See Figure 6-3 on page 6-5.)

▶ **To change the scanner login name and/or password:**

1   Open the scanner Properties dialog.

2   Click the **Settings** tab.

3   Type the new scanner login name in the Document Centre Login Name field.

4   Type the new password and verify it in the Password fields.

5   Click **Apply**.

Changing Default Scan Repository Settings

Distribution templates that don't specify a scan destination are stored in the default repository. Document Centres 240, 255, 265, 460, and 470 have a single default repository. Document Centres 220, 230, 332, 340, 420, 432, and 440 enable you to create up to four alternate repositories.

▶ **To change default or alternate repository settings:**

1 Open the scanner Properties dialog.

2 Click the **Settings** tab.

3 Click **Advanced**.

4 Select whether you are using a NetWare network or are connecting to the file server via TCP/IP. The associated server fields will vary based on the type of connection you use.

5 Enter the machine's IP address or server information.

- **For NetWare:** Type the server name, volume, NDS Context, or NDS tree, as appropriate for your environment.

- **For all other networks:** Type the file server's IP address and port (if used).

6 Enter the path to the template pool.

7 Type the scanner login name in the Document Centre Login Name field.

8 Type the Password and verify it in the Password fields.

9 Click **Apply**.

General Properties

Document Centres 240, 255, 265, 460, and 470 have some additional controls on the Advanced Settings *General* Tab. These settings cannot be accessed through the Properties dialog for other Document Centre scanners.
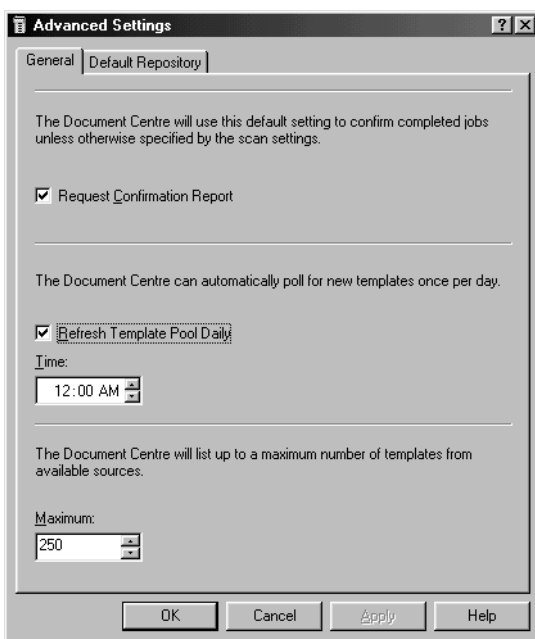
**Figure 6-4: Document Centre Properties—General Advanced Settings tab
Document Centres 240/255/265 and 460/470 only**

Setting the Confirmation Report Default

The *Request Confirmation Report* option enables Network Administrators to set a general default so that a confirmation report is generated with each scan job. This feature is available for DC 240, 255, 265, 460, and 470 only.

▶ **To set the Confirmation Report default:**

1   Open the scanner Properties dialog.

2   Click the **Settings** tab.

3   Click **Advanced** and choose the **General** tab.

4   Select the **Request Confirmation Report** checkbox to make sure a confirmation report is generated for each job. Deselect the option if you do not want to generate confirmation reports.

5   Click **OK**.

Enabling Template Pool to Refresh Daily

This option ensures that the Document Centre scanner will poll the Template Pool at least once daily to refresh the list of templates displayed at the scanner. This feature is available for DC 240, 255, 265, 460, and 470 only.

1 Open the scanner Properties dialog.

2 Click the **Settings** tab.

3 Click **Advanced** and choose the **General** tab.

4 Select the **Refresh Template Pool Daily** checkbox.

5 Click **OK**.

Completed Job Properties

Network Administrators with *Supervisor*, *Administrator*, or equivalent rights can control the manner in which the history for distribution jobs is displayed to users. By using the settings available on the Completed Jobs tab, Administrators can control whether a job history is maintained, how long the history will be retained (up to 30 days), and can clear the history record at any time.
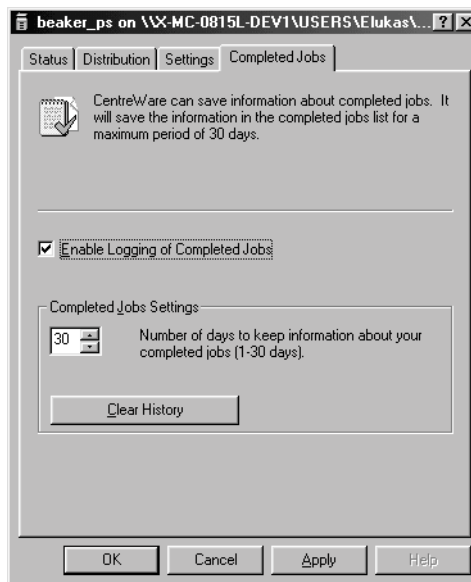
Figure 6-5: Document Centre Properties—Completed Jobs tab

To learn more about scan job history, see Chapter 10, *History*.

Enabling or Disabling Scan Job History

Enabling or disabling scan job history allows Network Administrators to control whether users can access a history log of scan jobs processed through the distribution server.

▶ **To enable or disable scan job history:**

1 Open the Xerox Network Scanners window.

2 From the Scanner menu, choose **Properties**. The Properties dialog opens.

3 Choose the **Completed Jobs** tab.

4 To maintain a history of scan jobs, *select* **Log History of Completed Jobs.** To disable job history, *deselect* **Log History of Completed Jobs**.

Modifying the Length of Time Job History is Retained

▶ **To change the number of days that job history will be retained:**

1 Open the Xerox Network Scanners window.

2 From the Scanner menu, choose **Properties**. The Properties dialog opens.

3 Choose the **Completed Jobs** tab.

4 Type the desired number of days (1 - 30) or use the up or down arrows to modify the number of days the job history should be retained.

Clearing the History Record

▶ **To erase an existing history record:**

1 Open the Xerox Network Scanners window.

2 From the Scanner menu, choose **Properties**. The Properties dialog opens.

3 Choose the **Completed Jobs** tab.

4 Click **Clear History**.

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.

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

Template Pool

Distribution Template

Network Server
(the *scan* server)
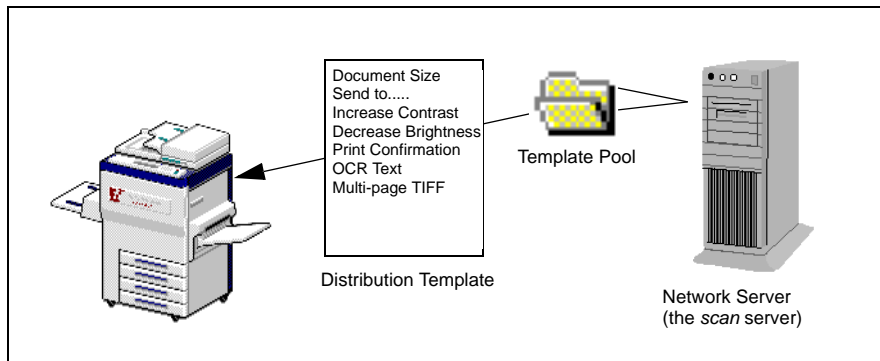
Figure 7-1: Distribution Templates

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.
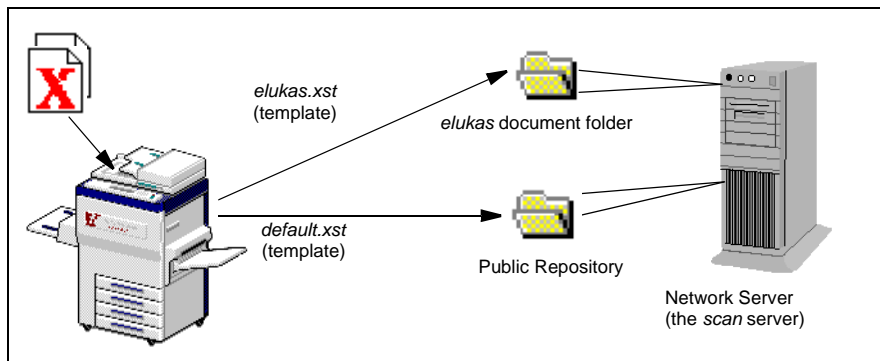
Figure 7-2: Default Template Destinations

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.
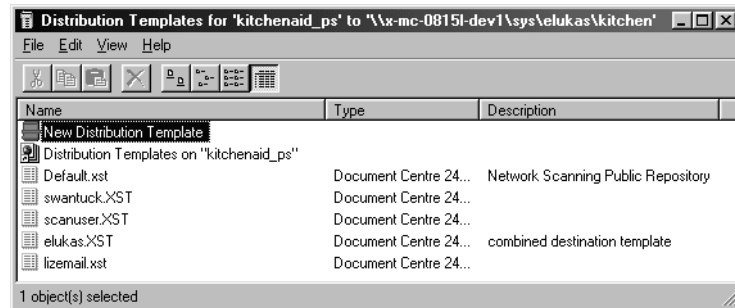
Figure 7-3: Distribution Template Window

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.
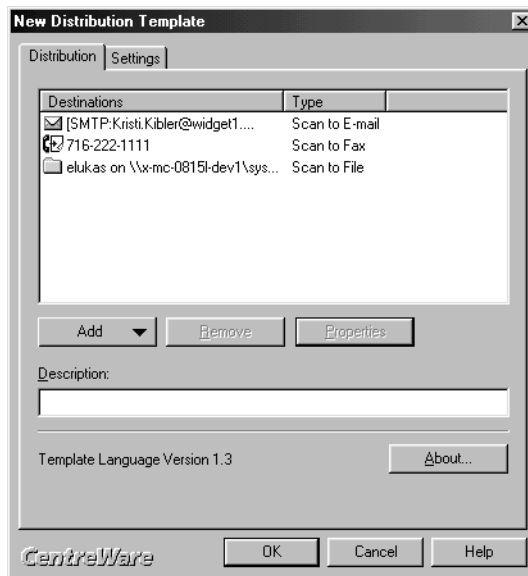
Figure 7-4: The Template Properties dialog

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 7-34.

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.
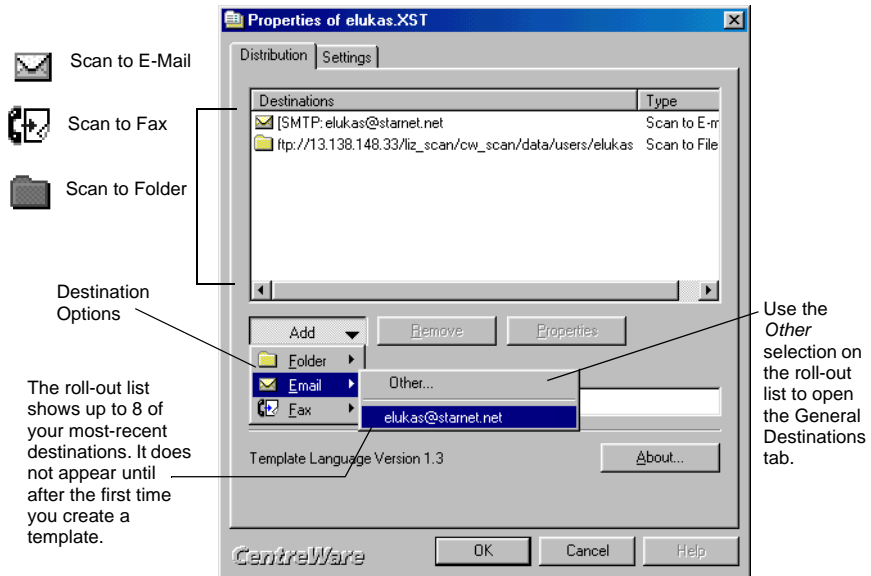
Figure 7-5: The Distribution tab

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 7-12.)

- *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 7-14.)

- *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 7-16.)

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.
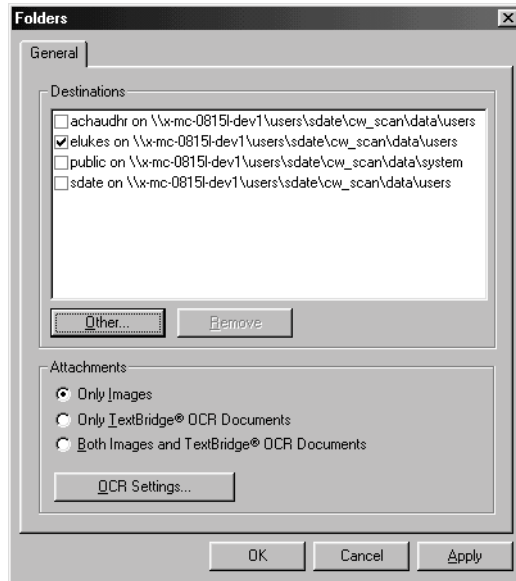
Figure 7-6: Distribution Template—General Folders tab

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.
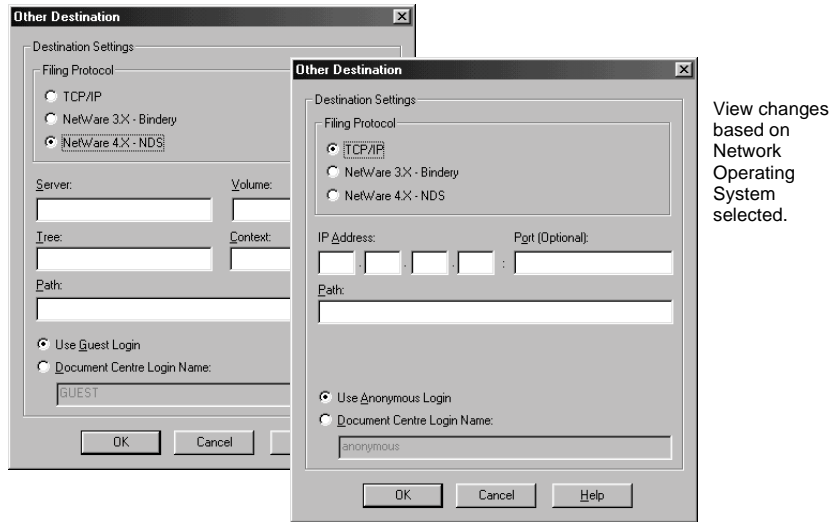
Figure 7-7: Other Destination dialog—TCP/IP and NetWare NDS

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 7-19, or click **Help** for more detailed instructions.

6 Continue with *Setting Scan Processing Options* on page 7-21, 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.
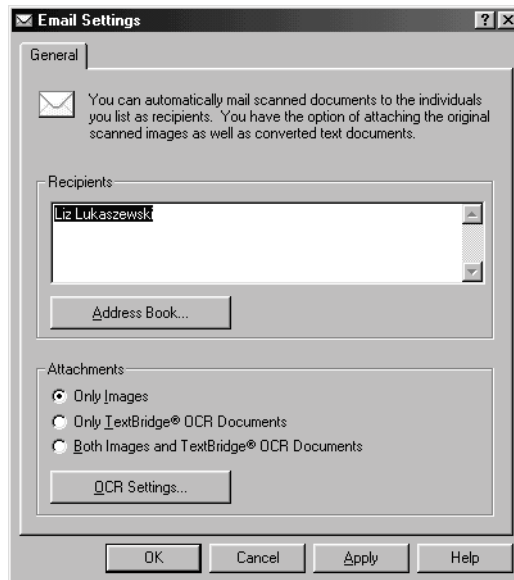
Figure 7-8: Distribution Template—General E-Mail Settings tab

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 7-19 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.
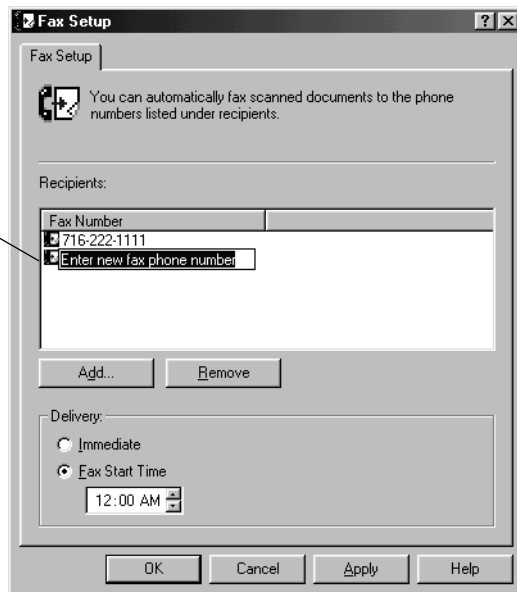
Figure 7-9: Distribution Template—Fax Setup tab

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 7-21, 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.
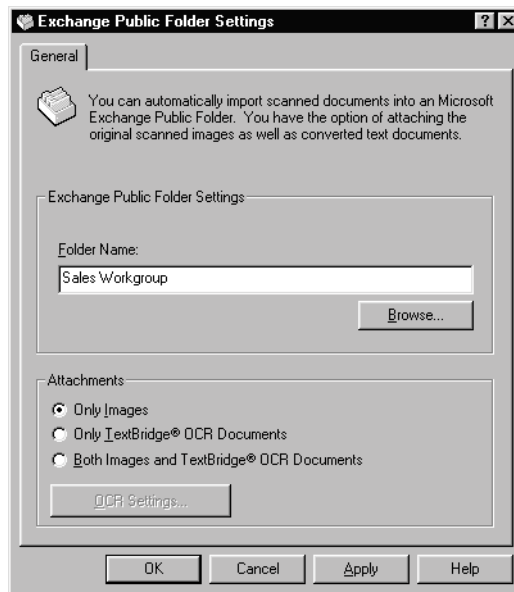
Figure 7-10: Exchange Public Folder Settings

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 7-19, or click **Help** for more detailed instructions.

6   Continue with *Setting Scan Processing Options* on page 7-21, 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.
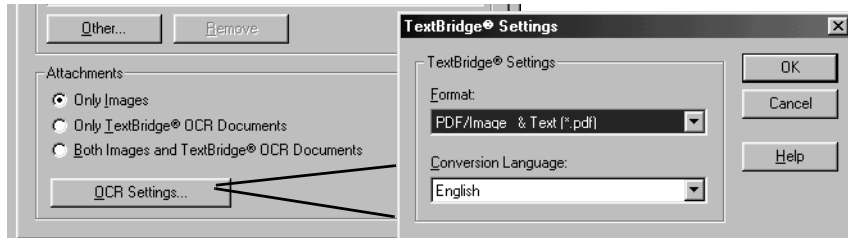
Figure 7-11: Network Scanning OCR Options on Destinations Dialog

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.
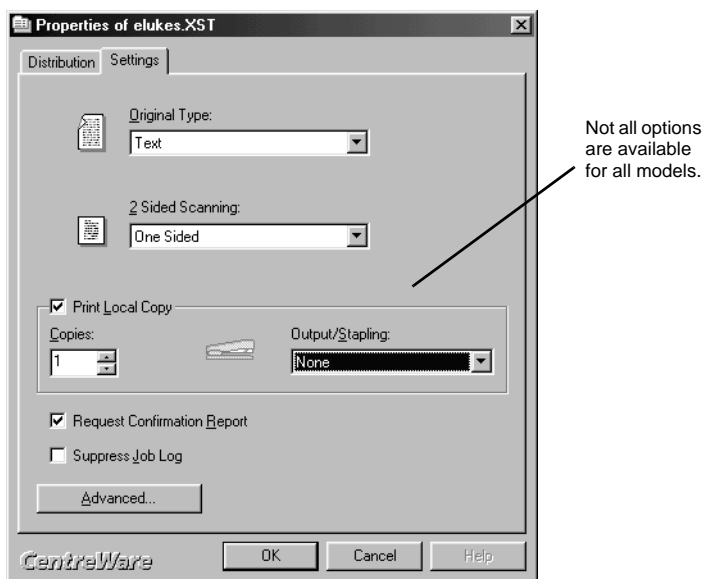
Figure 7-12: Distribution Template Scan Settings tab
Document Centres 220/230, 332/340, and 420/432/440 only

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
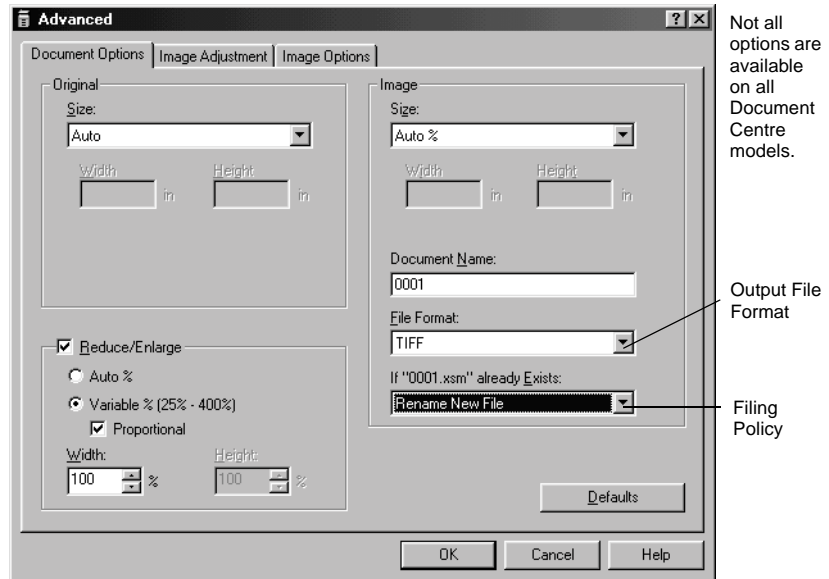
**Figure 7-13: Distribution Template Document Options tab
Document Centres 220/230, 332/340, and 420/432/440 only**

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.
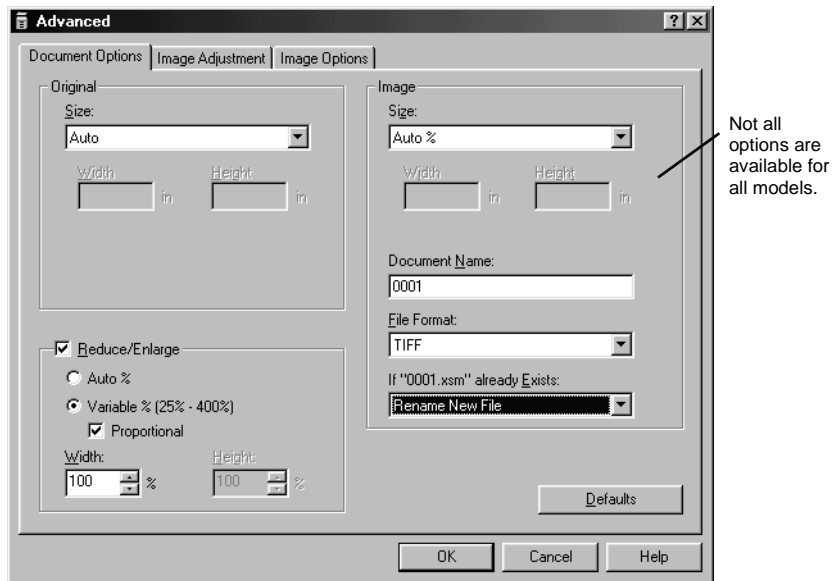
Figure 7-14: Distribution Template Scan Settings tab
Document Centres 220/230, 332/340, and 420/432/440 only

► **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 7-13 on page 7-23.)

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 7-13 on page 7-23.)

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 7-19 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.
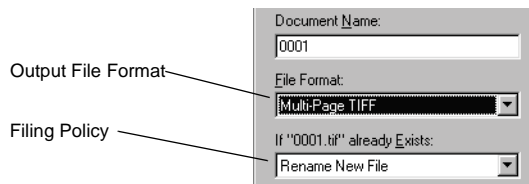
Figure 7-15: Document Options Filing Policy

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.
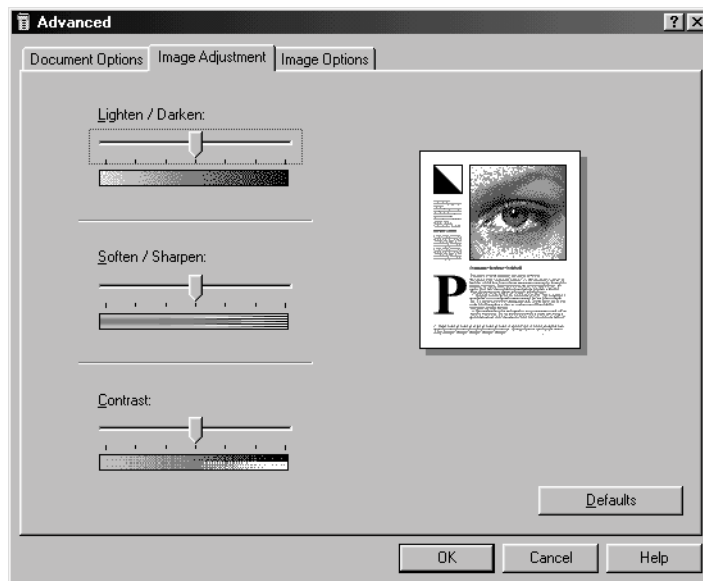
Figure 7-16: Distribution Template Image Adjustment tab
Document Centres 240, 255, 265, 460, and 470 only

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.
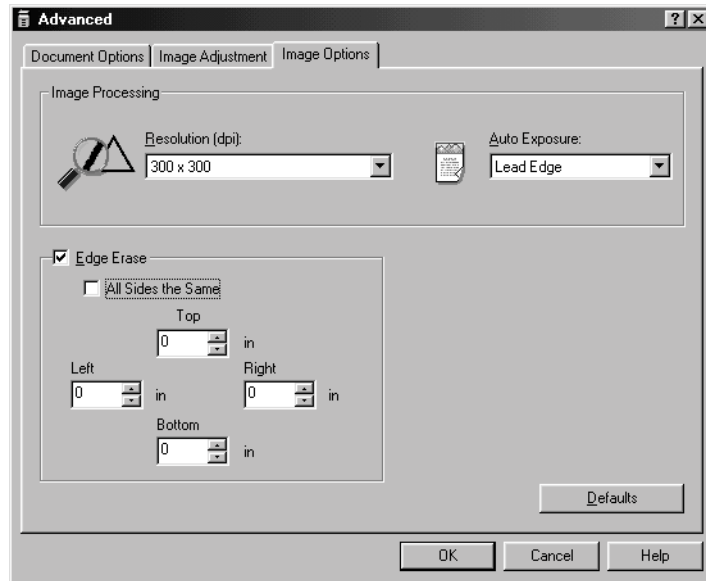
Figure 7-17: Document Centres 220, 230, 332, and 340 Image Options tab

▶ **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 7-17 on page 7-31.)

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.
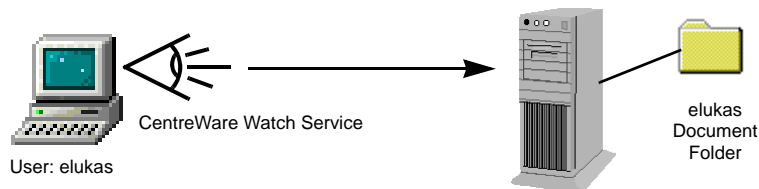
Figure 8-1: Watching a Document Folder

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 8-6 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 8-6 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.
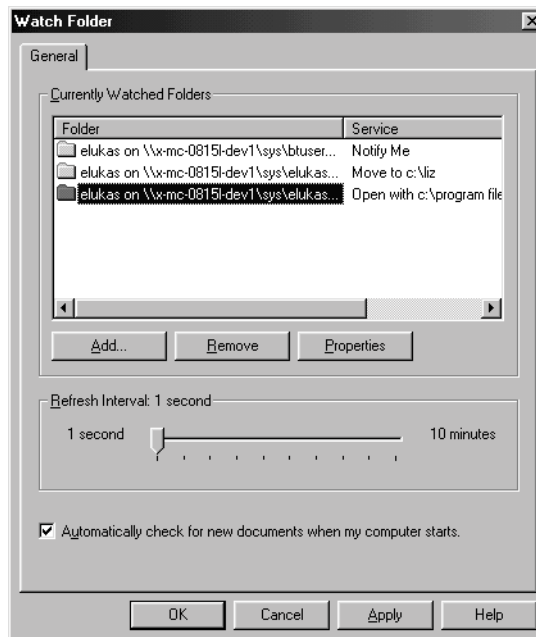
Figure 8-2: The Watch Folder Window

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 8-3: Watch Folder Wizard

> **NOTE:** For information on using watch services with PaperPort, see *When to Use CentreWare Watch Services* on page 8-3.

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.
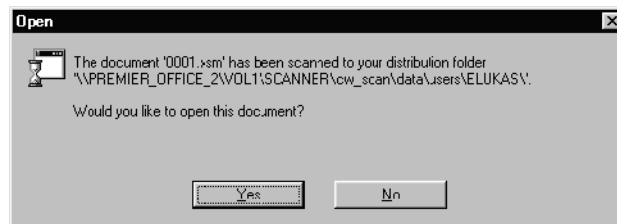
Figure 8-4: Message Generated with "Notify Me" option

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.)
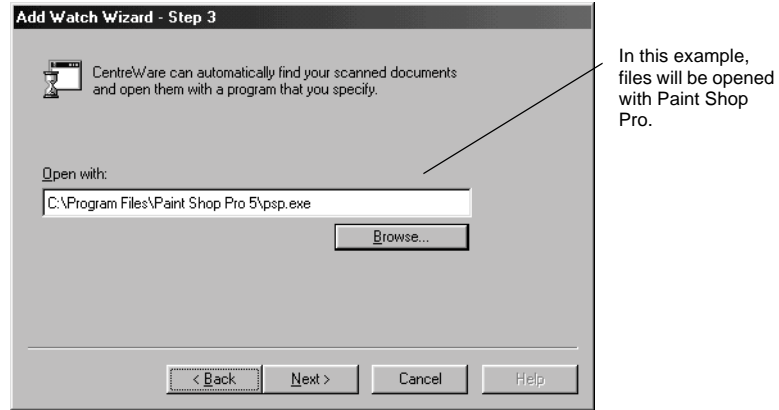
Figure 8-5: The "Open With" Watch Service

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**
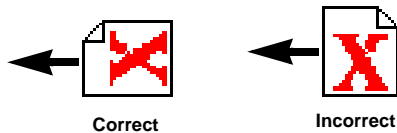
Document Feeder Paper Orientation

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
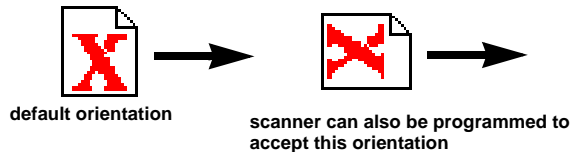
Document Feeder Paper Orientation

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.

History information is stored on the scan server in a file called *history.txt* located in the \CW_SCAN\CONFIG directory. By default, all enabled scan *users* have access to the history information, but they cannot clear the history log or change the number of days history information is saved. Only Network Administrators can modify the History settings. See *Setting History Properties* on page 10-5 for more information.

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.
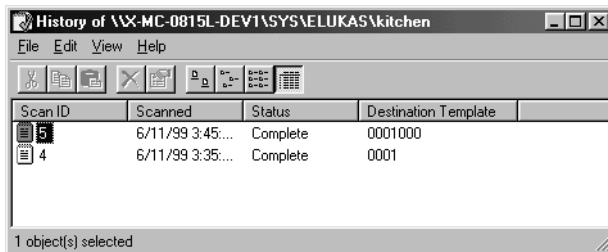
Figure 10-1: The History Window

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.
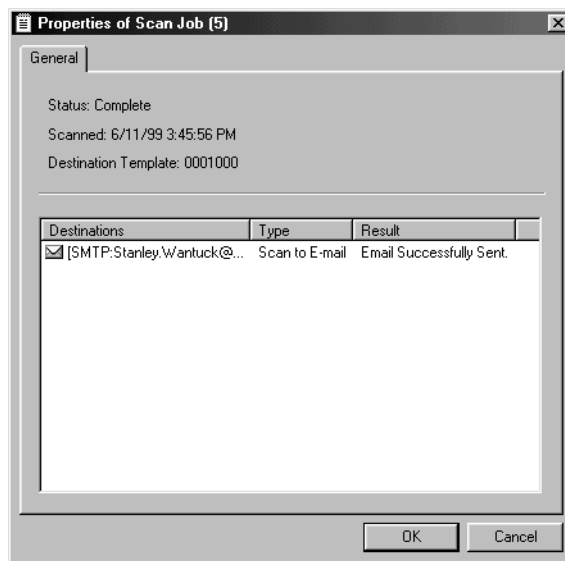
Figure 10-2: History Properties

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.

Setting History Properties

Network Administrators with *Supervisor*, *Administrator*, or equivalent rights can control the manner in which scan job history is displayed to users. By using the settings available on the Completed Jobs tab, Administrators can control whether a job history is maintained, how long the history will be retained (up to 30 days), and can clear the history record at any time.
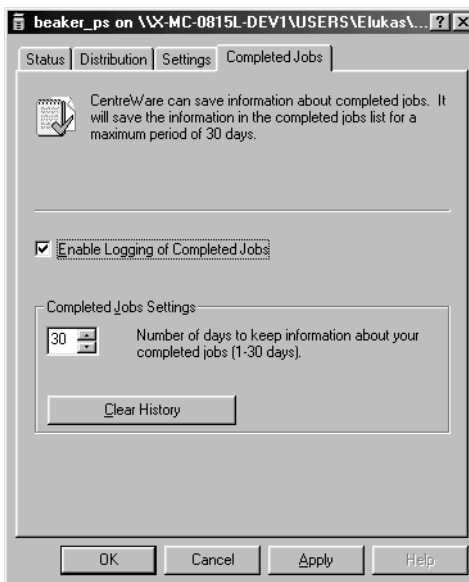
Figure 10-3: Completed Jobs tab

For more information on setting history properties, see *Completed Job Properties* on page 6-11.

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

Uninstalling the network scanning software involves performing two separate tasks:

- uninstalling the scan server software (for Administrators only)
- uninstalling workstation software

Uninstalling the Scan Server Software

CAUTION: This procedure uninstalls the entire \CW_SCAN directory on the scan server, including any document folders and the data within them.

You must uninstall the scan server software in the same manner in which it was installed. For example, if you used a Windows NT workstation to install the software on a Windows NT server, you must also uninstall the server software from a Windows NT workstation.

For NetWare and Windows NT networks: You must possess *Supervisor* or *Administrator* network access rights to uninstall the scan server software. All scan server software will be uninstalled as well as scan-specific groups and access rights.

For all other network environments: To uninstall software on non-NetWare or Windows NT servers, you must possess Read/Write access to the scanner directory. The uninstallation will remove the scan server software and will reset the Document Centre to factory default settings. However, any individual or group accounts created with FTP software will remain.

▶ **To uninstall the scan server software if the scanner appears in the Xerox Network Scanners window:**

1 Open the Xerox Network Scanners folder.

2 Select the scanner you want to uninstall from the list of scanners.

3 Click **Delete**. A dialog similar to the following appears:
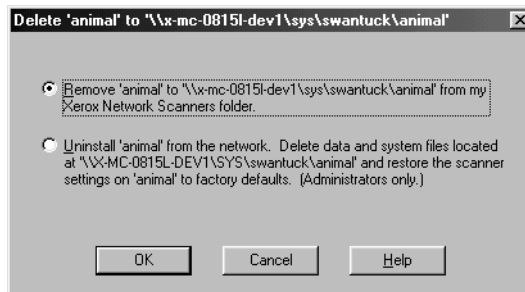
Figure 11-1: Delete dialog

4 Select **Uninstall <*scanner name*> from the network**.

5 A warning message appears. Click **Yes** to confirm that you want to uninstall the scan server software.

6 Type the scanner (device access) password.

The scanner is deleted from the Xerox Network Scanners window and all scanning software is removed from the server.

To uninstall the scan server software if the scanner does not appear in the Xerox Network Scanners window:

1   Open the Xerox Network Scanners folder.

2   From the Scanner menu, choose **Uninstall Scan Server.**

3   Select the operating system of the server containing the scan server software you wish to uninstall.

4   Type the path to the directory which contains the \CW_SCAN directory or click **Browse** to locate the proper directory on your network.

5   In the example below, the \CW_SCAN directory was created in the *\326* directory, so the path to that directory is specified in the *Location* field.
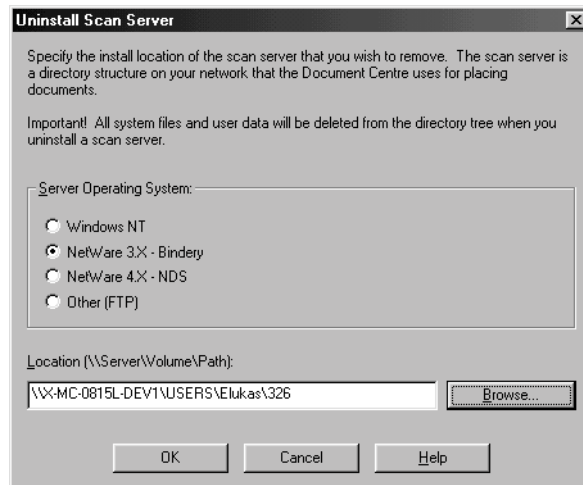
Figure 11-2: Uninstall Scan Server

6   Click **OK**.

7   Click **Yes** to confirm that you want to uninstall the scan server software. The scanning software and document folders are removed from the server.

Uninstalling the Workstation Software

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

▶ **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 issues are grouped by the type of user that would commonly encounter the specified problem.

■ Scan Administrators

■ Scan Users

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 Administrators

■ **I can't scan. What do I do now?**

- ■ Verify that the user account and password for the Document Centre exist.

- ■ Verify that you entered the password correctly.

- ■ If you are running on a Windows NT network, verify that the DCSUSERS group has been granted the right to *Log on Locally.*

- ■ Check the permissions on the directory to which you are scanning.

- ■ For installations to Windows NT servers and other non-NetWare environments, review *Part 2: Set Up Installation Directory and Enable FTP* on page 3-18 to ensure you enabled FTP properly.

- ■ Ensure that FTP access is *not* limited to anonymous logins only.

■ **Why can the scanner only retrieve a partial list of templates?**

This message indicates that the Document Centre Login Name, Password, or Security permissions are insufficient for the machine to log on and retrieve templates.

- ■ Verify the template and repository settings using the Document Centre Touch Panel. Check the accuracy of the Document Centre network name, password, path, server name, volume, IP address, etc.

- ■ Verify that the Document Centre's network user name and password have read access to the template folder.

  NetWare: Log on to the server using the Document Centre network name and use Windows Explorer to copy a template file.

  TCP/IP: Use FTP from the command line and validate that you can change to the template directory (as shown in the Document Centre Touch Panel). Then retrieve a template file using the GET function.

- ■ If you are able to perform the actions above, then both the Document Centre and network are set up correctly. Try rebooting the Document Centre by turning it off and on. You may need to reboot more than once.

- **Why isn't the scanner automatically discovered on the network?**

  - CentreWare will automatically find scan-enabled and configured Document Centre scanners on the network. It will search your local subnet for FTP-enabled scanners as well as any NetWare servers that you are logged into for NCP-configured scanners.

    If the scanner is not automatically discovered, you will need to map a network drive to the scan server and manually enter the location of the directory on the scan server which contains the Network Scanning \CW_SCAN directory.

  - If you are using SNMP and have modified the default GET/SET names *Public* and *Private*, review *SNMP Community Names* on page 3-5.

- **Why did I get an *Unknown Address* message?**

  The *Unknown Address* message means that the Domain Name Service (DNS) address is not listed in Host Table. The Document Centre's IP address must be listed in the host table for automatic discovery to occur. Otherwise, your only discovery option during installation is to enter the scanner's IP address.

- **Why can't I install over Windows NT when I use the Add Network Scanner Wizard?**

  The domain security features incorporated into CentreWare are only available if you are installing from a Windows NT workstation to a Windows NTFS partition on the server or if you are installing directly onto the Windows NT server.

  Windows 95 or Windows 98 users can use the *FTP Other* installation option within the Add Network Scanner Wizard and manually set the access privileges once the CentreWare installation is complete.

■ **How do I create remote repositories? I don't see the option in the Add Network Scanner Wizard.**

The Release 5.20 scanning installation has been simplified and the ability to create remote repositories has been removed from the installation wizard. Remote Repositories can now be created by specifying an *Other* folder destination in the distribution template properties.

■ **I have multiple Document Centre scanners on the network. Why won't some templates work with specific machines?**

Although all scan templates can be stored in the same template pool on the scan server, templates are not interchangeable with all scanners.

In addition, templates created with Internet Services are not interchangeable with those created with the Network Scanning Services software.

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.

Scan Server Configuration and Access Rights

This section contains detailed information about the network scanning configuration directory structure which is created during the scanning installation. It also provides a summary of scanning access rights assigned for both NetWare and Windows NT networks.

The Scanning Configuration Directory Structure

During installation with the Add Network Scanner Wizard, the \CW_SCAN directory structure is created on the scan server. The contents of this directory are outlined below:
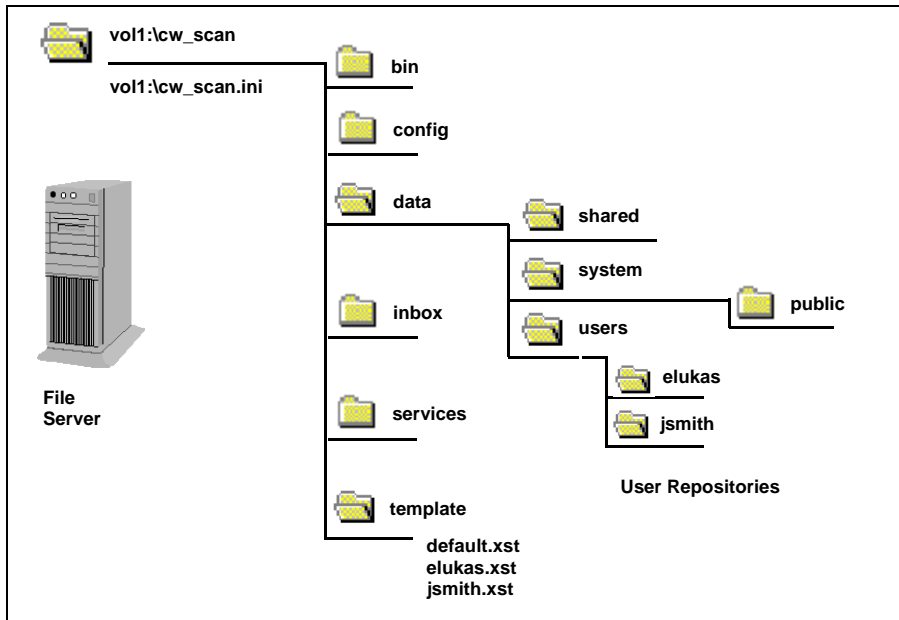
Figure 1-1: Scanning Configuration Directory Structure

Bin contains executable files needed for Network Scanning Services.

Config contains configuration files for the Network Scanning Services setup. These files include information about the location of repositories (*drdf.xst*), names of groups and the members within them (*groups.xst*), and data that specifies the location of the template pool (*jtdf.xst*). The scanning applications use the information in the *Config* files to determine the location of scan folders.

Data contains the scan repositories (document folders) associated with this scan server. Within data you will find the *Shared*, *System*, and *User* directories.

- *Shared* contains any shared document folders. Shared folders are those folders accessible to the members of a *group*. Groups are defined within the *Add Network Scanner Wizard* or the *Manage Users* dialog. Currently, the ability to create groups is available for NetWare and Windows NT (using NTFS) installations only.

- *System* contains the *Public* repository (document folder)*. Public* is intended to be used as a default repository where scanned documents, whose template does not specify a destination repository, will be filed. All scan users have read/write access to this repository.

- *Users* contains document folders for individual scan users.

Inbox is a scan repository used to process documents being distributed to E-Mail or to other applications' inboxes. The Distribution Server monitors this repository for the arrival of scanned documents and distributes the documents to the destination specified in the template.

Services is designed to enable the implementation of future scanning services. Currently this directory is not used.

Template contains the scan templates (the Template Pool). A default *Scan to PaperPort* template is created for each network user specified as a scan user during setup with the Scan Admin Wizard.

The *cw_scan.ini* is also created during installation and contains the path to the \CW_SCAN directory. The cw_scan.ini file resides in the same directory as the \CW_SCAN directory. It is not contained within the \CW_SCAN directory.

Summary of Access Rights

NetWare Networks

The following table summarizes the \CW_SCAN configuration directory structure on a NetWare network and defines the access rights for different user groups as they relate to different directories within the structure.

Folder/ Directory	User/Group Rights			
	DCSUsers Group	Enabled Scan Users	User	Group
\CW_SCAN	R/F	R/F		
\BIN	R/F	R/F		
\CONFIG	R/W/E/C/M/F	R/F		
\DATA	R/W/E/C/M/F	R/F		
\SHARED	R/W/E/C/M/F	R/F		
\SHARED*Group1*	R/W/E/C/M/F			R/W/E/C/M/F
\SYSTEM	R/W/E/C/M/F	R/F		
\PUBLIC	R/W/E/C/M/F	R/W/E/C/M/F		
\USERS	R/W/E/C/M/F	R/F		
\USERS*User1*	R/W/E/C/M/F		R/W/E/C/M/F	
\TEMPLATE	R/F	R/W/E/C/M/F		
\INBOX	R/W/E/C/M/F			
\SERVICES	R/W/E/C/M/F	R/F		

Table 1-1: NetWare Network Access Rights by User Type
R = Read, W = Write, E = Erase, C = Create, M = Modify, F = FileScan

Windows NT Networks

NTFS

When you install Network Scanning Services to an NTFS partition using the *Windows NT* option within the Add Network Scanner Wizard, CentreWare sets the folder permissions within the \CW_SCAN directory structure to all enabled scan users and to the account given to the Document Centre.

Because the folder permissions are filtered by the permissions of the *Share*, you must make sure that the *ENABLEDSCANUSERS* group has *Change* access at the Share level. *Change* access enables *Read*, *Write*, *Execute*, and *Delete* capabilities.

The following table summarizes the \CW_SCAN configuration directory structure on a Windows NTFS network and defines the access rights for different user groups as they relate to different directories within the structure.

Folder/ Directory	User/Group Rights				
	DCSUsers Group	Enabled Scan Users	User	Group	Everyone
\CW_SCAN	R/X	R/X			R/X
\BIN	R/X	R/X			
\CONFIG	R/W/X/D	R/X			
\DATA	R/W/X/D	R/X			R/X
\SHARED	R/W/X/D	R/X			
\SHARED*Group1*	R/W/X/D			R/W/X/D	
\SYSTEM	R/W/X/D	R/X			R/X
\PUBLIC	R/W/X/D	R/W/X/D			R/W/X/D
\USERS	R/W/X/D	R/X			
\USERS*User1*	R/W/X/D		R/W/X/D		
\TEMPLATE	R/X	R/W/X/D			
\INBOX	R/W/X/D				
\SERVICES	R/W/X/D	R/X			

Table 1-2: Windows NT Network Access Rights by User Type
R = Read, W = Write, D = Delete, X = Execute

FAT File Systems

CentreWare does not set folder permissions when installing to a Windows NT FAT file partition. You must manually set the permissions of the Share so that enabled scan users (*ENABLEDSCANUSERS* group) can connect to and use the server.

Document Centre Account Network Access Rights

The network account created for the Document Centre requires these additional settings:

- Rights to *Log on Locally (*assigned to the *EVERYONE* group*)*
- Password Never Expires
- User Cannot Change Password

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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