

ScanRouter EX Professional Version 3

Setup Guide

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- 1** System Requirements
 - 2** Server Setup
 - 3** ScanRouter EX Professional Setup
 - 4** After Installation
 - 5** Appendix

Introduction

This manual contains detailed instructions and notes on the operation and use of this product. For your safety and benefit, read this manual carefully before using the product. Keep this manual in a handy place for quick reference.

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- The product names of Windows 2000 are as follows:
Microsoft® Windows® 2000 Server
Microsoft® Windows® 2000 Professional
- The product names of Windows XP are as follows:
Microsoft® Windows® XP Professional
Microsoft® Windows® XP Home Edition
- The product names of Windows Server 2003 are as follows:
Microsoft® Windows Server® 2003 Standard Edition
Microsoft® Windows Server® 2003 Enterprise Edition
- The product names of Windows Server 2003 R2 are as follows:
Microsoft® Windows Server® 2003 R2 Standard Edition
Microsoft® Windows Server® 2003 R2 Enterprise Edition

ScanRouter EX Professional Manuals

ScanRouter EX Professional has several manuals. Read the manual that is relevant to your usage or query.

Note

- ❑ To display PDF format instructions, Adobe Acrobat or Adobe Reader must be installed on your computer.

❖ **Setup Guide**

Explains system environment requirements and how to set up a ScanRouter EX Professional delivery server. This guide also describes the first operation after establishing a delivery server and how to set up SSL communication.

❖ **Introduction Guide**

Explains basic ScanRouter EX Professional document delivery operations, using several examples. This guide also describes how to add destination data collectively.

❖ **Management Guide**

Explains delivery procedure and daily administrator operations for ScanRouter EX Professional. This guide also describes operations that are available by accessing a delivery server and Authentication Management Service using SR Manager and Authentication Manager.

❖ **Operating Instructions Capture Function**

Explains general procedures such as settings to make for using the capture function and ScanRouter EX Professional network device operations.

❖ **Operating Instructions Device Browser Delivery Function**

Explains settings for Device Browser delivery and ScanRouter EX Professional network device operations.

Reference

After installing ScanRouter EX Professional, you can display the manuals above in a PDF format according to the procedure below.

- On the **[Start]** menu, point to **[All Programs] > [ScanRouter System] > [ScanRouter EX Professional]**.

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How to Read This Manual

Symbols

In this manual, the following symbols are used :

Important

This symbol indicates a situation that may result in property damage or malfunction if instructions are not followed. Be sure to read the instructions.

Preparation

This symbol indicates information or preparations required prior to operating.

Note

This symbol indicates precautions for operation, or actions to take after abnormal operation.

Limitation

This symbol indicates numerical limits, functions that cannot be used together, or conditions in which a particular function cannot be used.

Reference

This symbol indicates a reference.

[]

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

Overview of ScanRouter System

ScanRouter System is a group of document management applications that helps users improve their business efficiency and productivity, and speed up management and organizational procedures.

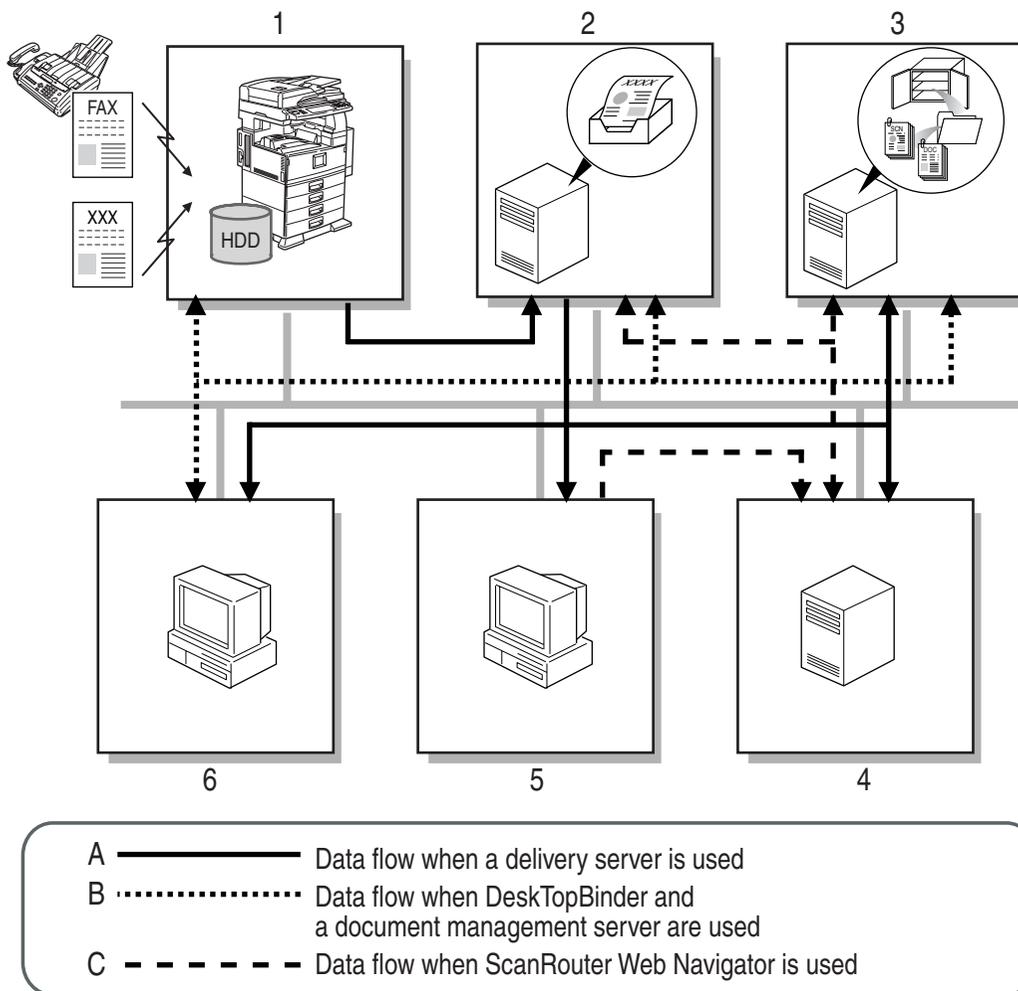
The volume of electronic and paper documents that must be stored increases on a daily basis. ScanRouter System can efficiently manage huge amounts of document data, such as scanned-in/fax-received image data and files made using computer applications-creating a work environment that is optimized for business usage information.

ScanRouter System documents can be easily retrieved, viewed, edited, printed, and sent by e-mail to communicate information to any person at any time.

In addition to supporting a wide variety of user authentication methods, for extra security, ScanRouter System can protect users' documents using easily made access settings.

ScanRouter System includes the following applications:

- DeskTopBinder Lite/Professional
- ScanRouter V2 Professional
- ScanRouter Enterprise
- ScanRouter EX Professional/Enterprise
- ScanRouter DocumentServer
- ScanRouter Web Navigator



ADP0015

1. Network devices

You can input or output documents using network devices.

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

2. ScanRouter V2 Professional, ScanRouter Enterprise, and ScanRouter EX Professional/Enterprise (delivery server)

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

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

3. ScanRouter DocumentServer (document management server)

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

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

4. ScanRouter Web Navigator (Web server)

ScanRouter Web Navigator is a portal application enabling access from Web client to document management server and delivery server in-trays using a Web browser. It is not necessary to install ScanRouter Web Navigator on each client computer, since document operations can be performed using the Web browser on client computers.

5. Web Browser (client computer)

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

6. DeskTopBinder Lite/Professional (client computer)

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

Using DeskTopBinder Lite, documents in the delivery server can be viewed and managed. Using DeskTopBinder Professional, documents in the document management server and delivery server can be viewed and managed.

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

1. System Requirements

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

Important

- ScanRouter EX Professional will not operate correctly if installed on the following environments:
 - Computer used as a mail server or database
 - Primary or backup domain controller
- When this software is used in a network environment, if it is installed and used on client server type operating systems such as Windows 2000 Professional and Windows XP Professional, the use of which is not permitted, you may be in breach of the license to use the products of Microsoft Corporation.
- Be sure to use the correct versions of client software and management tools for your version of ScanRouter EX Professional. Older versions of management tools may not work properly and newly added advanced functions may not be usable.

Limitation

- Install software that supports your operating system in use.

Reference

See the *Management Guide* for client software that can connect to ScanRouter EX Professional.

For the latest restrictions, see the Readme file.

System Requirements of the Delivery Server

Computer

❖ Main unit

PC/AT compatible

❖ CPU

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

❖ Operating Systems

- Microsoft Windows 2000 Server + Service Pack 4 or later
- Microsoft Windows 2000 Professional + Service Pack 4 or later
- Microsoft Windows XP Professional + Service Pack 1 or later
- Microsoft Windows Server 2003 Standard Edition + Service Pack 1
- Microsoft Windows Server 2003 Enterprise Edition + Service Pack 1
- Microsoft Windows Server 2003 R2 Standard Edition
- Microsoft Windows Server 2003 R2 Enterprise Edition

⚠ Important

- DHCP is not supported. A specific IP address must be set.
- Install ScanRouter EX Professional in the stand-alone server. Do not install ScanRouter EX Professional on a domain controller.

💡 Limitation

- The operating systems listed above do not support operation using remote desktop connection (terminal services) or clustering.
- Virtual OS environment such as VMware is not supported.
- Computer names can contain alphanumeric characters and hyphens only.

📝 Note

- Multiprocessors are supported on the above operating systems.
- Install the latest version of Service Pack for the operating systems listed above.

❖ Web Server

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

💡 Limitation

- ScanRouter Web Navigator does not support Microsoft Internet Information Services 6.0. If the server operating system is Windows Server 2003 and this system is installed on the same server as ScanRouter Web Navigator, be sure to specify **[Apache]** in the dialog box for selecting a Web server that appears during installation of this system.

- If the operating system running on the delivery server is Windows 2000 Professional or Windows XP Professional, Microsoft Internet Information Services is not available for operation.

 **Note**

- Microsoft Internet Information Services 5.0 can be installed from the CD-ROM of Windows 2000 Server. Microsoft Internet Information Services 6.0 can be installed from the CD-ROM of Windows Server 2003.
- Apache HTTP Server is automatically installed by selecting **[Apache]** in the dialog box for selecting a Web server that appears during installation of this system.
- After installing Microsoft Internet Information Service (IIS), check the Service Pack described in p.6 "Operating Systems" is installed. If it is not installed, install the specified Service Pack.

❖ **RAM**

512 MB or more recommended (256 MB minimum)

❖ **Hard Disk Space**

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

 **Limitation**

- In addition to the disk space for installation, reserve 500 MB or more to save documents. (Ensure you have enough free space on the target drive for saving documents as needed.)

❖ **Network Protocol**

TCP/IP protocol

❖ **Communication Port**

To use ScanRouter EX Professional, the following ports must be available.

- Port for HTTP (Default at installation: 8080(TCP))
Required to set a port number when ScanRouter EX Professional is installed.
- Port for HTTPS (Default at installation: 8443(TCP))
Required to set a port number when ScanRouter EX Professional is installed.
- Port required for other communications
"50304(UDP)", "50314(UDP)", "50324(UDP)", "50334(UDP)", "50344(UDP)", "50109(TCP)", "9100(TCP)", "50410(UDP)", "50420(UDP)", "50430(UDP)", "50440(UDP)", "50450(UDP)", "3670(TCP)", and "3671(TCP)".
- Port for DCOM

 **Important**

- The communication port used for ScanRouter System should not be used for the other applications on the same server computer.

 **Note**

- If there is a firewall between server and clients, set it to make the communication port available.

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

- ScanRouter InputOption (Ver.2.0.0.0 or later)
- ScanRouter Web Navigator (Ver.1.1.0.0 or later)
ScanRouter Web Navigator ConversionOption (Ver.1.1.0.0 or later)
- ScanRouter DocumentServer (Ver.2.0.1.0 or later)
- DeskTopBinder Professional (Ver.4.xxx or later)
- DeskTopBinder Lite (Ver.4.xxx or later)
- Desk Top Editor For Production (Ver.2.0.0.0 or later)

 **Note**

- ❑ ScanRouter Web Navigator ConversionOption is option products of ScanRouter Web Navigator respectively. You cannot connect those options to ScanRouter EX Professional independently.

❖ **Connecting to the delivery server and network devices**

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

 **Note**

- ❑ The delivery server can be connected with the network devices using IP over IEEE 1394.

 **Reference**

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

 **Important**

- ❑ Do not install ScanRouter EX Professional in a dial-up connection computer.

 **Limitation**

- ❑ The processing of some images sent to ScanRouter EX Professional may take time. These include grayscale images, color images, large images, and images with a resolution of 600 dpi or more. Processing takes a long time if the capture function is used continuously for many documents, or for multiple high-resolution documents. If you normally use such images, we recommend you increase the capacity of the CPU, memory, and hard disk of your computer.
- ❑ Use SR Manager version 3.2 or later to manage ScanRouter EX Professional (Ver.3.2.x).
- ❑ ScanRouter EX Professional cannot be installed on computers where SR Manager or Authentication Manager is separately installed.
- ❑ ScanRouter V2 Professional (Ver.2.xxx or earlier) cannot be installed on the same computer.

Available Authentication Methods

When ScanRouter EX Professional is installed, Authentication Management Service is also installed at the same time. Authentication Management Service allows you to manage settings related to User Authentication via ScanRouter EX Professional. Several authentication methods are available for User Authentication.

Authentication Management Service can be used in conjunction with other ScanRouter System server applications, allowing single point user authentication management across the whole ScanRouter System.

Authentication methods available for ScanRouter EX Professional and the environment required to use ScanRouter EX Professional are as follows:

❖ Basic Authentication

Requires no particular environment.

❖ Windows Authentication (NT compatible)

Requires one of the following environments:

The computer on which you want to install ScanRouter EX Professional must be a domain member.

- Windows NT domain
- Windows 2000 Active Directory domain (mixed mode, NT compatible access permission mode)
- Windows Server 2003 Active Directory domain (Windows 2000 mixed mode, Windows Server 2003 intermediate)

❖ Windows Authentication (native)

Requires one of the following environments.

The computer on which you want to install ScanRouter EX Professional must be a domain member.

- Windows 2000 Active Directory domain (native mode, access authorization mode for Windows 2000 only)
- Windows Server 2003 Active Directory domain (2000 native, Windows Server 2003)

❖ NDS Authentication

Requires a NetWare server environment.

Important

- The version corresponding to Novell eDirectory for NetWare is Ver.8.7.3 or later.

❖ LDAP Authentication

Requires an LDAP server environment.

Important

- The version corresponding to LDAP protocol is Ver.3 or later.

 **Note**

- Authentication Manager operates and manages Authentication Management Service.

 **Reference**

For details about operation and management of Authentication Management Service, see *Management Guide* and Authentication Manager Help.

Available Delivery Types and Required Environment

After installing ScanRouter EX Professional, start SR Manager and register destinations for sending data to the delivery server from the device. Setting a delivery method (delivery type) for each destination allows data received at that destination to then be delivered using one of several delivery methods. The table below lists the delivery types that are available and the environments they require.

Delivery type	Environment to be set
Mail Input (Input function)	Mail server
In-Tray Save	No particular environment is required
Save for Windows file	No particular environment is required
Save in Shared Network Folder	Create shared folders on a network computer or NetWare server
Send by SMTP mail	SMTP server  Reference p.14 "Mailing Environment"
Send by Notes R5 mail	Lotus Domino server  Reference p.14 "Mailing Environment"
Send by Exchange Mail	Exchange server
Save to Exchange Public Folder	 Reference p.14 "Mailing Environment" p.22 "Preparing a Linked Server"
Add as document	Servers of ScanRouter DocumentServer
Add to Web Document Management	Servers of ScanRouter Web Navigator
FTP Delivery	FTP server
Print	Add printer to the delivery server  Reference p.45 "Adding Printer"

Reference

For details about delivery types, see *Management Guide* or SR Manager Help.

For details about creating folders to save documents for the Save in Shared Network Folder feature, see *Management Guide*.

For information about printers and devices that support ScanRouter EX Professional, see the Readme file.

1

Upgrade Precautions

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

Important

- If you upgrade to ScanRouter EX Professional and inherit data, do not delete MSDE or SQL before the upgrade is complete.

Note

- Under Windows NT, if older versions of software are already installed, upgrade the operating system to Windows 2000 Server before installing ScanRouter EX Professional.

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

Destination and sender information, and document data saved in the in-tray can be inherited. So that a restoration can be performed if the installation fails, be sure to back this data up using ScanRouter V2 Professional (Ver.1.xxx, Ver.2.xxx) before starting work.

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

Note

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

❖ **Upgrade from ScanRouter V2 Lite to ScanRouter EX Professional**

Destination information, sender information, and document data saved in the in-tray can be inherited. So that a restoration can be performed if the installation fails, be sure to back these up using ScanRouter V2 Lite before starting work.

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

 **Note**

- If you do not want to inherit destination information, sender information, and document data saved in the in-tray, delete the setting data/content data during uninstallation of ScanRouter V2 Lite. Also, delete the “DR”, and “DRTmp” folders in the “RDCab” folder, and then install ScanRouter EX Professional.

❖ **Upgrade from ScanRouter to ScanRouter EX Professional**

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

- ① Download all ScanRouter documents in advance using client software.
- ② Back up the documents with ScanRouter.
- ③ Install ScanRouter EX Professional.
At this time, set a new data path for use in ScanRouter EX Professional.
- ④ Convert the Address Book, and then uninstall ScanRouter automatically.
- ⑤ Delete the data for ScanRouter if necessary.
See the manual for ScanRouter for how to delete the data.

❖ **Upgrade from ScanRouter Professional to ScanRouter EX Professional**

The Address Book and document data can be inherited.

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

Update Precautions

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

❖ Update Ver.3.2.0.0 up to Ver.3.2.2.0 to Ver.3.2.3.0 or later

ScanRouter EX Professional (Ver.3.2.3.0 or later) does not support creation of policy-controlled PDF documents.

If you want to keep the environment for creating policy-controlled PDF documents on your computer, you must install ScanRouter EX Professional (Ver.3.2.3.0 or later) directly over ScanRouter EX Professional (Ver.3.2.0.0 up to Ver.3.2.2.0) without uninstalling the earlier version.

Note

- For details about creating a PDF protection policy and the environment requirements, see the operating instructions that come with ScanRouter EX Professional (Ver.3.2.0.0 up to Ver.3.2.2.0).

Reinstallation Precautions

To reinstall a version of ScanRouter EX Professional that supports the Authentication Management Service and data inheriting, follow the procedure below:

- ① Use Authentication Manager to back up authentication information, or manually record the current settings.
- ② Set the data to be inherited, and then uninstall ScanRouter EX Professional.
- ③ Set which inherited data to make available, and then reinstall ScanRouter EX Professional.
- ④ Use Authentication Manager to restore the authentication information, or set it again manually.

Important

- If you do not perform this operation, the access right becomes invalid and data in the delivery server will be inaccessible.
- For Basic Authentication, we recommend you back up or restore the authentication information.
- Administrator settings other than those of Authentication Management Service are cleared and restored to their initial values. Set them again.

Mailing Environment

1

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

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

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

- SMTP mail
- Notes R5 mail
- Exchange mail

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

Set up the mail server in advance. For the delivery server to use mail, a mail environment must be set up and e-mail management software must be installed. The environment required for the delivery server differs depending on the type of mail used.

Limitation

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

Using SMTP Mail

❖ Mail Server

- To check undelivered notices, a POP / SMTP Server is required.

❖ Software required for the delivery server

No particular software is required.

Using Notes R5 Mail

❖ Mail Server

- Lotus Domino R5.x or later
- Lotus Domino R6 (Release 6.03 or later)
- Lotus Domino R6.5 (Release 6.50 or later)
- Lotus Domino R7

❖ Software required for the delivery server

- Lotus Notes R5 (Release 5.03 or later)
- Lotus Notes R6 (Release 6.03 or later)
- Lotus Notes R6.5 (Release 6.50 or later)
- Lotus Notes R7

1

Using Exchange Mail

❖ Mail Server

- Microsoft Exchange Server 2000/2003
- Microsoft Internet Information Services 5.0 or later

❖ Software required for the delivery server

- Internet Explorer 6.0 or later (If the delivery server is Windows 2000.)

Linked Server Environment

1

If you use a linked server with ScanRouter EX Professional, you can deliver documents to the following linked servers:

- Exchange Server
- NetWare Server

These linked servers must be set up before documents can be sent to them.

Database settings and a software installation must also be made on the delivery server. The environment required for the delivery server depends on the linked server to be used.

Exchange Server

To save documents to the specified public folder in Exchange server, the following software is required:

❖ **Linked Server**

- Microsoft Exchange Server 2000/2003
- Microsoft Internet Information Services 5.0 or later

⚠ **Important**

- After setting up Internet Information Services, use "Internet Information Services (IIS) Manager" to allow "WebDAV" of "Web service extension".

❖ **Software required for the delivery server**

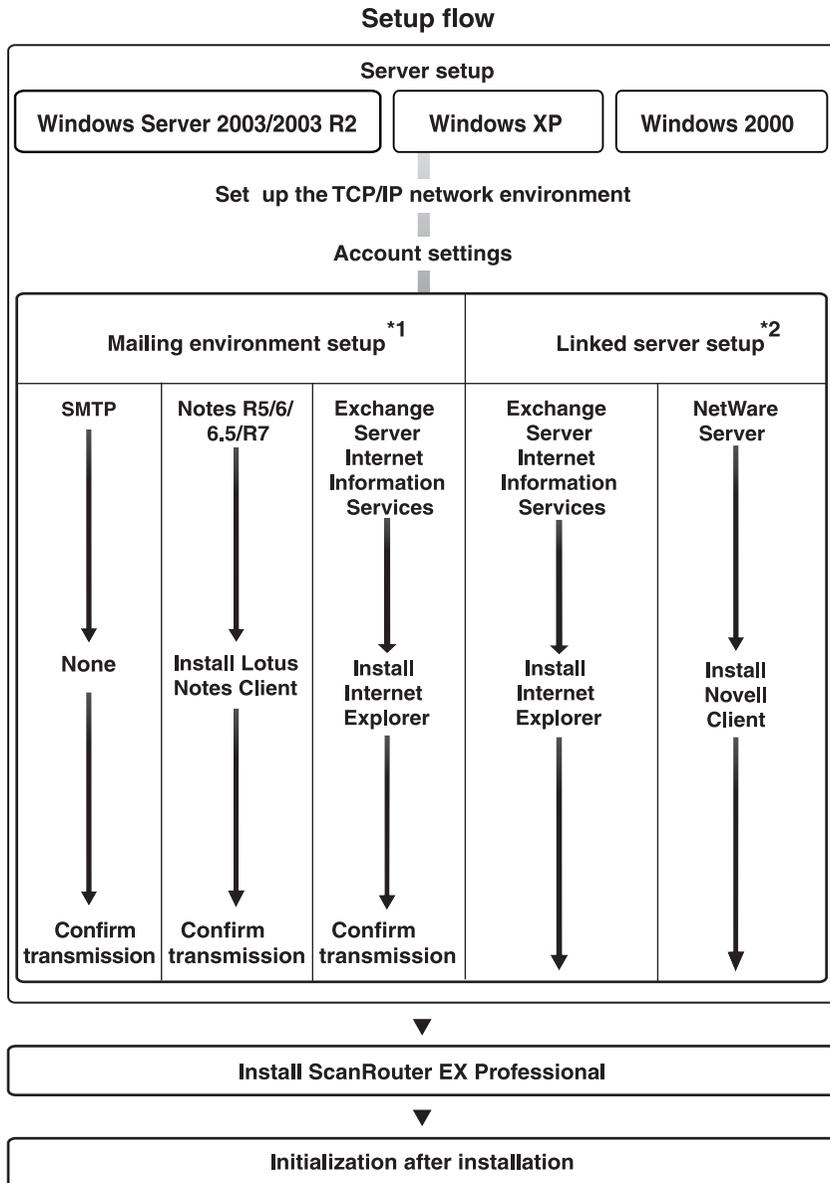
- Internet Explorer 6.0 or later (If the delivery server is Windows 2000.)

2. Server Setup

The following provides information on preparing a delivery server.

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

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



*1 To use e-mail delivery or e-mail notification

*2 To deliver documents to a linked server

BVR001S

Note

- Use Windows 2003 for the procedure described below. If another operating system is used, the procedure may be different.

Account Settings

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

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

Important

- When ScanRouter EX Professional is installed on the same computer as ScanRouter DocumentServer, the account for ScanRouter DocumentServer installation must be the same as that for launching ScanRouter EX Professional.
- A password must be set for the launching account.

Note

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

If You Belong to the Domain

Preparation

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

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

1 Log on as a member of the Administrators group.

2 Right-click [My Computer], and then click [Manage].

3 Select the [Groups] folder of [Local Users and Groups] from the console tree. Select [Administrators], and then click [Properties] on the [Action] menu.

4 Click [Add].

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

5 In the lower box, enter the name of the ScanRouter EX Professional Administrator and click [OK].

When selecting a name from the list, click [Advanced], enter a search criterion in the displayed dialog box, and then click [Find Now]. Select the name of the administrator from the search result and click [OK] to enter the name in the lower box on the [Select Users] dialog box.

6 Make sure that the launching account has been added to [Members], and then click [OK].

7 Close Computer Management.

If You Do Not Belong to the Domain

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

1 Log on as a member of the Administrators group.

2 Right-click [My Computer], and then click [Manage].

3 Select the [Users] folder of [Local Users and Groups] from the console tree, and then click [New User] on the [Action] menu.

The [New User] dialog box appears.

4 Click to clear the check box for [User must change password at next logon], and then enter the other items.

You must specify a password.

5 Select [Create], and then click [Close].

6 Select [Groups] of [Local Users and Groups] from the console tree.

7 Click [Administrators] from the window area in detailed information, and then click [Properties] on the [Action] menu.

8 Click [Add].

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

9 Select to highlight the launching account from the upper box, and then click [OK].

10 Make sure that the launching account has been added to [Members], and then click [OK].

11 Close Computer Management.

Mailing Environment Setup

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

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

Set up the mail server in advance. For the delivery server to use mail, a mail environment must be set up and e-mail management software must be installed. The environment required for the delivery server differs depending on the type of mail used.

Important

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

Limitation

- Use SMTP mail for Internet mail.

SMTP Mail

❖ Mail Server

- To check undelivered notices, a POP / SMTP Server is required.

❖ Software required for the delivery server

No particular software is required.

Notes R5 Mail

❖ Mail Server

- Lotus Domino R5.x or later
- Lotus Domino R6 (Release 6.03 or later)
- Lotus Domino R6.5 (Release 6.50 or later)
- Lotus Domino R7

❖ Software required for the delivery server

- Lotus Notes R5 (Release 5.03 or later)
- Lotus Notes R6 (Release 6.03 or later)
- Lotus Notes R6.5 (Release 6.50 or later)
- Lotus Notes R7

Important

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

Exchange Mail

❖ Mail Server

- Microsoft Exchange Server 2000/2003
- Microsoft Internet Information Services 5.0 or later

❖ Software required for the delivery server

- Internet Explorer 6.0 or later (If the delivery server is Windows 2000.)

Setting Up a Mail Client and Confirming Transmission

Log on to Windows using a launching account (see p.18 “Account Settings”), and then use each mail client to confirm mail transmission. After confirmation, delete the received mail.

Important

- Be sure to log on using a launching account.
- When using a delivery method that is send by e-mail, specify each e-mail account obtained for Scan-Router EX Professional.

Note

- Settings may differ depending on the type of e-mail program you want to use. Ask your mail administrator before making settings.

Preparing a Linked Server

ScanRouter EX Professional can be used to deliver documents to NetWare server and Exchange server.

Set up those linked servers in advance to send documents to them.

For the delivery server, database settings and software installation are also required. The environment required for the delivery server depends on the linked server to be used.

Save to Exchange Public Folder

To deliver documents to the specified public folder in Exchange server, the following software must be installed:

❖ Linked Server

- Microsoft Exchange Server 2000/2003
- Microsoft Internet Information Services 5.0 or later

❗ Important

- After setting up Internet Information Services, use "Internet Information Services (IIS) Manager" to allow "WebDAV" of "Web service extension".

❖ Software required for the delivery server

- Internet Explorer 6.0 or later (If the delivery server is Windows 2000.)

Save in Shared Network Folder (save in NetWare Server)

To deliver documents to NetWare server in Save in Shared Network Folder, the following software must be installed:

❖ Linked Server

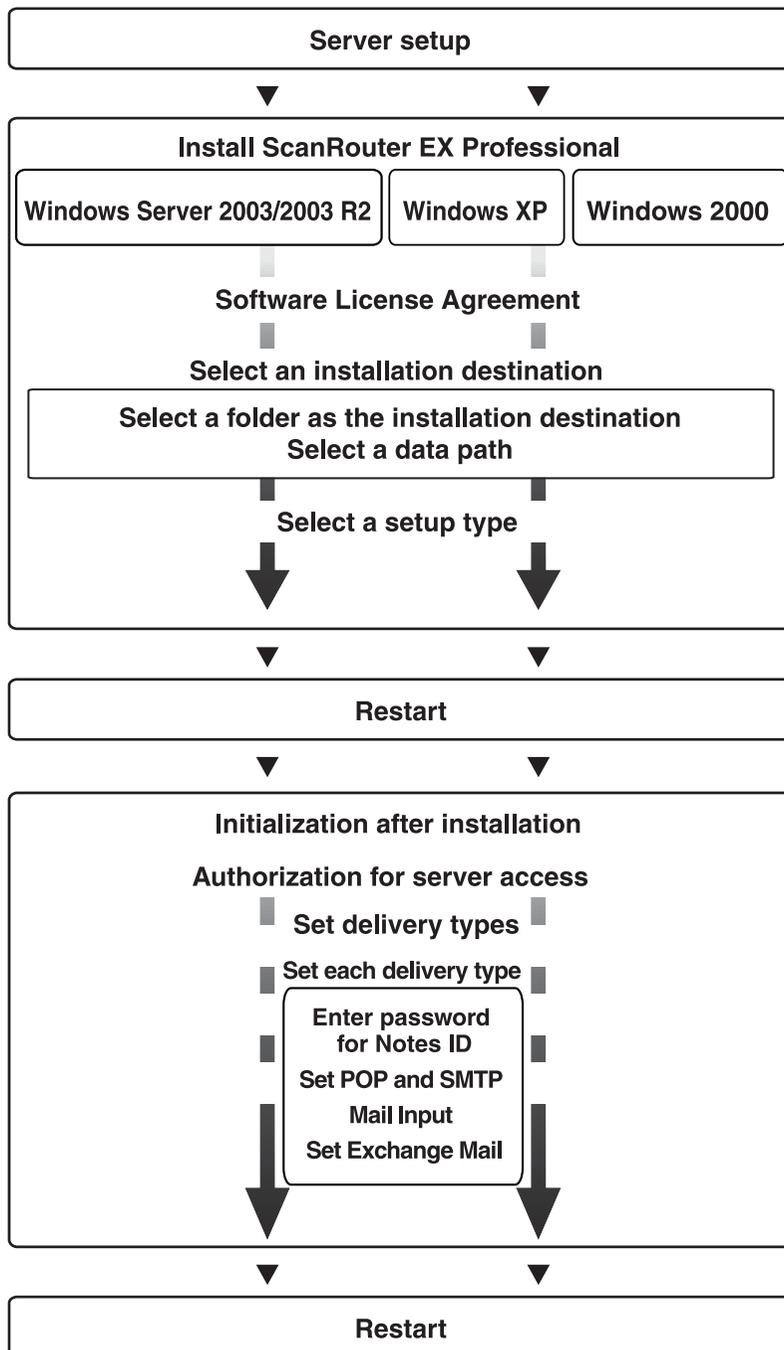
- NetWare 5.x/6.x

❖ Client software required for the delivery server

- Novell Client 4.83 for Windows NT/2000/XP/2003

3. ScanRouter EX Professional Setup

Use the flowchart below to set up ScanRouter EX Professional.



BVR002S

Installing ScanRouter EX Professional

Install ScanRouter EX Professional according to the procedure below.

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

Important

- After installation is complete, be sure to restart the computer. If any programs such as SR Manager is launched before restarting the computer, it does not work normally. In this case, reinstall ScanRouter Professional.
- If you need the document data or Address Book when ScanRouter or ScanRouter Professional is installed, back them up.
- To install ScanRouter EX Professional, be sure to log on to Windows with the launching account which was set in account settings. See p.18 “Account Settings”.

Limitation

- You cannot install ScanRouter EX Professional in a computer in which SR Manager or Authentication Manager is installed.

Note

- If anti-virus software is running on the target computer, cancel real-time virus scanning before installing ScanRouter EX Professional.

- 1** Insert the CD-ROM for this product into the CD-ROM drive.

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

- 2** Click [ScanRouter EX Professional].

- 3** If ScanRouter or ScanRouter Professional is installed, or data of ScanRouter V2 Professional, ScanRouter V2 Lite may be imported, select whether the data is used.

Reference

For how to upgrade from other products, see p.11 “Upgrade Precautions”.

The installation start confirmation dialog box is displayed.

- 4** Click [Yes].

Note

- If the operation system is Windows Server 2003, a dialog box is displayed to check if a password is set for the currently logged-on user.

- 5** Click [Next] in the displayed dialog box.

- 6** Confirm the Software License Agreement, and then click [Yes].

- 7** Enter customer information, and then click [Next].

The dialog box for choosing a destination appears.

8 Specify the installation destination.**Limitation**

- If DeskTopBinder or ScanRouter DocumentServer, etc. is already installed, you cannot specify the installation destination. The destination will be a folder common to them.

1 Enter a folder as the installation destination, and then click [Next].**Note**

- You cannot specify the following locations:
 - destinations within system folders
 - destinations in the Root directory
 - destinations in removable media (such as MO disks)

2 Enter a data path, and then click [Next].

You can specify a location for saving data used in the ScanRouter System

Note

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

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

You can select the method of starting the delivery server.

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

Limitation

- The method of starting cannot be changed after installation. To change the method, reinstall ScanRouter EX Professional.

10 Select the language, and then click [Next]. The language selected here is used for the SR Manager, Authentication Manager, Manual Help, and OCR process screens.**Note**

- If another ScanRouter System server product is already installed before ScanRouter EX Professional is installed and the settings for Web server and port number are complete, you do not need to perform steps **11** and **12**. Proceed to step **13**. Common Web server and port number with another ScanRouter System server product installed on the same computer are used.

11 Select a Web server to be used, and then click **[Next]**.

 **Limitation**

- To specify "Internet Information Services" as the Web server, Internet Information Services must be installed in the computer on which ScanRouter EX Professional is to be installed.

 **Note**

- When **[Apache]** is selected as the Web server, Apache HTTP Server is also installed with ScanRouter EX Professional.

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

Specify the HTTP and HTTPS port numbers.

 **Important**

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

13 Confirm the settings, and then click **[Next]**.

ScanRouter EX Professional is installed. Click **[Finish]** in the installation completion dialog box.

 **Note**

- After clicking **[Next]**, installation of ScanRouter EX Professional may continue for a brief time.
- If ScanRouter is installed, a message to uninstall it appears before completing the installation.

- If Microsoft Windows XP Service Pack 2 is running on the computer, where ScanRouter EX Professional will be installed, and a firewall is enabled, the "Windows Security Alert" dialog box appears before the installation finishes. When the "Do you want to keep blocking this program?" message appears, click **[Keep Blocking]**.

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

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

15 Click **[OK]**.

The computer restarts. When you log on to Windows using the account for launching, the dialog box to complete ScanRouter EX Professional settings appears. For details about the setup instructions, see p.27 "Initialization After Restarting".

 **Important**

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

Initialization After Restarting

Note

- After restating, it takes time before each setting page appears.

1 Make Authentication settings.

- ① Enter the password for launching ScanRouter EX Professional in the [Password:] and [Confirm Password:] boxes.

Reference

For details about ScanRouter EX Professional launching account settings, see p.18 "Account Settings".

- ② Click [OK].

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

When all setups are completed, a message prompting you to restart the computer appears so that the settings can be applied appears.

2 The [Authentication Method Settings] page for Authentication Management Service appears.

Enter [User name:], [Password:], and [Domain name:] of the Authentication Service Administrator.

After entering, click [OK].

Note

- If another ScanRouter System server application is installed and Authentication Management Service settings are completed, the [Login] dialog box for Authentication Management Service in this step appears if either of the following conditions are satisfied (if not, proceed to step **3**):

- The built-in user is not included in Authentication Service Manager

- The built-in user password is set

- [Domain name:] entry is not required depending on the type of authentication method.

- When logging in as the built-in user (Admin), [Domain name:] entry is not required.

3 The [Authentication Method Settings] dialog box for selecting an authentication method appears.

Select a method used for user authentication of ScanRouter EX Professional from the followings, and then click [OK].

- Basic Authentication

With Basic Authentication, you can add and manage unique authentication users. You can establish a user authentication environment without having a Windows or a Notes domain or a NetWare or LDAP server.

- Windows Authentication (NT compatible)

Using the user account such as the Windows NT domain, Windows 2000 Active Directory domain (mixed mode / NT compatible access authorization mode), Windows Server 2003 Active Directory domain (Windows 2000 mixed mode, Windows Server 2003 intermediate) established on the network, establish a user authentication environment.

- **Windows Authentication (native)**
Using the user account of the Windows 2000 Active Directory domain (native mode / access authorization mode only for Windows 2000) and Windows Server 2003 Active Directory domain (2000 native, Windows Server 2003) established on the network, establish a user authentication environment.
In **[Domain name:]**, **[Domain user name:]**, and **[Password:]**, enter the domain name and the information of accessible users.
- **NDS Authentication**
Using the user account of the NetWare server established on the network, establish a user authentication environment. Enter **[Login name:]** and **[Password:]** to access the NetWare server, click **[General Settings]**, and then enter the NetWare server's details.

Important

- When entering in **[Login name:]**, be sure to do the following:
 - Retain the right to view information of users/groups who belong to the NetWare server specified in **[Base DN:]** in the **[NDS General Settings]** dialog box.
 - Specify the complete DN in the format of "CN=ABC, OU=1G,OU=Center,O=Division,C=EN", etc.
- If you fail to perform authentication, confirm settings such as **[Login name:]**, **[Password:]**, **[Server Name:]**, and **[Port no.:]**

Reference

For details about the format of login names, see p.60 "Specifying the Range for the Login User Names (NDS and LDAP Authentication)".

- **LDAP Authentication**
Using the user account of the LDAP server on the network, establish a user authentication environment. Enter information of a user with access rights in **[Login name:]** and **[Password:]** to access the LDAP server, click **[General Settings]**, and then enter the detailed information of the LDAP server.
The supported version of LDAP protocol is Version 3 or later.

Important

- When entering in **[Login name:]**, be sure to do the following:
 - Retain the right to view information of users/groups who belong to the LDAP server specified in **[Base DN:]** in the **[LDAP General Settings]** dialog box.
 - Specify the complete DN in the format of "CN=ABC, OU=1G,OU=Center,O=Division,C=EN", etc.
- If you fail to perform authentication, confirm settings such as **[Login name:]**, **[Password:]**, **[Server Name:]**, and **[Port no.:]**

Reference

For details about the format of login names, see p.60 "Specifying the Range for the Login User Names (NDS and LDAP Authentication)".

 **Note**

- After setup, use Authentication Manager to make detailed settings for the selected authentication method.
- If necessary, use SR Manager to change the authentication method after setup.
- For the Basic Authentication, the user account recorded in Authentication Manager is used. For other authentication methods, the user account recorded in each domain is used for the authentication.
- If the built-in user password is already set, the setting in step 4 is not required. Proceed to step 5.

4 In the **[Set Built-in User Password]** dialog box, enter the password of the built-in user, and then click **[OK]**.

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

5 Select the delivery type to be used, and then click **[OK]**.**6** Make settings for each selected delivery type.

- Send by Notes R5 mail
If you select "Send by Notes R5 mail", enter the Notes ID password you used to install Notes, select whether or not to monitor the mail box, and then make the mail transfer settings.

 **Important**

- Do not change the Notes ID.

 **Note**

- If you selected the **[Monitor the mail box.]** check box, when an error occurs while sending by Notes R5 mail, the document is saved in the undelivered data tray, the error log is saved, and the administrator is notified of the error by mail.

- Deliver to Notes R5 Database
If you select "Deliver to Notes R5 Database", enter the Notes ID password you use to install Notes.

 **Important**

- Do not change the Notes ID.

- Send by SMTP mail
When SMTP mail is selected, set up mail delivery. Follow the instructions in the dialog box, and set the following for POP and SMTP:
 - Host name of the SMTP and POP servers
 - Prepared mail account and password for ScanRouter EX Professional
 - Setting mail box monitoring

 **Note**

- POP and SMTP authentication can be set in advance.
- If you selected the **[Monitor the mail box.]** check box, when an error occurs while sending by SMTP mail, the document is saved in the undelivered data tray, the error log is saved, and the administrator is notified of the error by mail.

- Mail Input
If you select Mail Input, make settings for related mail accounts. Follows the instruction in the dialog box to select POP. Enter the mail account and password specified for ScanRouter EX Professional.

 **Reference**

For details about mail delivery, see *Management Guide* or SR Manager Help.

- **Send by Exchange Mail**
If you select Send by Exchange Mail, make settings for related mail accounts. Follow the instructions in the dialog box to set the server name, account information, and whether or not to monitor the mail box. Enter the mail account and password specified for ScanRouter EX Professional.

 **Note**

- If you selected the **[Monitor the mail box.]** check box, when an error occurs while sending by Exchange mail, the document is saved in the undelivered data tray, the error log is saved, and the administrator is notified of the error by mail.
- **Save to Exchange Public Folder**
If you select Save to Exchange Public Folder, make settings for Exchange server accounts. Follow the instructions on the dialog box to set the server name and account information. Enter the account and password specified for ScanRouter EX Professional.

7 A message regarding activation is displayed. Click **[OK]**.

 **Note**

- This message is not displayed for an overwrite installation.

8 When the completion message is displayed, click **[Finish]**.

9 Restart the computer.

 **Important**

- When installation is complete, be sure to restart the computer. If program such as SR Manager launches before the computer has restarted, it may not work normally. If this happens, reinstall ScanRouter EX Professional.
- If installation of ScanRouter EX Professional fails, uninstall it after restarting the computer. Reinstallation will fail if ScanRouter EX Professional is uninstalled before you restart the computer.

 **Note**

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

 **Reference**

p.42 "Basic Settings"

p.45 "Adding Printer"

p.47 "SSL Settings"

10 Select the **[Start]** button, point to **[All Programs]**, and then click **[Activation Tool]** from the **[ScanRouter EX Professional]** folder of **[ScanRouter System]**.

- If the computer can connect to the Internet, set the Activation Method to **[Internet]**, and use the displayed page to register a license.
- If you are using a computer that cannot connect to the Internet, connect to the Internet using a different computer and acquire a License Code. Then set the Activation Method to **[Enter License Code]**, and register the License Code you received.

 **Important**

- If the license is not obtained, ScanRouter EX Professional will become unavailable after 90 days from the installation.

 **Reference**

For details about obtaining the license, see *Manual for Software Activation*.

Settings for Microsoft Windows XP Service Pack 2

Several settings are required if Microsoft Windows XP Service Pack 2 is running on the computer (delivery server), where ScanRouter EX Professional will be installed, and a firewall is enabled. Follow the procedure to make these settings.

 **Note**

- If ScanRouter EX Professional is installed on a computer where Microsoft Windows XP Service Pack 2 is running, the “Windows Security Alert” dialog box appears. When the “Do you want to keep blocking this program?” message appears, click **[Keep Blocking]** to continue the setup operation.

3

- 1** On the **[Start]** menu, click **[Control Panel]**.
- 2** Click **[Windows Firewall]**.
- 3** Click the **[Exceptions]** tab.
- 4** Click **[Add Port]** and **[Add Programs]** to add required ports and programs.
 - **Required ports**
UDP50410
 - **Required programs**

Program	Folders where the program locates	Port used by the program	Purposes
FtpSerDr.exe	ScanRouter EX Professional installation folder	TCP 3671	Delivery from network devices
SrScanDr.exe		TCP 3670	

 **Note**

- When accessing the delivery server using ScanRouter Web Navigator, install the following ports and programs.

- **Required ports**

Port	Purposes
HTTP port which was set during installation of the delivery server	Connects to the Web service
HTTPS port which was set during installation of the delivery server	This settings is not required when connecting SSL communication of Web service is not used.

- **Required programs**

Program	Folders where the program locates	Port used by the program	Purposes
discProxyService.exe	ScanRouter EX Professional installation directory “\Program Files\Common Files\RDH Shared2\discProxy”	TCP 50109	Connects to Web service
		UDP 1900	

Installing Managers in a Client Computer

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

Limitation

- If SR Manager and Authentication Management Service are already installed, the **[Modify, Repair, or Remove program]** dialog box will appear. To proceed with installation, select **[Repair]**.

System Requirements

❖ CPU

Pentium II 266 MHz or faster recommended

❖ Operating Systems

- Microsoft Windows XP Professional + Service Pack 1 or later
- Microsoft Windows XP Home Edition + Service Pack 1 or later
- Microsoft Windows 2000 Server + Service Pack 4 or later
- Microsoft Windows 2000 Professional + Service Pack 4 or later
- Microsoft Windows Server 2003 Standard Edition + Service Pack 1
- Microsoft Windows Server 2003 Professional Edition + Service Pack 1
- Microsoft Windows Server 2003 R2 Standard Edition
- Microsoft Windows Server 2003 R2 Professional Edition

Note

- Install the Service Pack that supports your operating systems in use.

❖ RAM

256 MB or more recommended (128 MB minimum)

❖ Hard Disk Space

At least 10 MB of disk space is required for installation.

Installing SR Manager

Important

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

Limitation

- You cannot install SR Manager separately in a delivery server where ScanRouter EX Professional is already installed.

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

2 Click **[SR Manager]** of ScanRouter EX Professional.

A confirmation message about starting installation appears.

3 Click **[Yes]**.

4 Click **[Next]** in the displayed dialog box.

5 Confirm the Software License Agreement, and then click **[Yes]**.

6 Enter user information, and then click **[Next]**.

7 Enter a folder as the installation destination, and then click **[Next]**.

 **Limitation**

- If any products of ScanRouter System have already been installed, you cannot specify the installation destination. The destination will be a folder common to them. The **[Select Install Location]** dialog box does not appear.

 **Note**

- You cannot specify the following destinations:
 - Within a system folder
 - Root directory
 - Within removal media such as the MO disk

8 Confirm the settings, and then click **[Next]**.

Installation of SR Manager starts.

9 Click **[Finish]**.

10 Restart the computer.

 **Note**

- If Microsoft Windows XP Service Pack 2 is running on the computer, where SR Manager will be installed, and a firewall is enabled, the “Windows Security Alert” dialog box appears before the installation finishes. When the “Do you want to keep blocking this program?” message appears, click **[Keep Blocking]**.

Installing Authentication Manager

 **Limitation**

- You cannot install Authentication Manager separately in a delivery server where ScanRouter EX Professional is already installed.

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

2 Click **[Authentication Manager]**.

A confirmation message about starting the installation appears.

3 Click **[Yes]**.

4 Click **[Next]** in the displayed dialog box.

5 Confirm the Software License Agreement, and then click **[Yes]**.

The installation destination selection dialog box appears.

6 Enter user information, and then click **[Next]**.

7 Enter a folder as the installation destination, and then click **[Next]**.

Starts to install Authentication Manager.

 **Limitation**

- If any product of ScanRouter System have already been installed, you cannot specify the installation destination. The destination will be a folder common to them. The installation destination selection dialog box does not appear.

 **Note**

- The following destinations cannot be specified:
 - Within a system folder
 - Root directory
 - Within removal media

8 Confirm the settings, and then click **[Next]**.

Installation of Authentication Manager starts.

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

- If Microsoft Windows XP Service Pack 2 is running on the computer, where Authentication Manager will be installed, and a firewall is enabled, the “Windows Security Alert” dialog box appears before the installation finishes. When the “Do you want to keep blocking this program?” message appears, click **[Keep Blocking]**.

Uninstalling ScanRouter EX Professional

This section explains how to uninstall ScanRouter EX Professional.

Important

- Before uninstallation, be sure to back up the system and other information.
- Before uninstallation, delete all network devices in the I/O device settings.
- To uninstall ScanRouter EX Professional, be sure to log on to Windows using the launching account p.18 "Account Settings".

1 Suspend the delivery server using SR Manager.

2 Close SR Manager.

3 Select ScanRouter EX Professional in [Add or Remove Programs] in Control Panel, and then click [Remove].

A confirmation dialog box appears.

4 Click [OK].

The driver using "DS Print Service Port" as a port will be deleted. If you do not want to delete the driver, for example because you are using it with other products, select [Cancel]. Change the driver to use a port other than "DS Print Service Port", and re-run the uninstaller. This confirmation message is not displayed when either ScanRouter DocumentServer or ScanRouter Web Navigator is installed since "DS Print Service Port" is not deleted.

5 Select whether or not settings for destinations etc. are retained.

6 Select whether or not settings for the authentication method etc. are retained.

ScanRouter EX Professional is uninstalled.

Note

- If you are asked to delete a file that may be shared with other programs, click [No].
- If a locked file is displayed, click [Remove after Restart].
- When ScanRouter EX Professional is uninstalled, if another ScanRouter System application is installed on the same computer, the message in step **6** does not appear. Proceed to step **7**.

7 Click [Finish].

Important

- If the setting information is not kept in step **5** and **6**, document data, destination setting, authentication method, and others are all deleted and cannot be used with the next installation.
- If only ScanRouter EX Professional is installed in the computer, you can delete the "RDCab" folder (or the folder specified as the data path). See p.24 "Installing ScanRouter EX Professional". If the data path is shared with DeskTopBinder or ScanRouter DocumentServer and so on, do not delete the "RDCab" folder (or the folder specified as the data path). If you want to delete the ScanRouter EX Professional data, delete only the "DR", "CSP" and "DRTmp" folders in the "RDCab" folder (or the folder specified as the data path).

Uninstalling Managers

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

Important

- If SR Manager or Authentication Manager is installed together with ScanRouter EX Professional, each Manager cannot be uninstalled separately.
- To uninstall ScanRouter EX Professional, be sure to log on to Windows using the launching account p.18 “Account Settings”.

Uninstalling SR Manager

1 Close SR Manager.

2 Click **[SR Manager]** in **[Add or Remove Programs]** in Control Panel, and then click **[Remove]**.

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

3 Click **[Next]**.

SR Manager is uninstalled and a dialog box appears informing you that the maintenance is completed.

Note

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

4 Click **[Finish]**.

Uninstalling Authentication Manager

1 Close Authentication Manager.

2 Click **[Authentication Manager]** in **[Add or Remove Programs]** in Control Panel, and then click **[Remove]**.

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

3 Click **[Next]**.

Authentication Manager is uninstalled and a dialog box appears informing you that the maintenance is completed.

Note

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

4 Click **[Finish]**.

4. After Installation

Device Setup

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

Start Menu

On the **[Start]** menu, point to **[All Programs]**, and then point to the **[ScanRouter System]** folder. The items below appear:

❖ **ScanRouter EX Professional**

When this is selected, the following menu items appear:

- **Activation Tool**
Use this when you want to obtain the ScanRouter EX Professional license.
- **Compatible Device List**
- **Introduction Guide**
Displays the Introduction Guide. This explains delivery basics.
- **Management Guide**
Displays the Management Guide. This explains ScanRouter EX Professional procedures.
- **Manual for Software Activation**
Displays Manual for Software Activation. This explains methods for obtaining the ScanRouter EX Professional license.
- **Operating Instructions Capture Function**
Displays the Operating Instructions <Capture Function>. This explains the capture function of delivery server.

- **Operating Instructions Device Browser Delivery Function**
Displays the operating instructions <Device Browser Delivery Function>, which explain delivery using Device Browser.
- **Readme**
Displays latest information, important matters, and precautions of the application.
- **Setup Guide**
Displays the Setup Guide. This explains delivery server setup.
- **SR Manager**
Starts SR Manager.
- **Start Delivery Services**
Starts Delivery Services.
- **Suspend Delivery Services**
Suspends Delivery Services.

❖ **Authentication Manager**

Starts Authentication Manager.

❖ **Environment Setting Tool**

Use this to change the computer name of the delivery server, domain environment, password of the installation account, or IP address.

🔍 **Reference**

For details about Environment Setting Tool, see the Readme file.

❖ **Readme (Environment Setting Tool)**

Displays information about how to use the Environment Setting Tool.

❖ **SSL Settings**

Starts the setting tool for operating ScanRouter System using SSL.

 **Reference**

p.47 “SSL Settings”

 **Note**

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

If only SR Manager is installed in a client computer, the following menu appears:

❖ **ScanRouter EX Professional**

- Management Guide
- Operating Instructions Capture Function
- Operating Instructions Device Browser Delivery Function
- Readme
- SR Manager

If only Authentication Manager is installed in a client computer, only “Authentication Manager” appears on the menu.

Setting Authentication Management Service

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

Basic Settings

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

Important

If the authentication method is Windows Authentication (NT compatible) or Windows Authentication (native), operation 2 in step 1 is not required because login is performed using a Windows login account when SR Manager starts. If the user of ScanRouter EX Professional Administrator is the same as the user logged into, you can start SR Manager in manager mode without logging in. If the user of the Windows login account differs from that of ScanRouter EX Professional Administrator, SR Manager starts in user mode. Change the user from **[Login as another User]** on the **[Server]** menu.

1 Start SR Manager.

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

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

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

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

2 Set the administrator.

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

- 1 Click **[Set Administrator]** on the **[Server]** menu.

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

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

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

- 3 Click **[OK]**.

The administrator has been set.

3 Add a user as a destination.

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

Note

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

Limitation

- The combined number of users and groups is limited to 2,000.

- 1 Open the **[Delivery Server]** tree on the left side of the window, and then select **[Main Destination List]** in **[Delivery Table]**.

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

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

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

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

- ④ Enter a destination ID.

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

- ⑤ Set a delivery type.

- ① To deliver documents to the in-tray, click **[Deliver to In-Tray]**.

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

- ② Select the delivery type in the **[Delivery type selection:]** list, and then click **[Add]**.

- In-Tray save
Documents can be saved to the In-Tray on the delivery server. The In-Tray is created if **[In-Tray save]** is selected for destinations (users) in SR Manager.
- Save as Windows file
Delivered documents are saved in a specified location as a file. Multiple locations can be specified.

🔹 Limitation

- Only a folder that can be confirmed by the delivery server can be specified as the save destination.
- Save in Shared Network Folder
Documents are saved as files in a specified folder on the network.

- Send by SMTP mail
Documents are delivered by SMTP mail. You can attach documents and document links to e-mail for delivery and notify clients of documents sent to the in-tray.
- Send by Notes R5 mail
Documents are delivered by Notes R5/6/6.5/R7 mail. You can attach documents and document links to e-mail for delivery and notify clients of documents sent to the in-tray.
- Send by Exchange Mail
Documents are delivered by Exchange mail. You can attach documents and document links to e-mail for delivery and notify clients of documents sent to the in-tray.
- Add as document
Documents are delivered for adding to the document management server of ScanRouter DocumentServer.
- Add to Web Document Management
Documents are delivered for adding to the document management server of a Personal Cabinet folder on ScanRouter Web Navigator.
- FTP Delivery
Documents are delivered to folders in FTP server, and then registered.
- Save to Exchange Public Folder
Documents are delivered to public folders in the Exchange server, and then registered.
- Print (Delivery)
Documents can be sent to a designated printer and printed using specified conditions.

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

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

- 7 Click [OK].
- 8 The user is added to [Main Destination List].
- 9 Repeat the operation from Step 2 to add another user.

- 4 Add the registered destination to the destination list.

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

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

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

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

The [Add Destination] dialog box appears.

- 3 Select all destinations to be added in [Main Destination List], and then click [Add].

- 4 Click [OK].

These destinations are added to the destination list.

- 5 Set up a device if necessary.

- 1 Open the [Delivery Server] tree on the left side of the window, and then click [I/O Device List:]. The menu appears on the menu bar.

- 2 Select [Add] on the [Operations] menu.

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

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

Note

- You can click [Browse] to select a device.
- If a network device that supports the authentication function is used, the [I/O Device Login] page appears. Enter the user name and password of the machine administrator, and then click [OK].

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

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

- 6 Start the delivery server.

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

- 1 On the [Server] menu, click [Resume Services].

The delivery server starts.

Adding Printer

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

Important

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

Limitation

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

Note

- Install the latest version of the printer driver.

The following procedure to add a printer is for Windows 2003. The procedure may differ depending on the operating systems.

1 Click **[Start]** and select **[Printers and Faxes]**.

The **[Printers and Faxes]** dialog box appears.

2 Double-click the **[Add Printer]** icon.

The Add Printer wizard starts.

3 Click **[Next]**.

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

4 Select **[Local printer attached to this computer]** to clear the **[Automatically detect and install my Plug and Play printer]** check box. Then click **[Next]**.

The **[Select a Printer Port]** dialog box appears.

5 Select **[Create a new port]**, specify **[Type of port]**.

- PCL or RPCS printer
If the printer to be added is PCL or RPCS, specify **[DS Print Service Port]** from the list.
- Other printers
For other printers, specify port types other than **[DS Print Service Port]**.

6 Click **[Next]**.

The **[Add Printer Port]** dialog box appears.

7 Click **[Display selectable printer(s)]** button. Select a displayed printer in the **[Selectable Printers]** list or specify a printer directly with the IP address, and then click **[OK]**.

Note

- Only the printers in the same segment on the network are displayed in the list. When adding a printer other than those in the list, specify it directly with the IP address.

8 Select a printer driver to be added, and then click **[Next]**.

9 Enter the name of the printer to be added, and then click **[Next]**.

10 Select whether you share the printer or not, and then click **[Next]**.

11 Enter the location of the printer and a comment and click **[Next]**.

12 Select whether you print a test page or not, and then click **[Next]**.

The dialog box about completing the Add Printer wizard appears.

13 Click **[Finish]**.

The Installation of the printer driver starts.

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

The printer is added to the **[Printers and Faxes]** dialog box.

Precautions When RPCS Printer is Added

4

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

- The printer name cannot be changed after the printer was added.
- Adding one printer under several different names is unavailable. One port must always be assigned to one printer (1:1).

❖ **When deleting a printer and port**

When deleting a printer, select and delete it in the **[Printers and Faxes]** dialog box.

SSL Settings

For ScanRouter System, SSL communication is available. To use SSL communication, the following settings are required depending on the method:

❖ Using SSL communication among ScanRouter EX Professional / Enterprise, ScanRouter Web Navigator, and ScanRouter DocumentServer

To use SSL communication between servers, you must first make the necessary settings.

See p.48 “SSL Settings for Servers”.

📍 Limitation

- ❑ To communicate with ScanRouter Web Navigator server, specific settings for the server are required in addition to the settings described on p.48 “SSL Settings for Servers”.

🔍 Reference

For details about settings, see *ScanRouter Web Navigator Setup Guide*.

📝 Note

- ❑ For ScanRouter EX Professional / Enterprise, when ScanRouter Web Navigator is used, Web URL links are available for delivery sent by e-mail. To use Web URL links when using SSL communication between ScanRouter Web Navigator and ScanRouter EX Professional / Enterprise, select **[Use SSL:]** on **[Web Settings]** of SR Manager.

❖ Using SSL communication between a client and a delivery server

To use SSL between a client (individually installed SR Manager or Authentication Manager) and a delivery server, you must first make the settings described below.

After completing SSL settings for a delivery server, make settings if necessary.

See p.48 “SSL Settings for Servers”.

See p.53 “SSL Settings for a Client Computer”.

❖ Using SSL communication between a device and a delivery server

To use SSL between a network device and a delivery server, you must first make the settings described below.

After completing SSL settings for a delivery server, make settings if necessary.

See p.48 “SSL Settings for Servers”.

See p.54 “SSL Setting Communication between a Device and a Server”.

⚠ Important

- ❑ When importing certificates or setting the SSL method, be sure to restart the computer after all settings are completed.

📝 Note

- ❑ To make SSL settings for servers, you can use a tool named “SSL Settings”. “SSL Settings” is installed when one of the following software systems is installed:
 - ScanRouter EX Professional (Ver3.xx)
 - ScanRouter EX Enterprise (Ver2.xx)
 - ScanRouter Web Navigator (Ver1.xx)

- Document Management Connection Program (packaged with ScanRouter Web Navigator (Ver1.xx))
- Delivery Connection Program (packaged with ScanRouter Web Navigator (Ver1.xx))
- ScanRouter Web Navigator ConversionOption (Ver.1.xxx)
- ScanRouter DocumentServer (Ver.2.xxx)

 **Reference**

For settings when using LDAP authentication, confirm "Readme".

4

SSL Settings for Servers

Follow the procedure below to make settings for using SSL communication between servers.

- ① p.48 "Setting CA server"
- ② p.48 "Issuing a certificate"
- ③ p.50 "Importing certificate"
- ④ p.50 "Setting the SSL method"
- ⑤ p.52 "Setting Internet Information Service Manager"

 **Important**

- When importing certificates or setting the SSL method, be sure to restart the computer after all settings are completed.

The following describes the procedure for Windows 2003 Server. Procedures may differ depending on the operating system you are using.

Setting CA server

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

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

Issuing a certificate

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

Certificates for a CA server and another server (for one unit) are issued at first issue. If you want more than one unit of other servers to utilize SSL communication, separately issue another certificate following the procedure described in p.49 "Issuing Certificates (at second issue or later)".

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

 **Issuing Certificates (at first issue)**

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

 **Note**

- At second issue or later, only the certificate for SSL communication server is issued.

- ① On the **[Start]** menu, point to **[All Programs]**, point to **[ScanRouter System]**, and then click **[SSL Settings]**.

The dialog box to select options of SSL settings appears.

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

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

- ③ Enter area information. Enter **[Country:]**, **[Area:]**, and **[City:]**, and then click **[Next]**.

🔔 Limitation

- [Country:]** should be filled in with 2 character strings.

- ④ Enter company information. Enter the company name and organization name, and then click **[Next]**.

- ⑤ Enter network information. Enter the server name and e-mail address, and then click **[Next]**.

- Server Name:
Enter a server name at random.
- Email Address:
Enter an e-mail address. It appears when the certificate is displayed in a Web browser.

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

- ⑥ Enter area information. Enter **[Country:]**, **[Area:]**, and **[City:]**, and then click **[Next]**.

🔔 Limitation

- [Country:]** should be filled in with 2 character strings.

- ⑦ Enter company information. Enter a company name and an organization name, and then click **[Next]**.

- ⑧ Enter network information. Enter the server name and e-mail address, and then click **[Next]**.

- Server Name:
Enter a server name that will import the server name certificate in the format of a host name with a domain name. (e.g., www.rds.co.jp)

- Email Address:
Enter an e-mail address. It appears when the certificate is displayed in a Web browser.

- ⑨ Enter a folder name to which the certificate for another server is placed, and then click **[OK]**.

- ⑩ In the confirmation dialog box, click **[OK]**.

The certificate is placed in the specified folder.

📝 Note

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

❖ Issuing Certificates (at second issue or later)

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

- ① On the **[Start]** menu, point to **[All Programs]**, point to **[ScanRouter System]**, and then click **[SSL Settings]**.

The dialog box to select options of SSL settings appears.

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

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

- ③ Enter area information. Enter **[Country:]**, **[Area:]**, and **[City:]**, and then click **[Next]**.

🔔 Limitation

- [Country:]** should be filled in with 2 character strings.

- ④ Enter company information. Enter the company name and organization name, and then click **[Next]**.
- ⑤ Enter network information. Enter the server name and e-mail address, and then click **[Next]**.
 - **Server Name:**
Enter a server name that will import the server name certificate in the format of a host name with a domain name. (e.g., www.rds.co.jp)
 - **Email Address:**
Enter an e-mail address. It appears when the certificate is displayed in a Web browser.
- ⑥ Specify the folder to which the certificate is placed, and then click **[Next]**.
- ⑦ In the confirmation dialog box, click **[OK]**.
The certificate is placed in the specified folder.

 **Note**

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

Importing certificate

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

- 1** On the **[Start]** menu, point to **[All Programs]**, point to **[ScanRouter System]**, and then click **[SSL Settings]**.
The dialog box to select options of SSL settings appears.
- 2** Click **[Import Certificate]**, and then click **[Next]**.
The dialog box to select an appropriate certificate appears.

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

Setting the SSL method

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

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

- 1** On the **[Start]** menu, point to **[All Programs]**, point to **[ScanRouter System]**, and then click **[SSL Settings]**.
The dialog box to select options of SSL settings appears.

- 2** Click **[Change SSL method]**, and then click **[Next]**.

- **All SSL Connections**
SSL is used for all communications including those between a delivery server and ScanRouter System server, and between ScanRouter Web Navigator and a Web browser.

 **Important**

- If the following condition are met, be sure to select **[All SSL Connections]**.
 - SSL is used for the communication with a delivery server.
 - ScanRouter System Authentication Management Service is used for the device.
- **Use SSL between Web Browser and Server Connections**
SSL is used only for communication between ScanRouter Web Navigator and a Web browser.

- Do not use SSL
You can quit SSL operations on the current server.

📌 Limitation

- ❑ If you quit operations of SSL at this point, you can no longer communicate with servers that use SSL. Make changes to SSL settings of related servers, if necessary.

🔍 Reference

p.51 “Quitting SSL operations”

3 In the confirmation dialog box, click [OK].

4 Restart the computer.

Quitting SSL operations

When you quit operations of SSL on the current server, Internet Information Service (IIS) Manager settings may be required for linked servers. Make the settings described below, if necessary.

📝 Note

- ❑ These settings are not required if “Apache” was selected as the Web server when ScanRouter EX Professional was installed.
- ❑ Note that the terms of “XXX site” in the following procedures should be interpreted as follows:
 - If ScanRouter EX Professional is installed on the same port number as the “default Web site” of IIS, “XXX site” indicates “default Web site”.

- If ScanRouter EX Professional is installed on a different port number from the “default Web site” of IIS, “XXX site” indicates “RDH Common2”.

🔍 Reference

For details about settings, see Internet Information Services Manager Help.

1 Log on to Windows using an administrator account.

If you are logged on under a different type of account, log off and then log on again using an account that has Administrator access rights.

2 Click [Start], point to [All Programs], and then click [Internet Information Services (IIS) Manager] in the [Administrative Tools] folder.

The [Internet Information Services (IIS) Manager] dialog box appears.

3 Select [XXX site], and then click [Properties] on the [Action] menu.

The [XXX site Properties] dialog box appears.

4 Click the [Directory Security] tab in the [XXX site Properties] dialog box. Then, select [Server Certificate] in the [Secure communications] area.

The server certificate wizard appears.

5 Click [Next].

The [IIS Certificate Wizard] dialog box appears.

6 Click [Delete a current certificate], and then click [Next].

Details about the current certificate appear.

- 7** Check the information, and then click **[Next]**.

The current certificate is deleted and saved to be used for this or another server later.

- 8** In the confirmation message about deleting, click **[Finish]**.

- 9** Restart the computer.

Setting Internet Information Service Manager

If the Web server contains the Internet Information Service (IIS), make settings for the SSL method, and then follow the procedure below to set Internet Information Service (IIS) Manager.

Note

- These settings are not required if “Apache” was selected as the Web server when ScanRouter EX was installed.
- Note that the terms of “XXX site” in the following procedures should be interpreted as follows:
 - If ScanRouter EX Professional is installed on the same port number as the “default Web site” of IIS, “XXX site” indicates “default Web site”.
 - If ScanRouter EX Professional is installed on a different port number from the “default Web site” of IIS, “XXX site” indicates “RDH Common2”.

Reference

For details about settings, see Internet Information Services Manager Help.

- 1** Log on to Windows using an administrator account.

If you are logged on under a different type of account, log off, and then log on again using an account that has Administrator access rights.

- 2** Click **[Start]**, point to **[All Programs]**, and then click **[Internet Information Services (IIS) Manager]** in the **[Administrative Tools]** folder.

The **[Internet Information Services (IIS) Manager]** dialog box appears.

- 3** Select **[XXX site]**, and then click **[Properties]** on the **[Action]** menu.

The **[XXX site Properties]** dialog box appears.

- 4** Click the **[Directory Security]** tab in the **[XXX site Properties]** dialog box. Then, select **[Server Certificate]** in the **[Secure communications]** list.

The server certificate wizard appears.

- 5** Click **[Next]**.

The **[IIS Certificate Wizard]** dialog box appears.

- 6** Select **[Assign an existing certificate]**, and then click **[Next]**.

- 7** Select the certificate imported using SSL settings in the list, and then click **[Next]**.

- 8** When the certificate overview appears, confirm its contents, and then click **[Next]**.

The certificate is installed on the Web server.

- 9** In the confirmation dialog box, click **[Finish]**.

The **[XXX site Properties]** dialog box reappears.

- 10** In the [XXX site Properties] dialog box, click the [Web site] tab.

Check the HTTP and HTTPS port numbers specified when the ScanRouter System server application was installed are the same as the TCP and SSL port numbers on this dialog box. Modify them if necessary.

- 11** On the [Home Directory] tab, check the [Write] box, and then set the access rights of “xxx Site” to “write-enabled”.

 **Note**

- Make the necessary security and access rights settings for your environment.

- 12** Click [OK].

 **Note**

- The [Inheritance Overrides] dialog box may appear. Make the necessary settings for your environment.

- 13** If the status of the “XXX site” you want to use is stop, click [Start] on the [Action] menu to start the service, or restart the computer.

 **Note**

- If the site stalls unexpectedly, its status may be improperly displayed by Internet Information Service (IIS) Manager. Select the “XXX site” folder, and then click [Refresh] on the [Action] menu to confirm the actual status.

SSL Settings for a Client Computer

To use SSL communication between a client (Web browser and management tool) and a server, in addition to server settings, settings for all client computers that connect to the server must also be made as follows:

The following describes the setting procedure for Windows 2003 and Internet Explorer. Procedures may differ depending on the operating system and Web browser you are using.

- 1** Open Internet Explorer, and then enter the following URL in the address bar, and then save files in the local disk:

http://Server name running as CA:Port number/RdsCA/ca.crt

Example:

http://xxxxx:nnnn/RdsCA/ca.crt

- xxxxx
The server name or IP address running as CA
- nnnn
The HTTP port number to be used
- Use ca.cer (DER format) if you cannot access using ca.crt (PEM format).

 **Important**

- If [Apache] was selected for the Web server when ScanRouter EX was installed, “RdsCA” is case sensitive. Enter it using the correct upper and lower case characters.

- 2** Click [Start], and then right-click [Explorer].

The Windows Explore window appears.

- 3** Select the file saved in Step 1, and then click [Open] on the [File] menu.

The [Certificate] dialog box appears.

 **Note**

- Obtain the value of [Seal] securely (without falsification) from the CA administrator, and then compare it with the value on the page.

- 4** If the values correspond, click the [General] tab, and then click [Install Certificate].

The [Certificate Import Wizard] dialog box appears.

- 5** Click [Next].

The Certificate Store dialog box appears.

- 6** Click [Place all certificates in the following store], and then click [Browse].

The [Select Certificate Store] dialog box appears.

- 7** Click [Trusted Root Certification Authorities] in the list, and then click [OK].

The Certificate Store page reappears. [Trusted Root Certification Authorities] appears in the Certificate Store.

- 8** Click [Next].

A dialog box about completion appears.

- 9** Click [Finish].

The [Certificate] dialog box appears.

- 10** Click [OK].

The certificate is imported and settings for the client computer are complete.

SSL Setting Communication between a Device and a Server

To use SSL communication between a network device and a server, server settings must be made (according to environment) as described below:

p.54 “When a device is a CA server”

p.55 “When a device browses another CA server”

When a device is a CA server

When the device is a CA server, follow the procedure below to obtain a certificate and install it.

- 1** Access the following URL from your Web browser:

`http://xxx.xxx.xxx.xxx/`

- xxx.xxx.xxx.xxx is the IP address of the device.

- 2** In the security warning dialog box that appears, click [View Certificate].

- 3** Check the certificate displayed in the certificate dialog box that appears. If the contents of the certificate are acceptable, click the [General] tab, and then click [Install Certificate].

- 4** A dialog box for starting the certificate import wizard is displayed. Click [Next].

- 5** Select [Place all certificates in the following store], and then click [Browse].

- 6** Select [Show physical stores], and then click "+" of [Trusted Root Certification Authorities] in the list.

Registries and the local computer are displayed.

 **Limitation**

- When you log in Windows using an account without administrator rights, the local computer is not displayed.

7 Select [Local Computer], and click [OK].

8 The Certificate Store dialog box is displayed. Click [Next].

9 A dialog box for completing the import wizard for the certificate is displayed. Click [Finish].

10 A completion message for importing is displayed. Click [OK].

11 In the certificate dialog box, click [OK].

12 In the security warning dialog box, click [Yes].

When a device browses another CA server

When a Device browses another CA server, obtain a certificate from the CA server, and then import the certificate to the delivery server.

The method of importing a certificate may change depending on CA servers.

Related Application Setup

Install and set up the application used for printing.

Important

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

Note

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

Microsoft Office 2000

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

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

Note

- Among the Microsoft Office 2000 functions, all of the **[Office Tool]** and **[Converter and Filter]** functions are recommended to be installed including the subcomponents.

Setting Word 2000

1 Start Word 2000.

2 After the "Welcome to Microsoft Word!" message appears, click **[Use Microsoft Word Now]**.

Note

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

3 Quit Word 2000.

Setting Excel 2000

1 Start Excel 2000.

2 After the "Welcome to Microsoft Excel!" message appears, click **[Use Microsoft Excel Now]**.

Note

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

3 Quit Excel 2000.

Setting PowerPoint 2000

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

 **Note**

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

- 3** On the **[Create New Presentation]** dialog box, click **[Cancel]**.

- 4** On the **[Tools]** menu, click **[Options]**.

- 5** In **[View Settings]** on the **[View]** tab, clear the check box of **[Startup Dialog]** and **[New Slide Dialog]**, and then click **[OK]**.

- 6** Quit PowerPoint 2000.

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

Microsoft Office XP

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

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

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

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

- Dialog box to select applications to be installed
Click **[Install by Selecting Options for Each Application]**.

- Dialog box to select the options to be installed
On **[Office Common Functions]**, point to **[Extend Input System]**, and then set **[IME]** not to be installed.

 **Note**

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

Setting Word/Excel/PowerPoint 2002

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

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

- 1** Start Word/Excel/PowerPoint 2002.

- 2** Through the Microsoft Office XP license authentication wizard, undergo the authentication according to the displayed messages.

 **Note**

- If the license authentication wizard does not appear, the authentication is already completed.

- 3** Quit Word/Excel/PowerPoint 2002.

Microsoft Office 2003

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

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

Word / Excel / PowerPoint 2003

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

Specifying the Range for the Login User Names (NDS and LDAP Authentication)

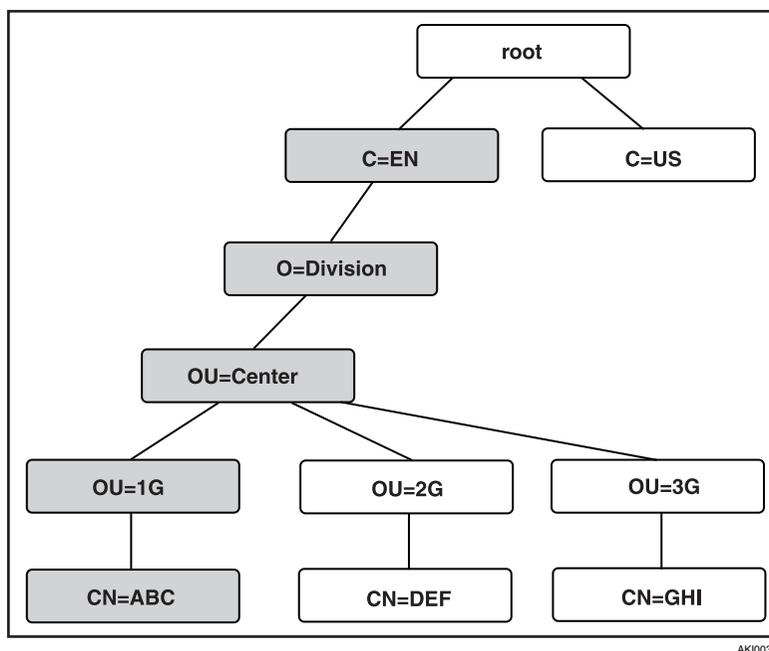
If you are running NDS or LDAP Authentication, you can specify the range for ScanRouter EX Professional server or Authentication Management Service login names in advance.

When installing ScanRouter EX Professional, select NDS Authentication or LDAP Authentication in the authentication method setting screen, and then click **[General Settings]** to display the general settings screen. Then, on the general settings screen, make settings for **[Prefix:]** and **[Suffix:]** in the **[Specify the range for the login user name]** area for specifying the format of login user names.

To enter **[Prefix:]** or **[Suffix:]**, use the Directory Information Tree information of the NetWare or LDAP server.

Specifying the Range for Login User Names: Example

Case sensitivity depends on the NetWare or LDAP server you are using.



AKI003S

Example **[Prefix:]** and **[Suffix:]** entries for user ABC set in the hierarchy above:

❖ Example 1

If "CN=" is specified in **[Prefix:]** and "OU=1G,OU=Center,O=Division,C=EN" in **[Suffix:]**, enter "ABC" as a login user name.

❖ Example 2

If "CN=" is specified in **[Prefix:]** and "OU=Center,O=Division,C=EN" in **[Suffix:]**, enter "ABC,OU=1G" as a login user name.

❖ Example 3

If "Not set" is specified in **[Prefix:]** or **[Suffix:]**, enter "CN=ABC,OU=1G,OU=Center,O=Division,C=EN" as a login user name.

❖ Example 4

To omit attributes and enter the user name entry by dividing with periods: Specify "CN=*,OU=*" in **[Prefix:]** and "OU=Center,O=Division,C=EN" in **[Suffix:]**, and then enter "ABC.1G" as a login user name.

💡 Limitation

- ❑ If an item contains a period (example: user name "AB.C"), enter "\" before the period (example: user name "AB\C").

Troubleshooting

5

Problems	Causes and solutions
<p>The following message appears: "The specified name or IP address is not valid. Please specify another name or address".</p>	<ul style="list-style-type: none"> • Check that network environment settings such as the operating settings of the specified server, and the computer name and IP address are correctly entered. • You may be logging on to Windows using an account that does not have administrator rights for the server. Check the logon account. • The Web service may not have started yet, because the computer has only recently started. If this is the case, start the management server after waiting a few minutes.
<p>When the password is entered in the [Authorization for Server Access] dialog box, "The password may be wrong. If the password is correct, press [Cancel] in the [Enter Password] dialog box and close." appears.</p>	<p>The password for the Windows logon account for launching the delivery server may be wrong or the account's rights may have changed. Make sure that the password and account's rights are correct, and then re-enter the password. After the password is entered, restart the computer.</p>
<p>[Standard Destination List] and [Standard Sender List] do not appear in the destination list.</p>	<p>ScanRouter EX Professional may not have been installed properly. If this is the case, suspend the delivery service. On the [Maintenance] menu of SR Manager, click [Return to Installation Defaults] to initialize the delivery server.</p>
<p>The delivery server does not operate normally immediately after installation.</p>	<p>When logging on to make the last settings after installation, the account for ScanRouter EX Professional was not used, so these settings were not correctly applied. Uninstall the application, and then re-install it. Then, make the last settings using the correct account.</p>
<p>Cannot connect to the delivery server from DeskTopBinder Professional or ScanRouter Web Navigator.</p>	<ul style="list-style-type: none"> • You may not be able to connect to the delivery server immediately after ScanRouter EX Professional is installed. If this is the case, restart the delivery server, and then try to reconnect. • When connecting to a delivery server that is in an environment outside your sub-network, set the name resolution environment so that the host names of DeskTopBinder Professional and ScanRouter Web Navigator, and the delivery server can be resolved using WINS, DNS, or HOSTS.
<p>When SR Manager is started, menus appear grayed and cannot be set.</p>	<p>If the Windows login account user differs from that of ScanRouter EX Professional Administrator, SR Manager starts in user mode. Change the user from [Login as another User] on the [Server] menu.</p>
<p>When a device managed through user account authentication is added as an I/O device, the login page appears more than once and log on is not possible.</p>	<p>The Simplified Encryption Authorization settings of the network device may be set to Disallow. Change this to Allow.</p>

Problems	Causes and solutions
Under Windows Authentication (native), a time-out error occurs upon starting SR Manager.	The domain trust relationship may not be correctly set. Check the trust relationship, and set it again if necessary.
MAPI mail is unavailable when making a destination setting using SR Manager.	The MAPI mailing environment may not be set up properly. If [Run in service mode] is set as the setup type, documents cannot be delivered by MAPI mail.
The "Profile is invalid." message appears when launching.	<p>The profile name created for sending by MAPI mail may not be [ScanRouterEX Profile]. Follow the procedure below to create a profile.</p> <ol style="list-style-type: none"> 1. Open [Control Panel], and then click [Mail]. 2. Click [Show Profiles], and then create a profile with the name [ScanRouterEX Profile].
When the delivery service is started, the message that the mail client is not set properly appears.	<p>The reason is as follows: if IE (Ver.5.0 or later) is installed after ScanRouter EX Professional is set up, Outlook Express is set as the default client.</p> <p>If the "E-mail" setting in the "Program" tab of IE "Internet Options" is "Outlook Express", set it to "None" (blank) or "Microsoft Outlook".</p>
	<p>The MAPI module (Messaging/Outlook) setting may be omitted.</p> <p>Set the MAPI module and create the profile.</p>
When the delivery service is started, the message that prompts quitting all applications provided with the messaging function and retry appears.	<p>Notes service may have been added at the end of the profile during the profile setting.</p> <p>Delete non-Notes services (for example, ScanRouter FAX) from the profile and add them again.</p>
When the delivery service is started, a message prompting you for the Notes password appears.	<p>Notes settings must be made to stop other Notes-based programs from prompting for a password. In Notes, in the [File] menu, point to [Tools], and then click [User ID]. Enter the password in the dialog box that appears. In the [User ID - Func Mix] dialog box, click [Basics], and then select the [Don't prompt for a password from other Notes-based programs.] check box.</p>
When an attempt is made to add the "Lotus Notes Mail" service to "ScanRouter Profile", the message "- Notes MAPI Service Provider - Can't Read ID File" appears.	Notes may not be set up. If this is the case, set it up.
Though the environment uses Lotus Domino R4.x, "Send by Notes R5 mail" is displayed as alternatives for selecting a delivery type.	When the client introduced into the delivery server is Notes R5.x/R6.x/R7.x, these alternatives are displayed. When the connected server is Lotus Domino R4.x, malfunction occurs. Do not select the alternatives.
Notes mail is not sent even after selecting "Send by Notes R5 mail" as the delivery type.	Check the version of Lotus Domino. Regardless of the version of the client introduced into the delivery server, you need to perform delivery by MAPI mail, when the server is Lotus Domino R4.x.

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 **Important**

- It is possible that any document or data stored in the PC will be damaged or lost by user error during operation or software error. Be sure to back up of all important data beforehand. Important documents and data should always be copied or backed up. Documents and data can be lost because of malfunction or human error. Furthermore, the customer is responsible for protection measures against computer viruses, worms, and other harmful software.
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ScanRouter EX Professional Version 3 **Setup Guide**

