OnBase®
Foundation EP5

Integration for eCopy ShareScan

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Foundation EP5

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Department/Group	Documentation
Revision Number	Foundation EP5

INSTALLATION GUIDE

ADMINISTRATION GUIDE

USER GUIDE

USAGE

Note: The **Integration for eCopy ShareScan** is for use only with eCopy ShareScan version 5.0, 5.1, 5.2, 5.4, or 6.1.

The Integration for eCopy ShareScan enables your eCopy ShareScan MFP document capture solution to integrate with your OnBase content management solution. This integration allows your networked, eCopy ShareScan-enabled MFP devices to scan and index documents and upload them directly to OnBase.

Once uploaded, documents scanned from your eCopy ShareScan-enabled MFP can be ad-hoc imported into OnBase or imported as a batch to an OnBase scan queue for indexing, quality assurance review, and/or additional image processing (e.g., bar code processing, full-page OCR, PDF conversion, etc.).

Note: Some batch processing features (e.g., bar code processing, full-page OCR, Advanced Capture, PDF conversion) require additional scan queue configuration and/or additional licensing. For more information, see the Document Imaging documentation.

The Integration for eCopy ShareScan is designed to make your organization more efficient by making the task of archiving documents faster and easier:

- Documents scanned directly at the source provide a superior image quality over those that are copied and then scanned, saving valuable time and money spent on document quality assurance procedures.
- Documents can be copied, printed, or scanned and uploaded to OnBase from the same piece of equipment, saving your organization money on hardware, shipping, and central scanning services.
- Documents can be indexed at scan-time using the eCopy ShareScan-enabled MFP device or after they are uploaded to OnBase.
  - **Indexing Documents at Scan-Time**. Documents that are scanned and indexed on the eCopy ShareScan-enabled MFP device can be indexed by the user who is most familiar with the documents and the business processes they support.
  - **Indexing Documents After Upload**. Once uploaded, documents can be manually or automatically indexed (via the separately-licensed OnBase Bar Code Recognition Server or Advanced Capture solutions) from one or more indexing workstations.
- Documents can be scanned, uploaded to OnBase, and indexed in a matter of seconds. Once indexed, these documents are simultaneously available to users all over the world; no more waiting for important documents to be overnighted and routed for review and no risk of documents being lost or damaged during shipping.

- Users need no specialized training, or even any knowledge of OnBase, to archive documents. It's as simple as using the office copy machine.

  Users with even the most limited experience will have no trouble archiving documents using the simple and easy-to-use eCopy interface.

Applications

Networked scanners and MFPs are prevalent in many organizations because they provide simple solutions for printing, copying, and scanning documents from virtually anywhere. The Integration for eCopy ShareScan extends the value of these devices by allowing users to not only print, copy, and scan, but to also capture documents and their indexing information and upload them directly to OnBase.

For example:

- A doctor can scan orders, patient records, and billing documents from his/her practice. Once uploaded and indexed, the documents are available to the hospital or physician group's central patient record or billing departments, cutting down on the cost of shipping and courier services, as well as the eliminating the risk of loss or misfiling involved with paper documents.
- Contracts can be signed and scanned at a sales meeting in New York, indexed by a user in Chicago, and reviewed by the Legal Department in San Francisco in a matter of minutes, or even seconds.
- Office workers, with very little training, can archive documents via departmental MFPs. Any employee who can use a copy machine can archive valuable business documents in just a few steps.
- An organization that operates a number of small, remote offices or an organization that relies on a largely volunteer or unskilled workforce can use an MFP device that they likely already have to upload documents to OnBase.

  By working with the MFP they already have and are familiar with, the organization increases user adoption rates and can save a great deal of money by not purchasing additional office equipment and/or hiring and training an administrative staff at each location.

System Prerequisites

The following prerequisites are required in order to implement an Integration for eCopy ShareScan solution.

- A properly configured OnBase Application Server
- An eCopy ShareScan 5.0, 5.1, 5.2, 5.4, or 6.1-enabled MFP

Note: To ensure that your MFP meets the requirements to use the eCopy ShareScan software, contact your hardware provider.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Integration for eCopy ShareScan functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 3.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 3.

Simplified Licensing

In addition to a base package license for standard OnBase functionality, the Integration for eCopy ShareScan OP add-on license is required to access standard Integration for eCopy ShareScan functionality.

Legacy Licensing

One of the following Integration for eCopy ShareScan licenses is required.

- **Integration for eCopy ShareScan**. This license allows you to register one eCopy ShareScan-enabled MFP to use the Integration for eCopy ShareScan. This license is a workstation license; it cannot be shared among a pool of available MFP devices. Multiple Integration for eCopy ShareScan licenses can be used in one OnBase/eCopy ShareScan solution.
- **Enterprise Integration for eCopy ShareScan**. This site license allows all of your organization's eCopy ShareScan-enabled MFPs to use the Integration for eCopy ShareScan.

A Client license is required in the following scenarios:

- When using the eCopy ShareScan Administration Console to configure eCopy ShareScan to upload documents to specific OnBase Document Types and/or scan queues.
- When accessing the OnBase Client or Web Client in order to index documents once they have been uploaded.

Note: The Integration for eCopy ShareScan and Enterprise Integration for eCopy ShareScan licenses also allow administrators to create and edit scan queues without a valid Document Imaging license.

Optional Licensing

If documents are to undergo batch processing (e.g., bar code processing, Advanced Capture, Full-Page OCR, etc.) once they are uploaded to OnBase, additional licensing may be required. For more information, see the **Document Imaging** documentation.

Check your current licensing status by selecting **Utils** | **Product Licenses** from the Configuration module.

OnBase® Foundation EP5

Integration for eCopy ShareScan

Installation Guide

Requirements

The following sections outline requirement information specific to Integration for eCopy ShareScan in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Integration for eCopy ShareScan and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Database Requirements
- Supported Desktop Operating Systems
- Microsoft .NET Framework Requirements
- Server C++ Requirements
- Server Browser Requirements
- 32-Bit Server Hardware Requirements (when using the 32-bit Application Server)
- 64-Bit Server Hardware Requirements (when using the 64-bit Application Server)
- Miscellaneous Requirements

eCopy ShareScan Requirements

The Integration for eCopy ShareScan is for use only with eCopy ShareScan version 5.0, 5.1, 5.2, 5.4 or 6.1.

For information on the hardware and software requirements for the server hosting the eCopy ShareScan Administrative Console, or for information on the hardware and software requirements for your MFP devices, contact your eCopy ShareScan solution provider.

Pre-Installation

Prior to installing Integration for eCopy ShareScan, you must ensure the following steps have already been completed:

- The eCopy ShareScan 5.0, 5.1, 5.2, 5.4, or 6.1 Administrative Console has been installed and configured correctly on its own dedicated server. For more information, contact your eCopy ShareScan solution provider.

Note: If you are upgrading from Integration for eCopy ShareScan OP, unregister the license consumed by this previous integration. This license will be automatically reused when logging into the Integration for eCopy ShareScan for the first time. This previous version of Integration for eCopy ShareScan has been deprecated as of OnBase 15.0. Configuration settings from Integration for eCopy ShareScan OP cannot be transferred to Integration for eCopy ShareScan.

- The OnBase Application Server must be installed and configured correctly on its own dedicated server. For more information, see the Web Server and Application Server module reference guides.
- All OnBase Disk Groups, Keyword Types, and Document Types that are used by the Integration for eCopy ShareScan have been created. For more information, see the System Administration documentation.

Note: Date & Time and **Specific Currency** Keywords are not supported by the Integration for eCopy ShareScan. Keywords of this type will not be displayed on the MFP's user interface during indexing.

Tip: Indexing documents can be difficult from the MFP's user interface. It is considered a best practice to centralize or automate as much of the indexing process as possible by using AutoFill Keyword Sets, Keyword Drop-Down Lists, Keyword Data Sets, and/or indexing automation modules (e.g., the Bar Code Recognition Server, Advanced Capture, Intelligent Capture for AP) for ease of use and to reduce the chance for error.

- If you are using the Integration for eCopy ShareScan to upload documents as a batch of an OnBase scan queue, ensure that the scan queue has been created. For more information, see the Document Imaging documentation.

Installation

The Integration for eCopy ShareScan software must be installed on the server hosting the eCopy ShareScan 5.0, 5.1, 5.2, 5.4, or 6.1 Administrative Console. This allows the eCopy ShareScan Administrative Console to communicate with your OnBase Application Server, and enables your MFPs to upload documents and their indexing information to OnBase.

To install the Integration for eCopy ShareScan;

1. Obtain the Hyland Integration for eCopy ShareScan 5 Setup Wizard's executable (**Hyland Integration for eCopy ShareScan 5.msi**) from your solution provider and copy it to the server hosting the eCopy ShareScan Administration Console.
2. Double-click the wizard's executable to launch it. The setup wizard's **Welcome** screen is displayed.
3. Click **Next** to proceed to the **Path To eCopy ShareScan5 Server** screen.
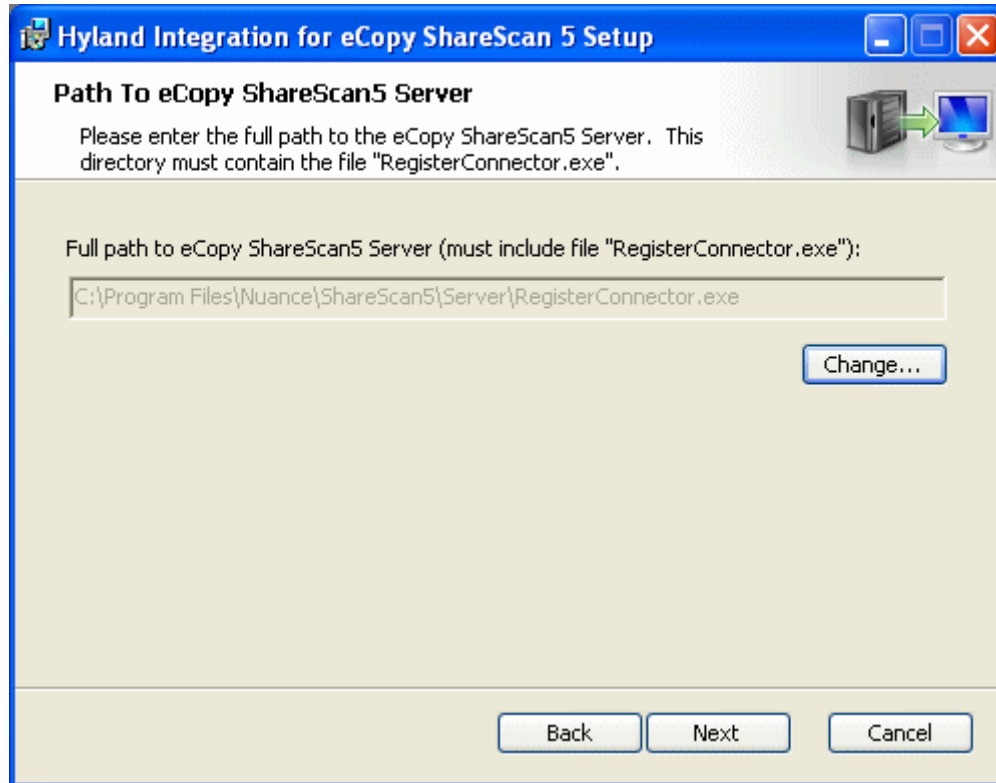
4. On the **Path To eCopy ShareScan5 Server** screen, you must specify the full path to the eCopy ShareScan RegisterConnector executable (**RegisterConnector.exe**).

   The default location is automatically selected; to browse to a different location, click **Change**.
5. When the path to the eCopy ShareScan RegisterConnector executable has been selected, click **Next**. The **Ready to install Hyland Integration for eCopy ShareScan 5** screen is displayed. Click **Install** to begin the installation.
6. Once the installation is complete, click **Finish**.

Change, Repair, or Remove an Installation

After initial installation, the setup program can be used to change, repair, or remove components from a previous installation. After launching **setup.exe** or the ***.msi** installation package, and clicking **Next** at the welcome dialog, the **Change, repair, or remove installation** dialog box is displayed.

Select the option for the actions you wish to perform:

Option	Description
Change	Add or remove components using the **Custom Setup** dialog.
	Note: This option is not available if the installer has no independently selectable features.
	The steps for adding selected components are the same as those under the Component Selection section of the installation instructions, if applicable to the installer.
	Note: Change does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.
Repair	Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries.
	Note: This option is not available from all installers. **Repair** does not include errors made in the configuration options set by the user during installation. For specific troubleshooting information regarding an installed component, see the module reference guide for that component.
Remove	Removes all previously installed components.

Command Line Switches

There are no command line switches specific to the Integration for eCopy ShareScan.

INI Options

There are no specific onbase32.ini settings for the Integration for eCopy ShareScan.

Application Server Web.Config Settings

There are no settings specific to the Integration for eCopy ShareScan in the OnBase Application Server's web.config file.

Backup/Recovery

Backup

Configuration

Configuration information for the Integration for eCopy ShareScan is stored in:

- **The OnBase Database** (i.e., Keyword Type information, Document Type information, scan queue information)
- **The OnBase Application Server's Web.Config File** (i.e., Application Server configuration information)
- **The eCopy ShareScan database** (i.e., connection information to the OnBase Application Server, document upload settings, etc.)

Proper backups of the OnBase database, the Application Server's web.config file, and the eCopy ShareScan database will contain all configuration information necessary for the Integration for eCopy ShareScan.

Registry Settings

No registry settings apply to the Integration for eCopy ShareScan.

External Files

Your Integration for eCopy ShareScan installation files must be backed up. They should be backed up during scheduled backups of your eCopy ShareScan installation files.

Ensure that your OnBase Application Server's web.config file is regularly backed up.

Module-Related .INI and Web.Config Settings

There are no onbase32.ini or web.config file settings specific to the Integration for eCopy ShareScan.

Ensure that the onbase32.ini file is regularly backed up on workstations used to access the OnBase Client or Configuration module.

Additional Steps

See your eCopy ShareScan documentation or contact your eCopy ShareScan solution provider for information on backing up your eCopy ShareScan installation files.

Recovery

Configuration

Configuration information is stored in the OnBase database, the OnBase Application Server's web.config file, and the eCopy ShareScan database.

Restoring the OnBase database, the OnBase Application Server's web.config file, and the eCopy ShareScan database from valid backups will restore all configuration information.

Registry Settings

No registry settings apply to the Integration for eCopy ShareScan.

External Files

The OnBase Application Server, including its web.config file, must be restored from a valid backup and the Integration for eCopy ShareScan must be restored from a valid backup of the eCopy ShareScan installation files.

If this is not possible, you can re-install the OnBase Application Server on its dedicated server and/or the Integration for eCopy ShareScan on the server hosting the eCopy ShareScan installation using their respective installers. Ensure, however, that you use the installers for the build of OnBase you are restoring (e.g., 11.0.0.31).

Module-Related .INI and Web.Config Settings

There are no onbase32.ini or web.config file settings specific to the Integration for eCopy ShareScan.

Ensure that the onbase32.ini file is restored from the last-known valid backup copy on workstations used to access the OnBase Client or Configuration module.

Registration

If your Integration for eCopy ShareScan solution is licensed for an Enterprise Integration for eCopy ShareScan license, then no MFP registrations need to be restored. A proper restoration of your OnBase database from a valid backup will properly restore all registration information.

If your Integration for eCopy ShareScan solution is licensed per device, using Integration for eCopy ShareScan licensing, then each MFP device is re-registered the next time it accesses OnBase.

Additional Steps

See your eCopy ShareScan documentation or contact your eCopy ShareScan solution provider for information on restoring your eCopy ShareScan installation files.

Troubleshooting

Common Issues

I have made changes in the OnBase Configuration module (e.g., created new scan queues, added new Document Types to existing scan queues, etc.) but the changes are not reflected on the MFP's user interface.

After a configuration change has been made to your OnBase solution, you must restart IIS, reset the OnBase Application Server's cache, or recycle the server's application pool in order for those changes to be reflected on your eCopy ShareScan-enabled MFP devices.

Automatic Scan Queue Processes are not Being Performed

Automatic processes, such as **Auto OCR Batches**, **Auto Commit Batches**, **Auto PDF Conversion**, **Auto-Perform Image Processing**, and **Auto-Run after Scan**, are only initiated when batch activity, such as indexing and scanning, is performed in the OnBase Client module.

If batch activity is taking place outside the OnBase Client and automation is needed, the desired processes must be performed on a workstation running the OnBase Client module with one or more auto-processing command line switches or they must be scheduled to occur on a workstation running the OnBase Client module.

This does not apply to the auto-foldering and auto-naming options, as they take place on a document level rather than based on batch activity.

I have multiple eCopy ShareScan-enabled MFP devices that I would like to use to scan and upload documents to OnBase. Not all MFPs will be scanning at the same time; can I purchase a few Integration for eCopy ShareScan licenses and share them among my MFPs?

Yes, you can share Integration for eCopy ShareScan licenses among several MFPs, but be aware that these are workstation licenses and need to manually be managed from the OnBase client (i.e., in order to re-assign a license from one MFP to another, an administrator needs to manually revoke the license from the registered MFP using the OnBase Client's workstation registration feature to make it available to the unregistered MFP).

The licenses cannot be shared in a common pool and automatically assigned to the eCopy ShareScan-enabled MFPs as needed.

As an alternative, you may purchase an Enterprise Integration for eCopy ShareScan license. With this license, no registration is necessary; all of your MFPs can be used to scan and upload documents to OnBase without each needing its own license.

Can I use my older MFPs with the Integration for eCopy ShareScan?

In order to use an MFP with the Integration for eCopy ShareScan, it must be compatible with eCopy ShareScan 5.0, 5.1, 5.2, 5.4, or 6.1.

For additional information about hardware requirements including information about your current MFPs' capabilities, contact your eCopy ShareScan solution provider.

My MFPs use an older version of eCopy ShareScan (3.0 or 4.x). Can I use the Integration for eCopy ShareScan?

The Integration for eCopy ShareScan is for use only with eCopy ShareScan version 5.0, 5.1, 5.2, 5.4, or 6.1.

I am trying to scan and index documents on my eCopy ShareScan-enabled MFP, but not all of the Keyword Types configured for the selected Document Type are displayed on the MFP.

Date & Time and Specific Currency Keyword Types are not supported by the Integration for eCopy ShareScan.

If you are assigning a document to a Document Type configured to use these types of Keywords, these Keywords will not be displayed on the MFP's user interface during indexing.

What languages and regional settings are supported for eCopy ShareScan?

The Integration for eCopy ShareScan supports several languages and regional settings (e.g., date formats, currency formats, etc.), including English, French, German, Dutch, Italian, Spanish, and Brazilian Portuguese. The language and regional settings apply to both the connector configuration information in the eCopy ShareScan Administration Console and the information displayed on the MFP's user interface.

These localization settings are controlled by eCopy ShareScan; the language and regional settings configured for eCopy ShareScan will also be used for the Integration for eCopy ShareScan. For more information on changing these settings, see your eCopy ShareScan documentation.

Error Tracing

Diagnostic information for the Integration for eCopy ShareScan is included with the error tracing functionality available from the eCopy ShareScan Administration Console to assist with troubleshooting.

This information captured by this error tracing is specific to the function of the Integration for eCopy ShareScan (i.e., the **OnBase** connector used by the eCopy ShareScan software). Diagnostic information for your OnBase solution, including your OnBase Application Server, can be captured by the OnBase Diagnostics Console; for more information, see the Diagnostics Service and Diagnostics Console documentation.

For more information about enabling error tracing in the eCopy ShareScan Administration Console, see your eCopy ShareScan documentation.

Error Messages

The following error messages may be displayed on the MFP's user interface.

System is currently locked out. Please contact your System Administrator.

- **Cause**: An administrator has enabled a system lockout (locking the entire OnBase solution) from within the OnBase Configuration module.
- **Resolution**: A system lockout is generally applied during upgrades to your OnBase solution. To resolve this error message, log onto the OnBase Configuration module and remove the system lockout.

Failed to reach server. Check your Service Path and try again.

- **Cause:** An invalid URL was entered into the **Service Path** field on the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console.
- **Resolution:** Ensure that the URL entered into the **Service Path** field on the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console is the correct URL to your OnBase Application Server. See Configuring the Connection to the OnBase Application Server on page 27 for more information.

Reached server but could not find database. Check your data source and try again.

- **Cause:** An invalid data source name was entered into the **Data Source** field on the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console.
- **Resolution:** Ensure that the name entered into the **Data Source** field on the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console is the correct name for your data source. See Configuring the Connection to the OnBase Application Server on page 27 for more information.

Failure on login. User is locked out.

- **Cause**: The OnBase user account has been locked, either by an administrator or due to repeated authentication failure.
- **Resolution**: Log onto the OnBase Configuration module and unlock the OnBase user account.

Failure on login. Unable to acquire a license.

- **Cause**: There are no Integration for eCopy ShareScan licenses available.
- **Resolution**: If your solution is configured to use workstation licensing (i.e., Integration for eCopy ShareScan licenses), log onto the OnBase Client and revoke an Integration for eCopy ShareScan license from another MFP.

  If your solution is configured to use enterprise licensing (i.e., an Enterprise Integration for eCopy ShareScan license), contact Technical Support.

A database version mismatch occurred. A more recent version of the database was expected.

- **Cause**: Your version of the OnBase database does not match the database version expected by the version/build of the Integration for eCopy ShareScan software.
- **Resolution**: Upgrade your OnBase database to the version expected by your Integration for eCopy ShareScan software.

Note: Even when performing incremental upgrades, it is always necessary to ensure that your OnBase database schema matches the database schema expected by the latest version of OnBase software you are using.

Failure on login. Please enter a valid username and password

- **Cause**: The OnBase user credentials that were entered are invalid.
- **Resolution**: There are several possible resolutions to this error depending on your configuration:
  - If you are using standard authentication, re-enter your OnBase user credentials and try to log on again.
  - If you are using a Guest user account, ensure that the guest user account credentials are correctly specified for the **OnBase** Connector in the eCopy Administration Console.
  - If you are using LDAP or Active Directory Authentication, ensure that your OnBase solution is configured to use LDAP or Active Directory Authentication and ensure that the user has the proper rights/privileges to log on to OnBase.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

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Integration for eCopy ShareScan

Administration Guide

Configuring OnBase User Groups/Rights

Users must belong to OnBase User Groups with specific rights and privileges in order to use the Integration for eCopy ShareScan.

Administrators

In addition to any eCopy ShareScan permissions required to access the eCopy ShareScan Administration Console, administrators (i.e., users that will be creating/configuring OnBase Connector profiles in the eCopy ShareScan Administration Console) must belong to a User Group with rights to all Document Types and Scan Queues that will be associated with the Connector profiles they are creating and configuring.

Note: An administrator cannot assign an OnBase Document Type or scan queue to an OnBase Connector profile that he/she does not have rights to.

Depending on the other tasks these users are required to perform outside of the Integration for eCopy ShareScan, they may need to belong to User Groups with more rights/privileges than these.

For information on creating/configuring User Groups, see the System Administration documentation.

End Users

In addition to any eCopy ShareScan permissions required to access the eCopy ShareScan application from an MFP, end users (i.e., users that will be scanning and uploading documents to OnBase via an eCopy ShareScan-enabled MFP) must belong to a User Group with the **Import** privilege and rights to all Document Types and Scan Queues that are associated with the Connector profile assigned to their MFP.

Depending on the other tasks these users are required to perform outside of the Integration for eCopy ShareScan, they may need to belong to User Groups with more rights/privileges than these.

Note: If the OnBase Connector profile is configured to use a guest OnBase account, rather than the users' credentials, to authenticate and upload documents to OnBase, then only the guest OnBase user account (not the individual users) are required to have these privileges and rights. For more information on creating a guest OnBase user account, see Creating a Guest User Account on page 18.

For information on creating/configuring User Groups, see the System Administration documentation.

Creating a Guest User Account

If you are configuring an OnBase Connector profile to use a guest OnBase account to authenticate to OnBase, you will need to create and configure the guest user account in the OnBase Configuration module.

Tip: If your OnBase solution consists of other modules/features that require the use of a guest user's account, it is recommended that you configure separate guest user accounts for each of these modules/features. Each guest account should be granted only the minimum rights and privileges needed for its specific purpose.

The following procedure outlines the necessary steps for creating a guest user account. For comprehensive information on configuring User Groups and user accounts, see the **System Administration** documentation.

To configure a guest OnBase user account:

1. Open OnBase Configuration.
2. Create a Guest User Group.

   This user group should be granted only the minimum rights and privilege needed to upload documents to OnBase from an eCopy ShareScan-enabled MFP (i.e., the **Import** privilege and rights to any Document Types and scan queues used by the connector profile it is associated with).
3. Create a Guest User Account.

   This user account should be given a unique name and password that would be difficult for others to guess.
4. Assign the Guest User Account to the Guest User Group.
5. Reset the data source cache or recycle the application pool on the OnBase Application Server.

   Once you've created your guest OnBase user account, you must restart IIS, reset the OnBase Application Server's cache, or recycle the server's application pool in order for the configuration changes to take effect.

Caution: Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

Managing Licensing

If your Integration for eCopy ShareScan solution uses the **Integration for eCopy ShareScan** workstation licensing, then each eCopy ShareScan-enabled MFP must be registered with a license in order to scan and upload documents to OnBase.

Note: If your Integration for eCopy ShareScan solution uses the **Enterprise Integration for eCopy ShareScan** licensing, then individual workstation registration is not required.

Integration for eCopy ShareScan workstation licenses cannot be shared among a common pool of eCopy ShareScan-enabled MFPs and automatically assigned and released as needed.

The first time a user logs on to the Integration for eCopy ShareScan from an eCopy ShareScan-enabled MFP, an Integration for eCopy ShareScan workstation license is registered on that device. The license remains registered on that device until it is manually revoked by an administrator.

As users continue to log on to the Integration for eCopy ShareScan from different eCopy ShareScan-enabled MFPs, the pool of available workstation licenses is consumed until there are no licenses remaining. At that point, no further eCopy ShareScan-enabled MFPs are able to access the Integration for eCopy ShareScan until more licenses become available (e.g., more licenses are purchased or licenses are revoked from existing, registered eCopy ShareScan-enabled MFPs).

To revoke a workstation license from a registered eCopy ShareScan-enabled MFP, an administrator must belong to a User Group with the **Client** Registered Processing Products Product Right and the **User Management** Administrative Privileges Product Right.

To revoke an Integration for eCopy ShareScan workstation license from a registered device:

1. From the OnBase Client, click **Admin | User Management | Workstation Registration**. The **Products Registered for Workstation** window is displayed.
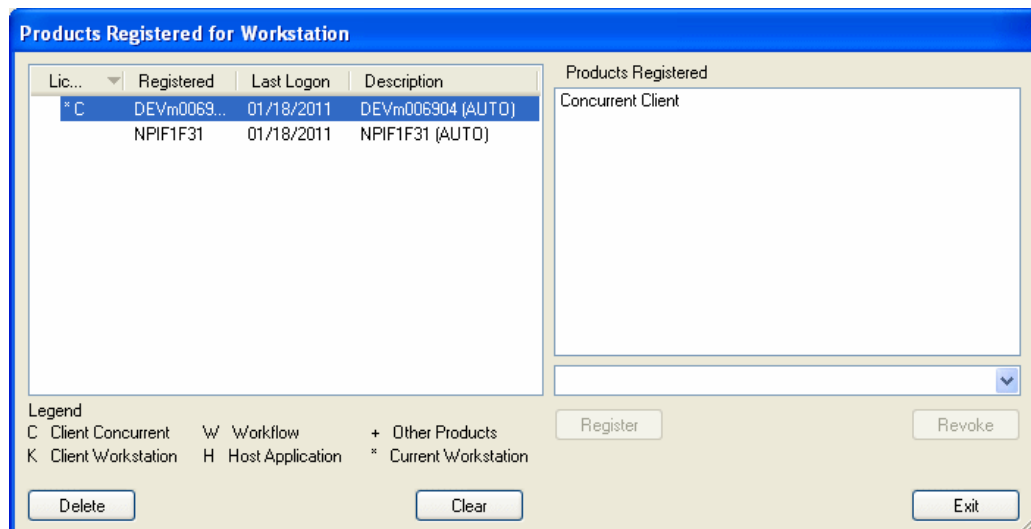
- The left side of the window lists all workstations (including eCopy ShareScan-enabled MFPs) currently connected to OnBase. The OnBase Client workstation you are using is listed at the top of the list and is denoted with an asterisk.
- The right side of the window lists all licenses registered for the selected workstation.

2. From the Products Registered list, select the eCopy ShareScan-enabled MFP that you would like to revoke the license from.
3. Using the **Products Registered** drop-down, select **Integration for eCopy ShareScan**.
4. Click **Revoke**. The license is revoked from that eCopy ShareScan-enabled MFP and is available to be assigned to another eCopy ShareScan-enabled MFP.
5. Click **Exit** to close the **Products Registered for Workstation** window.

The eCopy ShareScan Administration Console

The Integration for eCopy ShareScan is the application that allows eCopy ShareScan to communicate with your OnBase Application Server. It is configured in the eCopy ShareScan Administration Console.

Accessing the OnBase Connector

Configuration for the OnBase Connector is available in the eCopy ShareScan Administration Console.

To access configuration options for the OnBase Connector:

1. From the eCopy ShareScan server, launch the eCopy ShareScan Administration Console.
2. From the bottom of the left pane, select the **Connectors** tab. A list of all available connectors is displayed in the Configure Connectors pane.
3. From the Configure Connectors pane, select **OnBase**.
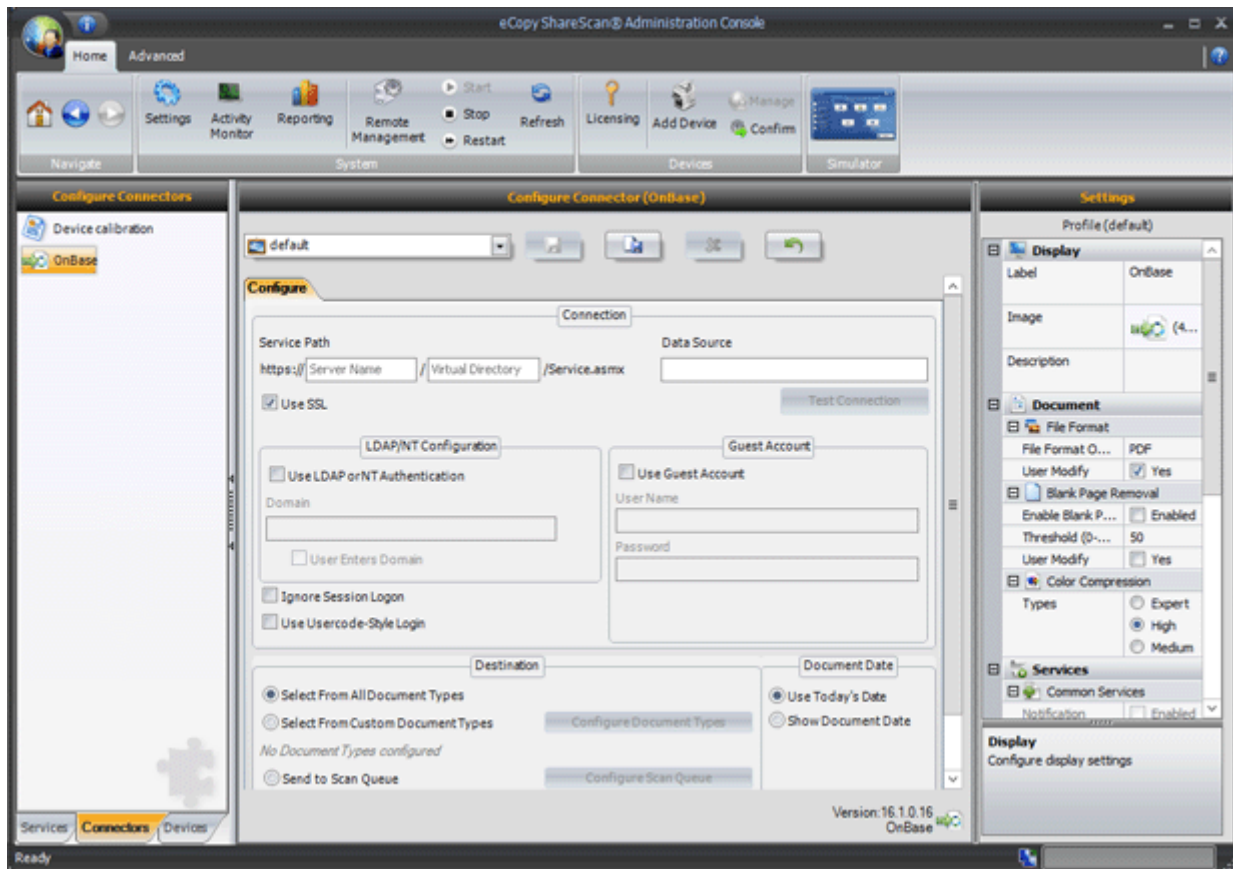
- The configuration options for the OnBase Connector are displayed in the Configure Connector (OnBase) pane in the center of the eCopy ShareScan Administration Console window. For more information on these settings, see Configuring the OnBase Connector on page 22.
- Additional settings are displayed in the Settings pane on the right of the eCopy ShareScan Administration Console window. For more information on these settings, see Specifying the OnBase Connector's General Settings on page 36.

Configuring the OnBase Connector

The OnBase Connector is configured in the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console.

Available options are described in the following table:

Configure Connector (OnBase) Options	Description
Profile Drop-Down	This drop-down allows you to select the profile that you are currently configuring. For more information, see Creating a Profile on page 26.
Save Current Profile	Click this button to save the current profile. For more information, see Creating a Profile on page 26.

Configure Connector (OnBase) Options	Description
Save Current Profile As	Click this button to save the currently-selected settings to a new profile. For more information, see Creating a Profile on page 26.
Delete Current Profile	Click this button to delete the current profile. For more information, see Creating a Profile on page 26.
Reset Current Profile	Click this button to reset the current profile to its default settings. For more information, see Creating a Profile on page 26.
Service Path	This field contains the URL to your OnBase Application Server. • Enter the **Server Name** in the first text field. • Enter the **Virtual Directory** in the second text field. For more information, see Configuring the Connection to the OnBase Application Server on page 27.
Use SSL	Select this check box to enable an HTTPS binding to the Application Server. For more information, see Configuring the Connection to the OnBase Application Server on page 27.
Data Source	This field contains the name of the data source. For more information, see Configuring the Connection to the OnBase Application Server on page 27.
Test Connection	Click this button to attempt to connect to the OnBase Application Server from the eCopy ShareScan Administration Console using the values you entered in the **Service Path** and **Data Source** fields. For more information, see Configuring the Connection to the OnBase Application Server on page 27.
Use LDAP or NT Authentication	Select this check box to enable LDAP or Active Directory authentication for the OnBase Connector. When this check box is not selected, standard OnBase security is used. By default, this check box is not selected. For more information, see Configuring OnBase Authentication on page 28.
Domain	This option is only enabled when the **Use LDAP or NT Authentication** check box is selected. This field contains the default domain used when logging users onto OnBase via LDAP or Active Directory authentication from the eCopy ShareScan-enabled MFP. For more information, see Configuring OnBase Authentication on page 28.

Configure Connector (OnBase) Options	Description
User Enters Domain	This option is only enabled when the **Use LDAP or NT Authentication** check box is selected. Select this check box if users should specify a domain when logging on to OnBase via LDAP or Active Directory authentication from the eCopy ShareScan-enabled MFP. If this check box is not selected, the users will automatically be authenticated using the domain supplied in the **Domain** field. For more information, see Configuring OnBase Authentication on page 28.
Ignore Session Logon	Select this check box if the OnBase Connector should ignore the authentication credentials that the user entered when logging on to the eCopy ShareScan-enabled MFP. By default, this check box is selected. When this check box is not selected, the eCopy ShareScan-enabled MFP can pass its authentication credentials to OnBase for authentication. For more information, see Configuring OnBase Authentication on page 28.
Use Usercode-Style Login	Select this check box if the specified data source is configured as an institutional database. When this check box is selected, the OnBase Connector requires credentials in the form of a usercode, password, and institution number. This check box is not available when **Use LDAP or NT Authentication** is selected. For information about institutional databases, see the **Institutional Databases** module reference guide.
Use Guest Account	Select this check box if the OnBase Connector profile should use a pre-configured guest OnBase account when a user attempts to log on to OnBase from the eCopy ShareScan-enabled MFP. When this check box is not selected, a user must be authenticated in OnBase using his/her own credentials (either standard OnBase security or Active Directory and LDAP authentication) when attempting to connect to OnBase from the eCopy ShareScan-enabled MFP. For more information, see Configuring OnBase Authentication on page 28.
User Name	This field is only enabled when **Use Guest Account** is selected. This field contains the user name for the guest OnBase account. If **Use Usercode-Style Login** is selected, the **User Name** field is replaced with the **Usercode** field.

Configure Connector (OnBase) Options	Description
Usercode	This field is only enabled when both **Use Guest Account** and **Use Usercode-Style Login** are selected. This field contains the usercode for the guest OnBase account.
Password	This field is only enabled when **Use Guest Account** is selected. This field contains the password for the guest OnBase account.
Institution	This field is only enabled when both **Use Guest Account** and **Use Usercode-Style Login** are selected. This field contains the institution number for the guest OnBase account.
Select From All Document Types	Select this option to allow users to assign a scanned document to any one of the Document Types that they have rights to. For more information, see Configuring Destination Settings on page 32.
Select From Custom Document Types	Select this option to allow users to assign a scanned document to one of a selected group of Document Types. Click **Configure Document Types** to specify which Document Types users will be able to choose from. **Note:** Users must have rights to the selected Document Types in order to assign documents to them. For more information, see Configuring Destination Settings on page 32.
Send to Scan Queue	Select this option to allow user to upload scanned documents to a batch of an OnBase scan queue. Click **Configure Scan Queues** to specify which scan queues users will be able to select from. **Note:** Users must have rights to the selected scan queues in order to use them to upload documents. For more information, see Configuring Destination Settings on page 32.
Use Today's Date	Select this option to automatically assign the current date as the scanned document's Document Date. For more information, see Configuring the Document Date on page 36.

Configure Connector (OnBase) Options	Description
Show Document Date	Select this option to allow users to select the date assigned as the scanned document's Document Date. For more information, see Configuring the Document Date on page 36.

The following steps are required to configure the OnBase Connector:

1. Create a profile. See Creating a Profile on page 26.
2. Specify the connection information to the OnBase Application Server. See Configuring the Connection to the OnBase Application Server on page 27.
3. Specify how users are authenticated from MFPs. See Configuring OnBase Authentication on page 28.
4. Specify how documents scanned by MFPs are imported into OnBase. See Configuring Destination Settings on page 32.
5. Specify a Document Date for documents imported by MFPs. See Configuring the Document Date on page 36.

Creating a Profile

A profile is a set of configured settings used by the OnBase Connector. For example, you can create one profile that uploads documents to a scan queue batch and another profile that ad hoc imports documents into OnBase.

Tip: For more information about profiles, see the documentation for eCopy ShareScan.

Profiles are created and configured using the **Profile** drop-down and the toolbar buttons near the top of the Configure Connector (OnBase) pane.

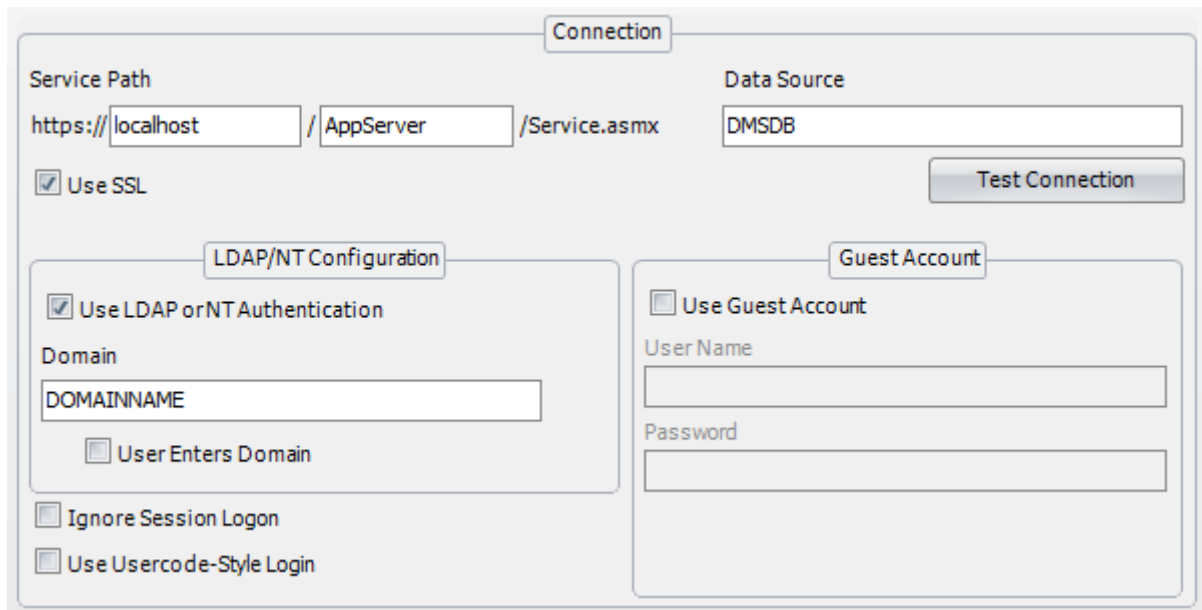| Name	Description
Profile Drop-Down 	This drop-down allows you to select the profile that you are currently configuring.
Save Current Profile 	Click this button to save the current profile.

Name	Description
Save Current Profile As	Click this button to save the currently-selected settings to a new profile.
Delete Current Profile	Click this button to delete the current profile.
Reset Current Profile	Click this button to reset the current profile to its default settings.

The default profile is selected by default. To create a new profile:

1. From the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console, click the **Save As** button. The **Save As** dialog box is displayed.
2. Enter a name for the new profile you are creating and click **Save**. The new profile is saved and added to the **Profile** drop-down. It is automatically selected.

Configuring the Connection to the OnBase Application Server

All of the options needed to configure the OnBase Connector's connection to the OnBase Application server are displayed in the Connection section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console.

To configure the connection settings to the Application Server:

1. Ensure that the profile you wish to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. Enter the URL to your OnBase Application Server in the **Service Path** field. Enter the Service Name and Virtual Directory (e.g., **http://ServerName/appserver/service.asmx**).
3. Enter the name of the data source that connects to your OnBase database in the **Data Source** field (e.g., **DMS, OnBase**, etc.).
4. Select **Use SSL** to use an HTTPS binding.
5. Click the **Test Connection** button.

   The eCopy ShareScan Administration Console attempts to connect to your OnBase Application Server using the service path and data source information that you provided.

   - If the test is successful, proceed to Step 5.
   - If the test is unsuccessful, re-enter the connection information to your Application Server and repeat Step 4. If the connection is still unsuccessful, see the Web Server documentation for additional Application Server troubleshooting information.

6. Save the profile.

Configuring OnBase Authentication

To upload documents to OnBase, the user must authenticate with OnBase to ensure the user has sufficient rights to import documents.

The options used to specify the authentication method used by the profile are displayed in the Connection section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console.

The Integration for eCopy ShareScan offers several authentication methods that allow users to upload documents to OnBase.

Note: The following descriptions assume that users must log on to the eCopy ShareScan application from the MFP prior to accessing the OnBase Connector. Authentication for eCopy ShareScan is specific to eCopy ShareScan, and falls outside the scope of this integration. For more information, see the documentation for eCopy ShareScan.

- **Standard Authentication**. After users log on to the eCopy ShareScan-enabled MFP with their eCopy ShareScan credentials, they select the OnBase Connector and log on to OnBase using their OnBase credentials.

  Although this option is secure, users may find it inconvenient to remember and enter two sets of login credentials.

  For more information, see Enabling Standard Authentication on page 30.

- **Guest Authentication**. After users log on to the eCopy ShareScan-enabled MFP with their eCopy ShareScan credentials, they select the OnBase Connector and are automatically logged in to OnBase using the guest login credentials supplied in the OnBase Connector profile.

  This option offers less security and less of an audit trail for the document being scanned, (the OnBase guest user account is credited with creating/indexing all documents), but it is more convenient for users, especially users who do not otherwise work with OnBase and do not need their own OnBase user account.

  For more information, see Enabling Guest Authentication on page 30.

- **Interactive LDAP or Active Directory Authentication**. After users log on to the eCopy ShareScan-enabled MFP with their eCopy ShareScan credentials, they select the OnBase Connector and are prompted to enter their network credentials.

  This option is secure and is somewhat more convenient that the standard authentication method, because users are required to know only their network credentials, not separate OnBase credentials. But users are still required to manually enter two sets of authentication credentials, and the OnBase solution must be configured to allow LDAP or Active Directory authentication.

  For more information, see Enabling Interactive LDAP or Active Directory Authentication on page 30.

- **Auto-login LDAP/ Active Directory Authentication**. After users log on to the eCopy ShareScan-enabled MFP with their network credentials, they select the OnBase Connector, and the MFP passes their network credentials to OnBase for authentication.

  This option is secure and is the most convenient, because users only need to remember their network credentials, and they only need to enter them once. But both eCopy ShareScan and OnBase must be configured to allow LDAP or Active Directory authentication.

  For more information, see Enabling Auto-login LDAP or Active Directory Authentication on page 31.

Enabling Standard Authentication

The standard authentication method is automatically selected when a profile is created using the default settings. The following information is provided as a reference.

To enable standard authentication:

1. Ensure that the profile you want to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. From the Connection section of the Configure Connector (OnBase) pane:
   a. Select the **Ignore Session Logon** check box.
   b. Ensure that **Use LDAP or NT Authentication** check box is NOT selected.
   c. Ensure that the **Use Guest Account** check box is NOT selected.
3. Save the current profile.

Enabling Guest Authentication

In order to use guest authentication, you must first configure a guest OnBase user account. For information on creating a guest user account, see Creating a Guest User Account on page 18.

To enable guest authentication:

1. Ensure that the profile you want to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. From the Connection section of the Configure Connector (OnBase) pane:
   a. Select the **Ignore Session Logon** check box.
   b. Select the **Use Guest Account** check box. The user credential fields are enabled.
   c. Enter the credentials for the guest account in the fields provided.
   d. Ensure that **Use LDAP or NT Authentication** check box is NOT selected.
3. Save the profile.

Enabling Interactive LDAP or Active Directory Authentication

Note: In order to use interactive LDAP or Active Directory authentication, your OnBase solution must be configured to use LDAP or Active Directory authentication. For more information, see the **Legacy Authentication Methods** documentation.

To enable interactive LDAP or Active Directory authentication:

1. Ensure that the profile you want to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. From the Connection section of the Configure Connector (OnBase) pane:
   a. Select the **Ignore Session Logon** check box.
   b. Select the **Use LDAP or NT Authentication** check box. The **Domain** field and the **User Enters Domain** check box are enabled.

    c. Specify how the users' domain is to be selected:
- To specify a default domain to be used by all users, enter the domain name in the **Domain** field.
- To require users to enter a domain, select the **User Enters Domain** check box.
- To specify a default domain but allow users the ability to modify it as needed, enter the domain name in the **Domain** field and select the **User Enters Domain** check box.

    d. Ensure that **Use Guest Account** check box is NOT selected.

3. Save the current profile.

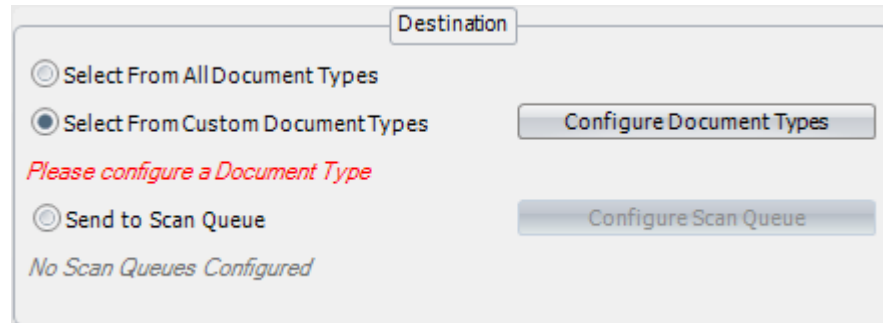## Enabling Auto-login LDAP or Active Directory Authentication

Note: To use auto-login LDAP or Active Directory authentication, ensure both eCopy ShareScan and OnBase are configured to use LDAP or Active Directory authentication. In addition, eCopy ShareScan must be configured to use Session Logon. For more information about configuring OnBase to use LDAP or Active Directory authentication, see the **Legacy Authentication Methods** module reference guide.

To enable auto-login LDAP or Active Directory authentication:

1. Ensure the profile you want to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. From the Connection section of the Configure Connector (OnBase) pane:
   a. Select the **Use LDAP or NT Authentication** check box. The **Domain** field and the **User Enters Domain** check box are enabled.
   b. Specify the domain name in the **Domain** field.
   c. Ensure the **User Enters Domain** check box is NOT selected.
   d. Ensure the **Ignore Session Logon** check box is NOT selected. If it is selected, de-select it.
   e. Ensure that **Use Guest Account** check box is NOT selected.
3. Save the current profile.

Configuring Destination Settings

The options used to specify how MFPs using this profile will upload documents to OnBase are displayed in the Destination section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console.

The Integration for eCopy ShareScan offers several options for uploading documents from the MFP to OnBase.

- **Select from All Document Types**. After scanning a document, the user is able to assign the document to any one of the OnBase Document Type he/she has rights to. This is the OnBase Connector's default behavior.

  For example, if a user has rights to 100 Document Types, he/she will be able to assign the document to any one of those Document Types.

  For more information, see Allowing Users to Select from All Document Types on page 33.

- **Select from Custom Document Types.** After scanning a document, the user is able to assign the document to a Document Type from a group of Document Types selected by an administrator.

  For example, if a user has rights to 100 Document Types, but the administrator has configured the profile to only allow documents to be assigned to one of three potential Document Types, then the user will only be able to assign the document to one of those three selected Document Types.

Note: In this scenario, the user must have rights to the three selected Document Types.

For more information, see Allowing Users to Select from a Group of Document Types on page 33.

- **Send to Scan Queue**. After scanning a document, the user uploads the document as a batch of a scan queue. Depending on the profile's settings, the administer can:
  - Prevent the user from assigning the document to a Document Type and indexing the document.
  - Allow the user to assign the document to one of the Document Types assigned to the scan queue and index it from the MFP.

Note: Users must have rights to the scan queue in order to upload documents to it via an eCopy ShareScan-enabled MFP. If the user is able to assign the document to a Document Type, he/she must also have rights to that Document Type.

Allowing Users to Select from All Document Types

By default, a user can assign a document to any Document Type that he/she has rights to. The following information is provided as a reference.

To allow a user to assign a document to any Document Type that he/she has rights to:

1. Ensure that the profile you wish to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. Select the **Select from All Document Types** radio button in the Destination section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console.
3. Save the profile.

Allowing Users to Select from a Group of Document Types

To allow a user to assign a document to a Document Type from a group of Document Types selected by an administrator:

1. Ensure that the profile you wish to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. From the Destination section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console, select the **Select From Custom Document Types** radio button. The **Configure Document Types** button is enabled.

3. Click **Configure Document Types**. The **Select Document Types** window is displayed.
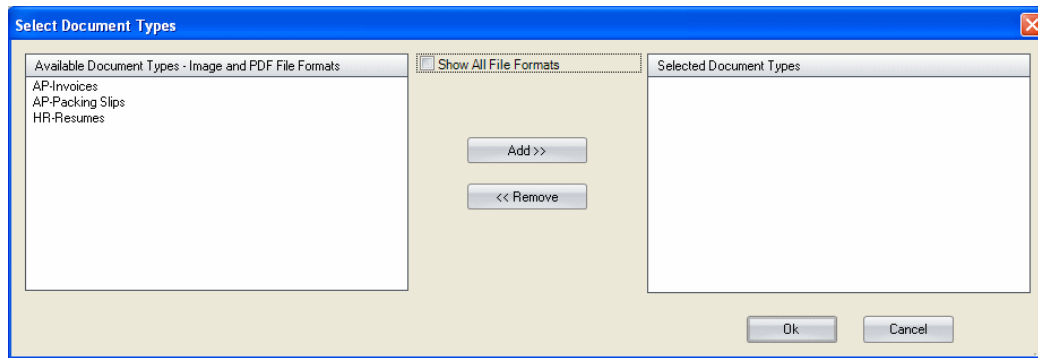
4. By default, all Document Types configured to have a default file format of **Image File Format** or **PDF** are listed in the Available Document Types list.

   To display all Document Types that you have rights to in the Available Document Types list, select the **Show All File Formats** check box.

5. To make a Document Type available to users from the eCopy ShareScan-enabled MFP device, move it from the Available Document Types list to the Selected Document Types. To move a Document Type to the Selected Document Types list, double-click it or select it and click **Add>>**.

   To make a Document Type unavailable to users from the eCopy ShareScan-enabled MFP device, move it from the Selected Document Types list to the Available Document Types list. To move a Document Type to the Available Document Types list, double-click it or select it and click **Remove>>**.

Note: In order to assign a document to one of the Document Types in the Selected Document Types list from the MFP, the user must have rights to that Document Type.

6. Once you have moved all of the desired Document Types to the Selected Document Types list, click **Ok**.

   The **Select Document Types** window is closed and you are returned to the eCopy ShareScan Administration Console. Note that the user interface is updated to reflect the number of Document Types available to users scanning documents with MFPs configured to use this profile.

7. Save the profile.

Allowing Users to Upload Documents to a Scan Queue

To allow users to upload documents as a batch of an OnBase scan queue:

1. Ensure that the profile you wish to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.

2. From the Destination section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console, select the **Send to Scan Queue** radio button. The **Configure Scan Queue** button is enabled.

3. Click **Configure Scan Queue**. The **Select Scan Queue** window is displayed.
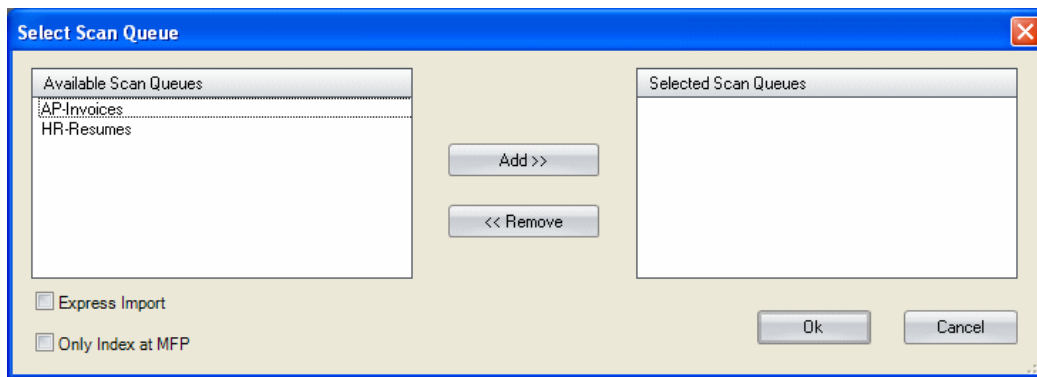
4. To make a scan queue available to users from the eCopy ShareScan-enabled MFP device, move it from the Available Scan Queues list to the Selected Scan Queues. To move a scan queue to the Selected Scan Queues list, double-click it or select it and click **Add>>**.

   To make a scan queue unavailable to users from the eCopy ShareScan-enabled MFP device, move it from the Selected Scan Queues list to the Available Scan Queues list. To move a scan queue to the Available Scan Queues list, double-click it or select it and click **Remove>>**.

Note: In order to upload a document to one of the scan queues in the Selected Scan Queues list from the MFP, the user must have rights to that scan queue.

5. By default, users are able to assign a document to a Document Type and index documents at the eCopy ShareScan-enabled MFP prior to uploading them to OnBase. Once uploaded, the batch containing the documents can be routed for additional indexing or processing.

   • To skip indexing documents at the MFP (i.e., the documents are scanned and are uploaded, unindexed, to OnBase), select the **Express Import** check box.
   • To require documents to be indexed at the MFP (i.e., the documents are scanned and indexed at the MFP and are uploaded as fully-indexed to OnBase), select the **Only Index at MFP** check box.

6. Once you have moved all of the desired scan queues to the Selected Scan Queues list and determined the indexing status of the documents being scanned, click **Ok**.

   The **Select Scan Queue** window is closed and you are returned to the eCopy ShareScan Administration Console. Note that the user interface is updated to reflect the number of scan queues available to users scanning documents with MFPs configured to use this profile.

7. Save the profile.

Configuring the Document Date

Documents uploaded to OnBase from an eCopy ShareScan-enabled MFP, like other documents stored in OnBase, are assigned a Document Date. The Document Date can be set to the date that the document was scanned and uploaded to OnBase or you can allow users to select the date that is assigned as the Document Date.

The options used to determine how a Document Date is assigned to documents scanned and uploaded by an eCopy ShareScan-enabled MFP using this profile are displayed in the Document Date section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console.
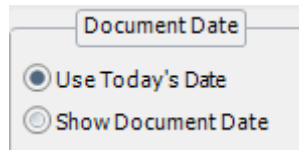
Automatically Assigning the Current Date as the Document Date

By default, the current date is assigned to all documents that are uploaded to OnBase from an eCopy ShareScan-enabled MFP. The following information is provided as a reference.

1. Ensure the profile you want to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. From the Document Date section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console, select the **Use Today's Date** radio button.
3. Save the profile.

Allowing Users to Select the Document Date

To allow users to select the date to be assigned as a document's Document Date:

1. Ensure the profile you want to configure is selected in the **Profile** drop-down. If it is not selected, select it from the **Profile** drop-down.
2. From the Document Date section of the Configure Connector (OnBase) pane of the eCopy ShareScan Administration Console, select the **Show Document Date** radio button.
3. Save the profile.

Specifying the OnBase Connector's General Settings

Note: The following information about general eCopy ShareScan Connector profile settings is provided for informational purposes only. For more information about these settings, see your eCopy ShareScan documentation.

You can modify some eCopy ShareScan Connector profile general settings to modify the appearance of the OnBase connector and to control how images are scanned by the MFP. These settings are displayed in the Settings pane of the eCopy ShareScan Administration Console.

Tip: None of these settings must be changed in order for your Integration for eCopy ShareScan solution to function as expected. However, they can be used to change the Integration for eCopy ShareScan's default behavior to match the behavior needed for your business processes.

Once you have made any changes to the current profile's general settings, remember to save the profile prior to exiting the eCopy ShareScan Administration Console.

The Settings pane is divided into five sections:

1. **The Display Section**. This section contains options that control how the OnBase Connector is displayed on an eCopy ShareScan-enabled MFP device. See The Display Section on page 38 for more information.
2. **The Document Section**. This section contains options that control how the electronic images of the documents that are scanned are created. See The Document Section on page 39 for more information.
3. **The Services Section**. This section contains options that control services related to the scanned documents. It does not contain any configurable options for the Integration for eCopy ShareScan.
4. **The Scanner Section**. This section contains options that control the MFP's scanner settings. See The Document Section on page 39 for more information.
5. **The Offline Processing Section**. This section contains options that control the MFP's offline processing settings. See The Offline Processing Section on page 40 for more information.

The Display Section

This section contains options that control how the OnBase Connector is displayed on an eCopy ShareScan-enabled MFP device.

Display Settings	Description
Label	This setting configures the text label for the OnBase Connector on the MFP's user interface.
Image	This setting contains the path to the image used for the OnBase Connector on the MFP's user interface.
Description	This setting contains the text description of the OnBase Connector on the MFP's user interface.

The Document Section

This section contains options that control how the electronic images of the documents that are scanned are created.

Document Settings	Description
File Format	This setting controls the file format of the image file that is created when a document is scanned.
	To allow user to select a file format different than the format specified, select the **User Modify** check box.
	Note: Only image and PDF file formats are supported by the Integration for eCopy ShareScan.
Blank Page Removal	This setting allows you to automatically remove any blank pages from the scanned document.
	To enable blank page removal, select the **Enable Blank Page Removal** check box. If this check box is not selected, then blank pages will not be automatically removed from scanned documents.
	Once blank page removal is enabled, enter a value (1-100) in the threshold field to determine the sensitivity of the blank page detection
	To allow a user to enable/disable blank page removal when scanning a document, select the **User Modify** check box.

| Document Settings	Description
Color Compression	This setting allows you to control the quality/size of the image file created when a document is scanned. • **Expert**: Select this radio button for the smallest file size and the best text quality. • **High**. Select this radio button for an average file size and high text quality. • **Medium**. Select this radio button for a larger file size and best image quality.

The Services Section

This section does not contain any configurable options for the Integration for eCopy ShareScan.
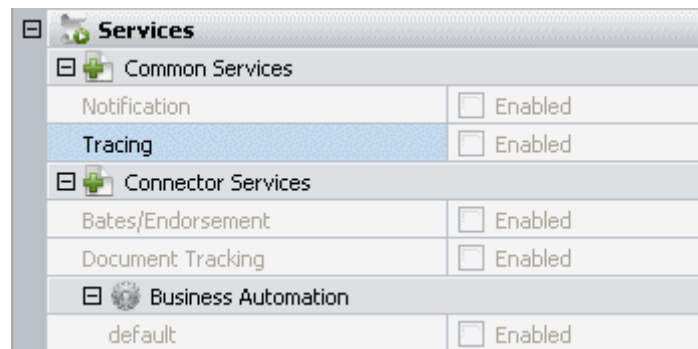
The Scanner Section

This section contains options that control the MFP's scanner settings.
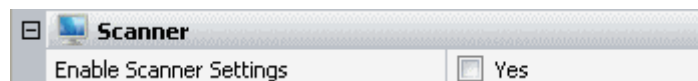
To enable scanner settings for this OnBase Connector profile, select the **Enable Scanner Settings** check box.

If this check box is not selected, the scanner settings will not be enabled for this profile.

The Offline Processing Section

This section contains options that control the MFP's offline processing settings.

To enable offline processing for this OnBase Connector profile, select the Enable Offline Processing check box.

If this check box is not selected, offline processing will not be enabled for this profile.

The following best practice recommendations were assembled by a team of OnBase subject matter experts. They represent the accumulation of years of experience installing and configuring OnBase solutions.

The following recommendations are general in nature, and are applicable to most OnBase solutions and network environments. Depending on your solution design and your organization's needs, not all of the best practice recommendations listed below may apply to, or be recommended for, your OnBase solution.

Carefully consider the impact of making any changes, including those listed below, to your OnBase solution prior to implementing them in a production environment.

Usage

Indexing Documents from the MFP

Indexing documents can be difficult from the MFP's user interface. It is considered a best practice to automate as much of the indexing process as possible for ease of use and to reduce the chance for error.

Some suggestions for simplifying the indexing process include:

- Using AutoFill Keyword Sets
- Using Keyword Drop-Down Lists and Keyword Data Sets
- Uploading documents as a batch of an OnBase scan queue and performing centralized indexing:
  - Batches can be manually indexed by one or more users at an indexing workstation
  - Batches can be automatically indexed using one of the indexing automation modules (e.g., batch bar code processing via the Bar Code Recognition Server, Advanced Capture, or Intelligent Capture for AP)

Note: These indexing automation modules require additional scan queue configuration and additional licensing. For more information, see the Document Imaging documentation.

For more suggestions on how to simplify or automate the indexing process, contact your solution provider.

Configuration

General OnBase Configuration Information

Granting Users Rights to Scan Queues and Document Types

It is considered a best practice to grant users rights to all Document Types assigned to scan queues to which the users have rights. If, for security reasons, users cannot be given rights to all Document Types assigned to a scan queue, then separate scan queues should be created.

Scan Queue Configuration

When configuring OnBase scan queues for use with your Integration for eCopy ShareScan solution, you should take into account all best practices that have been collected for scan queue creation and configuration. A complete listing of these best practices is available in the Document Imaging documentation.

Creating a Guest OnBase User Account

One OnBase authentication method supported by the Integration for eCopy ShareScan is guest authentication. When this authentication method is selected, a user uploads documents to OnBase from the eCopy ShareScan-enabled MFP device using a guest OnBase user account, not their own credentials.

If your OnBase solution consists of other modules/features that require the use of a guest users account, it is recommended that you configure separate guest user accounts for each of these modules/features. Each guest account should be granted only the minimum rights and privileges needed for its specific purpose.

The following tables highlight many of the similarities and differences among the features available in the primary OnBase MFD (multi-function device) integrations. Use the information provided to help determine which integrations best suit your organization's imaging needs.

General

Localization of the user interface is not supported in the Integration for eCopy ShareScan.

	Integration for HP Connect	Integration for eCopy ShareScan
Supports Software and Device Timeout	X	X
Supports User Interface Localization	X	
Supports Multiple Application Servers (Load Balancing)	X	X

Authentication

A similar assortment of authentication features is available in each of the MFD integrations.

	Integration for HP Connect	Integration for eCopy ShareScan
Supports Interactive OnBase Authentication	X	X
Supports Automatic OnBase Authentication	X	X

	Integration for HP Connect	Integration for eCopy ShareScan
Supports Interactive Active Directory and LDAP Authentication	X	X
Supports Automatic Active Directory and LDAP Authentication	X	X

Scanning

An assortment of scanning features are available in each of the MFD integrations.

	Integration for HP Connect	Integration for eCopy ShareScan
Allows Users to Select the File Format of the Documents Being Scanned		X
Allows Users to Change the DPI Setting for Scans	X	X
Supports Simplex and Duplex Scanning	X	X
Allows Users to Scan More Pages into the Current Batch	X	X
Allows Users to Delete Documents and Pages		X
Allows Users to Rotate Scanned Pages		X
Allows Users to Rescan Documents		X

	Integration for HP Connect	Integration for eCopy ShareScan
Allows Users to Navigate Through Scanned Documents and Pages		X

Indexing

General

Document Type Group selection is not available in the Integration for HP Connect.

	Integration for HP Connect	Integration for eCopy ShareScan
Allows Indexing at the MFD Only	X	X
Supports Scan Queue Selection	X	X
Supports Document Type Group Selection		X
Supports Document Type Selection	X	X

Keywords

Most, but not all, of the Keyword-specific support available in the Integration for HP Connect is also available in the Integration for eCopy ShareScan.

Specific Currency and **Date & Time** Keywords are not available in the Integration for eCopy ShareScan.

	Integration for HP Connect	Integration for eCopy ShareScan
Respects Maximum Keyword Length	X	X
Allows Users to Add Instances of an Existing Keyword Type	X	X

	Integration for HP Connect	Integration for eCopy ShareScan
Supports AutoFill Keyword Sets	X	X
Supports Drop-Down Lists for Keyword Data Sets	X	X
Supports Cascading Data Sets		
Supports Specific Currency Keywords	X	
Supports Date & Time Keywords	X	
Supports Date Keyword Auto-Masking	X	X
Supports Date & Time Keyword Auto-Masking	X	
Supports Masked Keywords	X	X
Supports Required Keywords	X	X
Supports Invisible Keywords	X	X
Supports Hidden Keywords	X	X
Supports Read-Only Keywords	X	
Supports Multi-Instance Keyword Groups	X	X

Uploading

Each of the MFD integrations supports batch upload of documents through a scan queue. Uploading single documents on an ad-hoc basis is not supported in the Integration for HP Connect.

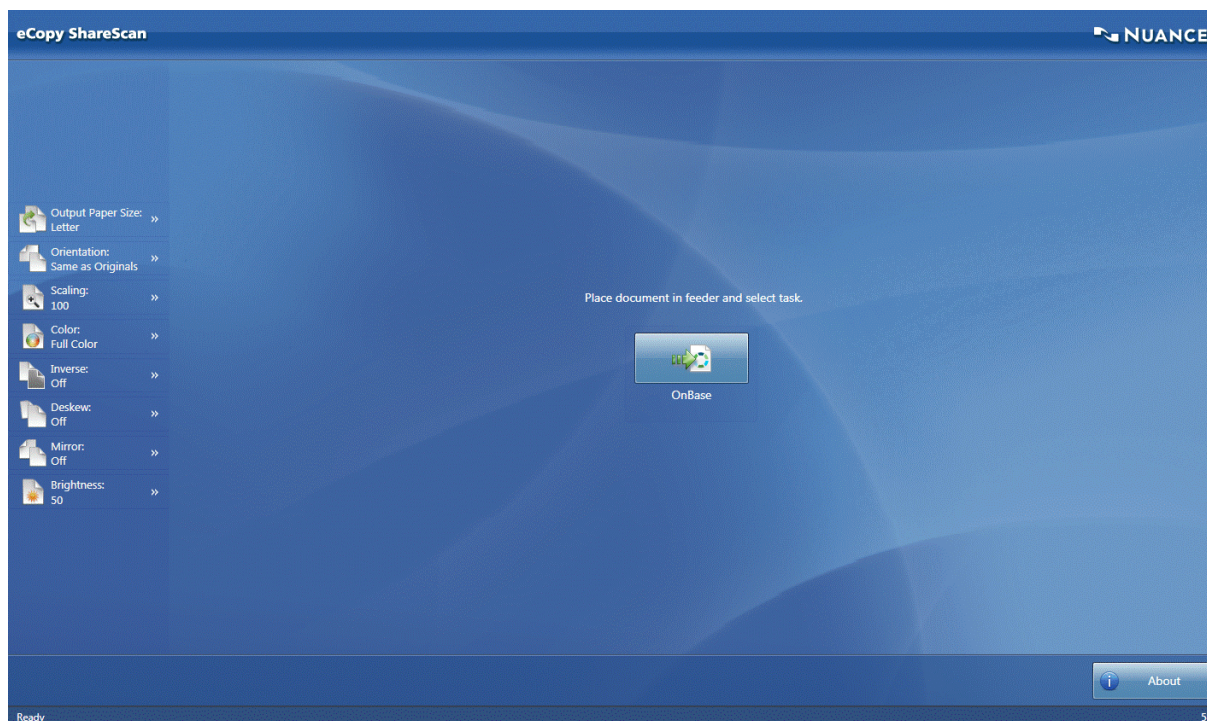|	Integration for HP Connect	Integration for eCopy ShareScan
Allows Users to Upload Documents as a Batch of a Scan Queue	X	X
Allows Users to Upload Single Documents on an Ad-Hoc Basis		X

Integration for eCopy ShareScan

User Guide

The Integration for eCopy ShareScan allows you to scan, index, and upload documents to OnBase.

All actions related to scanning, indexing and uploading documents are performed on an eCopy ShareScan-enabled MFP device. For information specific to using eCopy ShareScan, such as information about changing your scan settings, see the eCopy ShareScan documentation or contact your solution provider.

Scanning a Document

To scan a document:

1. Place the document to be scanned in the MFP's document feeder.
2. From the MFP's eCopy ShareScan interface, press the **Integration for eCopy ShareScan** button. In the example below, the button is labeled **OnBase**.

Note: Depending on your configuration, your **Integration for eCopy ShareScan** button may be labeled differently.

3. The document is scanned and the Preview screen is displayed.
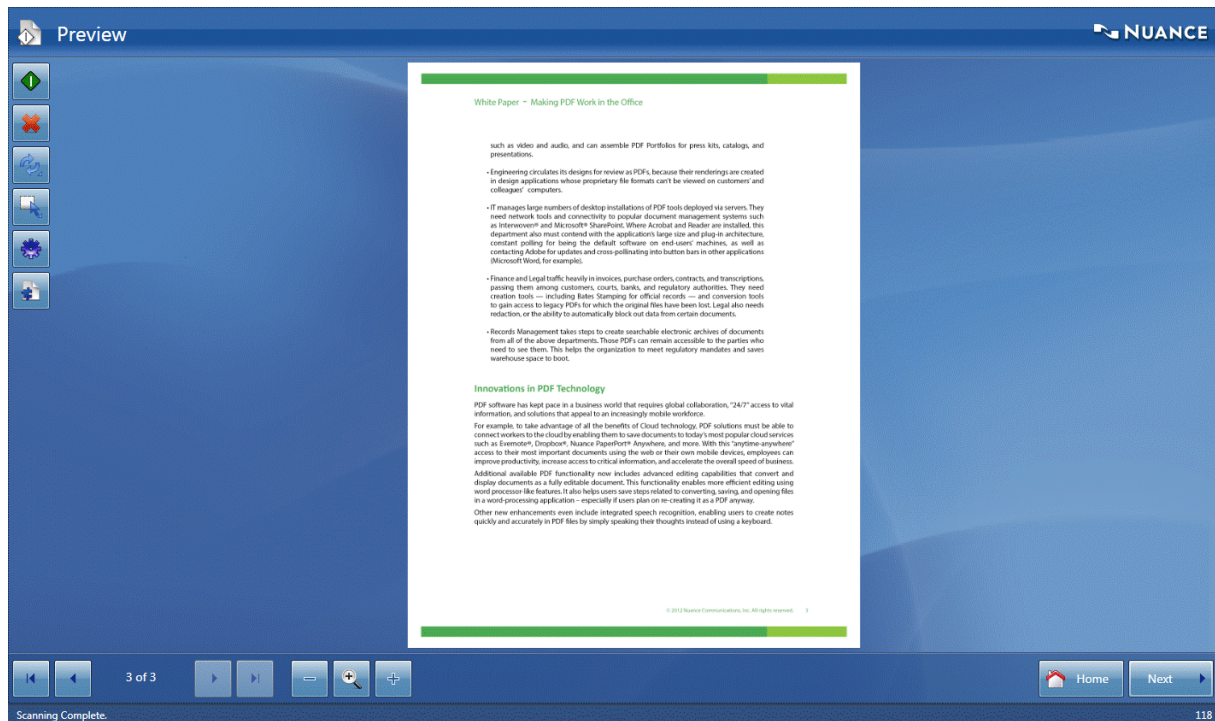
- To scan additional pages into the document, delete pages from the document, rotate pages, change the scanner settings, or select a different file format for the scanned document, click the corresponding button on the left side of the screen.
- To navigate the pages in the document or zoom in/out on the displayed page, click the corresponding button on the bottom of the screen.
- To discard the scanned document and return to the Home screen, click **Home**.

Note: For more information on these options, see your eCopy ShareScan documentation.

4. With the document to be indexed displayed on the Preview screen, press **Next**. The OnBase Log On screen is displayed.

Indexing & Uploading a Document

In order to index and upload the scanned document, you must complete the following tasks:

1. Log on to OnBase. See Logging On to OnBase on page 52.
2. Assign the document to a scan queue and/or Document Type. See Classifying the Document on page 52.
3. Assign Keyword Values to the scanned document. See Assigning Keyword Values to the Document on page 54.
4. Upload the document to OnBase. See Uploading a Document on page 59.

Logging On to OnBase

You must log on to OnBase before you can index and upload documents. Depending on your system's configuration, you may be logged in automatically. If the Log On screen is displayed, then you must log on manually.

To log on to OnBase:

1. At the Log On screen, enter your credentials using the MFP's keyboard or the virtual keyboard available from the MFP's interface.

Note: Depending on your configuration, your password may be case sensitive.

2. Press **Next**. The Import Document screen is displayed.

Tip: At any time, press **Back** to return to the previous screen, or press **Home** to discard the document and return to the Home screen.

Classifying the Document
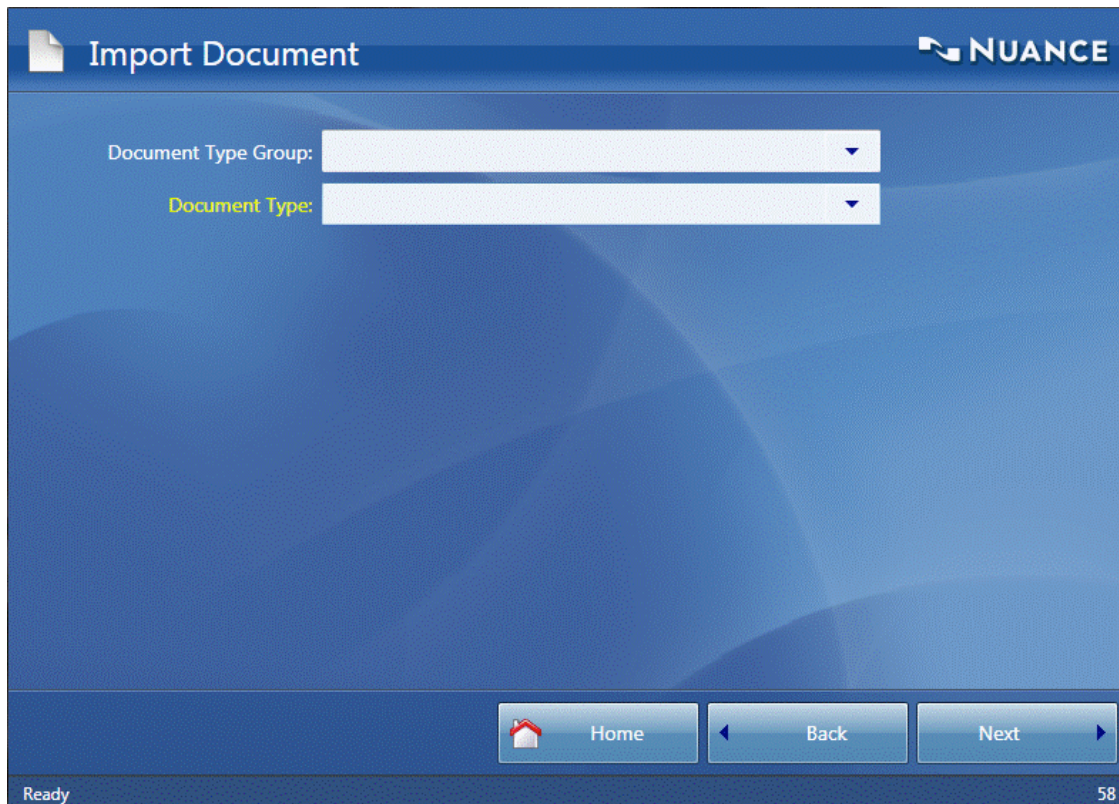
Depending on your configuration, the documents you upload from the MFP will be imported ad hoc or via a scan queue.

- **Ad Hoc Import**. When a document is imported into OnBase ad hoc, it is immediately stored in OnBase without any further processing.
- **Batch Import via a Scan Queue**. When importing a document via a scan queue, the document is routed through additional batch status queues for additional processing or indexing.

Note: For additional information on ad hoc and batch importing, contact your system administrator.

Ad Hoc Import

Prior to assigning Keyword Values to the document and uploading it to OnBase, you must assign the document to a Document Type from the Import Document screen.

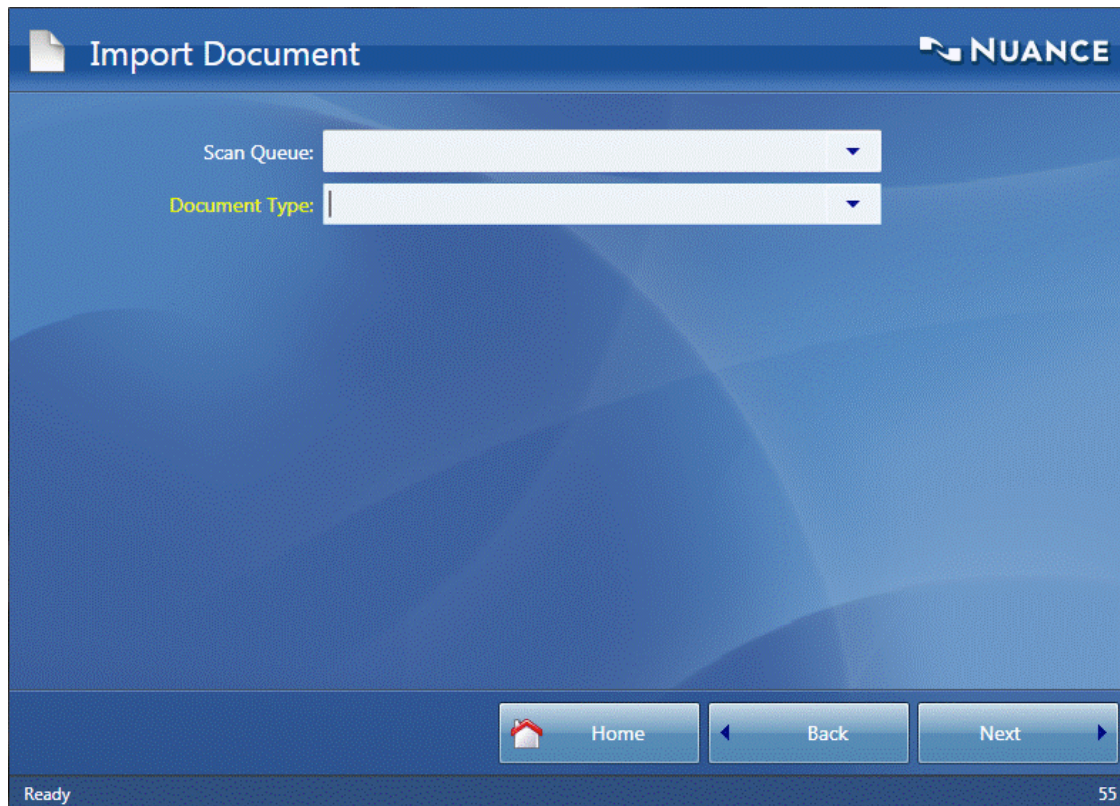To assign the document to a Document Type:

1. Select a Document Type Group from the **Document Type Group** drop-down.

   The selected Document Type Group filters the available Document Types.
2. Select a Document Type to assign to the document from the **Document Type** drop-down.

   Once a Document Type is selected, the Keyword fields associated with the selected Document Type are displayed.

Tip: At any time, press **Back** to return to the previous screen or press **Home** to discard the document and return to the Home screen.

Importing via a Scan Queue

Prior to assigning Keyword Values to the document and uploading it to OnBase, you must assign the document to a scan queue from the Import Document screen.

Depending on your configuration, you may also be able to specify a Document Type for the document. If you're able to assign the document to a Document Type, you will also be able to assign Keyword Values to the document.

To assign the document to a scan queue:

1. Select the appropriate OnBase scan queue for the document from the **Scan Queue** drop-down.
2. If the **Document Type** drop-down is displayed, select the Document Type the document should be assigned to. The **Document Type** drop-down may not be available, depending on your system's configuration.

   Once a Document Type is selected, the Keyword fields associated with the selected Document Type are displayed.

Tip: At any time, press **Back** to return to the previous screen or press **Home** to discard the document and return to the Home screen.

Assigning Keyword Values to the Document

Once the document has been assigned to a Document Type, Keyword fields are displayed on the Import Document screen. A Keyword field is displayed for each Keyword Type associated with the selected Document Type.

If you are uploading a document via a scan queue and are unable to assign the document to a Document Type, you will not be able to assign Keyword Values to the document.
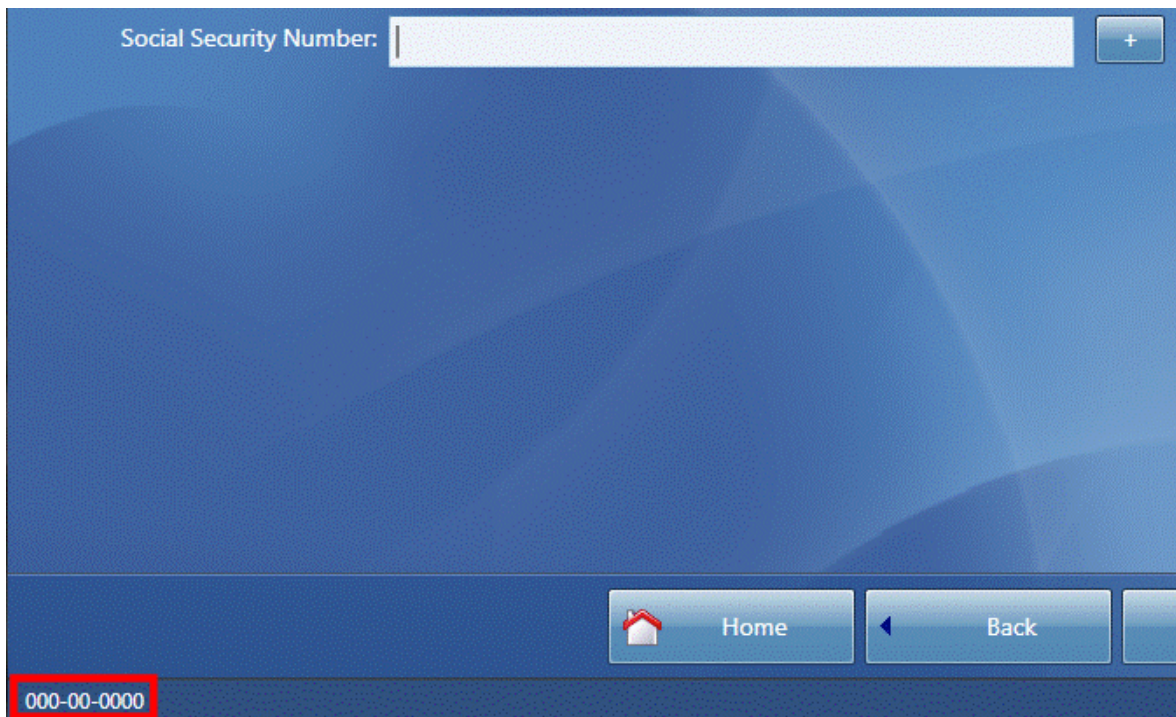

To assign Keyword Values to a document:

1. Select the first Keyword field on the Import Document screen.
2. Using the MFP's keyboard or the virtual keyboard available from the MFP's interface, enter the Keyword Value for the selected Keyword.
    *   Date Keyword Values cannot be entered manually. They must be entered via the MFP's calendar tool. To enter a date value, press the **Calendar** button next to the Keyword field.
    *   Required Keyword fields are displayed in yellow. You will not be able to upload a document to OnBase unless a value has been entered for all required Keyword fields.
    *   Depending on your configuration, a drop-down arrow may be displayed next to a Keyword field. Click the drop-down arrow to display a list of potential Keyword Values to select from for this Keyword field.

Note: Only the first 100 potential values are displayed in the drop-down.

To filter the values displayed in the drop-down, you may "type ahead" the first few characters of the desired Keyword Value.

- If a Keyword Type uses masking, help text is displayed at the bottom of the Import Document screen. The help text indicates how the Keyword Value must be formatted.

- AutoFill Keyword Sets are supported for the Integration for eCopy ShareScan. If you enter a value for the primary Keyword in an AutoFill Keyword Set, the AutoFill will automatically populate values in the secondary Keyword fields.

  For more information about using AutoFill Keyword Sets with the Integration for eCopy ShareScan, see AutoFill Keyword Sets on page 60.

- Multi-Instance Keyword Type Groups are supported for the Integration for eCopy ShareScan. If a Multi-Instance Keyword Type Group is configured for the selected Document Type, the MIKTG is set apart from the other Keyword fields on the Import Document screen and the name of the MIKTG is displayed above its Keyword fields.

- To add an additional instance of a Keyword field or a Multi-Instance Keyword Type Group, click the **+** button next to its Keyword field.

3. Enter a value for each Keyword field displayed on the Import Document screen.

   If the selected Document Type is assigned a large number of Keyword Types, you may need to scroll through multiple screens in order to view and enter values into all Keyword fields.

Uploading a Document

Once you have entered Keyword Values for the document, you must upload it to OnBase.

To upload a document to OnBase from the MFP:

1. From the Import Document screen, click **Next**.

   Prior to uploading the document, the Integration for eCopy ShareScan attempts to validate the Keyword Values assigned to the document to ensure that they are appropriate for their associated Keyword Types. The Integration for eCopy ShareScan checks for the following:

   - **Keyword Masking**. If a Keyword Type is configured to use masking, the Integration for eCopy ShareScan checks to ensure that the Keyword Value matches the mask configured for the Keyword Type.
   - **Data Types**. The Integration for eCopy ShareScan checks to ensure that the Keyword Value contains only the appropriate data for the Keyword Type (e.g., numeric only data, alphanumeric data, a date, etc.)
   - **Keyword Value Length**. The Integration for eCopy ShareScan checks to ensure that the Keyword Value does not exceed the maximum allowable length configured for the Keyword Type.

   If invalid Keyword Values are found, then the document is not uploaded and you are notified which Keyword Values are invalid and are given the opportunity to correct them. If all Keyword Values are valid, the document is uploaded to OnBase.

   Once the upload is complete, the Document Successfully Sent screen is displayed.
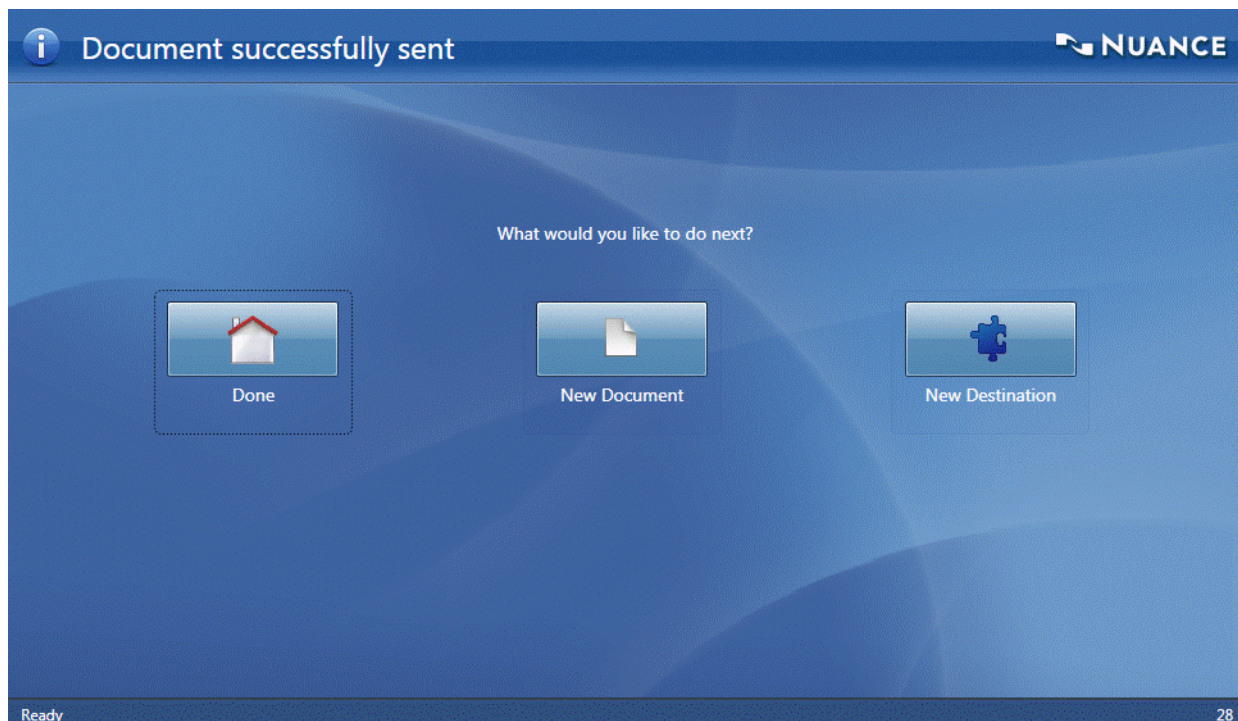
2. Do one of the following:
    - To return to the Home screen, click the **Done** button.
    - To scan, index, and upload another document using the same eCopy ShareScan connector (i.e., using the **Integration for eCopy ShareScan** button from the Home screen), click the **New Document** button.
    - To scan, index, and upload another document using another eCopy ShareScan connector (i.e., a different button on the Home screen), click the **New Destination** button's drop-down arrow and select the connector to be used.

System Interaction

AutoFill Keyword Sets

AutoFill Keyword Sets are supported for the Integration for eCopy Share Scan.

Prior to configuring AutoFill Keyword Sets for use with the Integration for eCopy Share Scan, be aware of the following limitations:

- One Document Type-level AutoFill Keyword Set or multiple Keyword-level AutoFill Keyword Sets can be used to index each document from the MFP's interface.
- If multiple instances of an AutoFill Keyword Set are associated with the same primary Keyword Value, only the first instance of the AutoFill Keyword Set is applied to the document. Users are NOT given the option to apply multiple instances or to select the instance of the AutoFill Keyword Set that they want to apply to the document.
- If an AutoFill Keyword Set attempts to populate a secondary Keyword Value in Keyword field already containing a Keyword Value, the Keyword Value from the AutoFill Keyword Set is ignored (i.e., the existing Keyword Value is not overwritten by the Keyword Value from the AutoFill Keyword Set).
- AutoFill Keyword Sets cannot be "cascaded," or used to trigger additional AutoFill Keyword Sets (i.e., if a secondary Keyword Value filled by one AutoFill Keyword Set is configured to be the primary Keyword Value of another AutoFill Keyword Set, the second AutoFill Keyword Set will not be expanded).
- If the primary Keyword Value and at least one secondary Keyword Value of an AutoFill Keyword Set reside in a Multi-Instance Keyword Type Group, the Integration for eCopy ShareScan will attempt to populate all remaining secondary Keyword Values in that instance of the MIKTG.

    If any secondary Keyword Values cannot be populated within the MIKTG, then the Integration for eCopy Share Scan will look to populate values in standalone Keyword Types or Single-Instance Keyword Type Group Keyword fields.

- If the primary Keyword Value is represented by the last Keyword field on a page of the Import Document screen and you must press another button or field (e.g., the Next button) to trigger the expansion of the AutoFill Keyword Set.

  If you press the **Tab** key on the MFP's keyboard or virtual keyboard to set the focus to the **Next** button, then the AutoFill Keyword Set will not expand. This is a known issue with the eCopy ShareScan software.