

eCopy PaperWorks™

Installation Guide



MAKING PAPER WORK™

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Table of Contents

Introduction	1
Further information	2
Activation and registration	3
Registering your software	3
Customer support services	4
Contact information	5
Installing eCopy PaperWorks	7
Minimum system requirements	8
Supported mail servers	9
Supported mail clients	9
Supported fax applications	9
Supported OCR applications	10
Supported scanning devices	10
Supported document management systems	11
Installing eCopy PaperWorks	12
Activating your software	14
Activation over a proxy server	14
Manual activation	14
Deactivating and transferring a product key	16
Uninstalling without deactivating the product key	17
Installing on a Terminal Server or Citrix server	18
Limitations	18
Installation	19
Running the client	23
Tested environments	24

Configuring eCopy PaperWorks	26
Microsoft Windows Installer deployment ...	27
Preparing your files for MSI deployment	28
Prerequisites	29
Creating a transform file	30
Advertised Shortcuts	31
Properties	32
Active Directory deployment	34
SMS/SCCM deployment	37
Collection Creation	37
Package Creation	39
Advertisement Creation	43
Additional information	44
Document management systems	45
eCopy PaperWorks document management connectors ...	46
ODMA document management systems	46

Introduction

This guide is intended for users who are installing eCopy PaperWorks™. It provides an overview of eCopy PaperWorks and describes system requirements and installation procedures.

In this chapter

- Further information 2
- Activation and registration 3
- Customer support services 4

Further information

The following resources contain more information about eCopy PaperWorks:

- **Getting Started Guide:** Provides information about configuring eCopy PaperWorks.
- **Online Help:** Access the Help file in eCopy PaperWorks by pressing F1 or by selecting Help > Contents. The online help provides detailed information on how to configure and use the software.
- **Tutorial:** Access by clicking Help > Tutorial in eCopy PaperWorks. The tutorial shows you how to use the main functions of the software.
- **Readme:** Contains important, last-minute product information that does not appear in the rest of the documentation. This document is available under eCopy Applications on the Start > Programs menu.

Activation and registration

After installing eCopy PaperWorks, you may be required to activate the software in order to use it. For information, see “Activating your software” on page 14.

Registering your software

You must register your software to receive customer support. You can access the Registration Web site by selecting Registration on the Help menu, or by using the following link:

<http://registration.ecopy.com/>.

Note: A product key can only be registered to one person. eCopy recommends that this person be the designated technical contact for your company.

Obtaining eCopy PaperWorks document management connectors

When you register your software, you get access to specific add-on eCopy PaperWorks document management connectors. These connectors are part of your eCopy PaperWorks software, and are licensed to you under your eCopy PaperWorks License Agreement. The connectors are available for download from the Registration Web site.

To the extent eCopy develops any other eCopy PaperWorks Connectors, such Connectors will be available for license at then current prices/terms.

Customer support services

The eCopy Customer Support Services groups provide:

- Customer support for licensing, registration, and other non-technical issues.
- Technical support for product configuration, troubleshooting, and product usage issues.

eCopy-provided services are available to registered (<http://registration.ecopy.com/>) users of eCopy software during the warranty period or for the duration of your software maintenance and support agreement. Contact your dealer or distributor for details.

As described in the maintenance and support agreement, your dealer or distributor will provide you with Level 1 support (Help-line telephone or other assistance) for operating the covered products during the hours established by your dealer or distributor. If you require technical support after your dealer or distributor has provided Level 1 support, the dealer or distributor will escalate the support issue to eCopy for resolution and will manage all related communications with you.

If you purchased your software directly from eCopy, check the Ask eCopy Knowledge Base (www.AskeCopy.com) for solutions to your technical problems. If necessary, open a ticket at www.AskeCopy.com. Ask eCopy provides 24x7 access to a knowledge base that includes Frequently Asked Questions (FAQs), product service packs, product support matrices, product information, and other information.

Note: eCopy does not provide hardware support. Contact your hardware dealer, distributor, or system integrator for support information.

Contact information

US/North America

Please visit the Ask eCopy Web site—www.askecopy.com—for Customer Support Services hours of operation, contact information, policies, and process descriptions.

eCopy Corporate Headquarters Telephone: +1.603.324.8500

eCopy Customer Support Services Telephone: +1.603.324.8400

Outside North America

Please contact your local dealer or national sales organization.

Installing eCopy PaperWorks

eCopy PaperWorks provides a comprehensive set of tools that enable business professionals to transform paper and electronic documents into secure PDF files. Users can integrate these documents into company workflows and distribute them using most e-mail and network fax applications.

eCopy PaperWorks offers add-on connectors for popular document management systems, including Interwoven® WorkSite®, Open Text™ eDOCS DMT™, and EMC® Documentum®. Users can store, search, and manage documents in these systems without extensive setup or configuration.

eCopy PaperWorks supports either of the following installation methods:

- Individual users can install eCopy PaperWorks from a local drive or from a location on the network.
- The administrator can use software, such as Microsoft Active Directory® or Microsoft Systems Management Server (SMS), to deploy eCopy PaperWorks to multiple systems. eCopy PaperWorks supports silent mode installations. Silent installations do not require any interaction with the end user.

In this chapter

- Minimum system requirements 8
- Installing eCopy PaperWorks 12
- Installing on a Terminal Server or Citrix server 18
- Activating your software 14
- Configuring eCopy PaperWorks 26

Minimum system requirements

Before installing eCopy PaperWorks, make sure that the target personal computer (PC) meets the following minimum system requirements:

TABLE 1. Minimum system requirements

Operating system	Processor	Disk Space and RAM
Microsoft Windows Vista x86 (32-bit) Business and Enterprise editions with latest service pack	800 MHz	<ul style="list-style-type: none"> ■ 512 MB RAM ■ 500 MB free disk space
Microsoft Windows XP with latest service pack	300 MHz	<ul style="list-style-type: none"> ■ 512 MB RAM for color images ■ 256 MB RAM for black-and-white images ■ 500 MB free disk space
Windows 2003 Server with latest service pack	300 MHz	<ul style="list-style-type: none"> ■ 512 MB RAM for color images ■ 256 MB RAM for black-and-white images ■ 500 MB free disk space
Windows 2008 Server with latest service pack	1 GHz	<ul style="list-style-type: none"> ■ 512 MB RAM ■ 500 MB free disk space

Note: To use the eCopy PaperWorks 128-bit document encryption, Microsoft strong encryption must be installed on the system.

Supported mail servers

- Microsoft® Exchange 2000/2003/2007
- Lotus® Domino® 6.5/7.0/8.0

Supported mail clients

- Microsoft Outlook® 2002/2003/2007
- IBM Lotus Notes 6.5/7.0.3/8.0
- Novell GroupWise® 6.5 SP6/7.0/7.2
- Microsoft Messaging Application Programming Interface (MAPI)-compliant applications: Outlook Express 6.0, Qualcomm Eudora 7.1, and Mozilla Thunderbird 2.0

Supported fax applications

- Open Text™ Fax Server (RightFax) 9.0/9.3
- Fax via Microsoft Exchange
- Fax via Lotus Notes
- Print-to-fax drivers: Biscom FAXCOM® 9.03; Castelle FaxPress™ 8.2.5

Supported OCR applications

- Readiris Pro 11; Readiris Pro Corporate Edition 11
- ABBYY FineReader® Professional 8.0; ABBYY FineReader® Corporate Edition 8.0/9.0

Supported scanning devices

eCopy PaperWorks supports TWAIN-compliant scanners.

Supported document management systems

eCopy PaperWorks add-on connectors provide integration with several popular document management systems, including:

- Interwoven WorkSite
- Open Text eDOCS DM
- EMC Documentum

Users can store, search, and manage documents in these systems without extensive setup or configuration.

ODMA document management systems

In addition, eCopy PaperWorks provides legacy support for the following ODMA-compliant document management systems:

- Open Text DOCS Open™ 4.1
- Open Text eDOCS DM 5.1.0.5/6.0
- Interwoven WorkSite 8.0/8.1/8.2 SP1/8.3; DeskSite® 8.0/8.1/8.2 SP1; FileSite® 8.2
- Lotus Domino Document Manager 6.5/7.0

Installing eCopy PaperWorks

Users can install eCopy PaperWorks from a local drive, or system administrators can make the software available for licensed users to install from a network.

To enable network installation:

- 1 Copy the eCopy PaperWorks Microsoft Installer file, **eCopy PaperWorks English.exe**, to a network folder.
- 2 Provide users with the information they need to access and install the software.

To install the software:

- 1 Use either of the following methods to start the installation:
 - If you have an eCopy PaperWorks CD, insert the CD into your drive.

If AutoRun is enabled on your computer, the **Welcome** window opens automatically.

If AutoRun is not enabled, double-click **My Computer** and then double-click the CD drive containing the eCopy PaperWorks CD. Double-click **Setup.exe**. The Welcome window opens.

- If you are installing from electronic media on a network or local drive, navigate to the location of the installer file and double-click **eCopy PaperWorks English.exe**.
- 2 In the **Welcome** window, click **Next**.
 - 3 Accept the terms in the license agreement and click **Next**.
 - 4 To retain the default destination folder, click **Next**.

If you want to select a different location, click **Change**, browse to the destination folder, click **OK**, and click **Next**.
 - 5 Select the file types for which you want eCopy PaperWorks to be the default viewer and click **Next**.

- 6** To install the Readiris™ OCR engine, click **Next**.
If you do not want to install this component, select **No, do not install Readiris OCR engine** and then click **Next**.
- 7** Click **Install**.
The installation program runs.
- 8** When the software is successfully installed, click **Finish**.

Note: If you do not have sufficient privileges to install eCopy PaperWorks, see your system administrator.

Activating your software

Your eCopy PaperWorks software license specifies the number of systems on which you can use the product. For example, if you have a 5-user license, you get a single product key that can be used on up to 5 systems.

Depending on the type of license you have, you may need to perform the following tasks:

- Enter your 21-character product key in the Licensing window the first time you start eCopy PaperWorks. eCopy PaperWorks validates the key.
- Activate the product key within 30 days of installation. The activation process associates the product key with the system's hardware ID, validates the key, and returns a license code.

If your system is connected to the Internet, eCopy PaperWorks activates the product key as soon as you enter it in the Licensing window. If the system is not connected to the Internet, you can activate the key manually.

Activation over a proxy server

If your license requires activation, and you are using a proxy server, it may block activation. To avoid this problem, system administrators should add the URLs for automatic activation (<https://ecopy.biz/>) and manual activation (<https://activation.ecopy.biz/>) to the proxy server list of allowed sites. Consult your proxy server documentation for instructions.

Manual activation

If automatic activation fails, you can activate eCopy PaperWorks manually. You have 30 days in which to activate the product key.

To activate the product key manually:

- 1 On the main menu, click **Options > Preferences > Licensing**.
- 2 Click **Export**.

- 3 Browse to a location to save the exported **eCopy Activation** file and click **OK**.
- 4 On a system with an Internet connection, navigate to the eCopy activation site, <https://activation.ecopy.biz/> and follow the prompts to upload the eCopy Activation file you exported. The site returns an eCopy Activation Response file.
- 5 Save the **eCopy Activation Response** file and copy it to the system you want to activate, or to a location on your network that the system can access.
- 6 On the system you want to activate, start eCopy PaperWorks, open **Options > Preferences > Licensing**, and select the **Activation** tab.
- 7 Click **Import** and browse to the **eCopy Activation Response** file.
- 8 Click **Open** to import a license code and activate the product key. You can now use eCopy PaperWorks.

Registering your software

You must register your software to receive customer support. You can access the Registration web site by selecting Registration on the Help menu, or by using the following link:

<http://registration.ecopy.com/>.

Privacy

When you activate the software, the product key and the hardware ID of the system on which it is installed are stored in the eCopy activation database. No personal information is collected. When you register the software, you do exchange personal information with eCopy. For a description of eCopy's privacy policies, see

http://www.ecopy.com/company_privacy_policy.asp.

Deactivating and transferring a product key

If your software license required activation, you can deactivate an eCopy PaperWorks product key in order to transfer it to another system.

Deactivation removes the eCopy PaperWorks product key (and its associated license code) from the system, freeing the product key for use on another computer. An Internet connection is required to contact the eCopy Activation server.

Once you deactivate the product key, you can no longer run eCopy PaperWorks on that system.

To deactivate a product key:

- 1 On the main menu, click **Options > Preferences > Licensing**.
- 2 On the Product Key tab, click **Deactivate**.
The eCopy PaperWorks product key is no longer associated with the system.

Uninstalling without deactivating the product key

In some cases, you may want to uninstall eCopy PaperWorks, but leave the activated product key on the system. For example, you would not remove the product key to reinstall the product.

To uninstall eCopy PaperWorks but leave the activated product key on the system:

- 1 Open **Control Panel > Add/Remove Programs**, select eCopy PaperWorks, and click **Change**.
- 2 In the Program Maintenance screen, select **Remove**.
- 3 In the Remove the Program screen, clear the **Deactivate Product Key** check box.
- 4 Click **Remove**.

Note: If you leave an activated product key on a system, it consumes one of the seats available under your license.

Installing on a Terminal Server or Citrix server

When properly licensed, eCopy PaperWorks supports multi-session access in Terminal Services and Citrix environments. To install eCopy PaperWorks as a published application for client access, you must use the command line procedure described in “Installation” on page 19.

TABLE 2. Supported multi-session environments

Environment	Servers	Clients
Windows Terminal Services	<ul style="list-style-type: none"> ■ Windows Server 2003 ■ Windows Server 2008 	<ul style="list-style-type: none"> ■ Microsoft Windows Vista x86 (32-bit) Business and Enterprise editions ■ Microsoft Windows XP with latest service pack
Citrix Presentation Server 4.5	Windows Server 2003	<ul style="list-style-type: none"> ■ Microsoft Windows Vista x86 (32-bit) Business and Enterprise editions ■ Microsoft Windows XP with latest service pack

TWAIN drivers must be installed on the client systems in a Citrix environment. These drivers may be installed on the server in a Terminal Server environment.

For information on tested environments, see “Tested environments” on page 24.

Limitations

eCopy PaperWorks does not support the following features in a Terminal Server or Citrix environment:

- Automatic Inbox Agent option for the ShareScan Scan to Desktop feature
- “Stand-alone” single-user installation on Windows 2003 Server with Terminal Services enabled

Installation

To install eCopy PaperWorks in a Terminal Server environment for multi-session access via Terminal Services or Citrix, you must use one of the command line procedures described below.

- If your company uses eCopy ShareScan with Automatic Inboxes, see “Installation for sites that use eCopy ShareScan” on page 19.
- If your company does not use eCopy ShareScan, see “Installation for sites that do not use eCopy ShareScan” on page 21.

Use the procedure that is appropriate to your environment. You must be an Administrator to perform this installation.

Installation for sites that use eCopy ShareScan

The following procedure sets the default Inbox for Scan to Desktop to Manual, and allows the Inbox path to be populated with the user (client) logon name interactively.

Important: Inbox folders must exist before you run this procedure. If your company uses eCopy ShareScan, it creates the Inbox folders automatically.

To install on a Terminal Server:

- 1 Open a command prompt window (**Start > Run > cmd**).
- 2 At the command prompt, type **change logon /disable** to disallow new connections to the server.
- 3 Use Terminal Services Manager to verify that there are no active user sessions; if users are connected, request that they log off.
- 4 Type **change user /install** to put the server into install mode.
- 5 Install the eCopy PaperWorks application via the following command line: **"eCopy PaperWorks English.exe" /v"S2DFILEPATH=\\Machine name\Share\Inbox\<user>"**
Substitute your Machine name, Share, and Inbox folder name, but enter the **<user>** variable, quotation syntax, and white space exactly as they appear above. (Spaces appear in the installation executable file name and before the **/v** parameter.)
- 6 When the installation is finished, type **change user /execute** to return the server to execute mode.
- 7 Type **change logon /enable** to allow users to connect to the server.

Installation for sites that do not use eCopy ShareScan

The following procedure sets the default Scan Inbox to None. You can configure scan inboxes for users after installation.

Note: Inbox folders must exist before you can configure them in eCopy PaperWorks.

To install on a Terminal Server:

- 1 Open a command prompt window (**Start > Run > cmd**).
- 2 At the command prompt, type **change logon /disable** to disallow new connections to the server.
- 3 Use Terminal Services Manager to verify that there are no active user sessions; if users are connected, request that they log off.
- 4 Type **change user /install** to put the server into install mode.
- 5 Install the eCopy PaperWorks application via the following command line: **"eCopy PaperWorks English.exe" /v"S2DFILEPATH=OFF ECOPYSCANTODESKTOP=OFF"**
Enter the quotation syntax and white space exactly as they appear above. (Spaces appear in the installation executable file name, before the **/v** parameter, and between the S2DFILEPATH and ECOPYSCANTODESKTOP parameters.)

Note: You can enter any value for the S2DFILEPATH parameter except "0" or NULL. Use the example string above ("OFF"), or use any string without spaces.

- 6 When the installation is finished, type **change user /execute** to return the server to execute mode.
- 7 Type **change logon /enable** to allow users to connect to the server.

When you have finished the installation, start eCopy PaperWorks and confirm the Scan Inbox options.

- From the main menu, select **Options > Preferences > Scan Inbox**, and select the **Scan Inbox** tab.

The Scan Inbox preferences page should be set to **None**.

Although the installation sets the default Scan Inbox to None, users can use the Scan to Desktop feature by configuring a Home directory or a Manual inbox as the scanning destination after installation. See “Scan Inbox Preferences” in the *eCopy PaperWorks Getting Started Guide*, or consult the *eCopy PaperWorks Online Help* for information on the Scan to Desktop feature.

Installation on Citrix Presentation Server 4.5

The procedure to install eCopy PaperWorks on Citrix Presentation Server 4.5 is similar to the procedure to install on a Terminal Server.

To install on Citrix Presentation Server 4.5:

- 1 Log on to the Windows 2003 Server that hosts the Citrix server.
- 2 Follow the installation steps appropriate to your environment:
 - If your company uses eCopy ShareScan, see “Installation for sites that use eCopy ShareScan” on page 19.
 - If your company does not use eCopy ShareScan, see “Installation for sites that do not use eCopy ShareScan” on page 21.

Running the client

Once you have installed eCopy PaperWorks on the server, users can access the software.

Launching the client under Terminal Services:

- 1 Log on to the Terminal Server via Remote Desktop.
- 2 Double-click the eCopy PaperWorks icon on the desktop.

Launching the client under Citrix:

- 1 Open **Citrix Program Neighborhood** (via the shortcut, via the **Start** menu, or via the Web interface).
- 2 Double-click the eCopy PaperWorks icon.

Tested environments

eCopy has tested eCopy PaperWorks in the following configurations for Terminal Services and Citrix Presentation Server 4.5.

Server Software:

- Microsoft Windows Server 2003 operating system
- Microsoft Windows Server 2008 operating system (Terminal Server only)
- Citrix Presentation Server v4.5 (single server)
- Microsoft SQL 2005 data store
- eCopy PaperWorks installed and published for client access
- eCopy PaperWorks document management connectors installed in the same location as eCopy PaperWorks

Client Software:

- Windows XP SP2 and SP3 operating system
- Windows Vista x86 (32-bit) operating system
- Citrix ICA client version 10.200
- Remote Desktop client versions 5.1.2600 and 6.0.6000
- User accounts were set up with Microsoft Active Directory domain user groups

Third-party applications, including Internet Explorer 7, Microsoft Office, and print drivers, were installed on the server.

TWAIN drivers were installed on the server in the Terminal Server environment; they must be installed on the clients in the Citrix environment.

Printer configurations:

Printers were configured and tested in the following ways in the Citrix Presentation Server 4.5 environment.

- Print server
- Redirected client (on the client)
- Server-based (on the Citrix server)

Configuring eCopy PaperWorks

The eCopy PaperWorks preferences affect the way that eCopy PaperWorks looks and behaves. You access the preferences from the main menu by selecting **Options > Preferences**.

Preferences enable you to specify the size of buttons on the toolbar, document security and storage options, and your default scanner. You can also configure your mail, fax, OCR, and printing applications. For more information on configuring preferences, see the *eCopy PaperWorks Getting Started Guide* or the *eCopy PaperWorks Online Help*.

See “Additional information” on page 44, for tips on deploying configuration settings to end users.

Microsoft Windows Installer deployment

This chapter describes Microsoft Active Directory and Systems Management Server (SMS)/System Center Configuration Manager (SCCM) deployment. For both types of deployment, the eCopy PaperWorks <language>.exe setup supports “advertisement” and “publishing” for per-user and per-machine configurations. As a system administrator, you can load the eCopy PaperWorks package onto a server and then push the installation to client systems, or you can make the application available for users to install by themselves.

Important: By deploying eCopy PaperWorks to users in silent mode, you agree to the terms of the eCopy Software License Agreement. To view the license agreement, see \Program Files\eCopy\PaperWorks\Documentation\License.rtf.

In this chapter

- Preparing your files for MSI deployment28
- Properties32
- Active Directory deployment34
- SMS/SCCM deployment37
- Additional information44

Preparing your files for MSI deployment

To perform an MSI (Windows Installer) deployment, you must first extract the .msi file from eCopy PaperWorks English.exe. Then, if you plan to install using Active Directory, you must create a transform file to customize your installation.

To extract the MSI file:

- 1 Double-click the **eCopy PaperWorks English.exe** file to launch the installation program.

The InstallShield Wizard window opens.

- 2 Click **Cancel** to stop the installation.

The MSI file is extracted to:

```
C:\Documents and Settings\%USER%\Local  
Settings\Application Data\eCopy\{GUID}
```

Note: On Windows Vista systems the file is extracted to:
C:\Users\%USER%\AppData\Local\eCopy\{GUID}.

- 3 Open the GUID folder with the most recent time stamp.
- 4 Copy the .msi file to a network share on the distribution machine.
This is your distribution point.

Prerequisites

Microsoft Core XML Services (MSXML) version 6, with Service Pack 1 or higher, must be installed on all target machines before deploying eCopy Paper Works. Machines with the following operating systems include MSXML 6:

- Windows Vista
- Windows XP, Service Pack 3
- Windows XP, Service Pack 2, with current updates

Creating a transform file

Transform files (.mst) are used to customize setups created with MSI technology. If you are using Active Directory to deploy eCopy PaperWorks, an MST file is used to configure the MSI Public Properties. This enables you to install the software with pre-determined parameters without the use of a graphical user interface (GUI) or user interaction.

For more information on the available MSI Public Properties see “Properties” on page 32.

To create a transform file you need an MSI transform tool. Any transform tool will enable you to create the file, however, Microsoft provides a transform tool called Orca as a free download. eCopy recommends Orca version 3.1 or higher.

To create a transform file using Orca:

- 1 Launch Orca.
- 2 From the main menu, select **File > Open**.
- 3 Browse to your eCopyPaperWorks.msi file.
- 4 From the main menu, click **Transform > New Transform**.
- 5 In the Tables column, double-click **Properties**.
This opens up a **Properties** column.
- 6 In the **Properties** column, open any property you want to configure and set the appropriate value.
- 7 From the main menu, click **Transform > Generate Transform**.

Advertised Shortcuts

For product “advertisement” using eCopy PaperWorks, the advertised shortcut is located at **Start > Programs > eCopy Applications > eCopy PaperWorks**.

Properties

The following is a list of MSI Public Properties that can be used to modify the MSI file:

TABLE 3. Properties

Variable	Description
ECOPYACTIVATION	Specifies the 21-digit product key provided when you purchased the product.
PDFASSOCIATION	Designates eCopy PaperWorks as the default application to open PDF files. If you do not want .pdf file extensions to be associated with eCopy PaperWorks, set this value to "0".
TIFFASSOCIATION	Designates eCopy PaperWorks as the default application to open TIFF or TIF files. If you do not want tiff/.tif file extensions to be associated with eCopy PaperWorks, set this value to "0".
READIRISOFR	Determines the installation of Readiris files: "Yes" delivers the Readiris files, and "No" does not.
ECOPYREGISTRATION	Suppresses eCopy PaperWorks software registration prompts. If you do not want users to see registration prompts, set this value to "Off".
ADMINPASSWORD	The password to the Options > Preferences menu. To protect your preference settings with a password, change this value from zero to the password you want.
ALLUSERS	This is a Windows installer property, not an eCopy PaperWorks property. Change this value only if you are familiar with its use. For more information see your Microsoft documentation.

TABLE 3. Properties (continued)

Variable	Description
<p>S2DFILEPATH</p> <p>This property and the two below should only be used if your company uses eCopy ShareScan and the Scan to Desktop connector</p>	<p>Used for Scan to Desktop in manual mode. You cannot use this variable in conjunction with S2DSERVER or S2DSUBDIR.</p> <p>You can push this with the user macro with the following syntax:</p> <p style="padding-left: 40px;">\\(Computer)\(Inboxes)\<user></p> <p>Note: <user> must be entered as you see it here. When the scan inbox is accessed, <user> is automatically replaced with the name of the person logged in to Windows and points to their inbox.</p>
<p>S2DSERVER</p>	<p>Used with ShareScan in 'home directory' mode. The value must be a valid server address that contains the home directory information for the ShareScan users.</p> <p>If you are using home directories, entering a value for S2DDSERVER is mandatory, but entering a value for S2DSUBDIR is optional.</p>
<p>S2DSUBDIR</p>	<p>This value must match the value for ShareScan 'home directory' mode. This is an optional value</p>

Note: The S2DFILEPATH, S2DSERVER, and S2DSUBDIR variables apply if you use eCopy PaperWorks with eCopy ShareScan. For more information, see *Working with eCopy ShareScan* in the *eCopy PaperWorks Getting Started Guide*.

Active Directory deployment

This process describes a “per machine” deployment of eCopy PaperWorks. For further information about per machine and per user deployments, please refer to your Microsoft documentation.

When these steps are complete, all users with eCopy PaperWorks deployed to them should have access to the application. Computers running Windows XP operating systems may require a second reboot to initiate the software deployment.

To prepare the active directory for deployment:

- 1 To open your active directory of users and computers, select **Start > Settings > Control Panel > Administrative Tools > Active Directory Users and Computers**.
- 2 Create a new organizational unit or open an existing one.
- 3 Right-click the unit and select **Properties > Group Policy**.
- 4 Click **New** and enter a name for the new group policy unit.
- 5 Double-click the group policy to open it and select **Computer Configuration**.

For information about configuration, please refer to your Microsoft documentation.

- 6 From the group policy tree in the left pane, right-click **Software Installation** and select **Properties**.

- 7 On the **General** tab, choose **Display the Deploy Software dialog box** and then click **OK**.
- 8 Right-click **Software Settings** and select **Software Installation > New > Package**.
- 9 Browse to your **eCopyPaperWorks.msi** file (see page 30) and then click **Open**.
You must browse in a network context, such as the UNC path `\\machine_name\share`.
- 10 In the **Deploy Software** window, verify that **Advanced** is selected, and then click **OK**.
The eCopy PaperWorks properties window opens.
- 11 Select the **Modifications** tab and then click **Add**.
- 12 Browse to your transform file for eCopy PaperWorks (see page 28) and click **OK**.
- 13 From the group policy tree, select **Computer Configuration > Administrative Templates > Windows Components > Windows Installer**.
- 14 Double-click **Always install with elevated privileges** and select **Enable**.
- 15 Double-click **Logging** and check **Enabled**. In the logging field, enter `voicewarmup` and then click **OK**.
- 16 From the group policy tree, select **User Configuration > Administrative Templates > Windows Components > Windows Installer**.

- 17 Double-click **Always install with elevated privileges** and check **Enable** and then click **OK**.
- 18 Using Active Directory, place the destination computers in the organizational unit selected for eCopy PaperWorks deployment and reboot those machines.
 - Start Active Directory Users and Computers and click the **Computers** folder.
 - Right-click the computer to add to the deployment list.
 - Select **ALL TASKS-MOVE**.
 - Select the Deployment Organizational Unit you created above.
- 19 Repeat step 18 above for each additional destination computer.

Note: When eCopy PaperWorks is first launched, the application seems to re-install. This is because, in certain deployment scenarios, Active Directory deploys the software before the user logs on to the system and there is no user context until the first user logs on. This is normal for “Computer Configuration” deployments.

SMS/SCCM deployment

This section describes how to create an eCopy PaperWorks installation package for distribution from the Microsoft Systems Management Server (SMS). If you use the Microsoft System Center Configuration Manager (SCCM) server, the steps are similar. eCopy PaperWorks supports deployment in .msi or .exe format. There are three parts to this procedure:

- **Collection creation:** Defines the computer(s) and user(s) who will receive the packaged software as part of the deployment.
- **Package creation:** Assembles the software that will be deployed.
- **Advertisement creation:** Gathers the collection and package together and then deploys the software.

Collection Creation

SMS enables you to manage resources by organizing them into collections. Collections gather resources into logical, manageable groups that enable you to manage your SMS site efficiently. For example, collections can reflect the structure of your organization by placing resources in units such as user groups, clients, and routers. With eCopy PaperWorks, SMS uses collections as targets during software distribution to clients.

Note: It is not within the scope of this manual to discuss all possible collection procedures. The following procedure shows you how to create a direct collection using a single system resource (computer). Please refer to your Systems Management Server or System Center Configuration Manager documentation for additional information.

To create a collection:

- 1 Launch the SMS administrator console.
- 2 Right-click the **Collections** folder and select **New Collection**.
The **Collection Properties** window opens.
- 3 Name the collection, and add a comment.
- 4 Select the **Membership Rules** tab.
- 5 Click the computer icon.
The **Direct Membership Rules Wizard** launches.
- 6 Click **Next**.
The system resource window displays.
- 7 Click **Next**.
- 8 Select values for **Resource class** and **Attribute name**, enter a value in the **Value** field and then click **Next**.
The **Collection Limiting** window opens.
- 9 Click **Browse** to search for an existing collection for the computer whose value you entered in Step 8 and then click **Next**.
The **Select Resources** window opens, and displays all the systems that match your selection criteria.
- 10 Select the systems you require and then click **Next**.
- 11 Click **Finish**.
The system creates the collection.
- 12 Click **OK**.
Your newly created collection appears in the **SMS Management** window.

Package Creation

Packages are the files and instructions that SMS uses to distribute software to clients. You create and maintain packages by using the Packages option in the SMS Administrator console.

When you have created the package, you must provide the following three categories of information to complete the setup: Access accounts, Distribution points, and Programs.

To create a package:

- 1 Launch the SMS Administrator console.
- 2 Right-click the **Packages** folder and select **New Package**.
The **Package Properties** window opens.
- 3 Select the **General** tab and enter values for **Name**, **Version**, **Publisher**, and **Language**.
- 4 Select the **Data Source** tab and define the source directory that contains the eCopy PaperWorks build that you want to deploy.
This directory must be shared.
- 5 Click **Set**.
The **Set Source Directory** window opens.
- 6 Specify the path to the source directory for the package.
The directory must be accessible to the SMS Service Account.
- 7 Click **OK**.
SMS creates the package.

Access Accounts

Package access accounts enable you to set permissions that specify which users and user groups can access a package folder on distribution points. By default, SMS makes these directories available to all users. If packages contain sensitive data or should have restricted access, you can configure package access accounts to limit access to specific users and user groups.

To assign account permissions:

- 1 In the SMS Management window, select the package from the tree and expand it.
- 2 For each account, specify the permissions for users and user groups (see Table 4 for descriptions of the available permissions).

TABLE 4. Account Permissions

Permission	Description
No Access	Prevents the account from reading, writing, or deleting files on the package share.
Read	Enables the account to view and copy files, run programs, change folders within the shared folder, and read extended attributes of files. By default, SMS grants the Users and Guests generic accounts Read permission to a package share on distribution points.
Change	Enables the account to change the contents and extended attributes of files and to delete files. Change permission is required for applications that need to write information back to the shared package folder on the distribution point.
Full Control	Enables the account to write the contents and extended attributes of files, and to delete files. By default, the Administrators generic account has Full Control permission so that the SMS components can access the package data.

Distribution points

SMS uses distribution points to distribute software programs to clients who use packages. In the SMS Administrator console, you can specify and maintain distribution points for a site by using the Site Settings.

To create a distribution point:

- 1 In the SMS Management window, select the package and expand it.
- 2 Right-click on the **Distribution Points** folder and select **New > Distribution Point**.
The **Distribution Point** wizard launches.
- 3 Follow the instructions provided by the wizard to create a new distribution point.

Programs

Programs are the package components that SMS uses to define the command lines that are run on clients. For more information on the properties available for the command lines, see page 32. In the SMS Administrator console, you can use the Packages functionality to create and maintain programs for a package.

To create a program:

- 1 In the SMS Management window, select the package and expand it.
- 2 Right-click on the **Programs** folder and select **New >Program**.
- 3 On the **General** tab, enter information for the **Command line**, **Start in**, **Run**, **Alter running**, and **Category** fields.
This is an example of a command line:

```
"eCopy PaperWorks English.exe"  
/v"ECOPYACTIVATION=<21-digit product key>"
```
- 4 Click the **Environment** tab and select **Run with administrative rights** and **Allow Users to interact with this program**.
- 5 Click **OK**.

Advertisement Creation

SMS uses advertisements to distribute programs to clients. In the SMS Administrator console, you can create and maintain them by using Advertisements.

To create an advertisement:

- 1 In the SMS Management window, right-click on the Advertisements folder and select **New >Advertisement**.
- 2 On the **General** tab, enter information in the **Name**, **Package**, **Program**, and **Collection** fields.
- 3 Click **OK**.

Additional information

To refine your eCopy PaperWorks configuration, launch eCopy PaperWorks on any computer and select **Options > Preferences** from the main menu. All preference changes are reflected in the registry key settings.

When you have made your changes, export the following registry key as a .reg file:

```
HKEY_CURRENT_USER\Software\eCopy\PaperWorks
```

You can distribute the .reg file to end points, as required, using a tool such as Windows Scripting Group Policy.

Notes:

- eCopy does not recommend direct editing of the .msi file prior to deployment.
- For some 'per-machine' deployments, a reboot may be necessary to enable full functionality with the eCopy PaperWorks Printer driver. eCopy recommends that you reboot all systems that receive this type of deployment.

If you want to configure an ODMA-compliant document management system as your default storage preference, configure the setting in **Options > Preferences > Storage**, and export the following registry key as a .reg file:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Classes\MAILROOM\ODMA32]
```

Document management systems

eCopy PaperWorks add-on connectors enable you to store documents in your document management system. Depending on the system, some additional configuration is required.

In this chapter

- eCopy PaperWorks document management connectors 46

eCopy PaperWorks document management connectors

eCopy PaperWorks add-on connectors provide integration with popular document management systems, including:

- Interwoven WorkSite
- Open Text eDOCS DM
- EMC Documentum

Separate documentation is available for each connector.

You must register eCopy PaperWorks to get access to add-on eCopy PaperWorks document management connectors. Specific connectors are part of your eCopy PaperWorks software, and are licensed to you under your eCopy PaperWorks License Agreement. The connectors are available for download from the eCopy Registration Web site.

You can access the Registration Web site by selecting Registration on the Help menu, or by using the following link:

<http://registration.ecopy.com/>.

ODMA document management systems

eCopy PaperWorks provides legacy support for several ODMA-compliant document management systems. (See “ODMA document management systems” on page 11.)

For configuration instructions for supported systems, see the *eCopy PaperWorks Online Help*.