

eCopy Desktop™

Version 9.2

Installation Guide



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Introduction

This guide is intended for users who are installing eCopy Desktop Version 9.2. It provides an overview of eCopy Desktop and describes system requirements and installation procedures.

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Related information

The following resources contain more information about eCopy Desktop:

- eCopy Desktop Getting Started Guide: Provides information about configuring eCopy Desktop. This document is available as a PDF file on the CD and is available as a download from the eCopy Web site.
- eCopy Desktop Online Help: Provides detailed information on how to configure and use the software. Access the Help file in eCopy Desktop by pressing F1 or by selecting Help > Contents.
- eCopy Desktop Quick Reference Card: Provides an introduction to the basic functions of eCopy Desktop.
- eCopy Desktop Tutorial: Access by clicking Help > Tutorial in eCopy Desktop. The tutorial shows you how to use the main functions of the software.
- eCopy Desktop Readme: Provided with your eCopy Desktop software, the readme file contains important, last-minute product information that does not appear in the rest of the documentation.

Customer support

Technical support is available to registered users of eCopy software during the warranty period or for the duration of your software support and maintenance agreement. Contact your supplier for details.

The maintenance agreement identifies the service provider. In most cases the dealer or distributor who provided the eCopy product to your organization also provides support. The dealer or distributor provides information about getting assistance for product installation, implementation, and usage. The eCopy Technical Support, Quality Assurance, and Development organizations provide backup support to the network of dealers and distributors. Policies established with each distributor of eCopy products determine how customer inquiries are escalated.

When you open a Technical Support case, your service provider will tell you what identification information you need to provide to validate the status of your support contract.

In addition to support provided by your dealer or distributor, the Ask eCopy Knowledgebase and online Ticket system site—www.ecopy.com/Support_Ask_eCopy.asp—provides 24x7 access to a knowledge base that includes Frequently Asked Questions (FAQs), product support matrices, product information, and other information.

Installing eCopy Desktop

eCopy Desktop provides a powerful set of document workflow tools that allow individual users to manage scanned documents.

eCopy Desktop works with most e-mail, network fax, and ODMA-compliant document management applications, including EMC® Documentum®, Lotus® Domino® Document Manager, Interwoven® WorkSite®, Lotus Notes® Mail, Microsoft® Outlook®, Microsoft Exchange, and Open Text™ Livelink®, Livelink ECM® DOCS Open™, and Livelink ECM eDOCS DM™.

eCopy Desktop supports either of the following installation methods:

- Individual users can install eCopy Desktop from a CD 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 Desktop to multiple systems in silent mode. Silent installations do not require any interaction with the end user.

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Minimum system requirements

Before installing eCopy Desktop, 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	800 MHz	<ul style="list-style-type: none"> ■ 512 MB RAM ■ 320 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 ■ 320 MB free disk space
Windows 2000 Professional 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 ■ 320 MB free disk space

Note: To use Copy Desktop's 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 2000/2002/2003/2007
- 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 1.5

Supported fax applications

- Captaris® RightFax® 8.7/9.0/9.3
- 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 7.0/8.0; ABBYY FineReader® Corporate Edition 7.0/8.0
- ScanSoft® Omnipage® Pro 14

Supported scanning devices

eCopy Desktop supports TWAIN-compliant scanners.

Supported storage options

You can configure eCopy Desktop to store documents using the following storage options:

- Standard Microsoft Windows file system, which supports nested folders.
- eCopy Desktop, which offers a single-level folder structure that supports private and shared folders.

Supported document management systems

- Livelink ECM DOCS Open 4.1
- Livelink ECM eDOCS DM 5.1.0.5
- Interwoven WorkSite/DeskSite 8.0/8.1/8.2 SP1; FileSite 8.2
- Lotus Domino Document Manager 6.5/7.0
- Open Text Livelink 9.1
- EMC Documentum 4.3.2

Note: If you have installed eCopy Desktop on a Windows Vista system, check with your document management system vendor about Vista compliance.

Updated software information

If you already use an earlier version of eCopy Desktop, please take note of the following changes:

- The default storage is Windows Standard File System, not eCopy Desktop storage. You can change this setting during installation or afterwards by selecting **Options > Preferences > Storage**.
- During installation, you can choose eCopy Desktop as your default viewer for PDF and TIF files. These options are selected by default. If you prefer to use another application as the default viewer for these file types, deselect these settings during installation.
- eCopy Desktop only supports TWAIN-compliant scanners. ISIS is no longer supported.
- The default file format is PDF, not CPY. You can change the format when you save, export or e-mail the document.
- TIF files and CPY files created in earlier versions of eCopy Desktop are converted to PDF files if the file is modified in eCopy Desktop.

To allow a user of eCopy Desktop 8.x to open a file created in eCopy Desktop 9.0 or later, you must save the file as a CPY (Desktop8) file. To send an eCopy Desktop 9.x file to an eCopy Desktop 8.x user by e-mail, use the **Format** button to change the file type.

- To use existing stamps from previous versions of eCopy Desktop, browse to your existing libraries or create a new library and import your existing stamps into it. For more information see the *eCopy Desktop Online Help*.

Installing eCopy Desktop

If you are upgrading from eCopy Desktop version 9.0 or 9.1 to eCopy Desktop 9.2, the installation program will upgrade your installation to version 9.2 and preserve all of your user settings.

If you are using a version of eCopy Desktop earlier than 9.0, you will be prompted to uninstall it before installing eCopy Desktop 9.2. eCopy strongly recommends that you uninstall your old version before installing the new one. The uninstall program preserves existing document storage folders and stamp libraries but does not automatically preserve existing user settings.

To uninstall older versions using Windows functionality:

- 1 Click the Windows **Start** button and select **Control Panel**.
The **Control Panel** window opens.
- 2 Double-click **Add/Remove Programs**.
The **Add/Remove Programs** window opens.
- 3 Select the earlier version of eCopy Desktop software from the list, and then click **Change/Remove** to uninstall the program.

Note: On Microsoft Windows Vista, use **Start > Control Panel > Programs > Uninstall**.

To enable network installation:

- 1 Copy the eCopy Desktop Microsoft Installer file, **eCopy Desktop.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:
 - Insert the eCopy Desktop 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 Desktop CD. Double-click **Setup.exe**. The Welcome window opens.
 - If you are installing from the network, navigate to the location of the installer file and double-click **eCopy Desktop.exe**.
- 2 In the **Welcome** window, click **Next**.
- 3 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**.
- 4 Select the default document file system and click **Next**.
Older versions of eCopy Desktop used the eCopy Desktop Storage File System; this version uses the Windows File System.
- 5 Select the file types for which you want eCopy Desktop 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 the 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 Desktop, see your system administrator.

Registering eCopy Desktop

To receive customer support for eCopy Desktop, you must register the product. When the product is registered, you receive timely notices of product updates and upgrades.

To register the product:

- 1 In the eCopy Desktop window, select **Help > Registration**.
The browser opens to www.ecopy.com/registration.
- 2 Login, or create an account if you do not have one.
- 3 If you are registering for the customer, select Dealer.
- 4 If you are the customer, select End User.
- 5 You will need to provide the following information:
 - An account name (your customer name).
 - A contact name and e-mail address for that contact.
 - The serial number or product key for the products being registered.
- 6 The eCopy Maintenance and Support certificate number, if purchased separately (products bundled will automatically register their support).

Note: The eCopy Desktop Serial Number and Product Key are printed on a label that is affixed to the back of the CD case.

Configuring eCopy Desktop

The eCopy Desktop preferences affect the way that eCopy Desktop 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 Desktop Getting Started Guide* or the *eCopy Desktop Online Help*.

See “Additional information” on page 30, for tips on deploying configuration settings to end users.

Microsoft Windows Installer Deployment

This chapter describes Microsoft Active Directory and Systems Management Server (SMS) deployment. For both types of deployment, the eCopy Desktop.exe setup supports “advertisement” and “publishing” for both per-user and per-machine configurations. As a system administrator, you can load the eCopy Desktop 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.

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Preparing your files for MSI deployment

To perform an MSI (Windows Installer) deployment, you must first extract the .msi file from eCopyDesktop.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 Desktop.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\Downloaded
Installations\{GUID}
```

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

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 Desktop, 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 19.

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 eCopy Desktop.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 Desktop 9.2, the advertised shortcut is located at **Start > Programs > eCopy Applications > eCopy Desktop 9.2**.

Properties

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

TABLE 2. Properties

Variable	Description
PDFASSOCIATION	Designates eCopy Desktop as the default application to open PDF files. If you do not want .pdf file extensions to be associated with eCopy Desktop, set this value to "0".
TIFFASSOCIATION	Designates eCopy Desktop as the default application to open TIFF or TIF files. If you do not want tiff/.tif file extensions to be associated with eCopy Desktop, set this value to "0".
STORAGETYPE	<p>Determines the default storage used for eCopy Desktop. (If you are using ODMA, you need to change the default storage type on the client system through Options > Preferences.)</p> <ul style="list-style-type: none"> ■ eDesktop: sets the default storage to eCopy Desktop. ■ Standard: sets the default storage to Windows standard file system.
READIRISOCD	Determines the installation of Readiris files: Yes delivers the Readiris files, and No does not.
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.

TABLE 2. Properties (continued)

Variable	Description
ALLUSERS	This is a Windows installer property, not an eCopy Desktop property. Change this value only if you are familiar with its use. For more information see your Microsoft documentation.
<p>S2DFILEPATH</p> <p>This property and the two below can only be used if your company uses a version of ShareScan that supports the Scan to eCopy Desktop connector</p>	<p>Used for Scan to eCopy 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> <pre>\\(Computer)\(Inboxes)\<user></pre> <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 current person logged in to Windows and points to their inbox.</p>
S2DSERVER	<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 S2DSERVER is mandatory, but entering a value for S2DSUBDIR is optional.</p>
S2DSUBDIR	This value must match the value for ShareScan 'home directory' mode. This is an optional value

Active Directory deployment

This process describes a “per machine” deployment of eCopy Desktop. 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 Desktop 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 eCopy Desktop.msi file (see page 16) 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 Desktop properties window opens.
- 11 Select the **Modifications** tab and then click **Add**.
- 12 Browse to your transform file for eCopy Desktop (see page 16) 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 Desktop 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 Desktop 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.

Example: This procedure assumes that you need to install eCopy Desktop at a site that has 25 workstations. Instead of running the executable file and adjusting the options manually at each workstation, you can complete the following steps:

- 1 Install eCopy Desktop.
 - 2 Copy the .msi file onto a USB thumb drive.
 - 3 Copy the file that calls the .msi file to your thumb drive (for example, a .bat script).
 - 4 Customize the eCopy Desktop preferences to reflect the settings you want to apply to other computers.
 - 5 Export the registry key to your thumb drive.
 - 6 On each of the other computers, plug in your thumb drive and double-click the .reg file.
Your preference settings are configured automatically
-

SMS deployment

This section describes how to create an eCopy Desktop installation package for distribution from the SMS (Systems Management Server) server. 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 Desktop, 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 Administrator's manual 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 Desktop 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 3 for descriptions of the available permissions).

TABLE 3. 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 19. 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 Desktop.exe" /v"STORAGETYPE=Standard"`
- 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 Desktop configuration, launch eCopy Desktop 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\Desktop9
```

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]
```

You can distribute the .reg files 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 Desktop Printer. eCopy recommends that you reboot all systems that receive this type of deployment.

Document Management Systems

eCopy Desktop enables you to store documents in your document management system. Depending on the system, some additional configuration is required.

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Livelink ECM DOCS Open

This section contains the information you need to configure Livelink ECM DOCS Open to work with eCopy Desktop.

Important! The file ODMA32.DLL must be in your path in order for eCopy Desktop to work with Livelink ECM DOCS Open.

To configure Livelink ECM DOCS Open:

- 1 Start the DOCS Open Library Maintenance program.
- 2 Double-click the Document Types icon and then click **New**.
The Document Types window opens.
- 3 Enter the information for the new document type (see Table 4) and then click **Close**.
- 4 Double-click the Applications icon and then click **New**.
The Application Maintenance window opens.
- 5 Enter the information that defines the eCopy Desktop application (see Table 5).
- 6 Click **Launch Methods** at the top of the window.
The Application Launch Methods window opens.
- 7 Enter the launch methods information for eCopy Desktop (see Table 6).
- 8 Click **Close** to return to the Application Maintenance window.
- 9 Click **Options** at the top of the window.
The Options window opens.
- 10 Verify that the **Shows on Desktop** and **Valid on Profile** options are selected.
- 11 Click **Close**.

In addition to setting up your document management system to work with eCopy Desktop, you must select the document management system as your default storage in eCopy Desktop Options > Preferences > Storage. See “Additional information” on page 30, for tips on deploying the eCopy Desktop configuration settings to end users.

TABLE 4. Document Types settings

^aField	Value
Type ID	eCopy
Description	eCopy Desktop
Full Text Index	Checked

a. Refer to the ECM eDOCS DM documentation for information about the fields not specified in this table.

TABLE 5. Application Maintenance settings

Field	Value
Application ID	eCopy
Description	eCopy Desktop
Print Application	(blank)
Viewer Application	(blank)
Filing Scheme	Enhanced
Default Extension	.PDF
Extensions to Index	(blank)
File Types	PDF, eCopy Desktop
Macintosh App Signature	(blank)

TABLE 6. Application Launch Methods settings

Field	Value
Application	eCopy (populated from Application ID field)
Description	eCopy Desktop
Location	<path to eCopy Desktop.exe>
Command Line Parameters	%FULLPATH
Default Directory	(click field to insert)
Search Mapping	(blank)
OS Environment	Windows/Windows NT
Integration	ODMA Compliant

Livelink ECM eDOCS DM

This section contains the information you need to configure Livelink ECM eDOCS DM to work with eCopy Desktop.

Important! The file ODMA32.DLL must be in your path in order for eCopy Desktop to work with Livelink ECM eDOCS DM.

To configure Livelink ECM eDOCS DM:

- 1 Start the Hummingbird Library Maintenance program.
- 2 Select **Document Types** and then click **New**.
The Document Types window opens.
- 3 Enter the information for the new document type (see Table 7) and then click **OK**.
- 4 Select **Applications** and then click **New**.
The Application Maintenance window opens.
- 5 Enter the information that defines the eCopy Desktop application (see Table 8).
- 6 Click **Launch Methods** at the top of the window, then click **New**.
The Application Launch Methods window opens.
- 7 Enter the launch methods information for eCopy Desktop (see Table 9).
- 8 Click **OK**, then click **Close** to return to the Application Maintenance window.
- 9 Click **Options** at the top of the window.
The Options window opens.
- 10 Verify that the **Shows on Desktop** and **Valid on Profile** options are selected.
- 11 Click **OK**, then click **OK** again to exit.

In addition to setting up your document management system to work with eCopy Desktop, you must select the document management system as your default storage in eCopy Desktop Options > Preferences > Storage. See “Additional information” on page 30, for tips on deploying the eCopy Desktop configuration settings to end users.

TABLE 7. Document Types settings

^aField	Value
Type ID	eCopy
Description	eCopy Desktop
Full Text Index	Checked

a. Refer to the DOCS Open documentation for information about the fields not specified in this table.

TABLE 8. Application Maintenance settings

Field	Value
Application ID	eCopy
Description	eCopy Desktop
Print Application	(blank)
Viewer Application	(blank)
Filing Scheme	Enhanced
MIME Type	Application/PDF
Default Extension	.PDF
File Types	PDF, eCopy Desktop

TABLE 9. Application Launch Methods settings

Field	Value
Application	eCopy (populated from Application ID field)
Description	eCopy Desktop
Location	<path to eCopy Desktop.exe>
Command Line Parameters	%FULLPATH
Default Directory	(click field to insert)
Search Mapping	(blank)
Integration	ODMA Compliant

Interwoven

This section contains the information you need to configure Interwoven to work with eCopy Desktop.

To configure Interwoven:

- 1 Start the Interwoven Database Administration program.
- 2 From the tree in the left pane, select **Type**.
- 3 From the Manage menu, select **Add**.
The Add Type window opens.
- 4 Enter the type information (see Table 10) and then click **OK**.
- 5 From the tree in the left pane, select **Class**.
- 6 From the Manage menu, select **Add**.
The Add Class window opens.
- 7 Enter the class information (see Table 11) and then click **OK**.
- 8 From the tree in the left pane, select **App Setup**.
- 9 From the Manage menu, select **Add**.
- 10 Enter the application setup information (see Table 12) and then click **OK**.

Note: Do not enter any DDE information in the Add Setup Entry window.

In addition to setting up your document management system to work with eCopy Desktop, you must select the document management system as your default storage in eCopy Desktop Options > Preferences > Storage. See “Additional information” on page 30, for tips on deploying the eCopy Desktop configuration settings to end users.

TABLE 10. Type settings

Field	Value
Description	A descriptive title for the type. eCopy recommends: eCopy Desktop
Alias	A descriptive alias for the type. eCopy recommends: ECOPYDESKTOP
DMS Extension	%V
App Extension	PDF

TABLE 11. Class settings

Field	Value
Description	A descriptive title for the class. eCopy recommends: Fax/Paper
Alias	A descriptive alias for the type. eCopy recommends: ECOPYDESKTOPP
Retain Days	365
Echo	Checked
Require Subclass	(blank)

:

TABLE 12. Application Setup settings

Field	Value
Name	eCopy Desktop
Path	<path to eCopy Desktop.exe>
Type	<the type defined in Step 4>
Primary Application	checked
Integration Mode	ODMA

Lotus Domino Document Manager

This section contains the information you need to configure Livelink Domino.Doc to work with eCopy Desktop.

To configure Domino Document Manager:

- 1 Open the Domino.Doc Library on the Lotus Notes Server or Client.
- 2 From the VIEWS section of the button bar at the left of the Lotus Notes Administration window, select **Library Administration**.
- 3 From the VIEWS section of the button bar, select **Launch Associations**.
- 4 From the ACTIONS section of the button bar, select **Create Launch Associations**.
The Launch Association Window opens.
- 5 Enter the association information (see Table 13) and then click **Save**

In addition to setting up your document management system to work with eCopy Desktop, you must select the document management system as your default storage in eCopy Desktop Options > Preferences > Storage. See “Additional information” on page 30, for tips on deploying the eCopy Desktop configuration settings to end users.

TABLE 13. Launch Association settings

Field	Value
ODMA Format	eCopy
File Extension	PDF
Application ID	eCopy
Description	eCopy Desktop

Open Text Livelink

If your company uses Open Text Livelink as your document management system, you must install the optional Livelink Desktop Activator for ODMA module, which is available from Open Text. This module lets you access Livelink items from ODMA-compliant desktop applications, including eCopy Desktop. Install and configure the Livelink Desktop Activator for ODMA module as described in the installation instructions that accompany the module.

You must also add the following to the beginning of the `formats.xml` file, located in the `C:\Program Files\Open Text\Livelink Desktop` directory:

```
<!-- eCopy -->
<format name=" eCopy "extension=".pdf"/>
```

In addition to setting up your document management system to work with eCopy Desktop, you must select the document management system as your default storage in eCopy Desktop Options > Preferences > Storage. See “Additional information” on page 30, for tips on deploying the eCopy Desktop configuration settings to end users.

EMC Documentum

To use EMC Documentum to store eCopy Desktop documents, you must configure the client workstation and the eContent Server.

To configure the Documentum client:

- 1 If the Documentum Desktop Client is not configured to use ODMA, re-install the client and select the ODMA integration component. To do this, click Word Options in the “Integrations” selection window during client installation and choose ODMA.

- 2 From the directory

C:\Program Files\eCopy\Desktop\Documentum\

run the file **ODMA_eCopy.Reg** to set the required registry settings.

To configure the EMC Documentum eContent Server:

- 1 Log on to the server as the Documentum administrator and connect to the server where you will store the eCopy documents.
- 2 Create a new format for eCopy documents (see Table 14).

Note: Indexing has not been tested and is not supported at this time

- 3 If your implementation requires, create a template for PDF types (refer to your Documentum administrator's guide for details).

In addition to setting up your document management system to work with eCopy Desktop, you must select the document management system as your default storage in eCopy Desktop Options > Preferences > Storage. See “Additional information” on page 30, for tips on deploying the eCopy Desktop configuration settings to end users.

TABLE 14. Format settings

Field^a	Value
Name	eCopy
Description	eCopy
Default File Extension	PDF
Mime Type	application/x-cpy

a. The values for the other fields in this window do not affect eCopy Desktop.

