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uniConnect Pro™ for Time Matters™ Quick Guide

*A Quick Guide to Installing, Using and Configuring the
uniConnect Pro for Time Matters System*

uniConnect™
Integration Solution for eCopy ShareScan OP

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OVERVIEW

The uniConnect system, in conjunction with eCopy SSOP, allows you to add document imaging and lookup capabilities to virtually any application that runs on Windows, including those that run in a terminal emulation window. uniConnect Pro for TimeMatters has been customized to integrate with the Time Matters system in real-time, providing users with the ability to scan and index documents directly into the Time Matters system using live data, such as Matter names and document type identifiers, which is retrieved as-needed at scan time.

uniConnect™
Integration Solution for eCopy ShareScan OP

SYSTEM REQUIREMENTS

The uniConnect Pro for Time Matters system consists of four separate components, which may be installed in different locations on your network. Usually, there is a single machine designated as the uniConnect Server, which holds the SQL Server Desktop and uniConnect Web Server. The uniConnect SSOP Connector is installed on each of the eCopy scanning stations that are to be uniConnect enabled, or is pushed to embedded clients from the SSOP server machine. **Note that the Time Matters Client is provided by Time Matters, and must be installed on each machine (or machines) running SSOP Administrator. A Time Matters Data Link License (also provided by Time Matters) must be available for each eCopy device that has the connector installed.** Time Matters Client Licenses are not used by the connector.

SQL Server Desktop and uniConnect Web Server

These components should be installed on the same machine, which may be an eCopy ScanStation, and should have the following specifications:

Windows 2000 Server or Professional, 2003 Server or XP Professional

If using Windows 2000 Server, make sure that all updates, including Service Pack 4, have been applied

Pentium 4/Xeon/Celeron, or AMD Processor, 1 Ghz or higher

512 MB RAM, 1 GB recommended

IIS (Internet Information Services) installed

Advanced file sharing enabled

uniConnect SSOP (eCopy) Connector

This component should be installed on eCopy scanning stations that already have the SSOP in place and configured, or on an SSOP server machine from which it can be pushed to devices.

.Net 1.1 Framework installed

Time Matters Client installed (Note: a client license will NOT be used by the connector)

INSTALLATION

There are two ways uniConnect can be installed. The standard approach is to install a fully-functional, separate instance on each eCopy Scan Station. The more advanced method is to install a single instance of uniConnect on a "server" machine, and then push the uniConnect SSOP connector to multiple eCopy enabled devices, be they scan stations or devices that run SSOP embedded. The installation process for each is much the same, with the difference being that in the first case, the process is repeated multiple times, and each instance must be configured separately.



Figure 1 -- The uniConnect installation menu, starting point for installing the uniConnect components.

There are three primary components that comprise the uniConnect system on a network, and each must be installed in turn:

**SQL Server Desktop
uniConnect Server (Web component)
uniConnect SSOP (eCopy) Connector**

These components are easily installed from the uniConnect CD or downloaded installation package, and should be installed in the order listed. To begin installing uniConnect, follow these steps:

SQL Server Desktop Engine

These steps should be performed once on the machine designated as the uniConnect Server, or on each eCopy ScanStation if desired. See system requirements above.

1. Insert the uniConnect Installation CD into the CD drive on the machine designated as the uniConnect Server.
2. If the installation screen does not auto-run, manually browse to the Launch.exe program on the CD and double-click it. If you are installing from a download, unzip the installation package and run the Launch.exe executable.
3. Choose Install Products from the graphical menu. The installable components will be displayed.
4. Choose SQL Server Desktop from the menu, and click Yes when asked to confirm.
5. When prompted, click Next twice to accept defaults, and then Install, to begin the file copy and installation process. Depending on the speed of your machine, it may take several minutes for this component to install.
6. When the InstallShield wizard completes, click Finish to exit the installer.
7. SQL Server Desktop Engine is now installed and ready to use.

uniConnect Web Server

These steps should be performed once, on the machine designated as the uniConnect Server, or on each eCopy ScanStation if desired. To perform this role, the machine must have IIS already installed. See other system requirements above.

1. From the uniConnect Installation Menu, choose uniConnect Server. (See steps 1-3 in the SQL Server Desktop Engine section above for how to reach this menu).
2. If prompted for a password, enter: uniConnect1 and click OK.

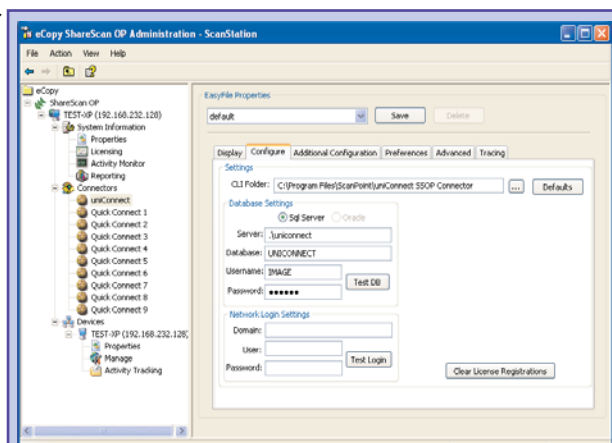


Figure 2 -- Configuring the uniConnect Connector in the eCopy SSOP admin interface. By default, the connector installs with database connection settings that look for MSDE to be installed on the same machine as SSOP Administrator.

UNICONNECT SSOP CONNECTOR

3. The pre-installation process will begin. When prompted, click Next, click the selector to accept the terms of the license agreement, then click Next again three more times to accept all defaults, and finally click Install to begin the installation process.
4. When the InstallShield wizard completes, click Finish to exit the installer.
5. The uniConnect Server is now installed and ready to use.

uniConnect SSOP Connector

These steps should be followed on each of the eCopy SSOP scanning stations that will be used to scan and index documents into the uniConnect system, or on the eCopy SSOP server, if the connector is to be run on embedded devices.

1. From the uniConnect Installation Menu, choose uniConnect SSOP Connector. (See steps 1-3 in the SQL Server Desktop Engine section above for how to reach this menu).
2. If prompted for a password, enter: uniConnect1 and click OK.
3. When prompted, click Next, then enter a User Name and Company Name in the appropriate fields, click Next again, and then click Install to begin the installation process.
4. When installation is complete, click Finish to close the wizard.
5. Repeat this process on any other eCopy SSOP machines, if necessary.

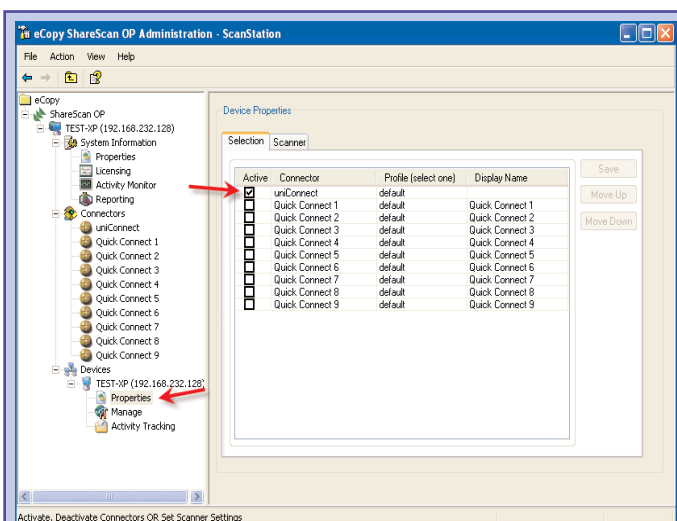


Figure 3 -- Configuring the uniConnect Connector in the eCopy SSOP admin interface. Be sure to check the box next to the uniConnect entry.

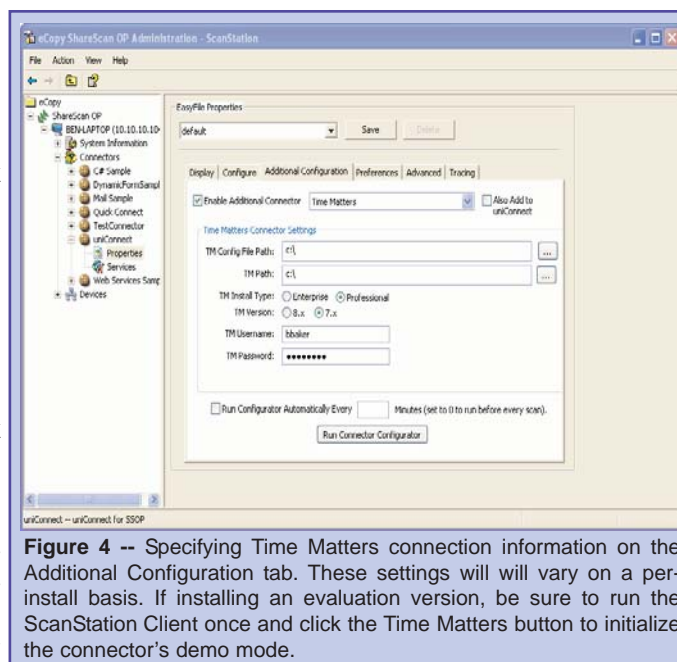


Figure 4 -- Specifying Time Matters connection information on the Additional Configuration tab. These settings will vary on a per-install basis. If installing an evaluation version, be sure to run the ScanStation Client once and click the Time Matters button to initialize the connector's demo mode.

6. You will now need to enable the uniConnect Time Matters Connector in the eCopy SSOP Administration console (Devices / Computer Name / Properties, and click the checkbox next to uniConnect). By default, the connector installs with database settings that assume that the MSDE database is running on the same machine as SSOP Admin. If the database is on a different machine, the Database Host field will need to be altered. See Figure 2 and Figure 3 for screen shots of the settings that must be changed.

At this point, to activate the demo license for uniConnect, run the ShareScan Client and click the Time Matters button. If the Scan More screen appears, the connector should be licensed for a 30-day Evaluation. Close the ScanStation Client at this point.

The final configuration step after licensing the connector is to enter your Time Matters configuration information on the connector's Additional Configuration tab in SSOP Administrator. See Figure 4 for a sample of what the Additional Configuration tab looks like. The Time Matters credentials that are entered will vary from office to office. Explanations of each of the settings are as follows:

- **TM Configuration File Path** is the location of the configuration file. Typically it is set to either C:\tmw7\tmw.cfg for Professional or C:\tmw7e\tmwe.cfg for Enterprise version 7.x.
- The **TM Path** is the root location where the time matters documents are to be stored. You must use a UNC path if it is on a network drive. E.g. it should be set to \\server\share\folder\sub
- **TM Install Type** selects between Professional and Enterprise versions of the Time Matters software.
- **TM Version** allows you to choose between version 7 and version 8 of the Time Matters software, depending on which is in use at the install site.
- **TM Username** must be a valid Time Matters user that has access to all the matter information as well as be able to add documents to a case.
- **TM Password** is the Time Matters password that corresponds with the entered TM Username.

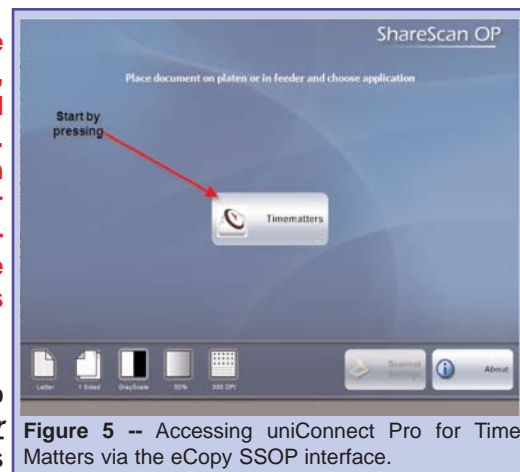


Figure 5 -- Accessing uniConnect Pro for Time Matters via the eCopy SSOP interface.

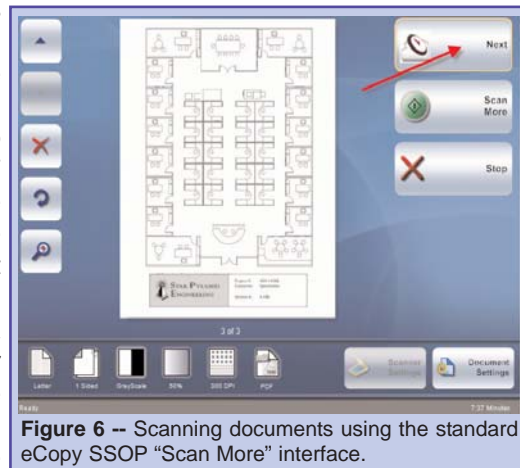


Figure 6 -- Scanning documents using the standard eCopy SSOP "Scan More" interface.

Installation of the uniConnect system is now complete.

USING UNICONNECT PRO

SCANNING AND INDEXING

Scanning and indexing documents using uniConnect Pro for Time Matters is a simple process that fits smoothly into office procedures, and real-time integration with Time Matters allows users to be certain that the documents they scan and send will end up in the right place, every time.

Scanning and Indexing Documents

These steps are carried out on an eCopy SSOP station, or embedded platform device, which has the uniConnect SSOP Connector installed.

1. From the eCopy SSOP screen, choose the Time Matters button.
2. Load your originals in the scanner's document feeder, or on the flatbed glass.
3. After your documents finish scanning, you can load more documents and click the Scan More button, which will add the next scanned back onto the end of the existing batch.
4. Once you have finished scanning all documents in the current batch, click the Next button.
5. Enter or select a Matter from the drop-down list. Note that if you type in the first few letters of the matter, it will limit the list to only those that match what you have typed. Note that this field is required.
6. Select a Document Type from the dropdown list. Note that this field is required.
7. Enter a description for this document, if desired.
8. When finished, click Done. The scanned documents will be sent to Time Matters immediately.
9. If a problem is encountered when saving, such as an invalid field format or missing required field, an error message will display and you will have a chance to correct the problem and send the document again.
10. Repeat for each batch to be scanned.

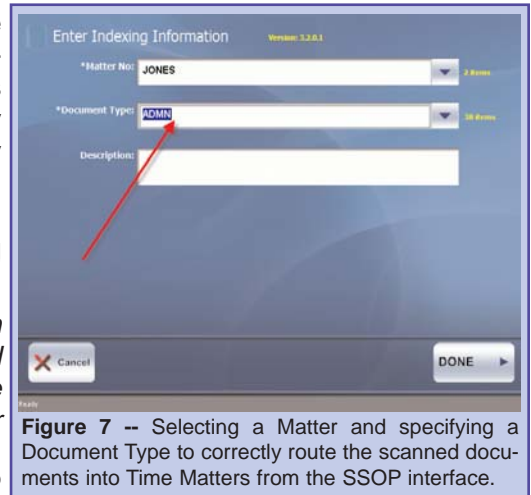


Figure 7 -- Selecting a Matter and specifying a Document Type to correctly route the scanned documents into Time Matters from the SSOP interface.

TROUBLESHOOTING

Although uniConnect is designed to be easy to get up and running, as with any piece of complex software, incorrect settings can lead to problems. This section of the Quick Guide is intended to help a system administrator or eCopy technician troubleshoot and fix common uniConnect configuration issues.

TMCLI.exe Errors

If error messages containing references to tmcli.exe pop up on the SSOP Administration machine when using the connector, and Time Matters data does not populate correctly, the likely cause is that Time Matters configuration options are not set correctly in SSOP admin.

Demo Licensing How-To

By default, uniConnect Pro for Time Matters installs with a 30-day demo license that allows the connector to be evaluated on a single eCopy-enabled copier or ScanStation. To properly activate this license, follow these steps:

- 1) Install the uniConnect components as outlined in the Installation section above.
- 2) Enable uniConnect in SSOP Administrator.
- 3) Run ScanStation Client, and click the Time Matters button to initialize the connector.
- 4) Refresh SSOP Administrator, select uniConnect under the Connectors heading in the tree, and click the Additional Configuration tab.
- 5) The Enable Additional Connector checkbox should be checked, and Time Matters should be selected in the dropdown list.
- 6) At this point, the connector should be licensed for use on a single eCopy device.
- 7) If more extensive evaluation licensing is needed, please contact your eCopy sales representative, or ScanPoint, Inc. at 1-800-243-8794.

No Available Licenses Error

This error is displayed when there are no more licenses available for the selected connector. The number of eCopy devices that can be registered to use the uniConnect connector is determined by the licensing purchased from ScanPoint, and is tracked on a per-eCopy-device basis. For example, if you bought a 5-unit license, then you can push the connector to 5 eCopy devices.

Since each device that uses the connector automatically registers itself and claims one of the available licenses, it may be necessary to clear current registrations if the connector needs to be moved to other machine(s). The current licenses can be cleared by clicking the **Clear License Registrations** button on the Configure tab in SSOP Administration. Once cleared, each eCopy device that you want to include the connector should be activated in turn -- this is done by accessing the connector from the device, which automatically registers the device and claims an available license.

Adding Purchased Licenses to uniConnect Pro for Time Matters

When you have purchase uniConnect Pro licenses from ScanPoint, you should receive instructions for installing them at that time.

Time Matters via uniConnect Button Doesn't Appear on eCopy Device

Make sure that the uniConnect connector is properly enabled in SSOP Administrator for the device in question.