OptimiDoc

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the world
of documents

OptimiDoc Server Guide

v12.03

optimidoc.com

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1 Introduction

OptimiDoc is a solution which ensures you the control over company print, copy and scan operations. Thanks to advanced print and scan functionality makes easier and faster everyday work for your employees. With secure access to devices protects your company data against theft. Finally, lets you look at the detailed report of print services cost with split to devices, departments and users.

Key benefits

Cost minimization

- Complete overview of print costs with a detailed report about each user or device.
- Automation of incoming document by scanning processes with barcode and OCR support.
- Easy integration with existing customer systems without additional extensions.

Security

- Secured devices and document until the user authentication by card, PIN or Login & Password.
- Control of printed documents by the administrator with details about the job such as preview of document.
- Secured data transfer between computer and printer by SSL protocol usage.

Productivity enhancement

- Print on any device with finishing options definition such as stapling or duplex printing directly on the device.
- Direct scanning from device into searchable PDF or Word.
- Small administrative requirement without having to install any applications on workstations and subsequent administration.

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Environmental

- Paper consumption minimized by finishing options and pull print.
- Less color toner consumption with the option to convert documents to Black & White on the device panel.
- Control of user responsibility by reporting.

Product description

OptimiDoc is an All-in-One solution which extends the multifunction device's functionality and helps you in everyday work and enhances company processes.

Security

OptimiDoc Security locks the multifunction printer against unauthorized people. With security you can minimize printing costs and mainly protect your documents before theft or copying.

- Card system — with OptimiDoc you can connect a card reader to the multifunction device and allow users to authenticate by cards. OptimiDoc supports various card standards and thanks to this, users can use cards that have already been used from other systems. Users can also authenticate themselves by PIN, Login & Password or by the combinations.
- Secured data transfer — OptimiDoc uses SSL protocol for communication with devices and for print data transfer from the user station to the device. All data are then encrypted and secured.

Print

OptimiDoc Print offers easier and faster printing on any device. The user is not limited anymore to a particular device where they send the job and at the same time, they set the final form of the document on the device.

- Jobs management — users can manage their print jobs directly on a multifunction device. Also, they can see detailed information about each job such as name, number of pages or complete document preview. Before printing the user can specify if the documents should be printed black & white, two sided or stapled.
- Pull print — all print documents are sent to the OptimiDoc server and they remain stored until the user requests them on the device. At the same time OptimiDoc knows from which device is the user connected and can send documents to a specific device which the user has requested.

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Scan

Scanning ensures digitalization of your documents by an embedded application directly on the multifunction device. Subsequently, these documents can be processed and stored in your repositories.

- Image enhancement — OptimiDoc can de-skew documents, clean up, or separate facing dual pages without any manual assistance.
- Document conversion — OptimiDoc converts scanned documents to more than 10 file types including Microsoft Word, Excel or searchable PDF/A.
- Barcodes and document separation — for bulk scan processing OptimiDoc supports the barcode recognition or separation of documents with a blank page.
- Multiple destinations — optional documents naming and support of multiple destinations such as folder, email, Microsoft SharePoint or Google Drive allow a user to route the document exactly where they want.

Reporting

Reporting helps you to get an overview about the printing services and printing costs with split to user or device.

- Web reports — with web reports you can create a fast overview of the cost per device, location, user and department. Such report can be used by an administrator or a user who can check their own costs.
- Excel reporting — OptimiDoc allows you to export data directly into Microsoft Excel. Together with pre-built report templates you can then monitor paper consumption, usage of duplex printing or even utilization of equipment on different days and hours.
- Print monitoring — monitoring provides an overview of actual printing in your organization with information who and what is being printed. At the same time the administrator may also look at the preview of the document.

Device Monitoring

Monitoring of device status regularly checks the individual statuses of the devices and consumables. Thanks to this, the administrator gets via web interface information about the print environment and simply responds to arising problems. Within the scope of monitoring, it is possible to monitor the information about device status, paper level in the individual containers, toner level, etc.

- Notification system **-** Within the scope of the notification system, it is possible to configure regular email notifications in case of the device status change or a drop of consumables below the pre-defined level. The email can contain information about a specific device where the problem has occurred, but also a detailed description of the problem or type of consumable, which should be replaced. By deployment of the notification system, it is possible to forego failures of individual print devices or to ensure quick resolution of faults.

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1.1 System requirements

Software requirements

OptimiDoc Server is fully based on Microsoft platform and its components.

Operating system

Operating system for using OptimiDoc server can be server operating system but also non-server operating system. OptimiDoc Server, which is installed on non-server operating system is mostly used for testing and promoting purpose. Server operating systems are highly recommended.

- Windows Server 2012* / R2
- Windows Server 2016
- Windows Server 2019
- Windows 8 Professional 64bit*
- Windows 8 Enterprise 64bit*
- Windows 8.1 Professional 64bit*
- Windows 8.1 Enterprise 64bit*
- Windows 10 Professional*
- Windows 10 Enterprise*

Other software

- Microsoft .NET Framework 4.6
- Microsoft Internet Information Services (IIS) or later with ASP.NET feature
- Internet Explorer 11 and higher or equal browser
- Certificate for HTTPS (Self-signed certificate included in installer)
- Firewall exceptions must be configured
- *PowerShell - ExecutionPolicy set to unrestricted during installation - required in order to install DLLs into Global Assembly Cache (GAC)

SQL Servers supported:

Supported SQL Servers	LocalDB	Express	Standard	Enterprise
Recommended amount of devices*	20	100	>100	cluster server implementation
SQL Server 2019	•	•	•	•
SQL Server 2017	•	•	•	•
SQL Server 2016	•	•	•	•
SQL Server 2014	•	•	•	•
SQL Server 2012	•	•	•	•

*Specific cases could have different requirements.

Hardware requirements

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Minimal configuration

- CPU: Dual Core 2 GHz
- RAM: 4 GB
- Free disk space: 20 GB or more
- Network connection: LAN 100 Mbps

Recommended hardware*

- CPU: Quad Core 2 GHz or faster processor
- RAM: 8 GB
- Free disk space: 100 GB
- Network connection: LAN 1 Gbps
- Server operating system

*Should manage up to 200 devices for authentication, print management, reporting and document capture.

Cluster and enterprise environments

- Please contact OptimiDoc Technical Support at https://support.optimidoc.com or at support@optimidoc.com

Security

Authorization and access level

Access Levels and Accounts

In order to deliver the services, OptimiDoc requires the following types of accounts

Service accounts

Services accounts are exclusively to be used by the software components to run the services within the server's environments across all architecture (central and regional components).
It is recommended that the services account is common to all architecture.
Services accounts should have Local Administration rights to the servers where the services are running.
Services account password policy can be aligned with the corporate policies.

Support accounts

Support account will be used by OptimiDoc personnel to support on Install, configure, deploy and support the OptimiDoc Services central and regionally.
OptimiDoc can work either with generic accounts to the service or dedicated personnel accounts, in which case, OptimiDoc will provide Customer with details for each user that an account needs to be created for.

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OptimiDoc recommends that 2 groups of accounts are created.
A group for users with temporary tasks (Install, configure, deploy) and a second group for users with longer lasting tasks (ongoing support of the solution).

Tip Database requirements are based on number of operations and records in it. DB size is approximately **100 MB per 100 000 records** in it.

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1.1.1 Port Specification

OptimiDoc Server communication

The OptimiDoc Server provides a communication through server protocols based on specified service. A list of protocols and ports is described below.

Customer security boundaries

The OptimiDoc Server doesn't provide any user data outside of the customer ICT environment, only communication with utilized cloud services is required as a part of solution design and basic prerequisites.
The exception to above, happens when scanning to Cloud Storages is used. e.g. user scans a document in customer ICT environment and selects Cloud storage on the internet. The OptimiDoc Server receives scan data from an MFP device and delivers it to selected storage.

Communication paths & encryption

The OptimiDoc Server provides and receives data from the following components:

- Print server
- MFP device
- Mobile application for iOS and Android
- Web browser
- OptimiDoc Print Node
- OptimiDoc Client

Components can be excluded in specific customer implementations.

Communication channels and protocols

Print server > OptimiDoc Server

Purpose	Data	Protocol	Port	Encryption
Delivery of print job	- Print data (PCL/PS/XPS/PDF) - Login	LPR	515	No
		IPP	14265	No
		IPPS	14266	TLS

MFP device > OptimiDoc Server

Purpose	Data	Protocol	Port	Encryption
Authentication & authorization of user	- Login and password or PIN or Card - Email - Full name - Access rights	HTTP	14265	No
		HTTPS	14266	TLS
		SOAP *(Konica Minolta and Develop)*	14267	TLS

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Embedded terminal communication	- Print job data (name, preview) - Scan workflows including metadata - Storages folders structure including files - Billing codes	HTTP	14265	No
		HTTPS	14266	TLS
Delivery of scanned document	- Scan document data - Scan document description file with user login and metadata	HTTP	14265	No
		HTTPS	14266	TLS
		WebDAV (Konica Minolta and Develop)	14269	TLS
		FTP (Epson)	21	FTP server defined

OptimiDoc Server > MFP device

Purpose	Data	Protocol	Port	Encryption
Device authentication in case of external authentication method	- Login - Email - Full name - Access right	HTTP	80	No
		HTTPS	443	Device defined
Device installation and configuration	- OptimiDoc Server parameters	HTTP	80	No
		HTTPS	443	Device defined
Device status check	- Device detailed information including serial number, trays, …	SNMP	161,162 (UDP)	No
Print documents delivery	- Print data (PCL/PS/XPS/PDF) - User login	LPR	515	No
		IPP	80, 631	No
		IPPS	443	Device defined
		JetDirect	9100	No
Device configuration		HTTPS	443 (Xerox) 50003 (KM) 7627 (HP)	Device defined

OptimiDoc Server > LDAP

Purpose	Data	Protocol	Port	Encryption
Lightweight Directory Access	- Login - Email	LDAP	389,3268	No

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Protocol synchronization	- Full name - Department - Card - PIN	LDAPS	636, 3269	LDAP defined

OptimiDoc Server > Other services

Purpose	Data	Protocol	Port	Encryption
Outgoing emails	- Notification and error alerts - Scans and defined metadata	SMTP	25	SMTP server defined
Incoming email	- Documents for print and scan through OptimiDoc	IMAP	143,993	Mailserver defined
		POP3	110,995	Mailserver defined
Delivery and download from Cloud storages	- Scan document - Access/Refresh token - Metadata	HTTPS	443	Cloud storages defined
Popup request to Client	- URL address to OptimiDoc - Server address - Proprietary commands	binary	14262	
Network Card Reader TCPConv 2	- User card number		14263	No
Google Chrome Extension	- Print data	HTTP, HTTPS	14265, 14266	

Print server > OptimiDoc Print Node

Purpose	Data	Protocol	Port	Encryption
Delivery of print job	- Print data (PCL/PS/XPS/PDF) - Login	LPR	515	No
		IPP	14265	No
		IPPS	14266	TLS

OptimiDoc Print Node > OptimiDoc Server

Purpose	Data	Protocol	Port	Encryption
Print job registration	- Login - Job name - Job language - Print job accounting data	HTTPS	14266	TLS
Heartbeat	- Status of OptimiDoc Print Node	HTTPS	14266	TLS

OptimiDoc Server > OptimiDoc Print Node

Purpose	Data	Protocol	Port	Encryption
Print job release request	- Login - Job ID - Device IP - Delivery type - Finishing options	HTTPS	14260	TLS
Job maintenance	- Job ID	HTTPS	14260	TLS
Job preview	- Job preview	HTTPS	14260	TLS

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OptimiDoc Print Node > MFP device

Purpose	Data	Protocol	Port	Encryption
Print documents delivery	- Print data (PCL/PS/XPS/PDF) - User login	LPR	515	No
		IPP	80, 631	No
		IPPS	443	Device defined
		JetDirect	9100	No

Note

- The exact set of ports and protocols can be different based on used MFP devices and architecture.
- Complete communication between the OptimiDoc Server internal components is secured through TLS.

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1.2 Specification

Security

User authentication

Web interface: Login&Password

Multifunctional device: please check device comparison part

Access rights

Web interface: Administrator, Local administrator, Manager, Department manager, User

Multifunctional device: Copy, Print, Scan, Color copy/print, Scan workflows, Print connectors
*Supproted access right could be different based on device model and manufacturer

Print

Incoming print queues to OptimiDoc

Supported standards: IPP(s), LPR/LPD

Other channels: Web submit

OptimiDoc print queue types

Direct queue – print jobs are printed directly on specified device

Secured queue – print jobs are hold on server until user authenticates and requests the jobs

Supporter job delivery to device

Supported standards: IPP/IPPs/ IPP (HTTP 1.0), Xerox PullPrintAPI, JetDirect, LPR

Print jobs maintenance

Automatic unprinted jobs removal in predefined period (days)

Automatic printed jobs removal in predefined period (days)

Print terminal

Browse of unprinted and printed jobs

Print of selected/all print jobs

Delete of selected jobs

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Search between files and folders in the current directory**

Job detail: Full preview, First page preview, Number of pages, Job name, Owner, Date

Finishing options: Force BW, Force simplex/duplex, Number of copies, Stapling, Punching
*Supproted print termianl feautres could be different based on device model and manufacturer
** Available only on HP Enterprise and Xerox

Print terminal

Archives: Mailbox, Google Drive*, Folder (SMB)*, Dropbox*, OneDrive, Shared Queue, WebDav, SharePoint Online, Box

Suppotred file types: Microsoft Word, Microsoft Excel, Microsoft PowerPoint, HTML, PDF, TIF, JPG, PNG, TXT, RTF

Access to connectors based on groups

MFP need to support PDF printing.

*Supproted print connectors could be different based on device model and manufacturer

Print rules

Triggers: Authentication on device, Print job delivery to printer, Job execution on device

Conditions: Username, User, Login, Department, Group, Device, Job name, Current monthly consumption, Jon type, Number of pages

Actions: Force duplex, Force BW, Reject operation, Save print preview, Email notification to user, Email notification to customer email, Print all jobs, Job consumption estimate, Redirect print job to device
*Supproted print rules could be different based on device model and manufacturer

Scan

Scan processes

Max. amount of scan processes: unlimited

Max. amount of scan parameters per scan process: 6

Access rights

Access to scan processes based on groups

Input channels

MFP, HotFodler, Email, Mobile, Web submit

MFP specific features

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Scan settings (fix/optional): Resolution, Duplex, Paper format, Job assembly*, Color

Scan parameters types: String, Number, Boolean, Date, Internal list, External list CSV/JSON/XML, User list (email, login, name), SharePoint list
Scan parameters can have a default value and can be optional or required

*Supproted scan features could be different based on device model and manufacturer

HotFolder specific features

Local folder supproted

Input formats: PDF, TIF

Input parameters for subfolders name: Maximally 5

Parameters types: User

Websubmit specific features

Input formats: PDF, TIF

Email specific features

Input formats: PDF, TIF

Supported protocols: IMAP, POP3

SSL support

Image enhancement

Auto-detection of page orientation, Splitting facing pages and dual pages, Automated image de-skewing, Image despeckling, Texture filtering, Blank page removal

Barcode recognition

Supported barcodes

1D codes: Codabar, Code 128, Code 39, Code 93, EAN 8, EAN 13, IATA 2 of 5, Industrial 2 of 5, Interleaved 2 of 5, Matrix 2 of 5, Patch, PostNet, UCC-128, UPC-A, UPC-E

1D barcodes with checksum: Code 39, Interleaved 2 of 5, Codabar

1D barcodes with supplemental: EAN 8, EAN 13, UPC-E

2D barcodes: PDF417, Aztec, DataMatrix, QR Code

Regular expression supproted

Operation up to barcodes: Barcodes substring extraction, Barcodes separation by character, Barcodes conversion by conversion table

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Bulk scan separtion

Separation by: Blank page*, Barcode, Predefined number of pages, Zone
* not supported with Zonal OCR

Document export

compact PDF/A (*.pdf), searchable PDF/A (*.pdf), PDF (*.pdf), Microsoft Word (*.docx and *.doc), Microsoft Excel (*.xlsx and *.xls), Microsoft PowerPoint (*.pptx), Rich Text Format (*.rtf), Text (*.txt), JPEG image (*.jpg)*, Multipage TIFF (*.tif)

Document export

Zones types

Text zone: Support of regular expressions, Definition of zone page

Barcode zone: Support of regular expressions, Definition of zone page

Supported destinations

Every scan workflow can have assigned multiple destinations.

Folder/SMB/DFS, FTP, Email, SharePoint, Google Drive, Script, OptimiDoc, DropBox, One Drive, One Drive Business, SharePoint Online, Box, WebDav

Scan delivery reporting

Trigers: Always, Only on errors

Type: Overal, Per document

Format: JSON, XML, Custom

Reporting

Device native reporting

Supported operations: Print, Scan, Copy

Copy/print information: Number of pages, Format, Number of sheets, Price

Scan information: Number of pages, Price
*Supproted accouting features could be different based on device model and manufacturer

Network device - Accouting based on job analyzer

Supported operations: Print (PCL/PS languages)

Print information: Number of pages*, Format, Price
*In case of minimal color coverage can be the page detected as a black&white.

Accouting based on Print Monitor

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Supported operations: Print

Print information: Number of pages*, Format, Price
*Print Monitor takes information from Windows spooles.

Web reports

Job list/Activity log

Provided information: Name, User, Department, Device, Time, Number of pages, Number of scans, Number of sheets, Price, State

Supported filters: Date from/to, User, Department, Device, Job name, Status

Standard reports:

Reports by: User, Department, Device, Location, Days

Report content: Number of pages, Number of scans, Number of sheets, Price

Supported filters: Date from/to, User, Department, Device, Location

Excel reports

Reports by: User, Department, Device, Location, Days

Report content: Number of operations, Number of pages, Number of scans, Number of sheets and paper format, Workload in hours and days, Utilization of duplex or color print, Price

Supported filters: Date from/to, User, Department, Device, Location

Automatic reporting

Automatic report generation to multiple email address

Definition of email: Receivers emails, Email subject, Email body, Localization

Time period: Last month

Supported formats: Excel

Supported filters: User, Department, Device, Location

Export features

Supported formats: XML, CSV, HTML

Supported filters: Date from/to

User management

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User database and synchronization

Internal user database

Synchronization with multiple Active Directory, OpenLDAP *: Synchronization of user login, name, email, department**, PIN and card.
* Server needs to be added to domain
** Department is synchronized from organization unit or selected user account field

Synchronization with CSV file

Synchronization with Lotus Domino

Automatic PIN generation

Automatic PIN generation with distribution to user email: PIN length definition, Filter for generation of PIN just to users without PINs or without Card, Email content definition

Mass operation

Cards import from CSV

Pin import from CSV

GDPR

Keept information list for specific user

User anonymization

General features

UI rebranding

Webinterface: Logo upload

Multifunctional device: Colors, Logo upload

*Supproted rebranding features could be different based on device model and manufacturer

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1.3 Changelog

V 12.03 (release date 23/07/2021)
- [FEATURE] – RFIDeas card reader support
- [BUGFIX] - Epson - cannot process new CheckForUpdate data
- [BUGFIX] - OCR engine performance enhancements

V 12.02 (release date 12/07/2021)
- [IMPROVEMENT] - VersaLink automatic installation
- [BUGFIX] - Epson - scan - duplex page opacity
- [BUGFIX] - Wrong KM accounting when LPR/JetDirect delivery is used
- [BUGFIX] - Add instalation progress/check/status when device is created
- [BUGFIX] - Missing localization in User edit
- [BUGFIX] - Missing localization in Standard Report
- [BUGFIX] - HP Ent - Single Sign-on support
- [BUGFIX] - HP Pro: App cannot be launched with OD12
- [BUGFIX] - Scan - report - OptimiDoc OCR does not return number of pages
- [BUGFIX] - Configuration - number of parallel tasks by default is 0
- [BUGFIX] - Epson - error when starting scan
- [BUGFIX] - Epson installer with SSL fails
- [BUGFIX] - Epson - Swipe with unassigned card whilst another user logged in assigns card to the current user
- [BUGFIX] - Epson - Separate Scan error
- [BUGFIX] - Epson - IPP upgrade required during getting info about device
- [BUGFIX] - Scan parameter - parameter still editable if uneditable selected
- [BUGFIX] - HP Ent - manually selected localization does not take effect
- [BUGFIX] - OCR zone - reg exp does not return group match in ( ) but whole occurrence

V 12.01 (release date 01/06/2021)
- [FEATURE] - Add support for InePro card readers
- [BUGFIX] - Scan - separation by barcode does not work
- [BUGFIX] - License invalidated (TimeExpired) problem
- [BUGFIX] - HP Ent: Sign in button has to be pressed on terminal prior to card swipe
- [BUGFIX] - Scan - orientation detection is not turn on in OptimiDoc OCR
- [BUGFIX] - Scan - HotFolder - unable to change path
- [BUGFIX] - Print queues settings not visible in Configuration

V 12 (release date 13/05/2021)
- [FEATURE] - new licensing model
- [FEATURE] - new OCR engine
- [IMPROVEMENT] - Modern terminal - search possibility in scan "Folder"
- [BUGFIX] - Standard report - table sorting
- [BUGFIX] - Error when scan destination ends with "\" and paramater follows

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1.3.1 Version 11

V 11.04

- [BUGFIX] - Canon - Scan from MFP produces upload error
- [BUGFIX] - Web terminal - application authentication (login&password) - possible to log in without password
- [BUGFIX] - Canon terminal - not reflecting Print All settings from server, last selection is kept

V 11.02 and V 11.03

- [FEATURE] - Support of OptimiDoc Chrome Extension
- [BUGFIX] - Lexmark - login&password authentication allows login with empty password field
- [BUGFIX] - Job parser - PCL XL Class 3 support
- [BUGFIX] - Jobs from spooler folder are not being deleted
- [BUGFIX] - Epson terminal shows data for previously signed in user
- [BUGFIX] - Ricoh terminal - not reflecting default input scan workflow setting (such as paper size, duplex, etc.)
- [BUGFIX] - Canon - if logged in with pin and another user logs in with card it only logs out previous user

V 11.01

- [BUGFIX] - HP - scan error message when no session open on server - device without authentication
- [BUGFIX] - Possible NULL value when removing old job
- [BUGFIX] - Modern terminal look - missing information "Scan has been finished succe..."

V 11

- [FEATURE] - SharePoint Online - site selection
- [FEATURE] - Ricoh terminal integration
- [FEATURE] - Canon terminal integration
- [IMPROVEMENT] - Standard report - retrieve data only after clicking the Apply filter button
- [BUGFIX] - OCR zone background - missing TIFF file type
- [BUGFIX] - KM - Print All does not work
- [BUGFIX] - HP - terminal layout problem on small screen
- [BUGFIX] - Standard reports - Excel export issues
- [BUGFIX] - Print job removal - jobs deleted when specific combination set up
- [BUGFIX] - Hotfolder picks up also other than only newly created files
- [BUGFIX] - Add login/email to display on terminal to Userlist parameter
- [BUGFIX] - Allow to find non diacritics results when searching through User List names
- [BUGFIX] - Scan parameter list "VAL" string breaks the values

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1.3.2 Version 10

V 10.08

- [BUGFIX] - Internal DB server name does not show up on dashboard
- [BUGFIX] - Network accounting not working when IPP delivery method selected
- [IMPROVEMENT] - Modern terminal look - search possibility in print
- [IMPROVEMENT] - Possibility to hide OptimiDoc print queues (Waiting, Printed) on the terminal

V 10.07

- [BUGFIX] - Error when acccessing option Diagnostic - Active Users
- [BUGFIX] - Ability to assign default billing code without access rights by admin
- [BUGFIX] - Scan workflow - OCR settings kept after document type changed to non-OCR
- [BUGFIX] - IE doesn't display content of data tables
- [BUGFIX] - HP - Deny usage of color
- [BUGFIX] - Mobile app: HP Pro and Epson - unlock feature
- [BUGFIX] - HP terminal - responsive buttons with long labels
- [BUGFIX] - HP Pro: signout after 2nd card swipe (device freezing)
- [BUGFIX] - HP: change of finishing option is not reflected
- [BUGFIX] - HP Pro: handling of group access rights
- [BUGFIX] - IPP print problem on HP Pro devices
- [BUGFIX] - Xerox WorkCentre - modern terminal - scan parameter date picker won't open
- [BUGFIX] - Xerox - job preview button visual bug
- [BUGFIX] - Xerox - logout problem when using proxy
- [BUGFIX] - Data table - sorting applied on current page only
- [BUGFIX] - Automatic LDAP synchronization - minutes button
- [BUGFIX] - Epson: ability to add admin password
- [BUGFIX] - Epson: EOP test connection does not work
- [BUGFIX] - Epson: deny copy, print, scan, color functionality
- [BUGFIX] - IPP delivery - wait for ready state of printer before sending job
- [BUGFIX] - Filter Job list by owner does not work once the user was cached in browser
- [BUGFIX] - Installer - SQL Test button correction
- [BUGFIX] - Rules sync task - cyclic reference
- [BUGFIX] - Rules sync task - error handling
- [BUGFIX] - Finishing options display all possible options instead of only available
- [BUGFIX] - Event log - show message full HD display
- [BUGFIX] - Login form uses GET request method
- [IMPROVEMENT] - OD service: improve error message when Web is unavailable
- [IMPROVEMENT] - GSuite integration - user import
- [IMPROVEMENT] - Extend the documentation with whitepaper
- [IMPROVEMENT] - Installer: configure application preload in IIS
- [IMPROVEMENT] - Web interface speed optimization
- [IMPROVEMENT] - Current SQL driver in installer does not support TLS 1.2
- [IMPROVEMENT] - Ability to use hostname for SSL instead of IP
- [IMPROVEMENT] - HP: device installer modification to use strict SSL
- [IMPROVEMENT] - Install DLLs to GAC
- [IMPROVEMENT] - Xerox: DNS record in XSA

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V 10.06

- [BUGFIX] - Deleting Email OCR flow won't delete (input) destination belonging to it
- [BUGFIX] - Long device or location name adds crlf after icon
- [BUGFIX] - Scan destination -> Email contains duplicate items
- [BUGFIX] - Language Icon doesn't show up correctly
- [BUGFIX] - Dashboard optimization
- [BUGFIX] - Job List - date To is limited by time when page is loaded
- [BUGFIX] - IP address and Server name in System info widget
- [IMPROVEMENT] - Old jobs removal - allow only one instance of process and add paging
- [IMPROVEMENT] - Correction of accounting data query in scheduler instead of startup procedure
- [IMPROVEMENT] - Welcome message after web interface login
- [IMPROVEMENT] - Job receiving optimization in spooler

V 10.05

- [BUGFIX] - Unescaped values in scan XML metadata
- [BUGFIX] - Unable to delete pricelist when was assigned to device without accounting
- [BUGFIX] - Scan workflows - Refresh after import
- [BUGFIX] - Epson: scan delivery doesn't work when configuration of FTP server is without "ftp://" prefix
- [BUGFIX] - Devices -> "Install same device functionality" - misleading data
- [BUGFIX] - Rules: check uniqueness of rule name
- [BUGFIX] - Sending automatic report in the same day as start of period
- [BUGFIX] - User import - Status is always "finished"
- [BUGFIX] - Billing code not used in accounting for direct queue print
- [BUGFIX] - Deleted departments are active in group
- [BUGFIX] - In OCR zone settings - dropdown type - visible different value than selected
- [BUGFIX] - OptimiDoc Client - popup doesn't appear in front of other applications
- [BUGFIX] - Rule - email notification - when "return key" typed in message body can't edit rule again
- [BUGFIX] - Epson broken screen texts (layout)
- [BUGFIX] - Rules - conditions for group Everyone not applied
- [BUGFIX] - Rules - when selected "less than" in numeric condition upon edit "greater than" is selected
- [BUGFIX] - Rule - save job preview - system parameters not applied while naming folder path
- [BUGFIX] - Rule - save job preview and reject in one rule don't work
- [BUGFIX] - List parameters field value/title description missing
- [BUGFIX] - File might be corrupted (Report export table)
- [BUGFIX] - Job list - Dropdown list in search stucks
- [BUGFIX] - Office365 IMAP server doesn't delete e-mails
- [BUGFIX] - "Remove AD" button doesn't delete AD settings
- [BUGFIX] - User Import - wrong localization - ID attribute, Default project attribute
- [BUGFIX] - Scan workflow - import creates duplicate destinations
- [BUGFIX] - Scan workflow - import can create duplicate workflows
- [BUGFIX] - Scan workflow - HotFolder - wrong redirection when not filled Folder Path
- [BUGFIX] - HotFolder - modal with parameters has wrong title
- [BUGFIX] - Scan workflow - import creates duplicate scan parameters

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- [BUGFIX] - Scan workflow - import keeps document loaded
- [BUGFIX] - Automatic reports - filter items cannot be cleared
- [BUGFIX] - New AltaLink firmware (SPAR Release 103.xxx.000.06000) requires argument Provides during installation
- [BUGFIX] - Automatic reports are not generated
- [BUGFIX] - AD import - 2nd AD synchronization issue
- [BUGFIX] - AD import - 2nd AD advanced settings not applied
- [BUGFIX] - Scan destination FTP - unable to connect to different port
- [BUGFIX] - Email scan destination won't send output to more recipients
- [IMPROVEMENT] - Subscription business model
- [IMPROVEMENT] - HP - ability to configure timeouts for connections
- [IMPROVEMENT] - Xerox - colour forcing for xpif header print job

V 10.04

- [BUGFIX] - Deny usage of color in copying - Xerox
- [BUGFIX] - Wrong error messages during adding/editing scan parameters
- [BUGFIX] - Problem with default billing codes accounting on copies
- [BUGFIX] - Epson - Calendar parameter wrong localization
- [BUGFIX] - IE doesn't display content of data tables
- [BUGFIX] - Invalid cluster IP address causes web doesn't start
- [BUGFIX] - AD import editor problems
- [BUGFIX] - Reports doesn't display circle graphs correctly
- [BUGFIX] - User import - advanced options doesn't send configuration
- [BUGFIX] - Unable to connect to TLS 1.2 only POP3/IMAP servers
- [BUGFIX] - Billing code not used in accounting for direct queue print
- [BUGFIX] - Slow CSV parameter loading in modern terminal look
- [BUGFIX] - HP: disable scanning button until device has finished previous scan
- [BUGFIX] - Email OCR: Enabled button (disable state) does not work
- [BUGFIX] - Insufficient Rights on modern terminal causes error
- [BUGFIX] - Epson - not working forced localization in device settings
- [BUGFIX] - Epson - Button Scan in Scanning Workflow - shifted label
- [IMPROVEMENT] - Add external ID to user info
- [IMPROVEMENT] - Add loading of default project from AD
- [IMPROVEMENT] - add user external ID to report data
- [IMPROVEMENT] - add external ID to excel report
- [IMPROVEMENT] - add external ID to standard report
- [IMPROVEMENT] - Upgrade Aspose Libraries to version 20.01

V 10.03

- [BUGFIX] Epson - Access OptimiDoc Web interface through terminal
- [BUGFIX] HP fw 4.9.x : concurrency exception during login process

V 10.02

- [BUGFIX] Count of password's chars
- [BUGFIX] Unable to delete pricelist when was assigned to removed device
- [BUGFIX] Terminal - available actions when no jobs are displayed
- [BUGFIX] RBE: print all action doesn't work on Lexmark devices
- [BUGFIX] Lexmark: missing space between rows in scan workflows list

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- [BUGFIX] Unable to install Epson device
- [BUGFIX] HP: web authentication with proxy
- [BUGFIX] HP: separate scan opens OptimiDoc interface instead of native
- [BUGFIX] Xerox scan delivery ignores SSL setting
- [IMPROVEMENT] Lexmark - logout by card
- [IMPROVEMENT] Lexmark - add Croatian localization
- [IMPROVEMENT] Lexmark - add configurable landing screen
- [IMPROVEMENT] HP: ability to force version of scan API

V 10.01

- [BUGFIX] Epson: Scan using Job Assembly & Scan parameters
- [BUGFIX] Terminal: If there is no ScanWorkflow, it will show up a message.
- [BUGFIX] OD web - mobile layout: Redirection link to dashboard
- [BUGFIX] Web service will not start, if the server is not connected into network
- [BUGFIX] Device - Tags: Device counter (after deleting device)
- [BUGFIX] Scan Workflows - Input options: Scaling button size in Web UI in (Window mode)
- [BUGFIX] Diagnostic: Search elements in Log center stays same after switching to another log (event, web, service)
- [BUGFIX] Mass Operations: Data Import - card assignment to active users only
- [BUGFIX] Web UI: Flag icons
- [BUGFIX] HP: Authentication issues (problem with cards and hanging sessions)
- [BUGFIX] EDGE: Delete user from specific group
- [BUGFIX] Mobile app: Problem with unlocking HP devices
- [BUGFIX] Scan workflow: Displays incorrect info during edit OCR zone settings (Apply on page)
- [BUGFIX] Active Directory: user import from more directories
- [BUGFIX] OD Client: Billing code pagination
- [BUGFIX] Unable to edit Hotfolder settings in case of parameter usage
- [BUGFIX] HP scan: Selection of the closest DPI doesn't work properly
- [BUGFIX] SMTP Configuration: Test connection
- [BUGFIX] Slow web responses when server is without internet access
- [BUGFIX] Group List - Group settings: Enabling disabled workflows, connectors and billing codes
- [BUGFIX] KM/Develop terminal: Invalid checking of mandatory fields (PIN or Login & password authentication)
- [BUGFIX] HP: Scan settings using default values
- [BUGFIX] Modern terminal: Enter in ScanWorkflow description causes JavaScript is not working
- [IMPROVEMENT] Clear Event Log in DB (records older than one month)
- [IMPROVEMENT] Zonal OCR: added E13B font support
- [IMPROVEMENT] Group List: Added information about deleted user
- [IMPROVEMENT] Device/Dept/Group List: Fast browsing through all pages
- [IMPROVEMENT] Epson terminal: Automatic terminal layout
- [IMPROVEMENT] User settings: Default billing code whispering
- [IMPROVEMENT] Submit form by enter/button
- [IMPROVEMENT] Improved localizations
- [FEATURE] Add ability to select terminal version (Xerox & HP devices)
- [FEATURE] Allow selection of terminal layout (only for HP Enterprise and Xerox devices)

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- [FEATURE] Notification: New item is not added (Group List)
- [FEATURE] Add WebDAV support as scan destination / print connector
- [FEATURE] Epson: Enable Modern layouts in device settings

V 10.00

- Version 10 is a brand new version of OptimiDoc

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1.4 Embedded terminals comparison

	License type			Device type									
Feature	**Full**	**Print**	**Scan**	**Xerox**	**HP Enterprise**	**HP Pro**	**Konica Minolta / Develop**	**Lexmark**	**Epson**	**Ricoh**	**Canon**	**Network device**	**Print monitor**
Device license support													
OptimiDoc Full MFP				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
OptimiDoc Print MFP				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
OptimiDoc Scan MFP				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Embedded applications													
Interface				Web	Web	Native	Native	Java	Web	Android	Web	None	None
Localizable				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Authentication													
Device authentication													
Card				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
PIN				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Login & password				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Combinations of methods				Yes	Yes	No	Yes	No	No	No	No	No	No
Mobile application				Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	No	No
Card assignment				Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
OptimiDoc application													
User List				Yes	Yes	No	No	No	No	No	Yes	No	No
PIN				Yes	Yes	No	No	No	No	Yes	Yes	No	No
Login & password				Yes	Yes	No	No	No	No	Yes	Yes	No	No
SingleSignOn				Yes	No	No	Yes	No	No	Yes	No	No	No

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Access rights											
Print restriction		Yes[5]	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Scan restriction		Yes[5]	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Copy restriction		Yes[5]	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Color print/copy restriction		Yes[5]	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Printing											
Print All after authentication		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Secured print		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes[1]	No
Pull print		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes[1]	No
Finishing options		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes[2]	No
Full job preview		Yes	Yes	No	Yes[3]	No	Yes	Yes	Yes	Yes[2]	No
Job management		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes[2]	No
Print connectors											
Email print connector		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
SharedQ		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Folder		Yes	Yes	No	No	No	Yes	Yes	Yes	No	No
Google Drive		Yes	Yes	No	No	No	Yes	Yes	Yes	No	No
OneDrive		Yes	Yes	No	No	No	Yes	Yes	Yes	No	No
DropBox		Yes	Yes	No	No	No	Yes	Yes	Yes	No	No
Scanning											
Scanning workflows		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Scan parameters		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Job assembly		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Scan settings definition		Yes	Yes	Yes	partial[4]	Yes	Yes	Yes	Yes	No	No
Folder browsing		Yes	Yes	No	No	No	Yes	Yes	Yes	No	No
Accounting											
Native device		Yes	Yes	Yes	Yes	Yes	Yes	Yes[67]	Yes[6]	No	No
OptimiDoc parser		No	No	No	No	No	No	No	No	Yes	No

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Windows spooler		No	No	No	No	No	No	No	No	No	Yes
Billing codes (Print/Copy/Scan)		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes/No/No	No
Device monitoring											
Device monitoring		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Notifications		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No

[1]only through OptimiDoc Mobile Application or Elatec TCPconv
[2]only through OptimiDoc Mobile Application
[3]first page only
[4]limitation of scan settings definition available for OpenAPI
[5]preauthorization functionality required
[6]requires devices authentication
[7]jobs done outside of the OptimiDoc application (such as direct print, copy, native scan) are accounted under admin user

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1.5 OptimiDoc vs ABBYY OCR engine functionality comparison

	OptimiDoc Scan Processing	ABBYY Fine Reader Engine
Limitation of processing		
	unlimited	PPM/number of CPUs
Supported input file types		
	JPG, TIF, PDF	JPG, TIF, PDF
Image enhancement		
Remove punch holes	Yes	No
Remove black borders	Yes	No
Autodetection of page orientation	Yes	Yes
Automated image de-skewing	Yes	Yes
Image despeckling	Yes	Yes
Splitting facing pages and dual pages	No	Yes
Texture filtering	No	Yes
Blankpage removal	Yes	Yes
Barcode recogniton		
Linear barcodes	Yes	Yes
2D barcodes	Yes	Yes
Separation		
Barcodes	Yes	Yes
Blankpages	Yes	Yes
Zones	No	Yes
Predefined number of pages	Yes	Yes
OCR		
Fast and Accuracy mode	Yes	Yes
Supported language	130	nearly 200
Multithreading support	Yes	Yes
Zonal Ocr		
Text zones	Yes	Yes
Barcode zones	Yes	Yes
Export file types		
Microsoft Word	Yes	Yes
Microsoft Excel	No	Yes
Microsoft PowerPoint	No	Yes
PDF	Yes	No
TIF	Yes	No
searchable PDF	Yes	Yes
searchable PDF with MRC compression	Yes	Yes
RTF	No	Yes
TXT	Yes	Yes

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1.5.1 OptimiDoc OCR performance comparison

The comparison table of OCR processing between OptimiDoc scan processing and ABBYY Fine Reader. Tests were performed on Windows 10 Home, Intel(R) Core(TM) i7-7500U 2.70GHz, 8 GB RAM.

		4 processes				1 process			
		TIF 300 dpi		PDF 300 dpi		TIF 300 dpi		PDF 300 dpi	
		10p [s]	1p [s]	10p [s]	1p [s]	10p [s]	1p [s]	10p [s]	1p [s]
OptimiDoc Scan processing									
	Fast	2.2	3.2	1.1	2.2	2.5	5.0	1.6	5.0
	Accuracy	10.9	9.8	4.9	9.5	13.6	28.0	6.3	29.0
ABBYY Fine Reader									
	Fast	2.1	2.5	2.0	2.8	4.5	9.0	4.5	9.0
	Accuracy	3.9	5.1	3.5	4.8	8.2	10.0	7.9	10.0
Comparison									
	Fast	-4%	-21%	84%	29%	79%	80%	172%	80%
	Accuracy	-64%	-47%	-29%	-49%	-40%	-64%	26%	-66%

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1.5.2 ABBYY OCR performance

OCR Performance guide

Excellent performance of the OCR component is one of the key factors for high customer satisfaction. This chapter provides information on general OCR performance factors and the possibilities to optimize them.
When measuring OCR performance, there are two major parameters to consider:

- RECOGNITION ACCURACY
- PROCESSING SPEED

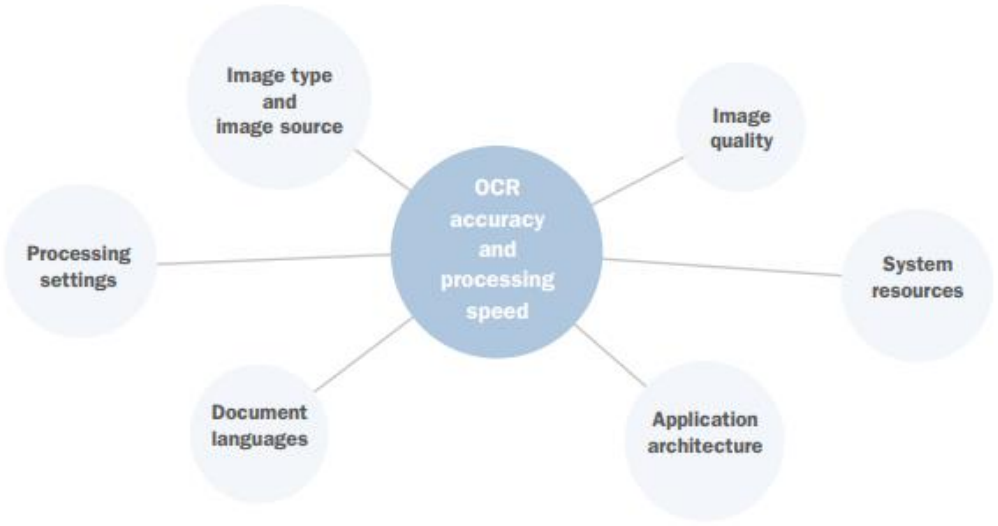

Image Type and Image Quality

Images can come from different sources. Digitally created PDFs, screenshots of computer and tablet devices, image files created by scanners, fax servers, digital cameras or smartphones – various image sources will lead to different image types with different level of image quality. For example, using the wrong scanner settings can cause “noise” on the image, like random black dots or speckles, blurred and uneven letters, or skewed lines and shifted table borders. In terms of OCR, this is a ‘low-quality image’. Processing low-quality images requires high computing power, increases the overall processing time and deteriorates the recognition results.

Image quality = Key factor for OCR performance

On the other hand, processing ‘high-quality images’ without distortions reduces the processing time. Additionally, reading high-quality images leads to higher accuracy results. Therefore, it is recommended to use high-quality images for the OCR process.
Increase OCR speed and accuracy by enhancing the image quality.

How to Get High-Quality Images

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TIPS FOR DOCUMENT SCANNING

- Font Size
  - Documents printed in very small fonts should be scanned at higher resolutions. Use the following resolution for scanning:
    - 300 dpi for typical texts (printed in fonts of size 10 pt or larger)
    - 400-600 dpi for texts (fonts size 9 pt or smaller)
- Print Quality
  - Poor quality document, such as old newspapers or books should be scanned in the grayscale mode. This mode retains more information about the letters in the scanned text.

TIPS FOR TAKING PHOTOS

- Correct Lighting
  - Make sure that lighting is evenly distributed across the page and that there are no dark areas or shadows.
  - If possible, use a tripod. Position the lens parallel to the plane of the document and point it toward the center of the text.
  - Turn off the flash to avoid glare and sharp shadows on the page.
  - If the camera has “White Balance” option, use a white sheet of paper to set white balance. Otherwise, select the white balance mode, which best suits the current lighting conditions.
- If There is Not Enough Light …
  - Select a greater aperture value
  - Select a greater ISO value for sensitivity
  - Use manual focusing if the camera cannot lock the focus automatically

Image Quality Enhancement with OptimiDoc Server

If it is not possible to influence the image quality in advance, it is recommended to enhance it prior to the recognition step. In OptimiDoc Server, various powerful image preprocessing functions are available:

ADVANCED IMAGE PROCESSING FUNCTIONS
• ABBYY Camera OCR technology • Auto-splitting of double-pages • Removal of stamps and written notes • Automated image de-skewing • Autodetection of page orientation and rotation • Image despeckling

Predefined Recognition Modes

Another possibility to influence the OCR performance is to use recognition modes designed for particular scenarios. OptimiDoc Server provides following predefined recognition modes:

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NORMAL	FAST
Using this mode you will achieve the highest recognition accuracy. This mode is highly recommended when recognizing content is going to be reused in other applications or tasks where high accuracy is critically important.	Usage of this mode increases processing speed up to 200-250%. This mode is recommended when processing speed is of the primary importance, such as in high-volume document processing for archiving, content and document management systems.

Document Languages

OptimiDoc Server is capable of recognizing both mono- and multi-lingual (e.g. written in several languages) documents. It is very important to specify the correct recognition language, since an incorrectly specified language can significantly slow down the document processing and decrease the recognition quality. If the recognition language cannot be specified in advance, it is possible to use automatic language detection.
However, a high number of preselected recognition languages will reduce the processing speed. Therefore, it is not recommended to specify more than five recognition languages.

OptimiDoc Server OCR - Speed Testing Results

The table presents the results of internal performance testing. Please be aware that testing results always depend on many factors, such as image quality, used recognition languages and other factors.

ONE-PAGE PAGES/MINUTE	ONE MULTI-PAGE PAGES/MINUTE
165	10

Technical Test Information

Intel® Core™ i5-4440 (3.10 GHz, 4 physical cores), 8 GB RAM, 4 processes running simultaneously.
The performance was tested on 300 documents in English, using the ‘DocumentArchiving_Speed’ predefined profile. In the scenarios „One-page documents“ and „One multi-page document“ the documents were exported as PDF format. * The text was extracted from pre-defined areas on one-page documents. No export to any file format was

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performed

System Resources

During the OCR process, a range of different algorithms are applied. They depend on image quality, document languages, layout complexity and number of pages in the document. Accordingly, such algorithms might require higher memory resources. It is recommended to set up the system in accordance with the outlined memory requirements to optimize the processing speed by allocating adequate system memory.

MEMORY REQUIREMENTS

Processing multi-page documents	minimum 1 GB RAM recommended 1,5 GB RAM
Parallel processing	350 MB RAM x number of CPU cores + additional 450 MB RAM
Parallel processing of documents in Arabic, Chinese, Japanese or Korean	850 MB x number of CPU cores + 750MB RAM

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2 Administrator Quick Start Guide

This chapter provides the instructions to install and start using OptimiDoc. Before you start, the installation wizard checks the hardware and software requirements listed in the System requirements chapter.

Basic Introduction

OptimiDoc is a **server based application** which manages access to devices, **prints** and **scans** in a customer network and is capable of realizing **cost** and **usage reports**.

Device access management

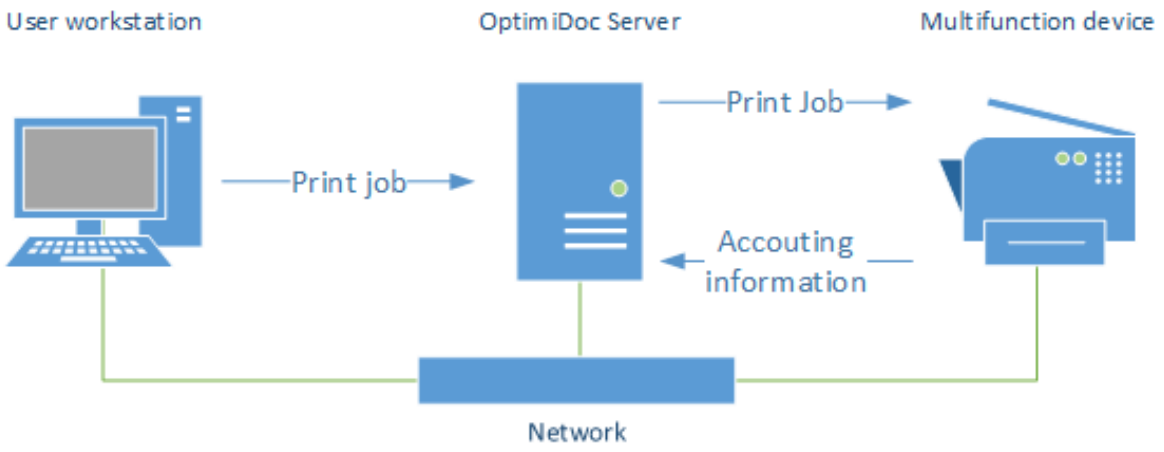
OptimiDoc provides the functionality for limitation of access to the multifunction devices before unauthorized usage. OptimiDoc secures complete device functionality or particular features by PIN, user name and password or card authentication. The device checks the user access rights during user authentication. Based on the information provided the user is either authenticated or access is denied.

Printing via OptimiDoc

OptimiDoc works as a print server which accepts print jobs from workstations and distributes them to specific MFPs or printers. Every workstation needs a shared printer with print queue created or added which points directly to the OptimiDoc server. When a user decides to print, a print job is sent to the OptimiDoc server instead of printing directly on a print device. Based on queue type the job is accepted and held on the server until the user requests it on a selected device (PullPrint queue), or is accepted and immediately sent to a printer without any additional steps (Direct queue).

Multifunction devices provide accounting data for reporting based on the print result. For other devices OptimiDoc gets accounting data from print job analysis before sending it to the device.

The print jobs are assigned to a user according to their workstation account. If the user account does not exist in the OptimiDoc server then the job is rejected.



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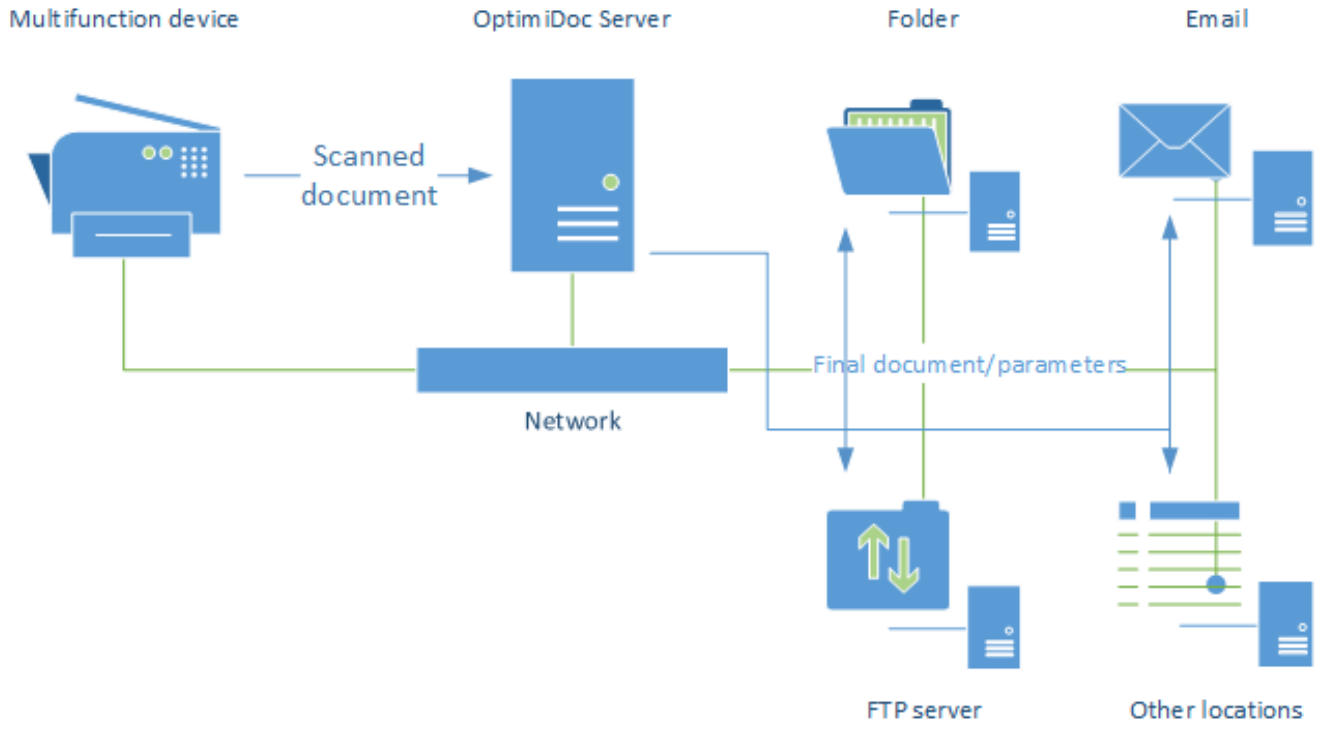
Scanning via OptimiDoc

OptimiDoc offers advanced scanning of documents. Multiple scanning workflows can be created, and each scanning workflow may have different scan settings, parameters (metadata describing the document ex. invoice number), processing e.g. **OCR, Barcode** recognition or a destination where a document will be saved.

The scanning workflow can be selected by a user directly on a device panel together with selecting other options. After the selection the document is scanned and transferred to the OptimiDoc server for further processing. Scanned documents are transferred via FTP or HTTP/HTTPS.



Installation and configuration of the OptimiDoc server

Proceed with the following steps to start using OptimiDoc. Perform the procedure depending on your environment.

1. OptimiDoc Server installation

Install the OptimiDoc server - including the operating system configuration - and the database engine. Before the installation, be sure to log on with Windows Administrator rights.

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2. License activation link

The OptimiDoc license activation is on the server.

3. Add the users

Before you start using OptimiDoc you need to add users manually or import them from a CSV list file or Active Directory.

4. Add the device

The next essential step is device installation and configuration.

5. Create the OptimiDoc printer on workstations

To start printing via OptimiDoc it is required to set up a printer on a workstation which sends documents to the server instead of the printer.

6. Create basic scanning workflow

Create a basic scanning workflow for conversion of documents to supported formats such as Microsoft Word and delivery to email or other supported destinations.

7. Test your installation

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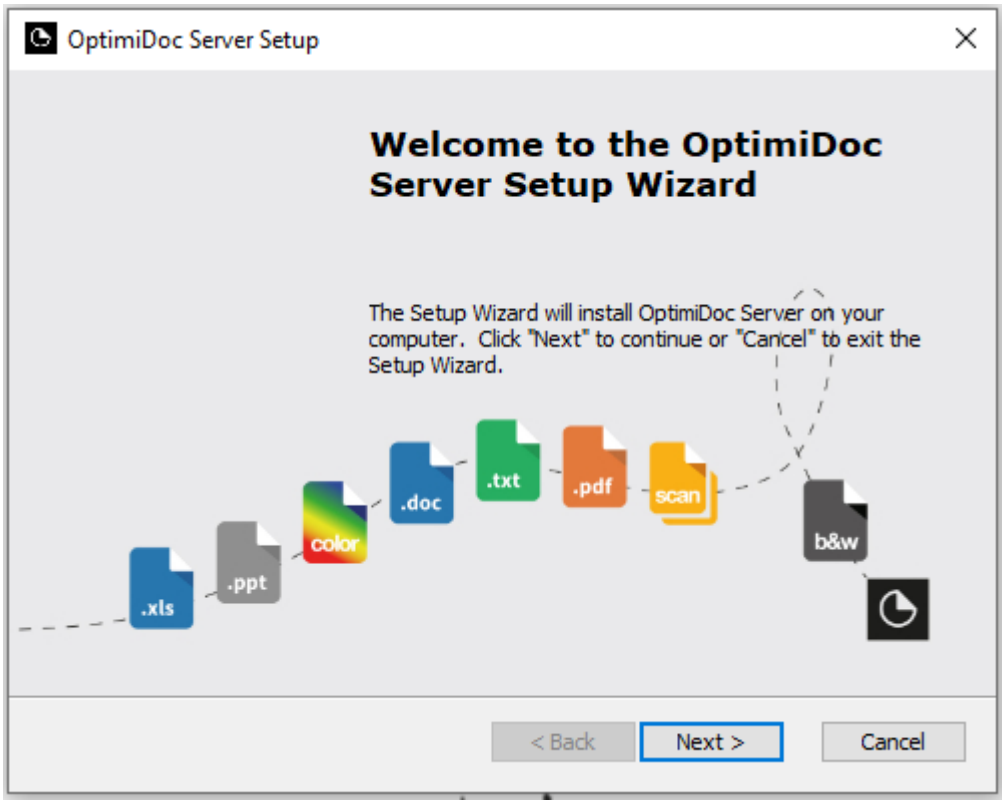
2.1 Step 1. OptimiDoc Server installation

To begin installation run the **installation package file** downloaded from our partner portal **as Administrator**.

1. Start installation by clicking on the **Next** button.



2. Select the setup type, whether you would like to install OptimiDoc with localDB or external SQL Server connection. All necessary information is written within the window.

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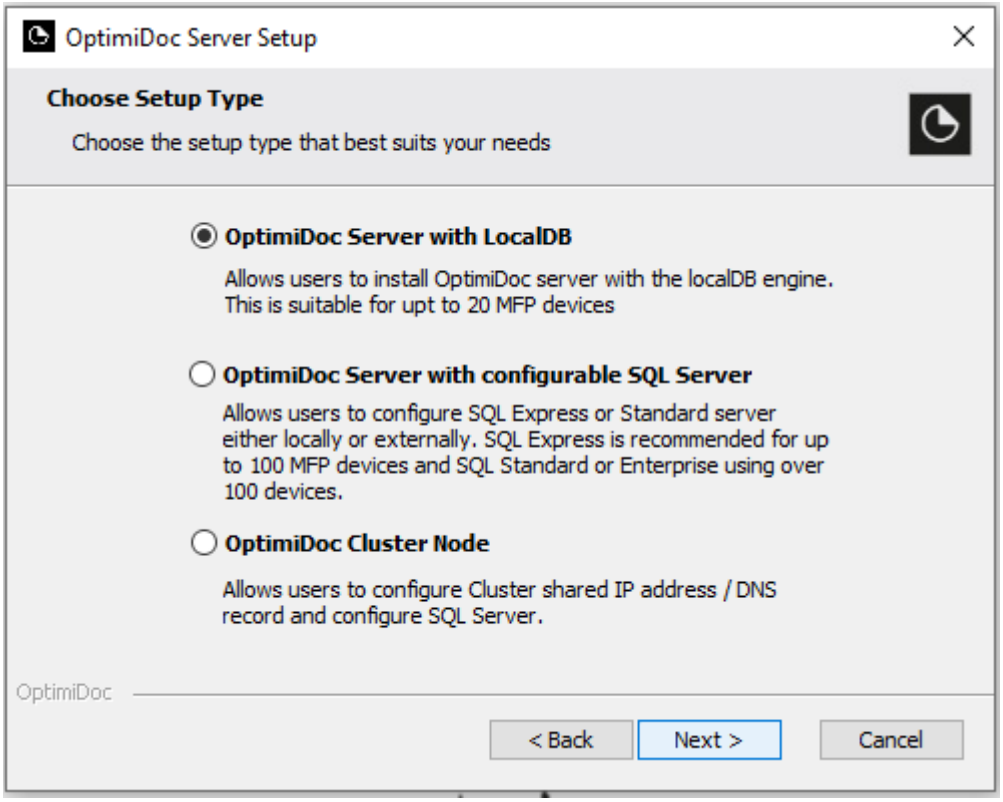
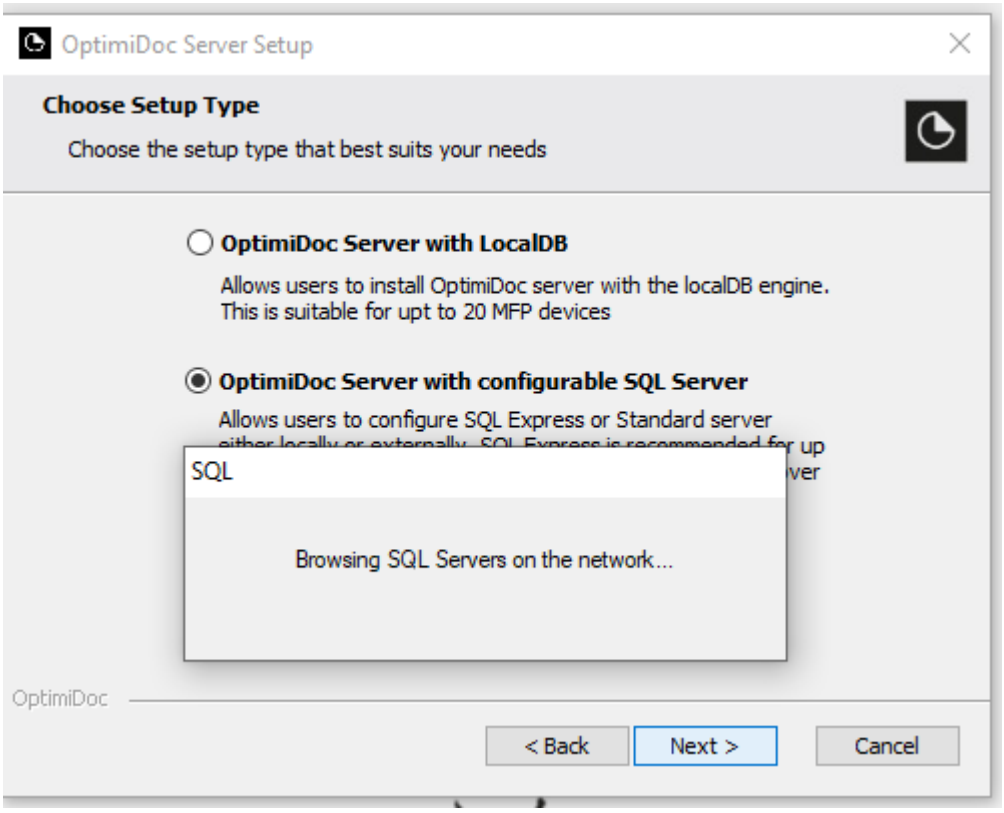


2a. When you select LocalDB installation you will directly continue with step 3.

2b. When you select option OptimiDoc Server with configurable SQL Server first we will try to detect any SQL Servers available, then installer will proceed to the next screen.



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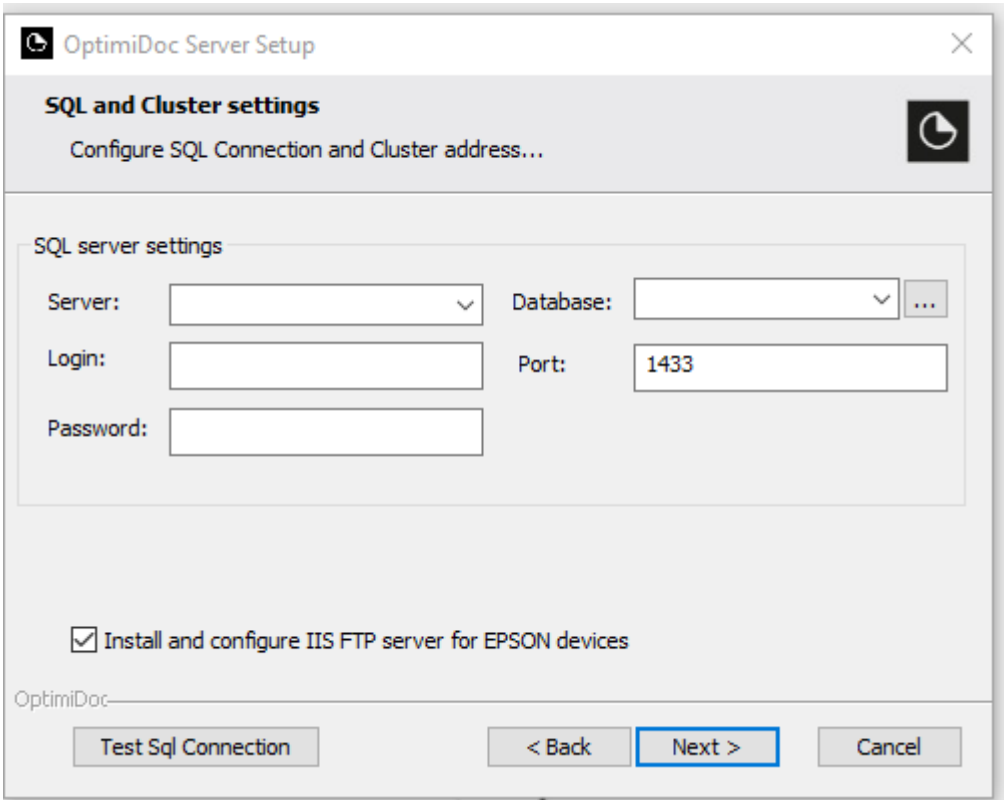
In this screen, enter following information:

- **Server**- server name, where instance name is optional (ex. SERVER\OptimiDoc)
- **Database** - name of dedicated database, we will try to detect all existing databases on the SQL Server. If you enter non-existing name, we will create such database. If you enter a new name and the user has correct rights, we will create a new database with such name.
- **Port** - SQL server port
- **Login** - name of user with access to SQL server and database
- **Password** - user password



2c. When you select OptimiDoc Cluster Node, you will have a possibility enter SQL Server information as in the step 2b. and on top of this you will enter Cluster IP address.

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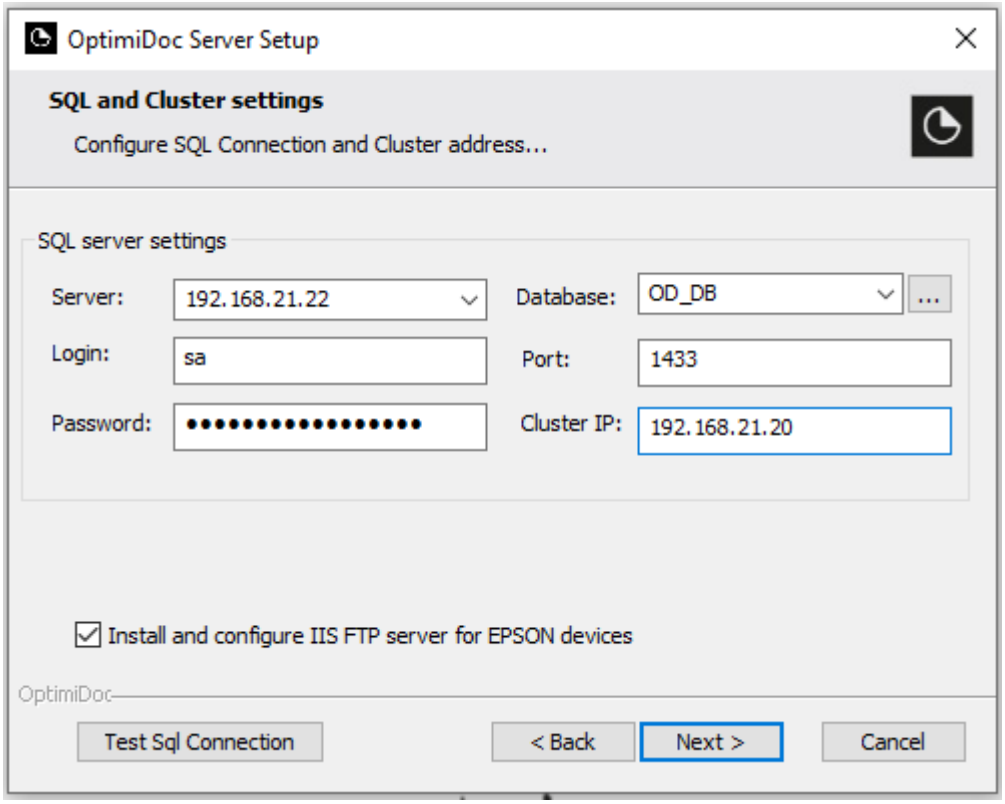
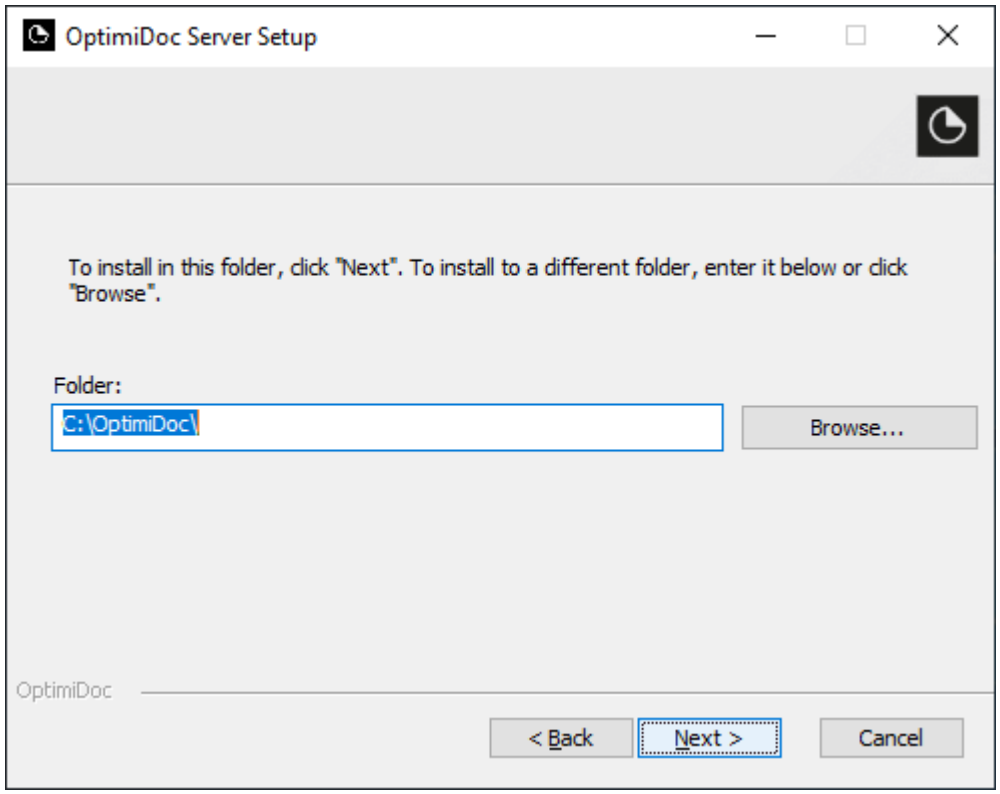


Once finished with these steps, click on the Next button and continue with step 3.

3. Accept License Terms



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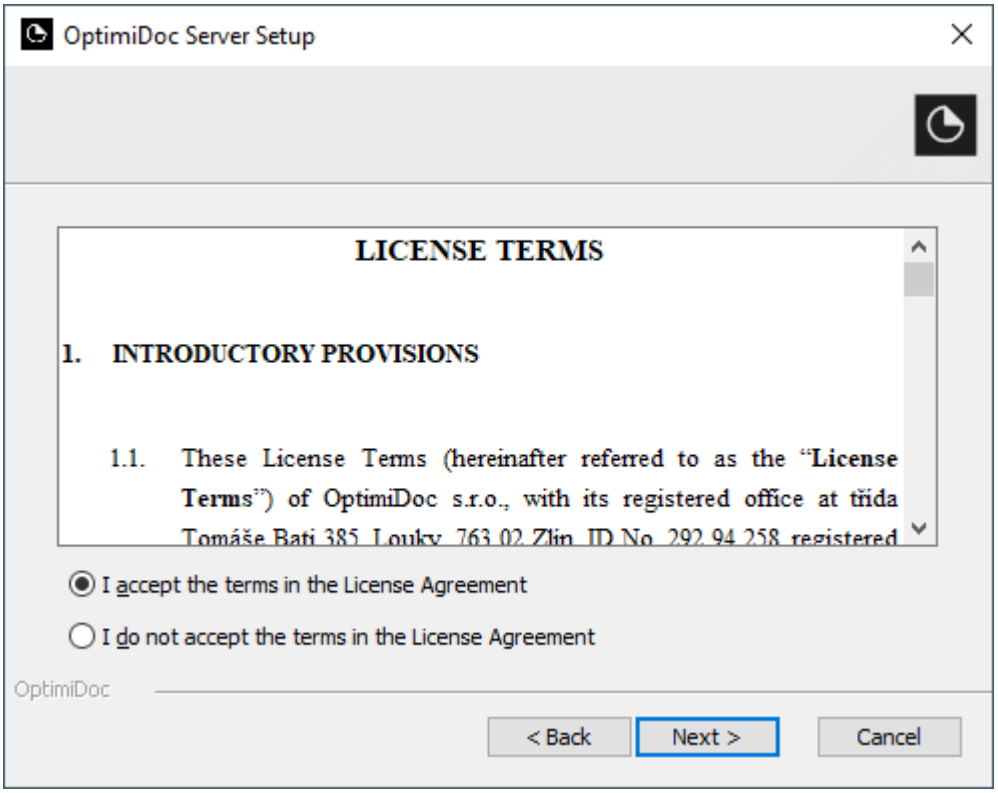
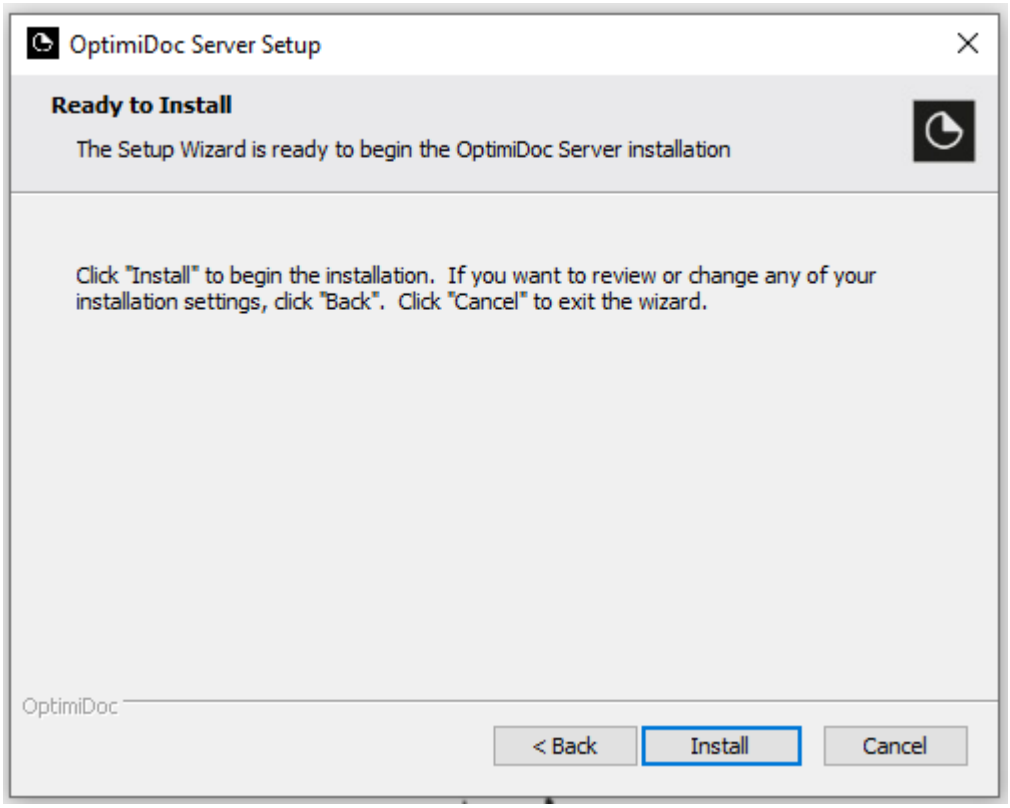
4. Select the **install folder.**



5. To begin the installation process click on the **Install** button.



6. Wait for the installation process to finish and then click on the **Finish** button.

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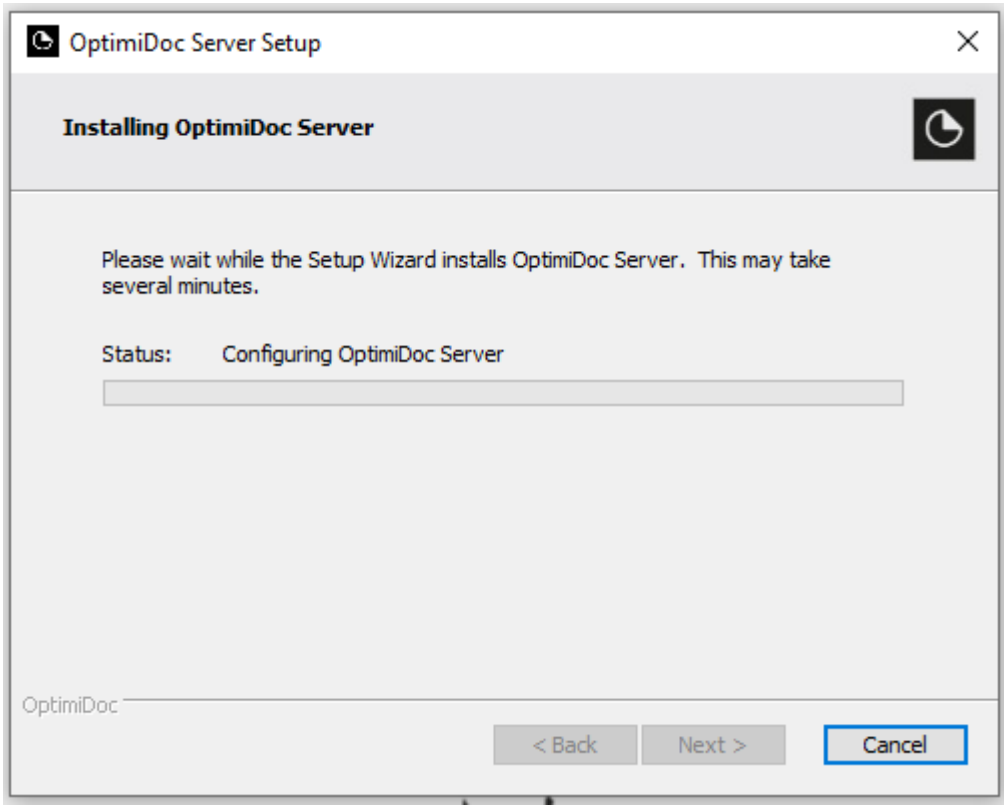

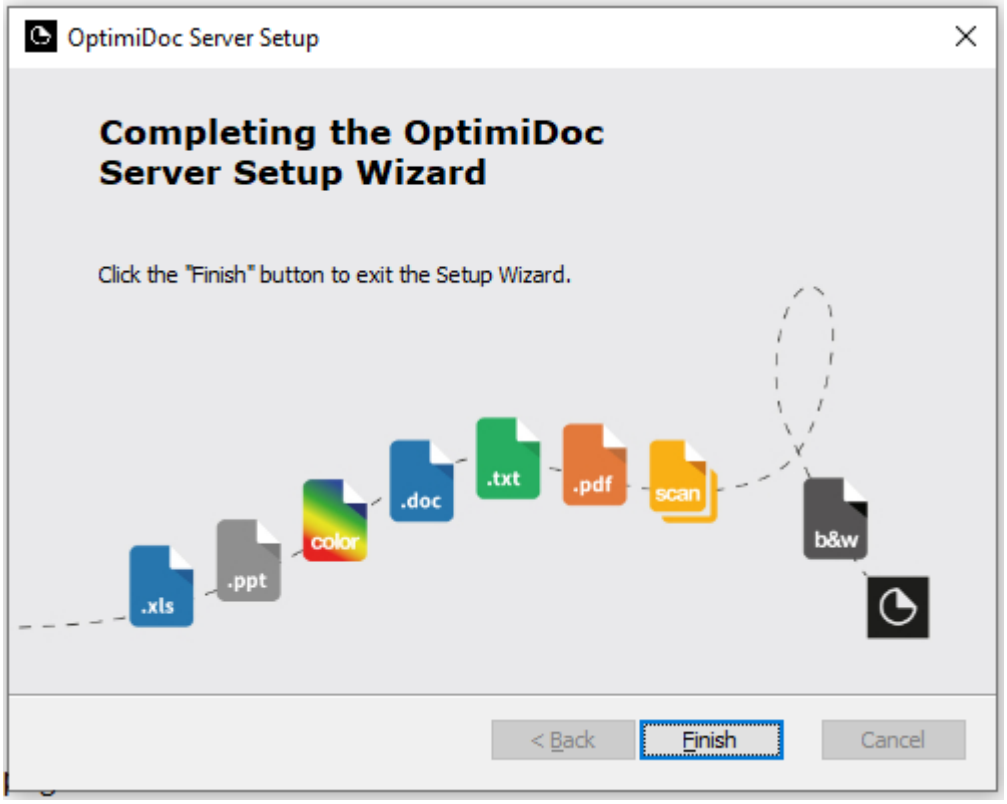

7. To open the OptimiDoc web interface click on **OptimiDoc icon** on the Desktop.

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Note The default authentication **username is “admin” with password “admin”**.

Tip **Note:** If you have issues with OptimiDoc installation, you can run the installer in a special mode for logging purposes, e.g.:
"C:\Temp\OptimiDoc_12.exe" /L*V "example.log"
Explanation: First create the folder C:\Temp and copy the setup file to this folder. Write the command above in the command line prompt and then press Enter. In the Temp folder a log file named "example" will be created. All parts of the installation process will be written to this log file.

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2.1.1 Folder structure

In this chapter you'll find the folder structure and location of the most important files.

OptimiDoc

- **FTP - used, by default for scan delivery on EPSON devices.**
- **Help**
- **OCR**
  - Bin64
    - **LicenseManager.exe - ABBYY license manager that manages ABBYY licenses**
- **Parser - used to estimate page count and for creation of print job previews**
  - PageCounter
  - pcl2img - to disable completely creation of previews, delete this folder
  - ps2img - to disable completely creation of previews, delete this folder
- **Services**
  - data
  - logs
  - webdav
- **Support**
  - OLAP
- **WebApp**
  - App_Data
    - Flows - default Xerox XST scan ticket
    - License - OptimiDoc licence files
    - Rules - rules definitions in XML format
    - Scan2OptimiDoc - files location if scan to OptimiDoc destination is used
    - Spooler - default spooler folder
    - Upload
    - config.json
    - OptimiDoc.mdf - default database MDF file when localDB used
    - OptimiDoc_log.ldf - default database log file when localDB used
    - hpent.txt
    - hppro.txt
    - hpguest.txt
  - Areas
    - Client
    - Mfp
    - Terminal
  - bin
  - Content
    - help
    - report
    - zones
    - description.xml
    - descriptionPrint.xml
    - descriptionScan.xml
    - lexmark.fls
  - gettext

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- Helpers
- locale
- logs
- Scripts
- Views
- Web.config

Other locations used by OptimiDoc:

C:\ProgramData\ABBYY\SDK\12\Licenses - location of ABBYY licence file

C:\Windows\ServiceProfiles\NetworkService\AppData\Local\Temp\optimidoc - OptimiDoc temporary files

%SystemDrive%\inetpub\logs\LogFiles - IIS log files

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2.1.2 ABBYY OCR Extension installation

To begin installation run the **installation package file** downloaded from our partner portal **as Administrator**.

1. Start installation by clicking on the **Next** button.

2. Select the destination folder and click on the **Next** button.

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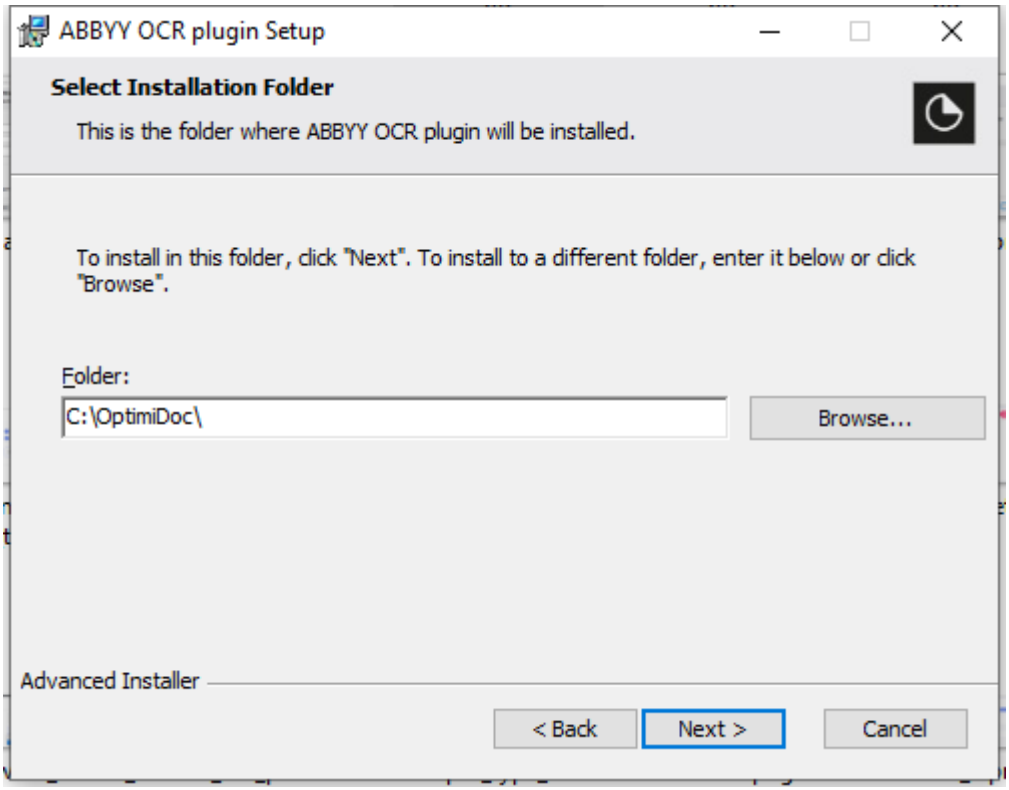
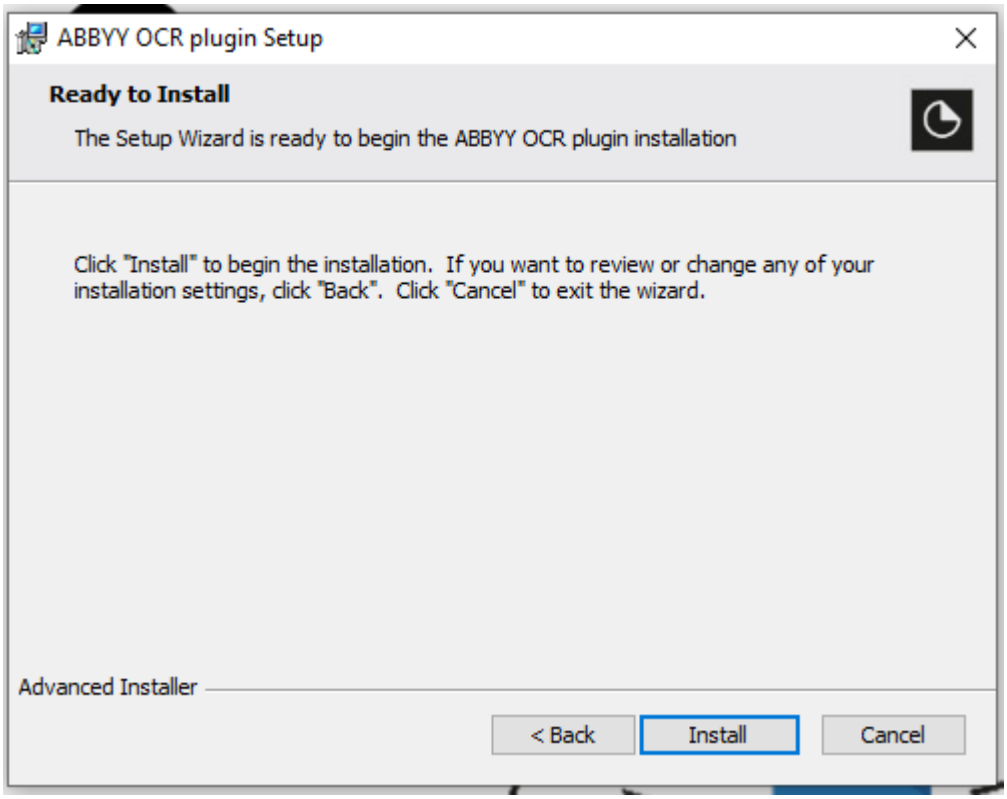


3. To begin installation click on the **Install** button.



4. Wait for installation process to finish and at the end click on the **Finish** button.

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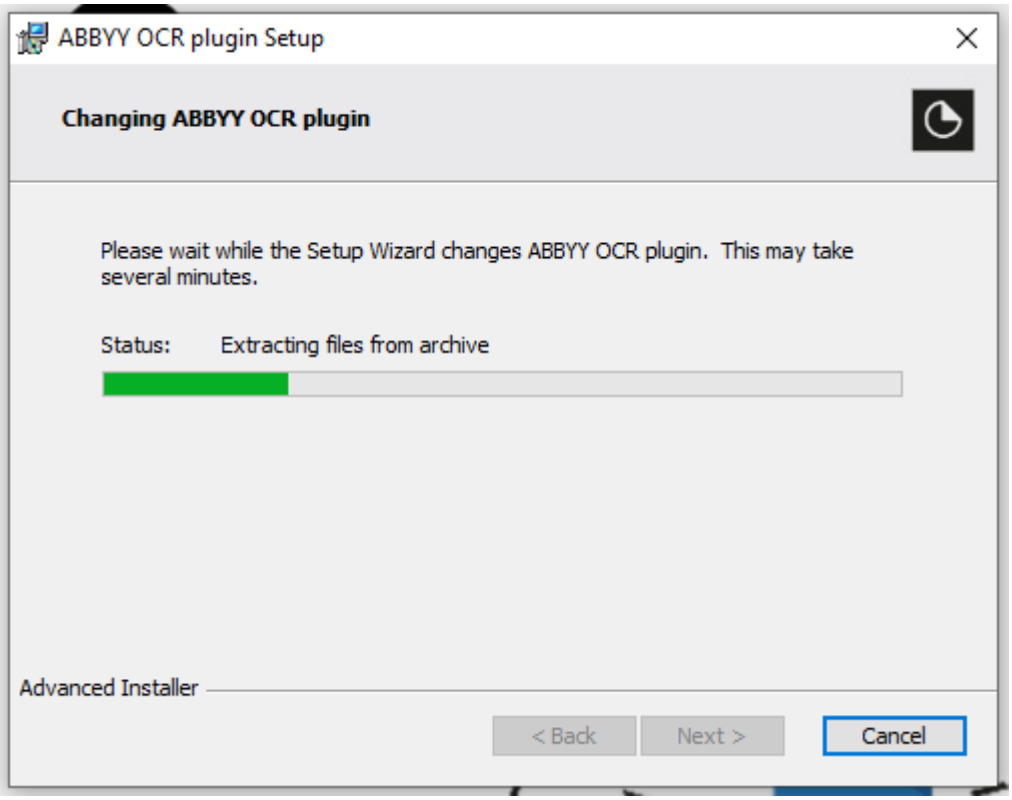

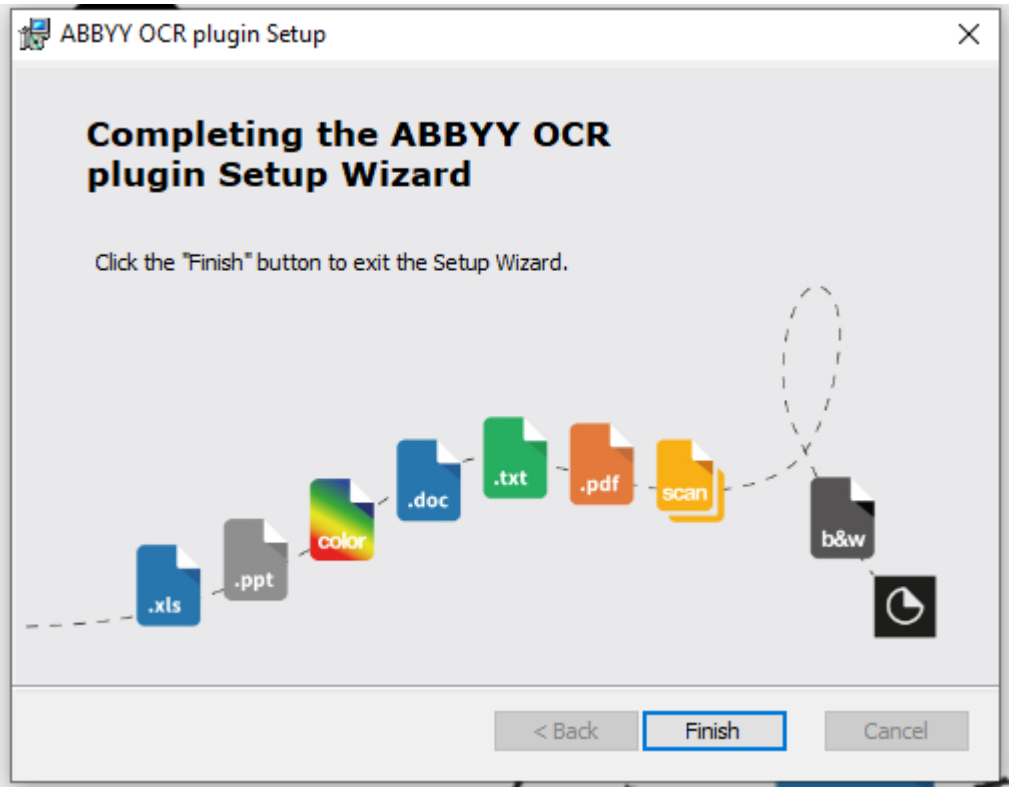

5. To activate the ABBYY OCR license, please follow the steps in ABBYY license activation section.

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2.2 Step 2. License activation

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2.2.1 OptimiDoc license activation

The second step of installation is the OptimiDoc license activation. The activation process can be achieved in two ways:

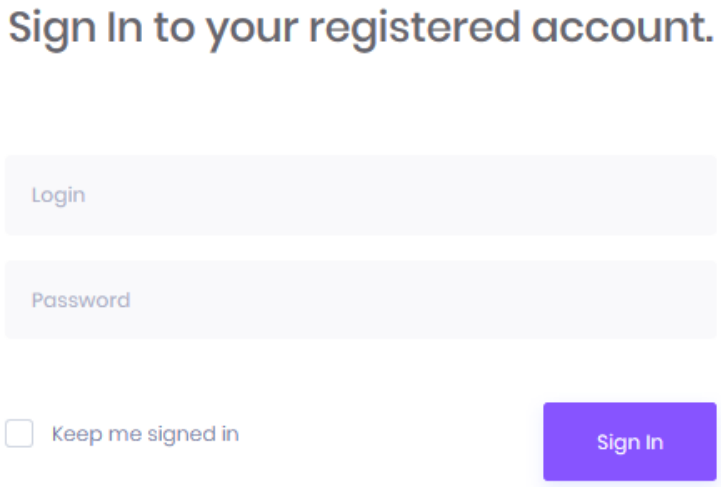
- Online activation - for servers with internet connection
- Offline activation - for servers without internet connection

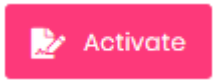
2.2.1.1 Online activation

To activate the license online follow these steps:

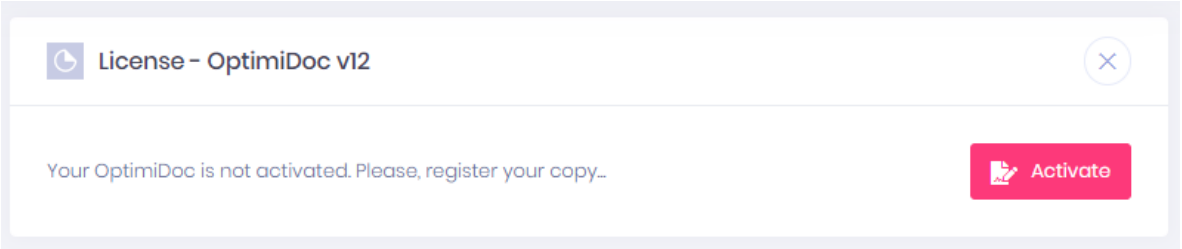
1. Open the web interface URL: **http://localhost:14265**

2. Sign in as administrator (default):
- **Login:** admin
- **Password:** admin



3. Click 

at the License widget on the Dashboard page.



4. Select "Online", enter the license code and then click **Activate**.

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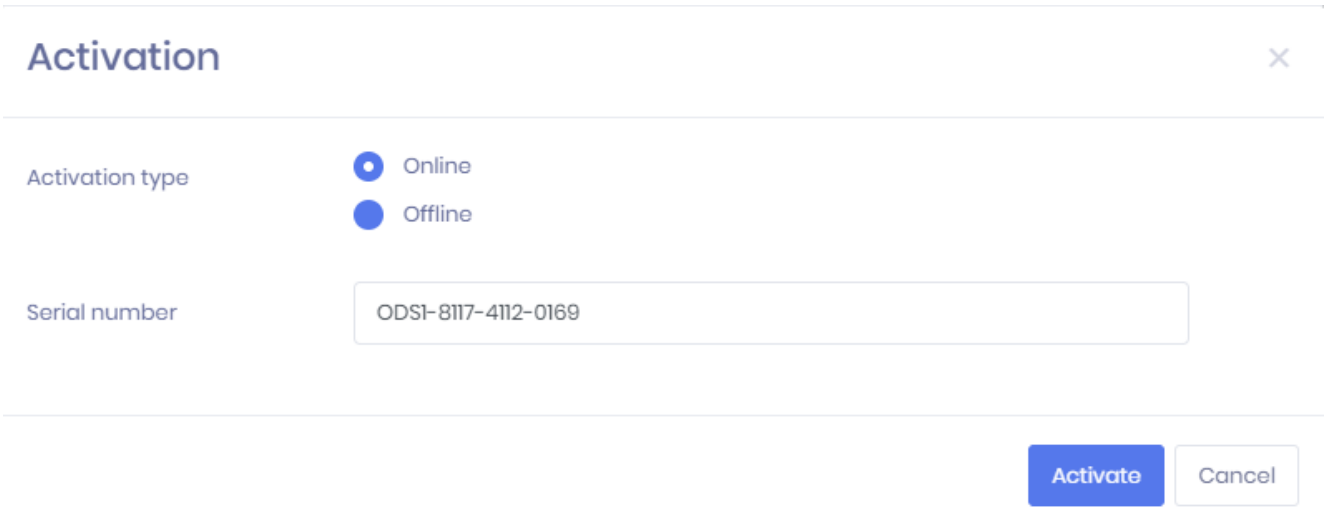

5. After the license activation you will see your license details.

2.2.1.2 Offline activation

To activate the license online follow these steps:

1. Open the web interface URL: **http://localhost:14265**

2. Sign in as administrator (default):
- **Login:** admin
- **Password:** admin

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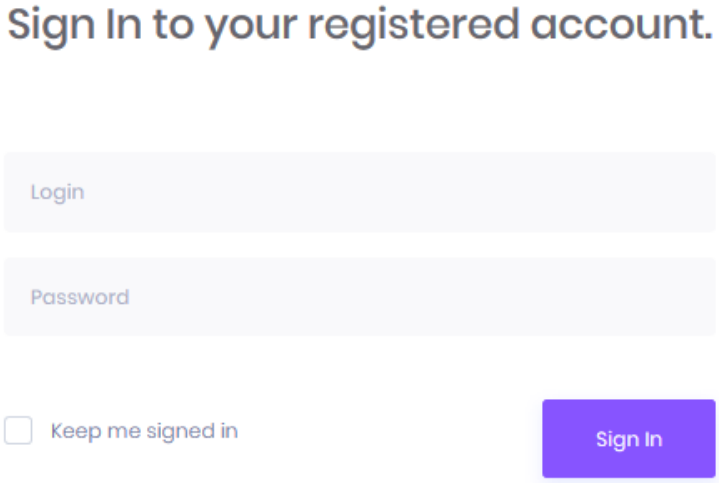
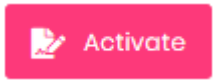
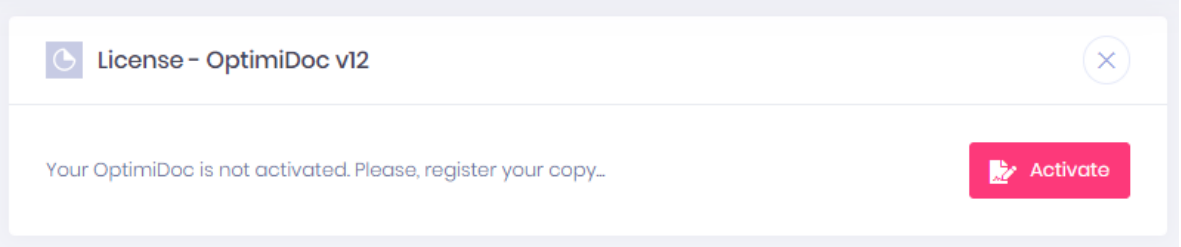
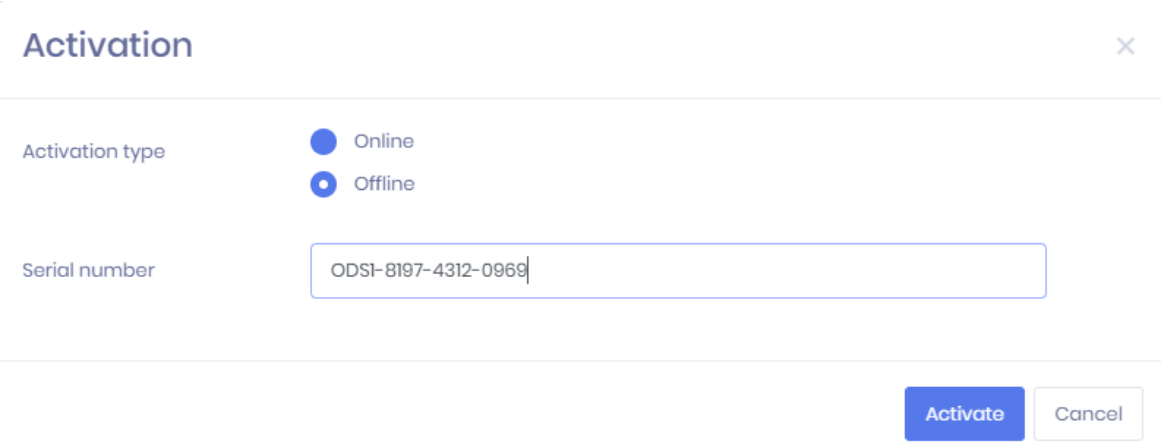


3. Click  at the License widget on the Dashboard page.



4. Select "Offline", enter the license code and then click **Activate**.



5. Follow the instructions; copy the text from the green box, visit the link from the text - there enter copied text and download the file; finally drop or select the file in the particular area.

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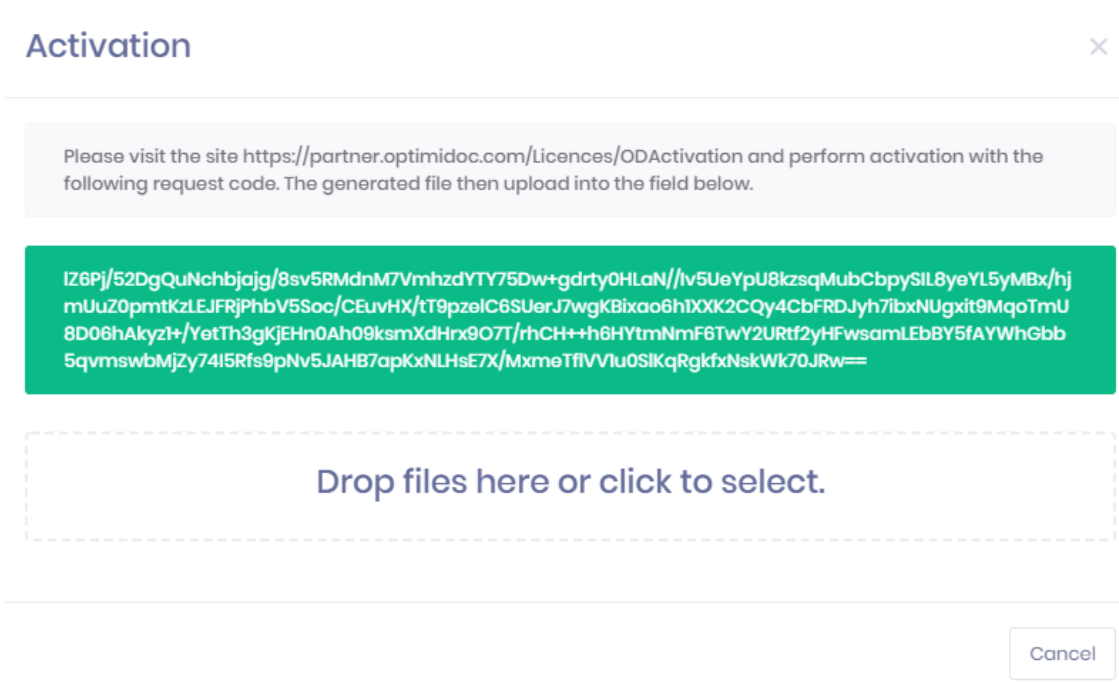

6. After the license activation you will see your license details.

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2.2.2 ABBYY license activation

The second step of installation is the OptimiDoc license activation. The activation process can be achieved in two ways:

- Online activation - for servers with internet connection
- Offline activation - for servers without internet connection

There are currently two types of licenses, standard and subscription one (SaaS). **Standard license** has a new version support valid for one year, which is included in the initial (basic) price and in addition you can extend the new version support by paying a fixed annual price (upfront payment). On the other hand, **subscription license's** new version support and its validity is being extended each month upon successful payment by the customer.

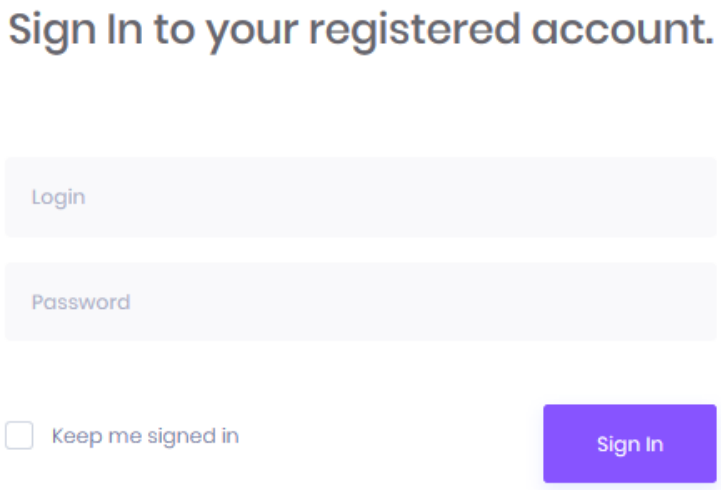
For the activation of hardware protection, it is necessary to install drivers for the iKey 1000 protection dongle. The latest driver can be found at http://www.safenet-inc.com/support-downloads/ikey-drivers

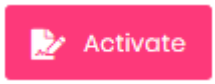
2.2.2.1 Online activation

To activate the license online follow these steps:

1. Open the web interface URL: **http://localhost:14265**

2. Sign in as administrator (default):
- **Login:** admin
- **Password:** admin



3. Click 

at the License widget on the Dashboard page.

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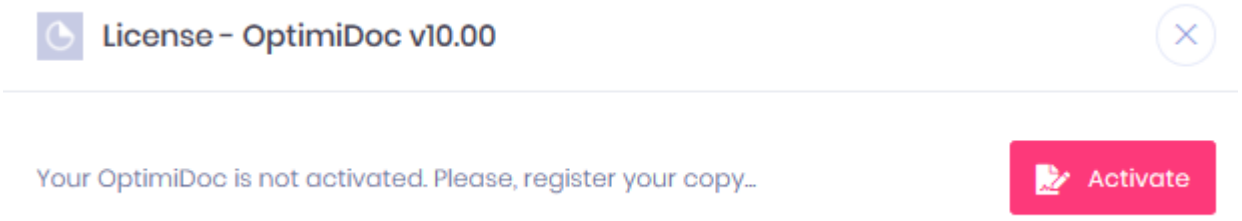
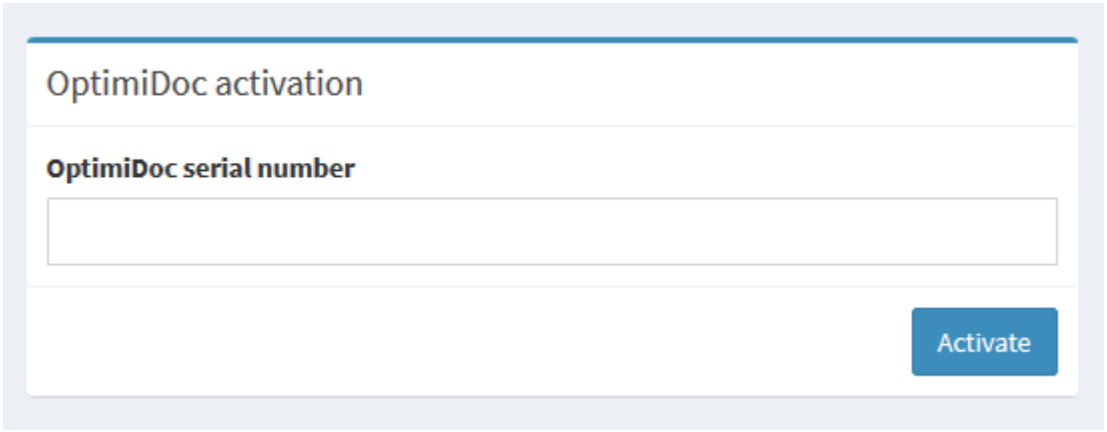


4. Enter the license code and then click Activate.



5. After the license activation you will see your license details.

2.2.2.2 Offline activation

To activate offline follow the steps below:

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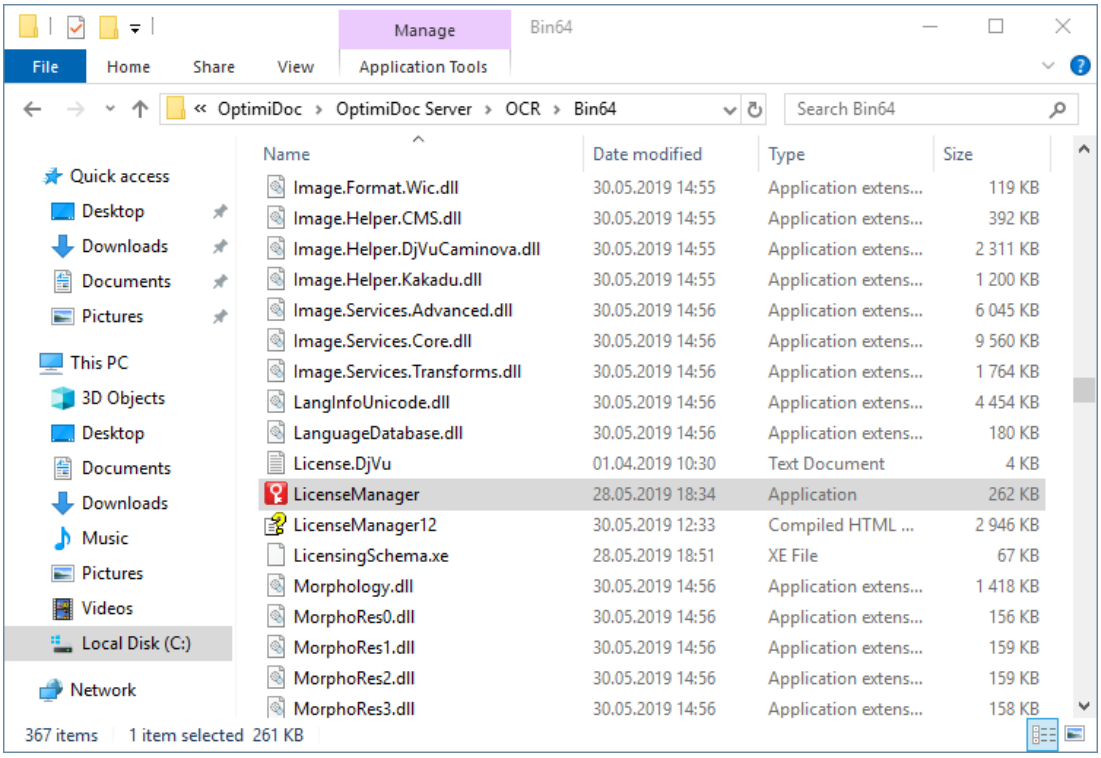
1. ABBYY FineReader Engine Activation

Tip You will find a video tutorial about the offline activation process on Youtube

1. Switch to path <OptimiDoc install folder>\OptimiDoc\OCR\Bin64 and run **LicenseManager.exe**



2. In ABBYY SDK 12 License Manager click on the '**Activate license...**' button

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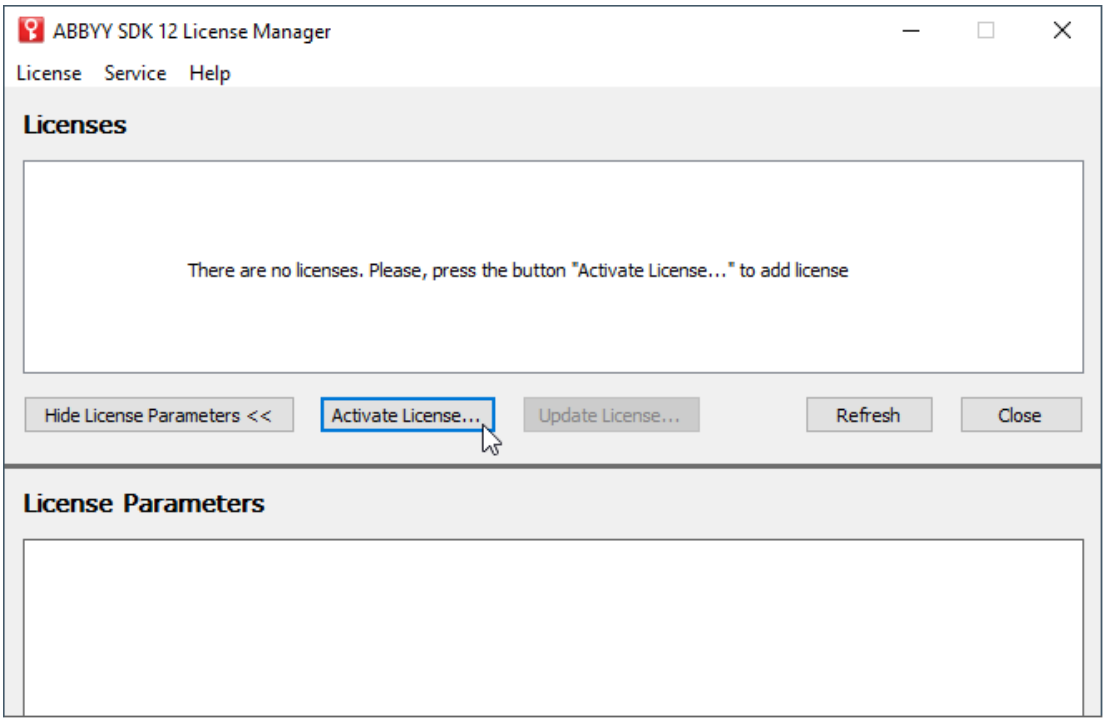
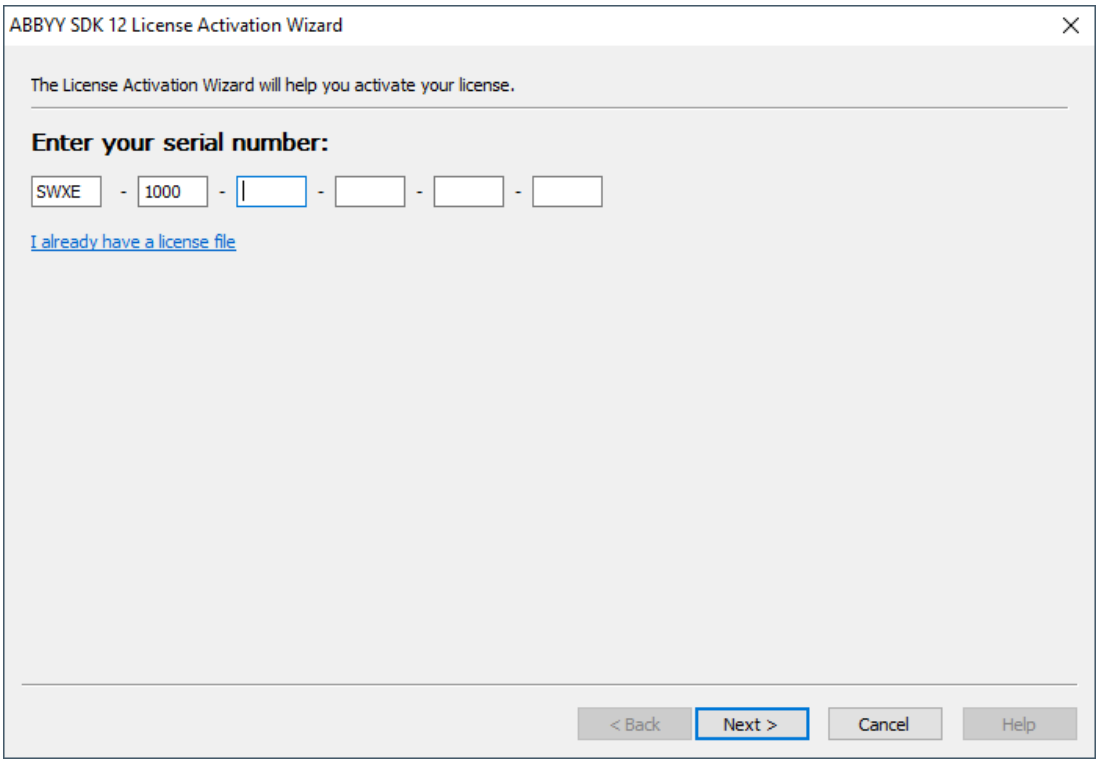


3. Enter your serial number and click on the '**Next >**' button.



4. Select activation method "**by email from another computer (slow)**" and click on the '**Next >**' button.

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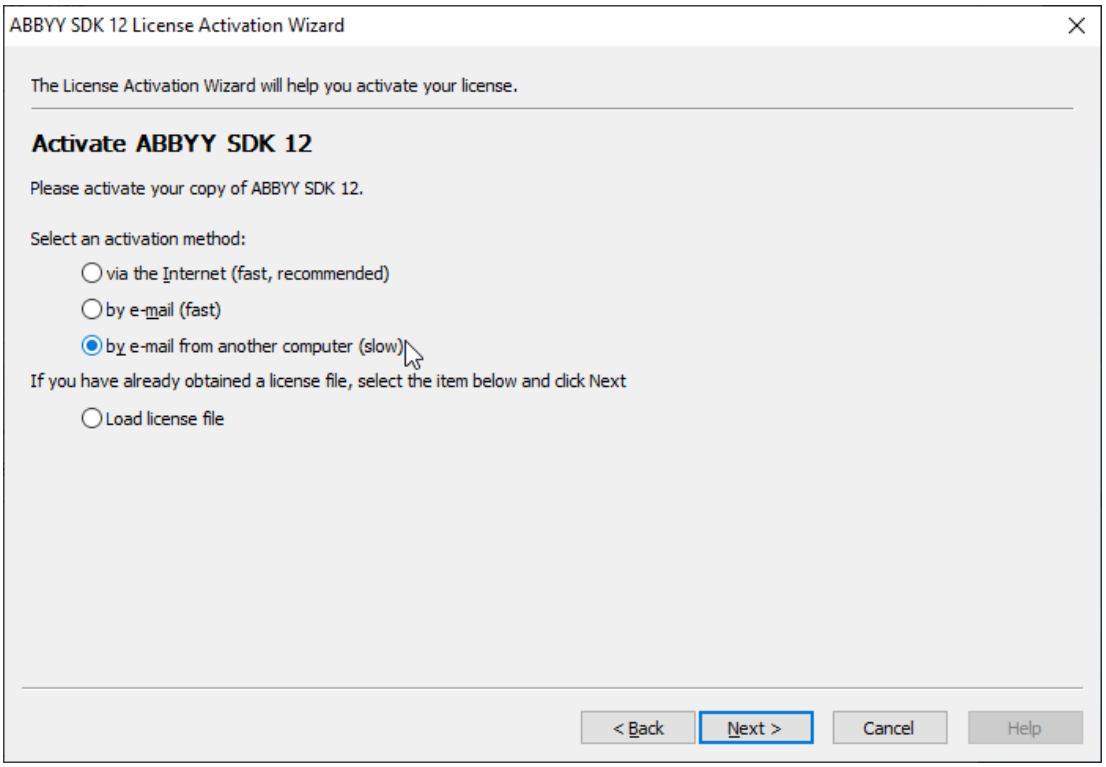

5. Copy the full **Activation text** and paste it to your email client software, fill in the email address **product-activation-robot@abbyy.com**

Do not put any text in the Subject field!

Send the email.

In ABBYY SDK 12 License Activation Wizard click on the '**Next >**' button.

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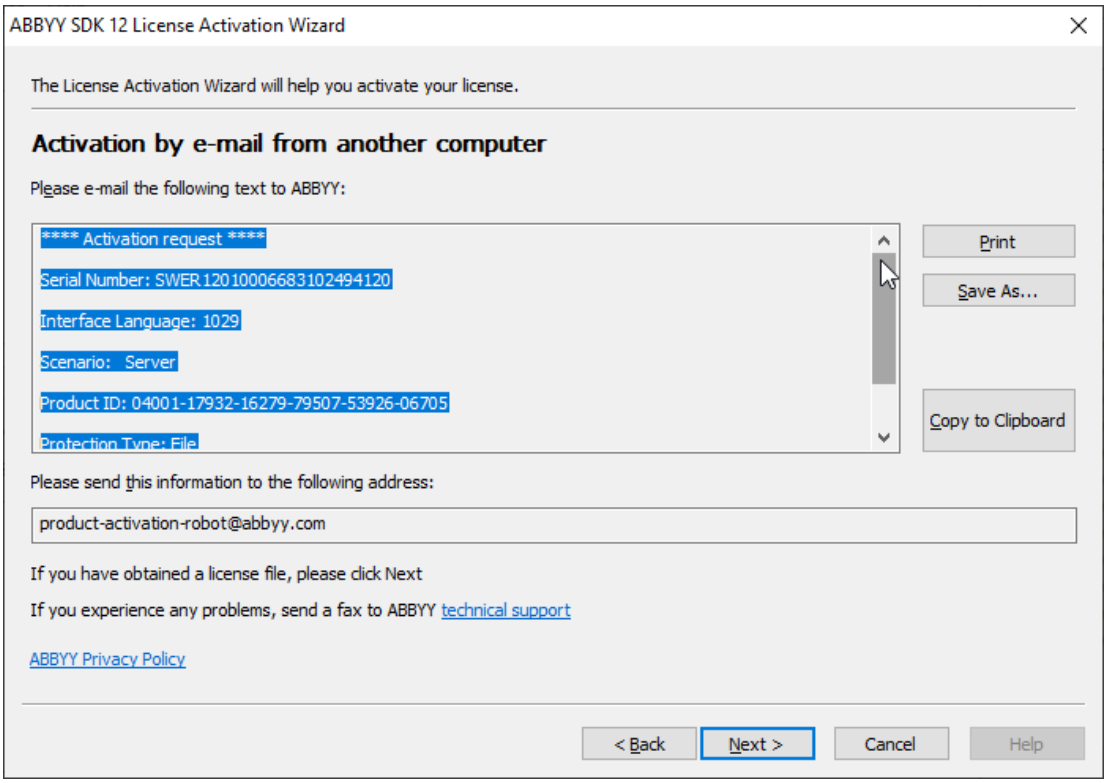
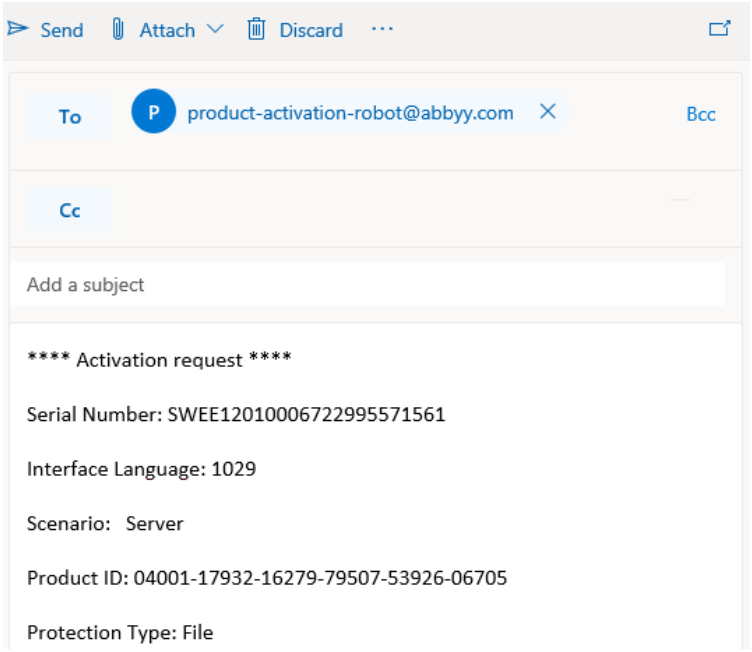
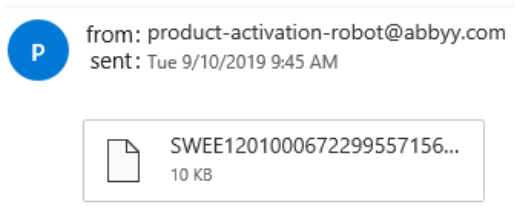




6. When you get a response to your email, save the attachment and copy this attachment to your server.



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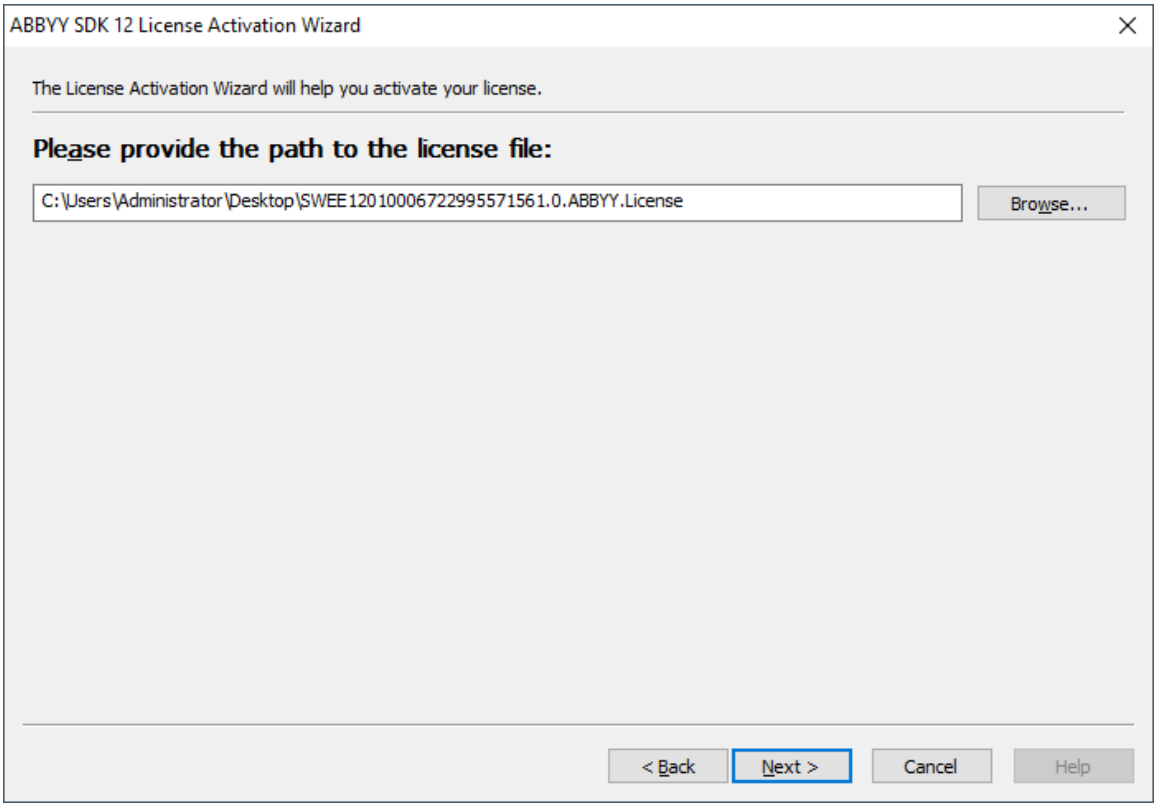
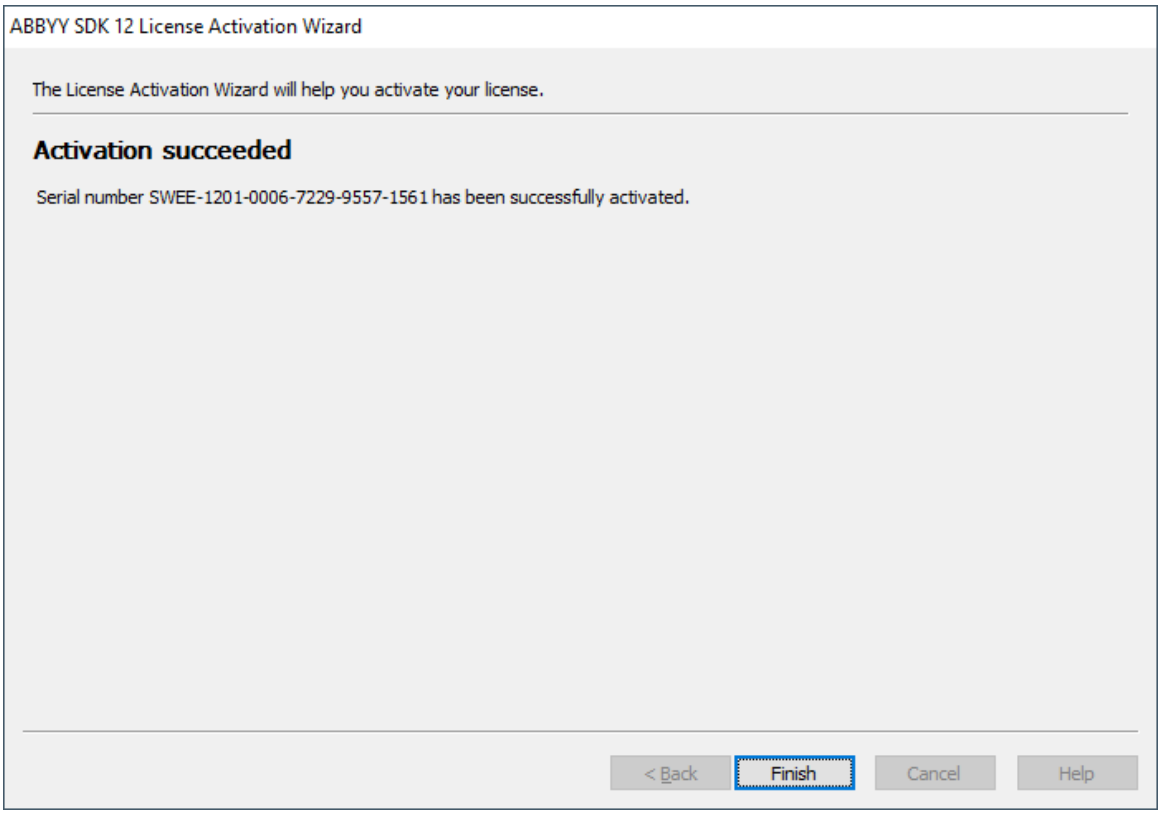
7. Browse the activation file and then click on the '**Next >**' button.



8. Check that the activation has succeeded.



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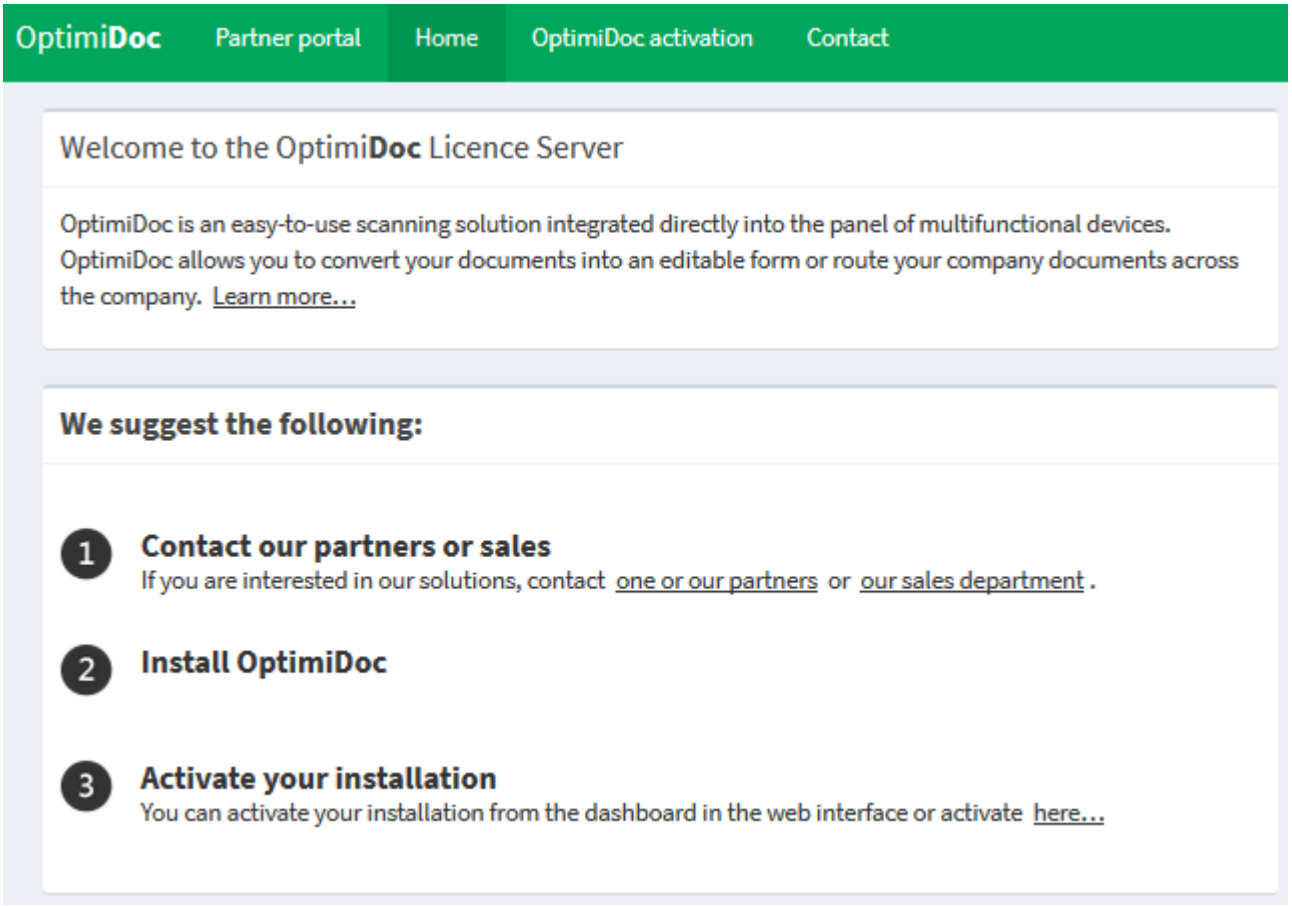
9. Close the ABBYY SDK 12 License Activation Wizard clicking on the '**Finish'** button.

2. OptimiDoc server activation

1. Go to the webpage **https://partner.optimidoc.com/Licences** and click on **OptimiDoc activation on** the top green menu



2. Enter your **serial number** and click on the '**Activate'** button**.** You will get a license file.

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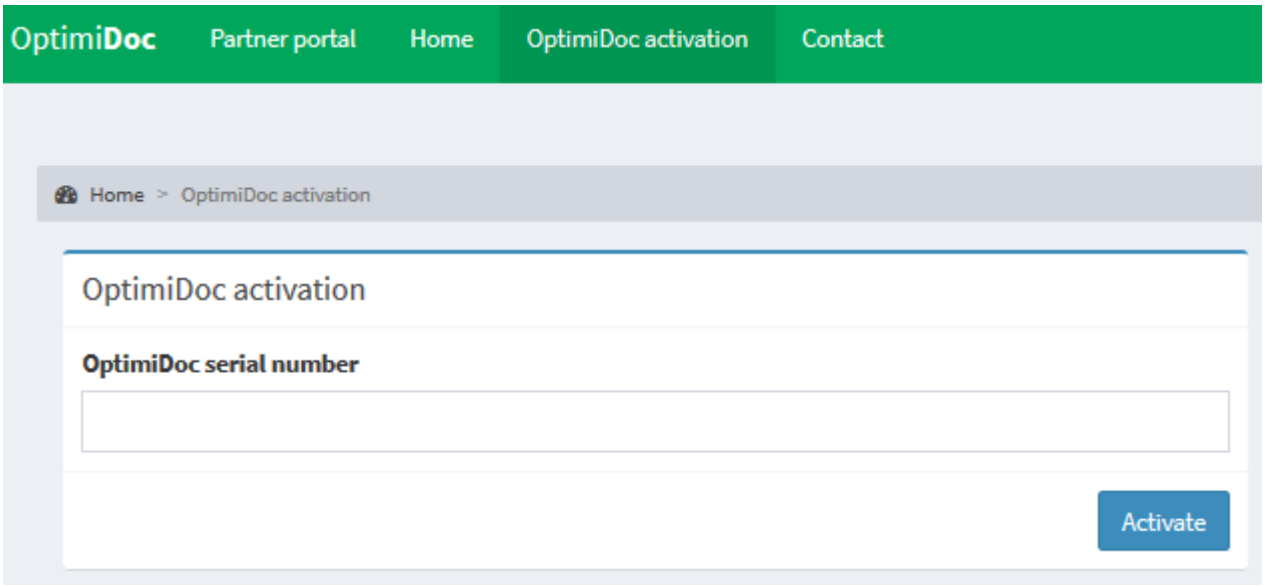

3. Copy the license file to <OptimiDoc install folder>\OptimiDoc\WebApp\App_Data\License\ folder.

4. Restart web application in IIS.

2.2.2.3 Network Online & Offline activation

ABBYY FineReader Engine Activation - Network license

To make the network online or offline activation follow the steps below:

1. Boot your servers for OptimiDoc and allow **port "3022"** for the **licenseservice.exe** executable for communication between servers.

2. Choose one of your servers as a license server for sharing your license.

3. Activate the license at that server with the Online or Offline method.

4. **Check the version** of your license (NETWORK) by **licencemanager.exe (<OptimiDoc installation folder>\OptimiDoc\OCR\Bin64\LicenseManager.exe)**

5. **Download** .XML files for ABBYY network activation from here - DOWNLOAD -

Extract the downloaded file 'ABBYY Network.zip' to your preferred location.

6. On your license server, put the LicensingSettings.xml file (extracted from License Server subfolder) with the information about the server communication (TCP/IP) into folder <OptimiDoc installation folder>\OptimiDoc\OCR\Licensing. On your License Server, i.e. the server where you have activated the ABBYY and OptimiDoc, restart ABBYY license service with Task Manager.

7. Client server: You will need to put the file LicensingSettings.xml (extracted from License Client subfolder) with the information about the server communication (TCP/IP) and IP address of your Licensing Server into two folders <OptimiDoc installation folder>\OptimiDoc Server\OCR\Licensing and <OptimiDoc installation folder>\OptimiDoc\OCR\Bin64\. At the server where you want activate ABBYY and OptimiDoc, restart ABBYY license service with Task Manager.

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8. At your client server **reinstall license service**:
    - Run the command prompt (CMD.exe) as administrator and switch to the folder Licensing of your OptimiDoc installation, e.g.
    - CD C:\OptimiDoc\OptimiDoc Server\OCR\Licensing
    - Use LicensingService.exe executable with parameters \uninstall and \install to reinstall license service:
        - LicensingService.exe /uninstall
        - LicensingService.exe /install

9. Copy the OptimiDoc license file from the License Server to the Client Server into <OptimiDoc installation folder>\OptimiDoc\WebApp\App_Data\License\

10. Restart the OptimiDoc web application with iisreset command in the command prompt.

Tip To check the state of network ports use the following command in the command prompt:
netstat -ab

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2.3 Step 3. Add users

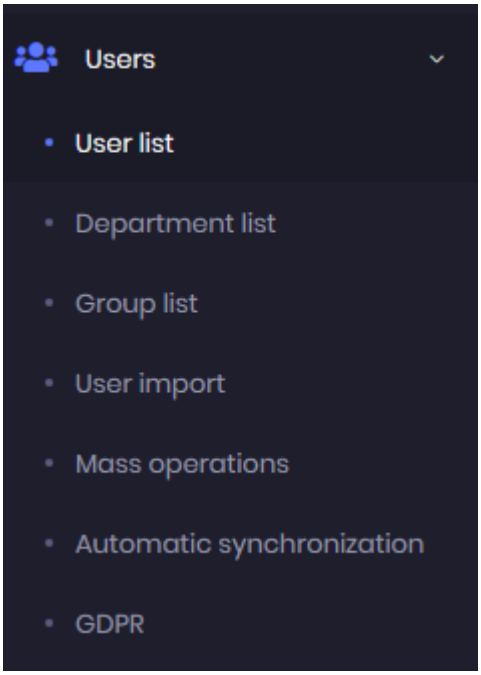
Before you start using OptimiDoc, it is necessary to create users who will manage OptimiDoc and will print or scan via OptimiDoc. OptimiDoc offers three ways to create or add users:

1. **Create users manually**
2. **Import users from Active Directory**
3. **Import users from CSV file**

Note The following guide shows how to create a user manually. If you want to import users from AD or CSV file please refer to the *User import* part.

1. In the OptimiDoc web interface click on **Users** on the left hand side menu and then click **User list.**

A list of users will appear on the right side. Here you can click on the + Add user button and then fill in the new user's details.



2. **Enter the mandatory user details:**
- First name
- Last name
- Login - the value is used for assignment of print jobs and shall be the same as the user's authentication to his/her workstation.
- Password - user's password

The following entries are optional:
- Email - user's email for delivery of scans and notifications
- PIN - the PIN code for device authentication
- Card number - for device authentication
- Home folder - for delivery of scans

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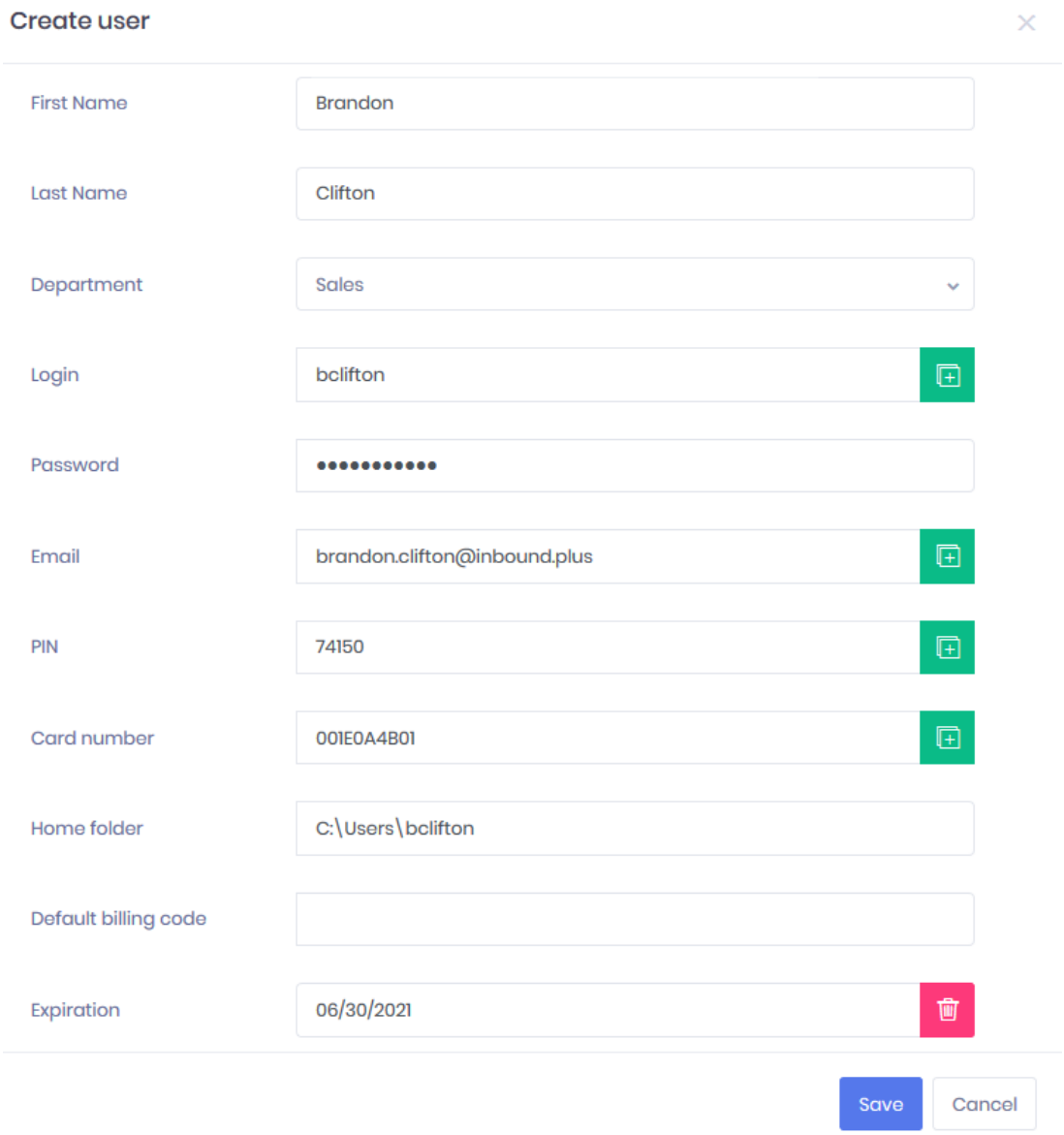
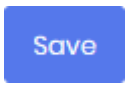
- Department - add user to a department
- Default Billing Code - enter the default billing code for the user
- Expiration - for users with time limited accounts

Fields with on the right side allow more than one value. Use this button to add more values.

To remove a value, use this button



3. Click on the  button when finished. Repeat the process for all users.

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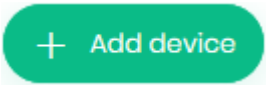
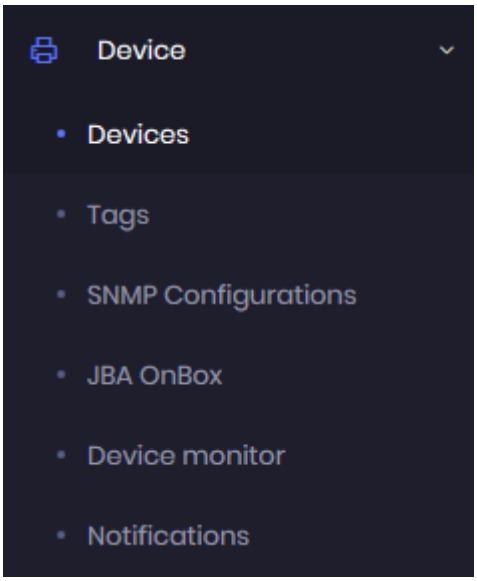
2.4 Step 4. Add a device

It's necessary to install OptimiDoc on the multifunction device before it can be used with the OptimiDoc Server. To install the device please follow the steps below (for more details please go to the Devices section):

1. In the OptimiDoc web interface click on **Device** on the left hand side menu and then click **Devices.**

A list of assigned devices will appear. Click on the 

button to add a new device.



2. Fill in the device data:
- **Device type**:
  - **Konica Minolta** - select this option for Konica Minolta OpenAPI capable devices.
  - **Xerox** - select this option for Xerox EIP capable devices.
  - **Hewlett Packard** - select this option for Hewlett Packard devices.
  - **HP Pro** - select this option for Hewlett Packard PageWide Pro devices.
  - **Lexmark** - select this option for Lexmark devices.
  - **Epson** - select this option for Epson devices.
  - **Network device** - for all other network devices.
- **Name** - custom name of the device (will be used for reporting).
- **Location** - specify a location of the device (will be used for reporting).
- **IP address** - enter an IP address of the device.
- **Model** - fill in the device model or click the blue magic wand icon on the right side of the field and the device model will be automatically detected from given IP address.
- **Serial number** - fill in the serial number manually or click the blue magic wand icon next to the field, the device serial number will be automatically detected from given IP address).
- **Prefer SSL communication** - enables secured HTTPS communication with the device.
- **Use accounting** - accounting of device operations. When enabled a pricelist must be selected. (Pricelist can be defined under the section Report - Pricelists).

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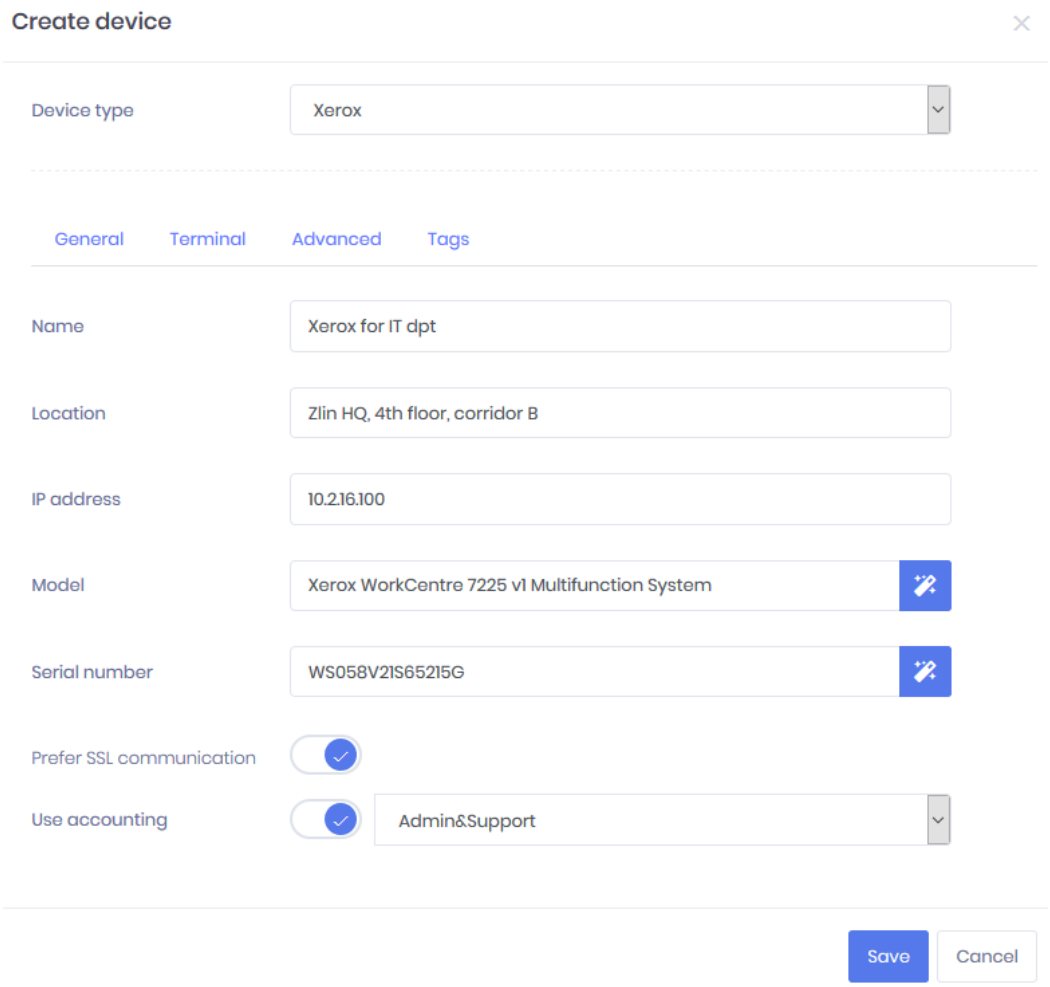
Important To ensure factual SSL communication, HP requires server certificates to be installed in Certificate Management.



3. For Develop, Konica Minolta, Xerox, Epson, Hewlett Packard and Lexmark devices it is also necessary to fill in the Terminal and Advanced tabs.

Terminal:
- **Terminal layout** - allows to change the layout for terminal displays (feature for Xerox, HP Enterprise and Epson devices).
- **Device authentication** - enable or disable authentication to the device. When checked users need to login to use the device.
- **Authentication method** - type of user authentication.
- **Localization** - force the localization of the user interface.
- **Display settings** - selection of default tab/function.

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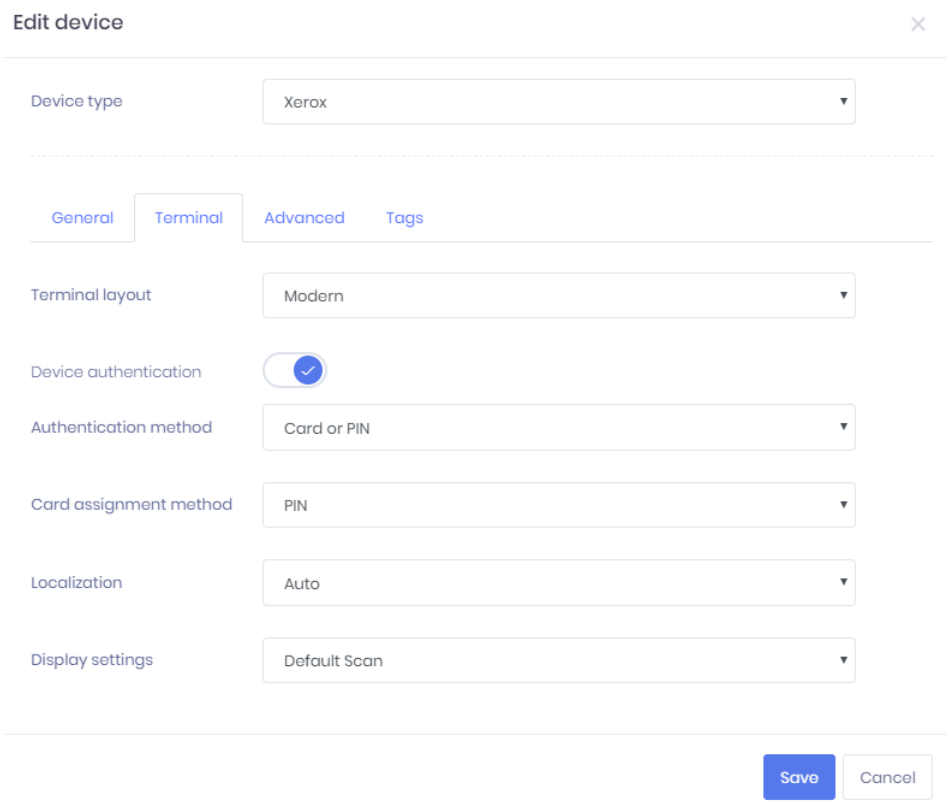

Advanced:
- **Login** - MFP administrator login name.
- **Password** - MFP administrator password.
- **Separate application registration** - check for separate application icons Print and Scan on the device screen.
- **OptimiDoc as the default application** - check if you want OptimiDoc as default application on the device (currently applicable only on brands Xerox and HP).
- **Print all** - When a user logs in, all his/her newly received documents will be printed immediately.
- **Use Pre-Authorization** - check this for Xerox devices if you require usage of rules features.
- **Delivery type** - select print job delivery type.
- **SNMP config** - SNMP configuration selection.
(SNMP configurations can be managed under Device > SNMP Configurations)

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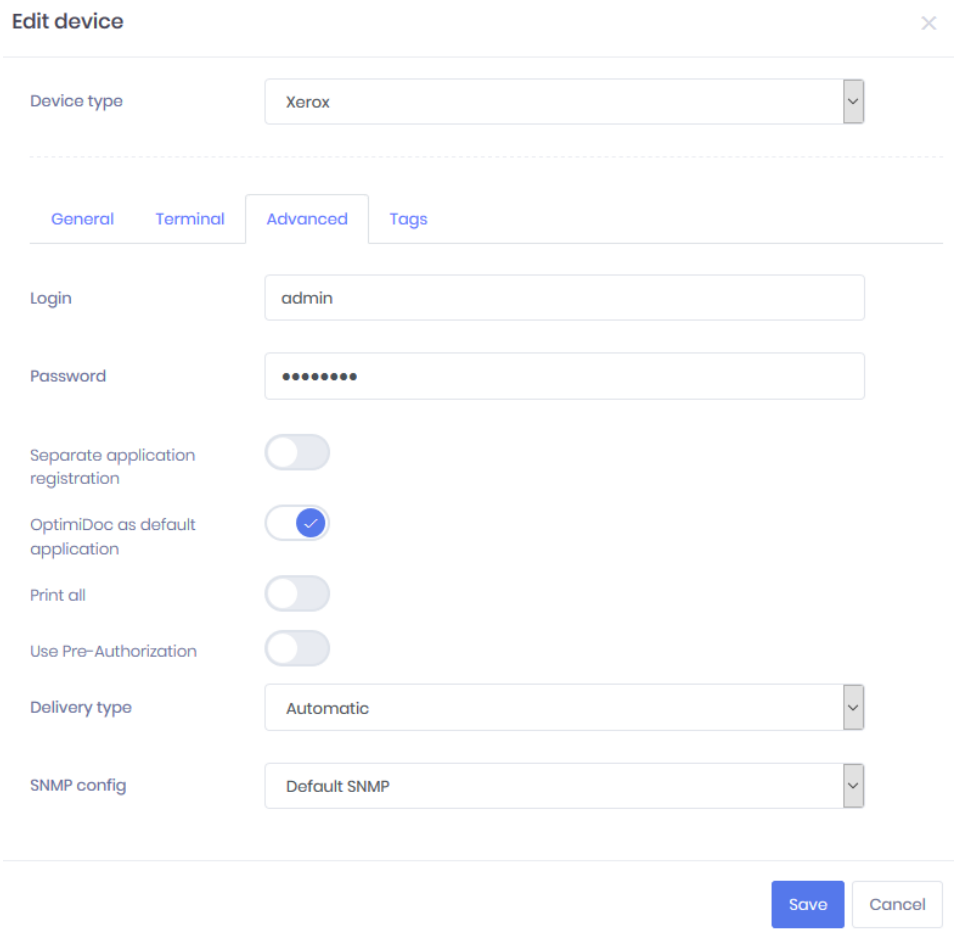

Tags:
Mark the device with a tag or several tags.
(Tags can be managed under Device > Tags).

To assign an existing tag to a device - click on the tag's name so it will change its color from gray to a predefined tag color.

To remove a tag from a device - click its name to unassign it from the device

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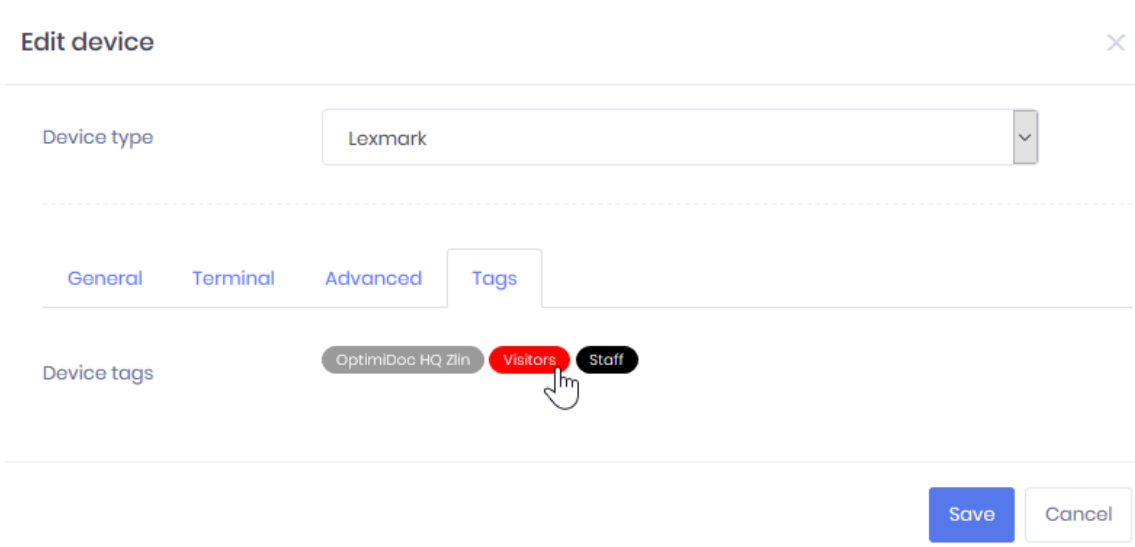

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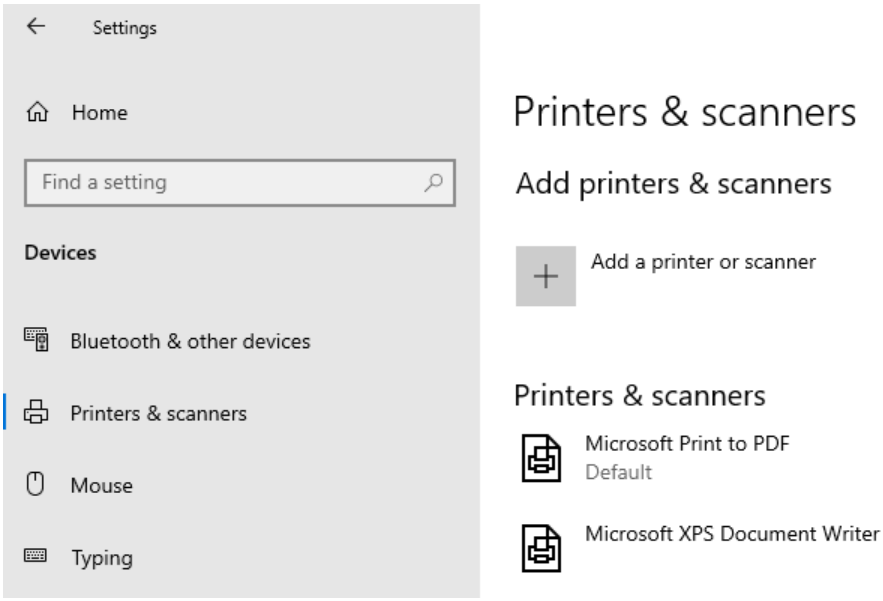
2.5 Step 5. Create the OptimiDoc printer on workstations

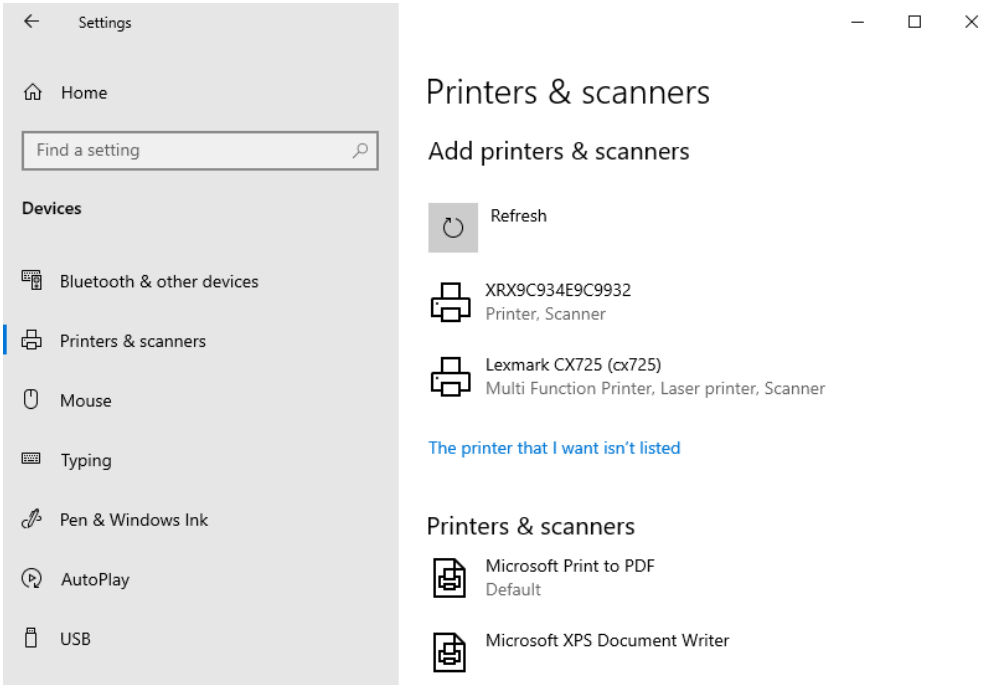
To start printing with OptimiDoc it is necessary to create a printer on the server or on each workstation which will print to the OptimiDoc server. The process below describes how to create it on Microsoft Windows.

1. Open Printers & scanners from the Start menu (i.e. Start Menu > Settings > Devices > Printers & scanners), or from the Control Panel.

2. Click on **Add a printer or scanner**



3. As soon as the system tries to search for new printers and scanners, don't wait for the search to finish and
click on **The printer that I want isn't listed**.



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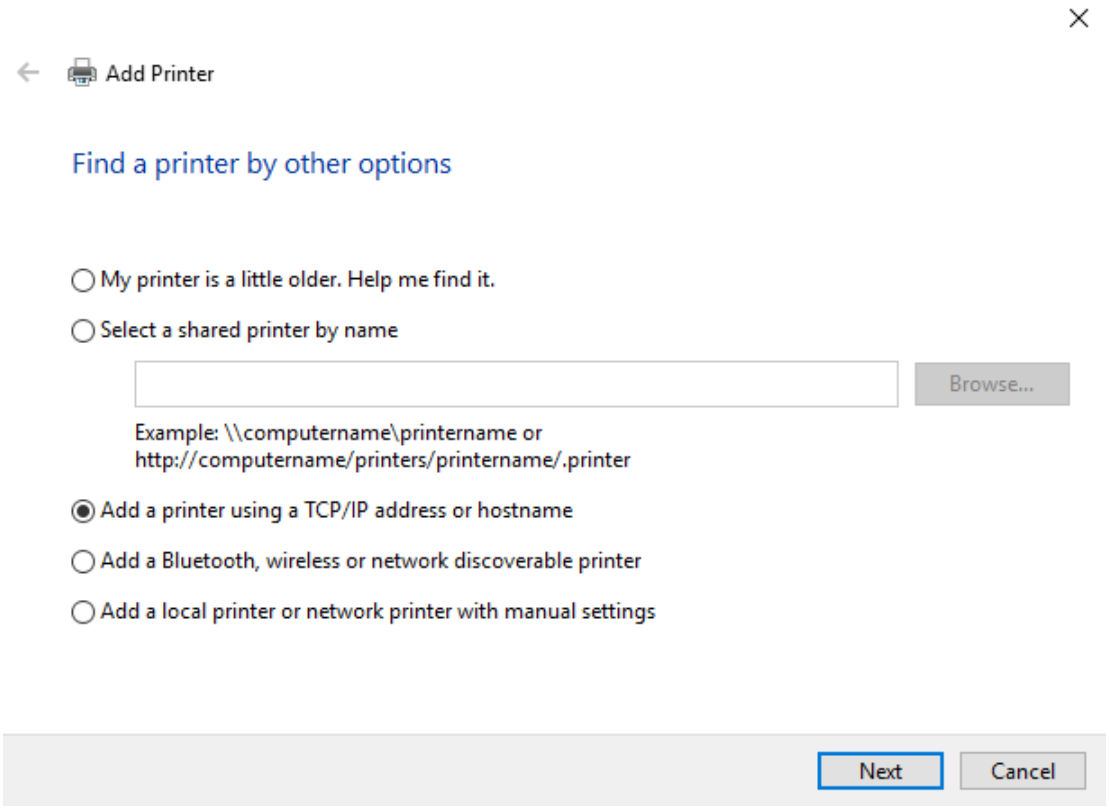
4. In the Add Printer dialog, check **Add a printer using a TCP/IP address or hostname** and then click **Next**.



5. Change **Device type** to **TCP/IP device** and enter the IP address of your OptimiDoc server under the **Hostname** field. Leave **Port name** predefined automatically or enter a custom port name.
Click on **Next** to continue.

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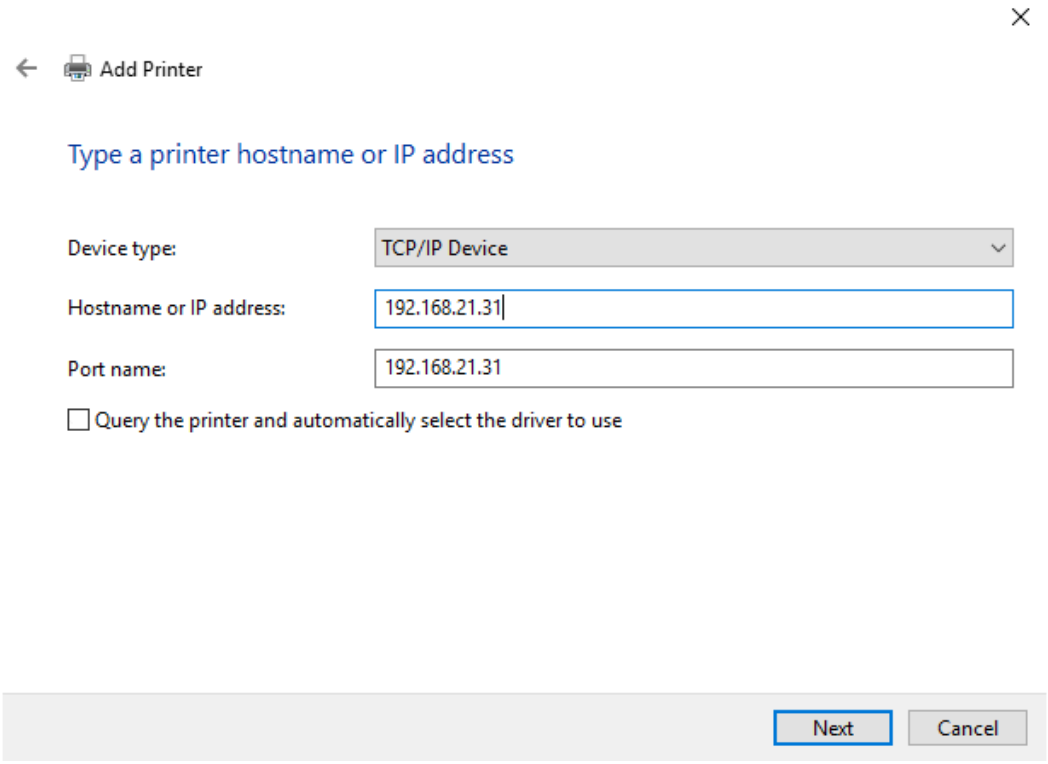
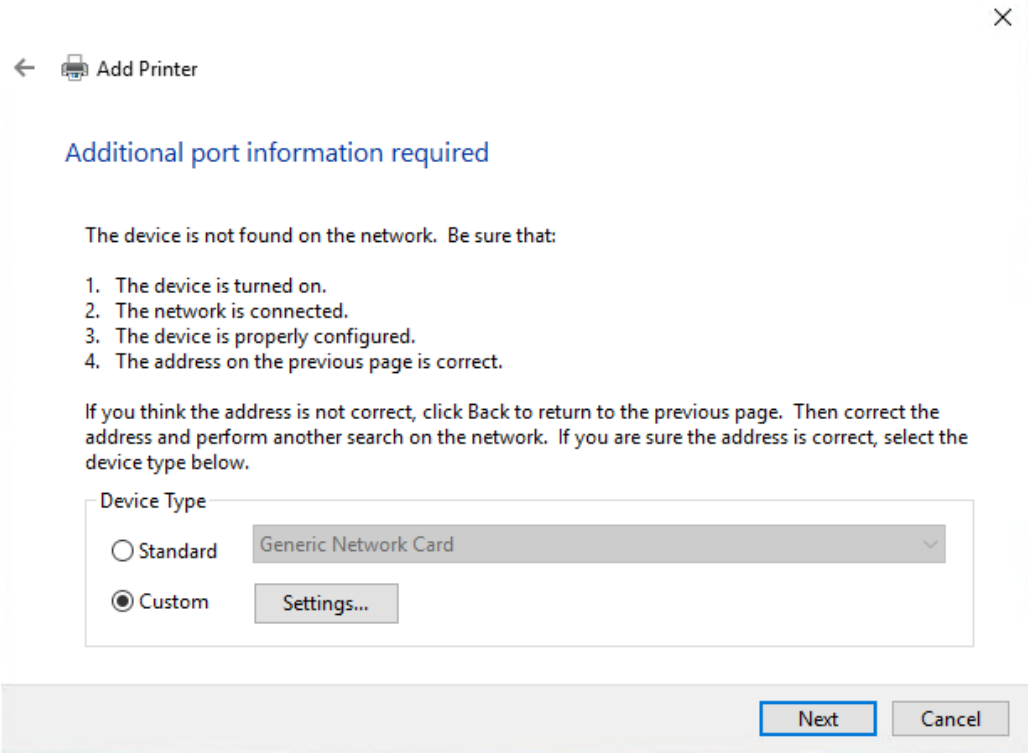


6. Check **Custom** under Device Type and click on **Next.**



7. Change **Protocol** to **LPR** and enter the queue name **OptimiDoc.**
Click on **Next.**

If you want to print directly to the device, put a direct queue ID instead of OptimiDoc into the **Queue Name** field.

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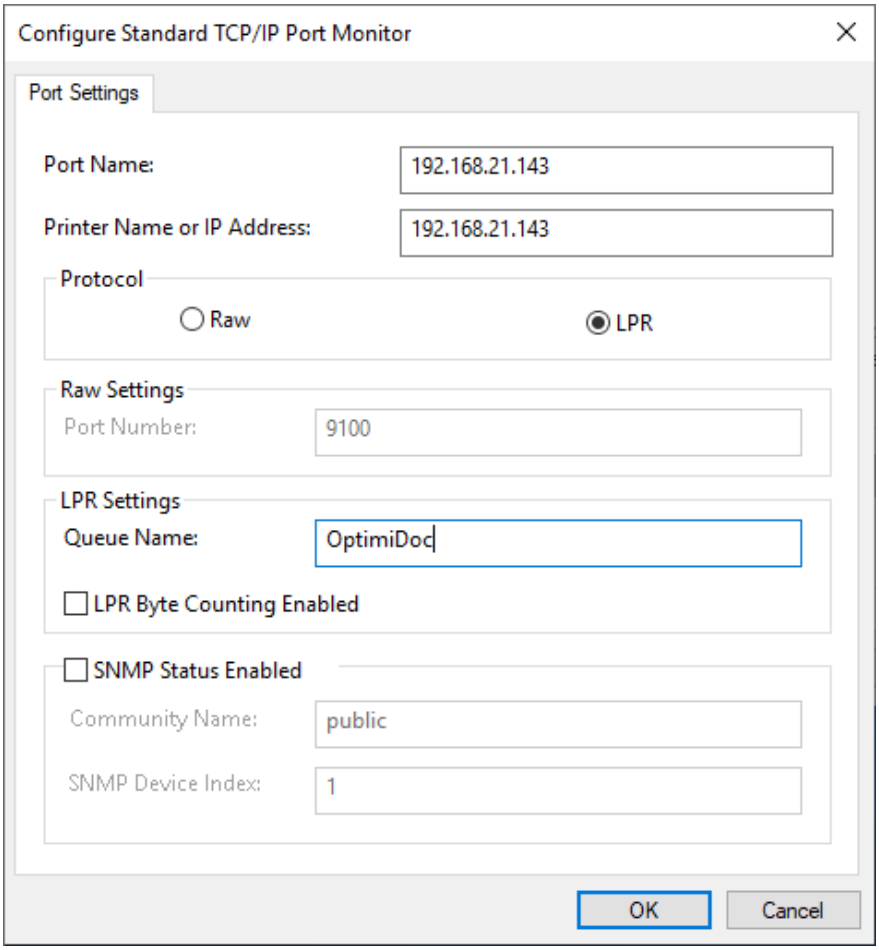
You can specify project by a code of project, name of a queue and a user login using the Queue Name field. For more information, see Advanced Queue Name settings.

Click **OK** to continue.



8. Select an appropriate device driver from the list. If the driver is not listed, click **Have Disk** to browse for a driver file.

Click on **OK** when finished.

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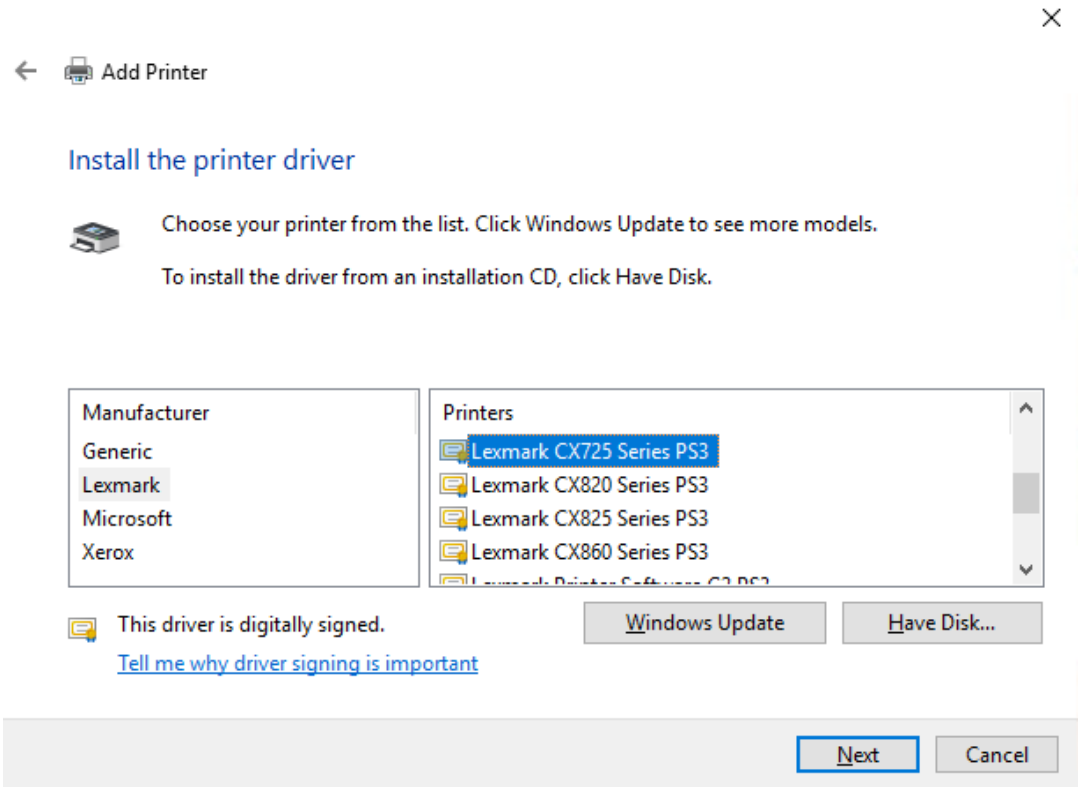
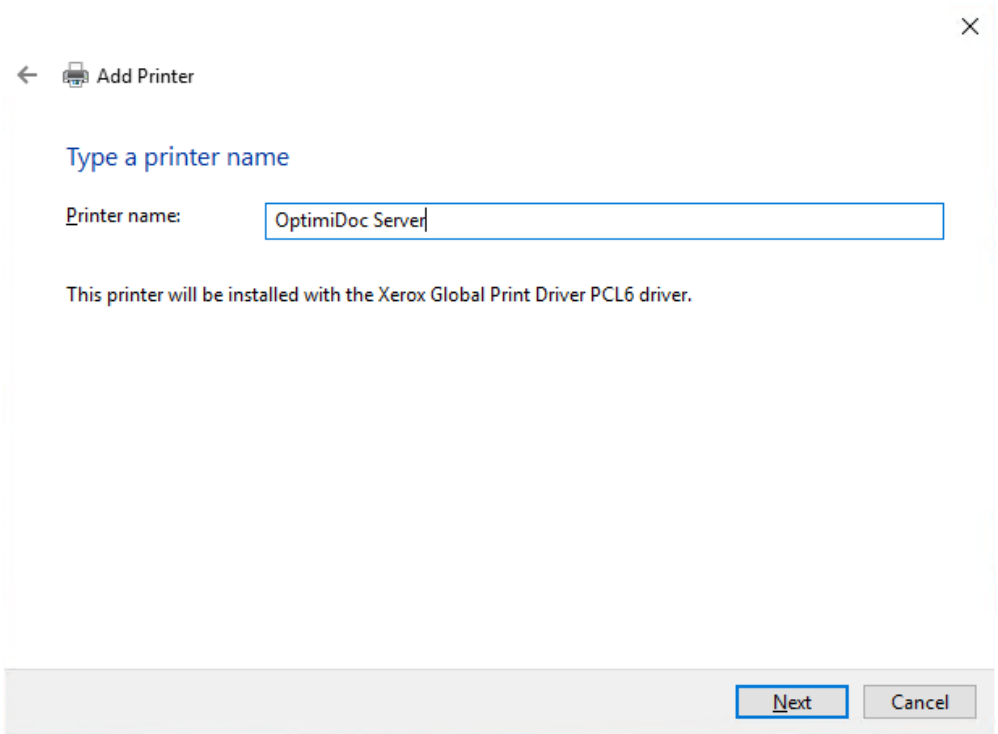


9. Enter **Printer name** and click **Next**.



10. Select **Do not share this printer** and then click **Next**.

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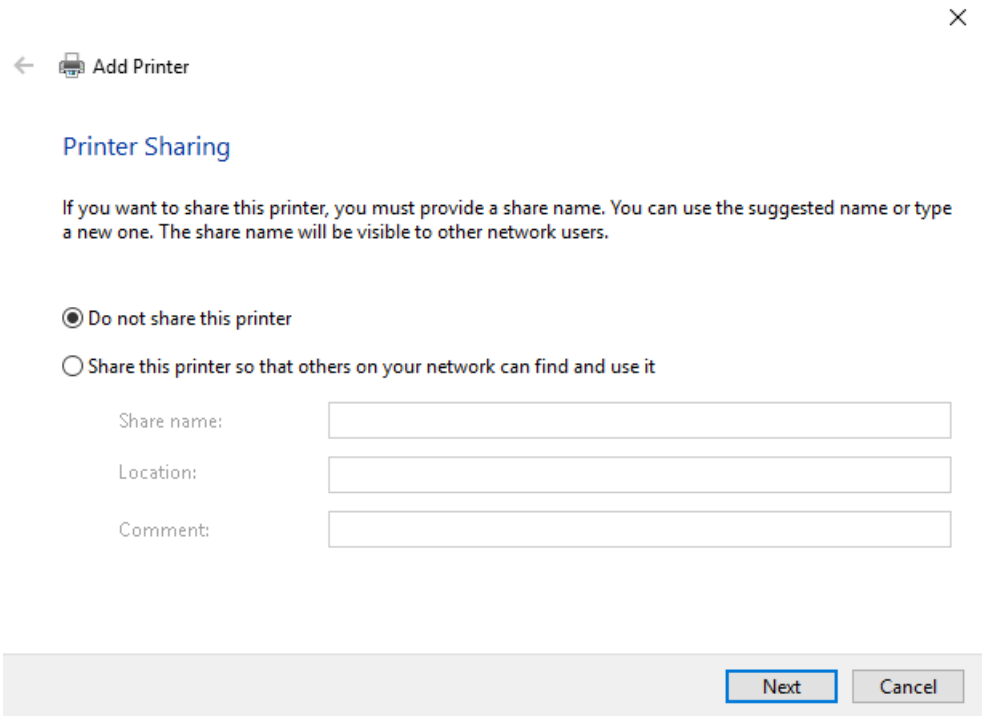
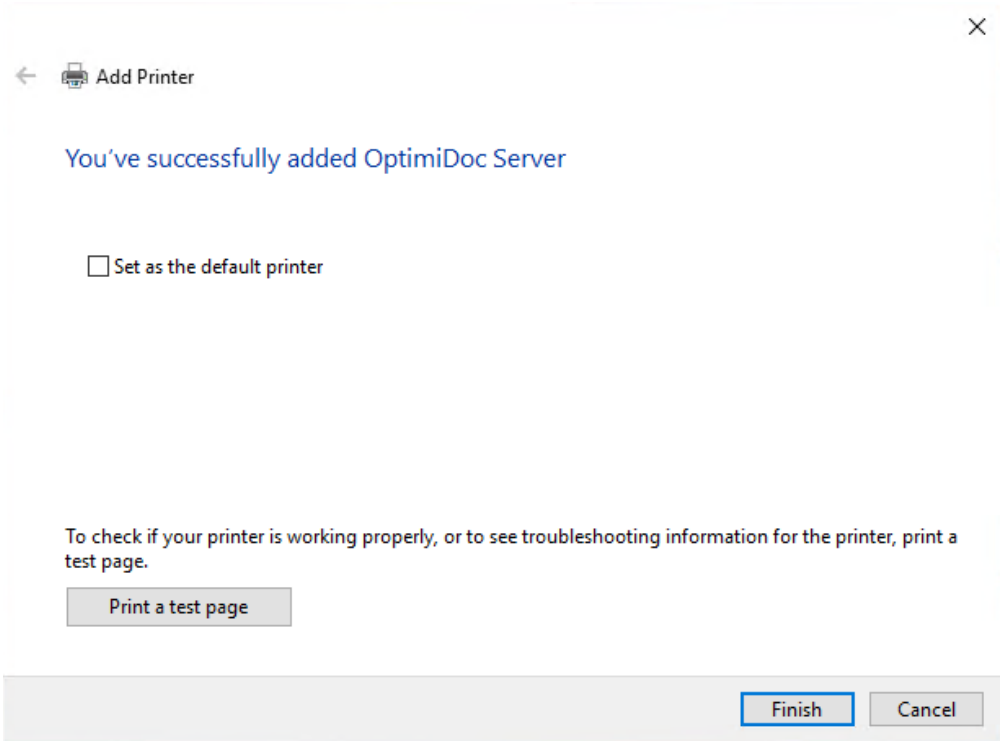


11. To send a test page to OptimiDoc, click the **Print a test page** button or confirm the printer installation by clicking **Finish**.



12. Optionally you can check the status of the print job. Go to Job list under Report menu.

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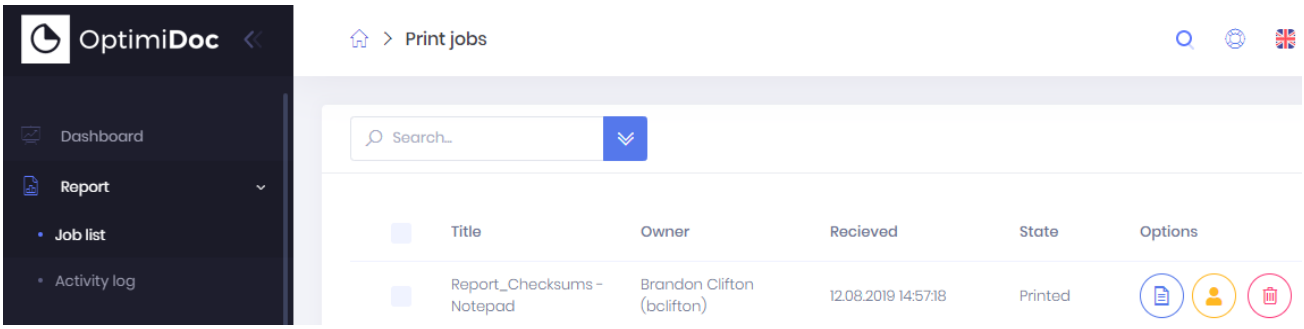

Important If the job is not listed, go to **Diagnostic** in the left menu and check the section **Unauthorized accesses**. For more information visit the page **Unauthorized accesses**.

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2.5.1 Advanced Queue Name settings

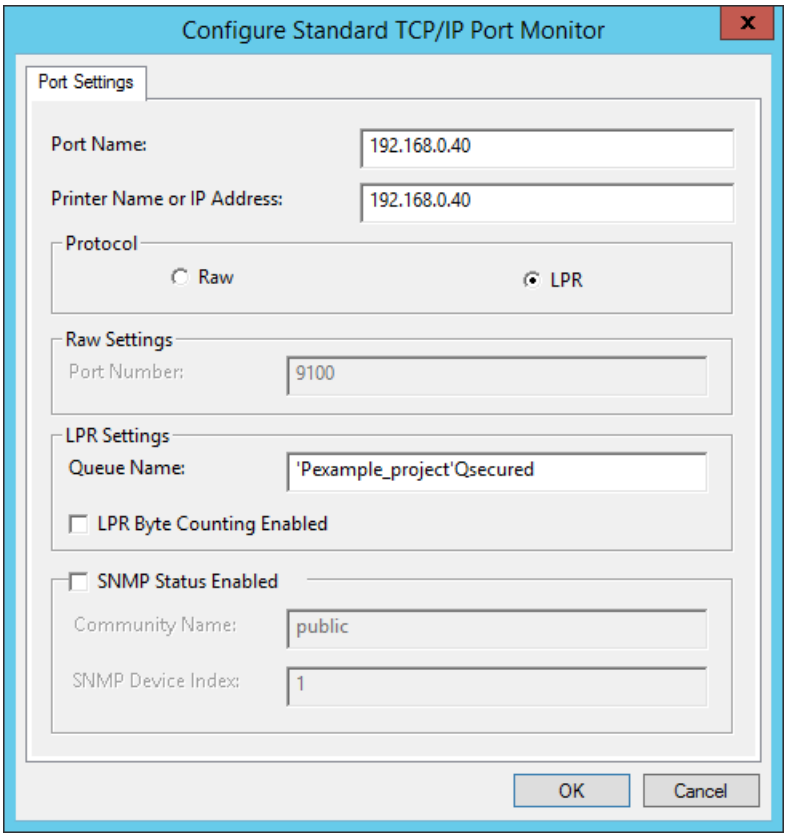
You can specify a project (using the **project code**), name of a queue and a user login using certain modifiers inside the Queue Name field in the printer settings.

modifier	description	example
'L	user login	'Landrew
'P	project name	'Pexample_project_code
'Q	queue name	'Qsecured

Parse User from Job name

modifier	description	example	expected job name from example
'Cly	l is for Login, y is separator	'Cl-	user-jobname
'Cey	e is for email, y is separator	'Ce-	usermail@mail.com-jobname

You can also use any combination of these **modifiers**.



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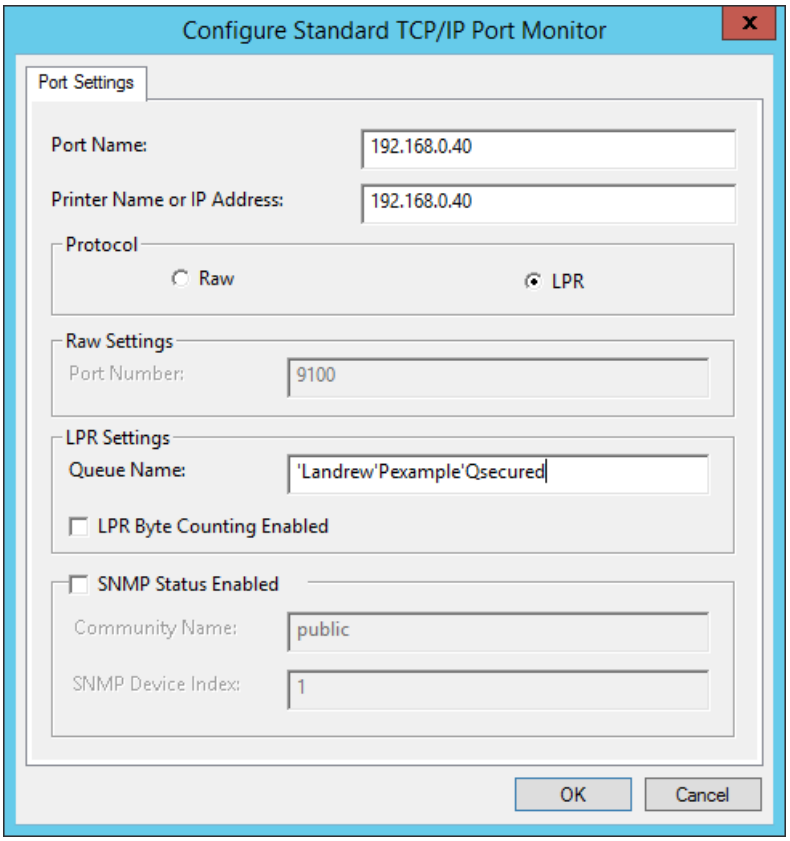

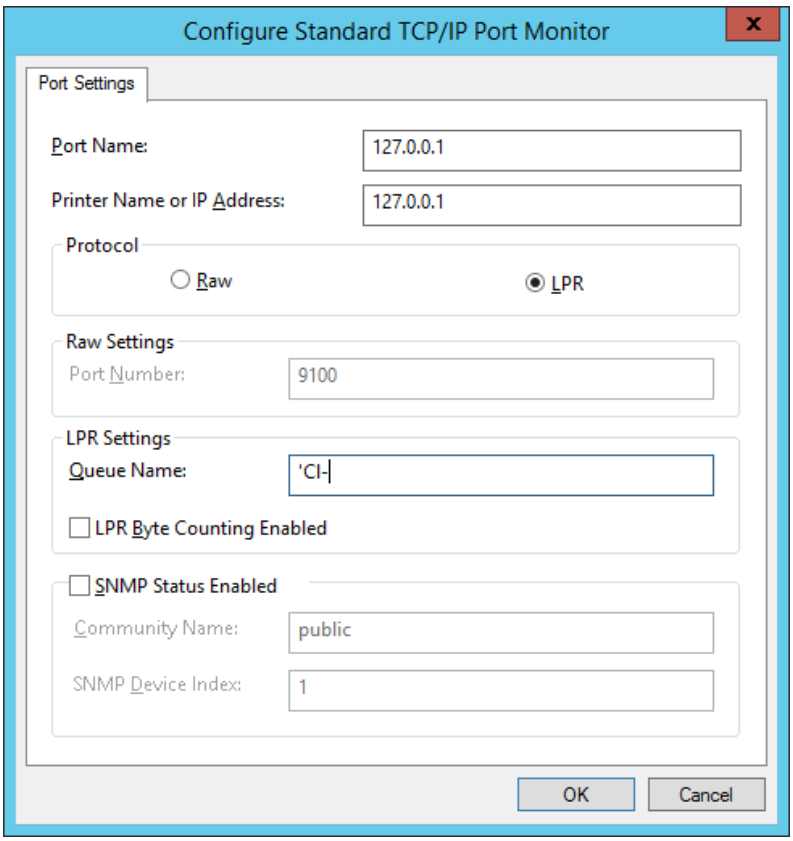

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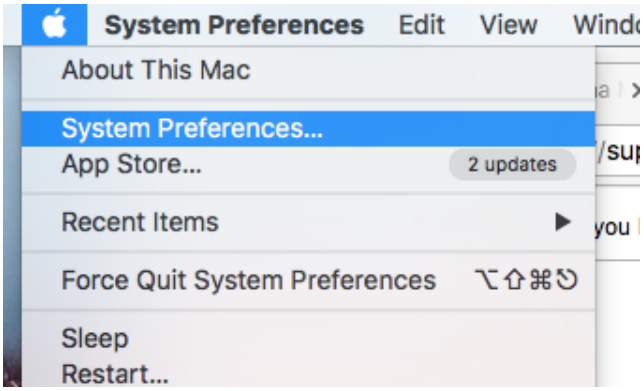
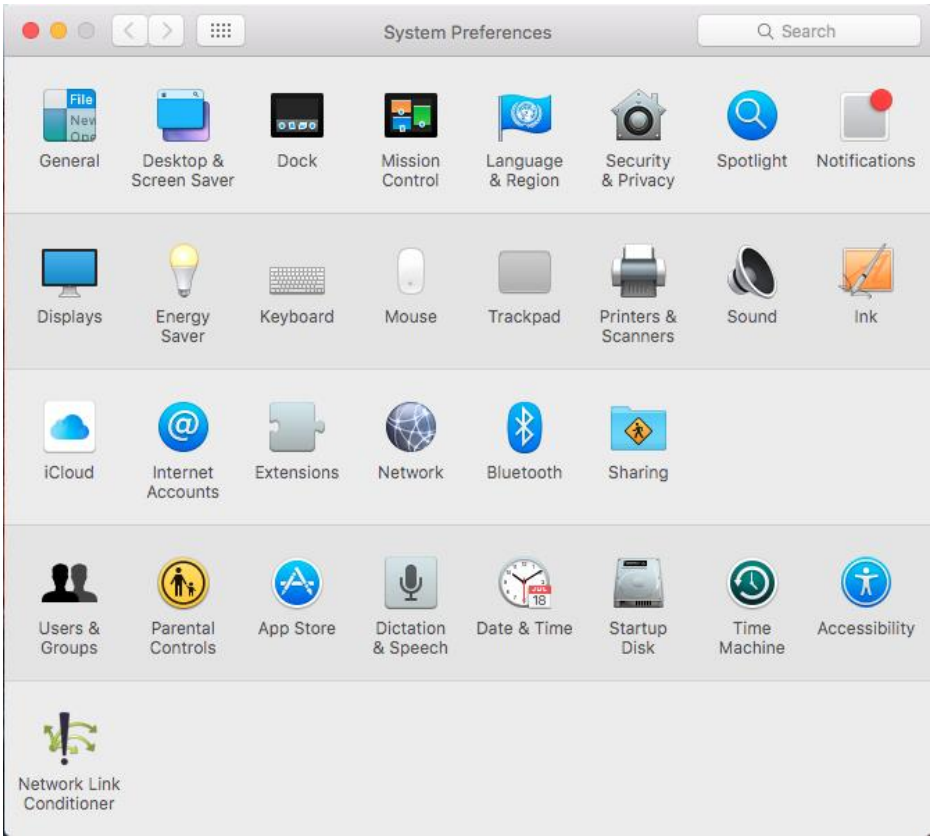
2.5.2 Add printer on Mac

To add printer on Mac please go to "**System Preferences**"



then click "**Printers & Scanners**"



click "**+**" button and select "**Add Printer or Scanner...**"

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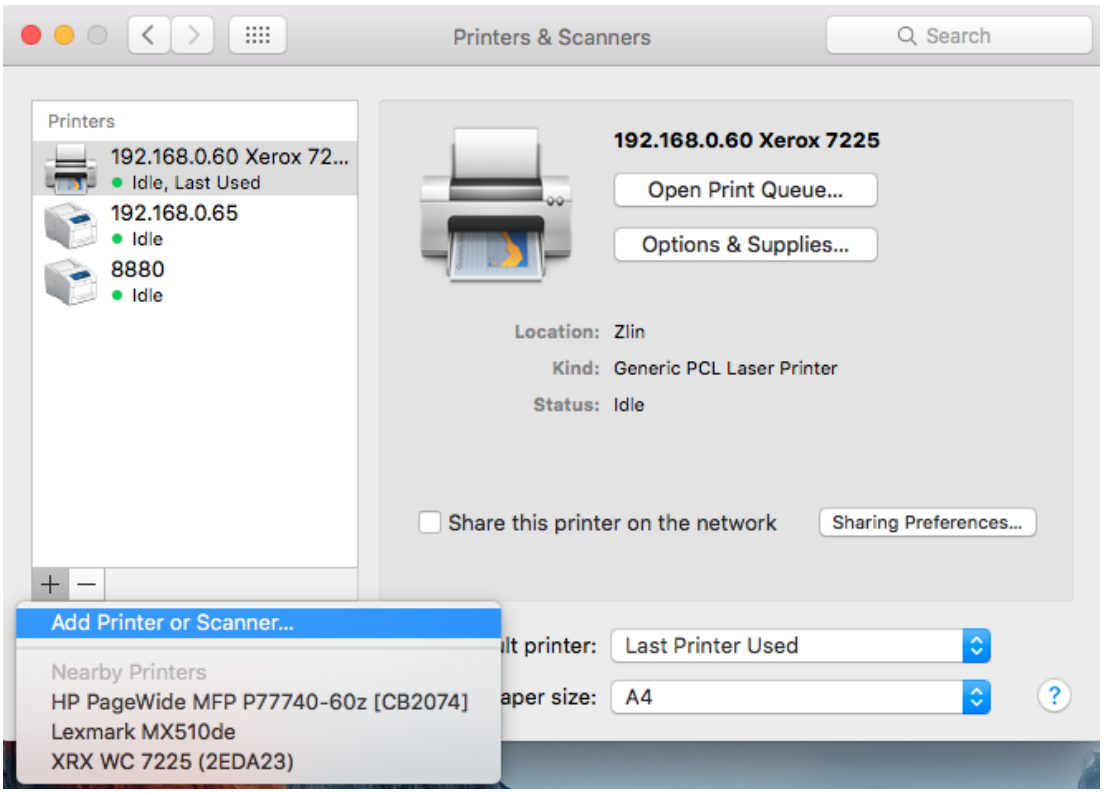
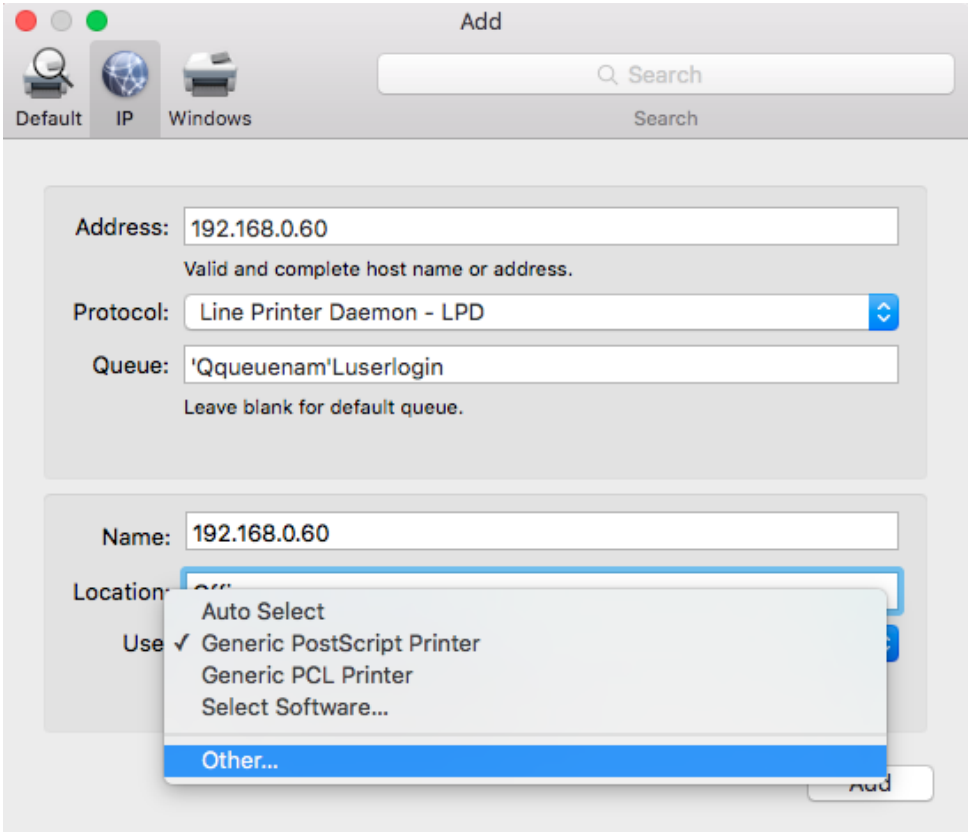


In the following popup **fill out the IP address of the OptimiDoc server**, Queue name value is optional. Also select correct printer driver.



Finally click the "**Add**" button and the printer is ready to print.

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2.5.3 Add printer on Ubuntu

1. Enter "Printer" keyword in the Ubuntu search menu and in search results click on Printers.

2. Click on "Additional printer". The button will appear at the bottom of the list of printers.

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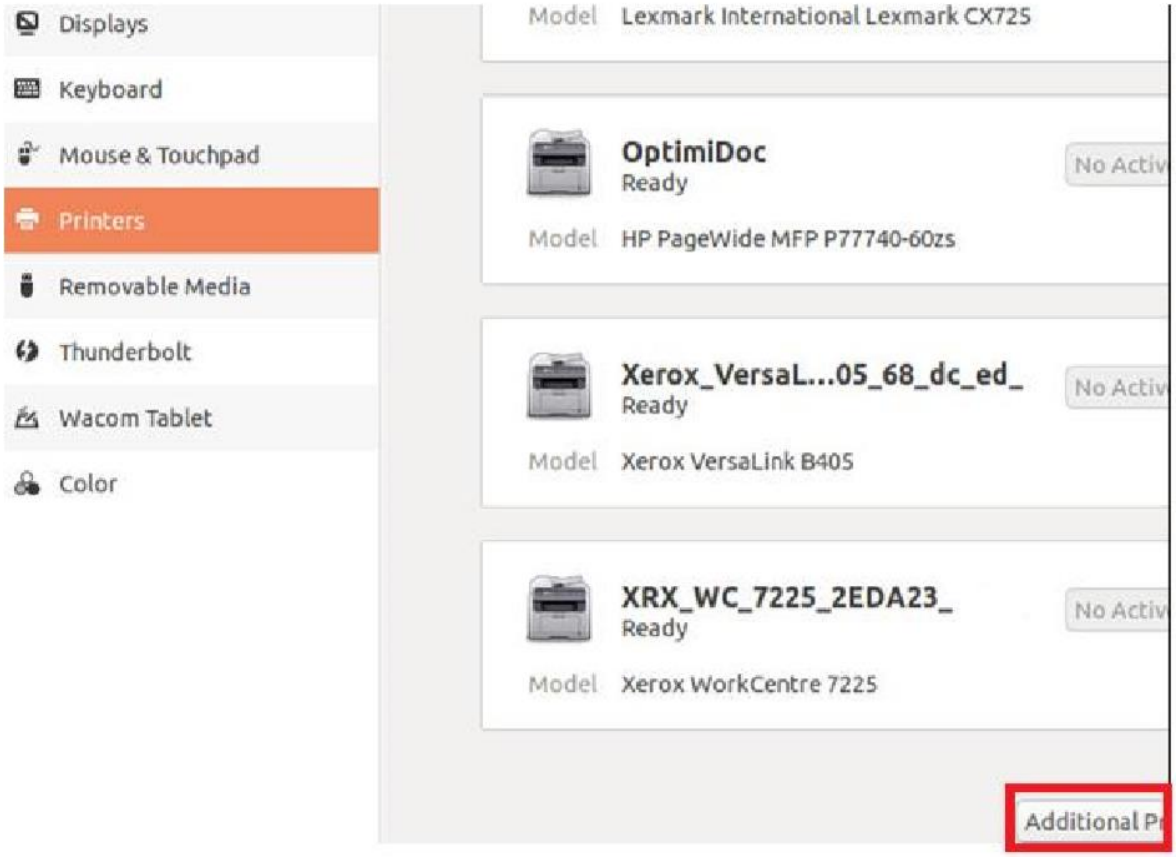
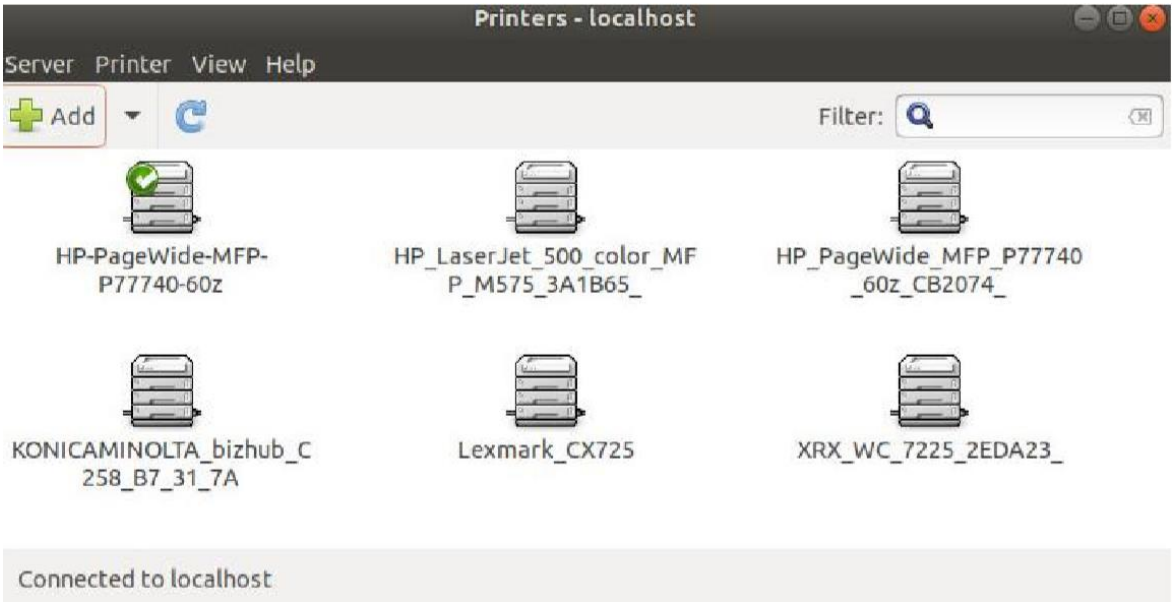


3. Click on "Add" button



4. Choose "LPD\LPR Host or printer" from the Network printer list
Fill in the form
Host: Server IP
Queue: OptimiDoc
Click on the "Forward" button

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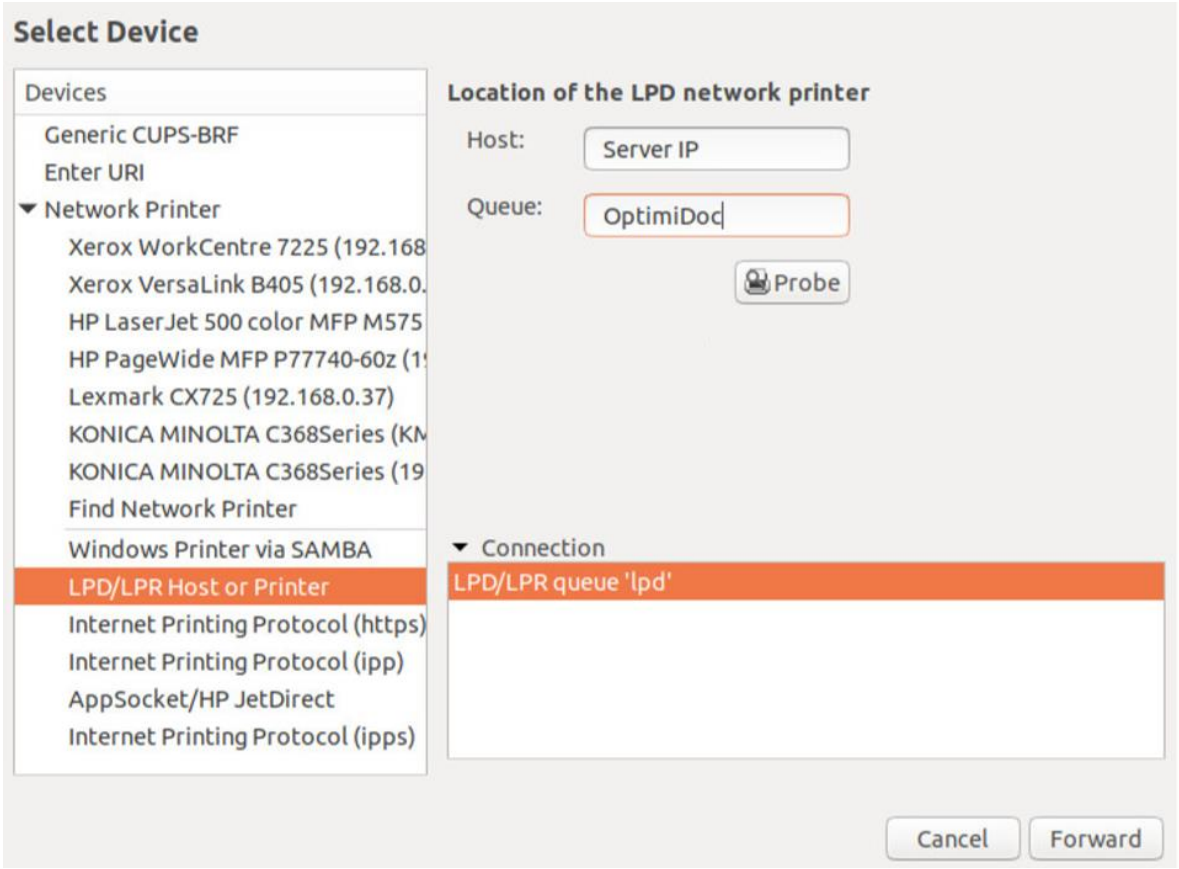

5. Select the driver of the printer which you want to add. At first, we will select "HP" and after that the printer model (PW77740).

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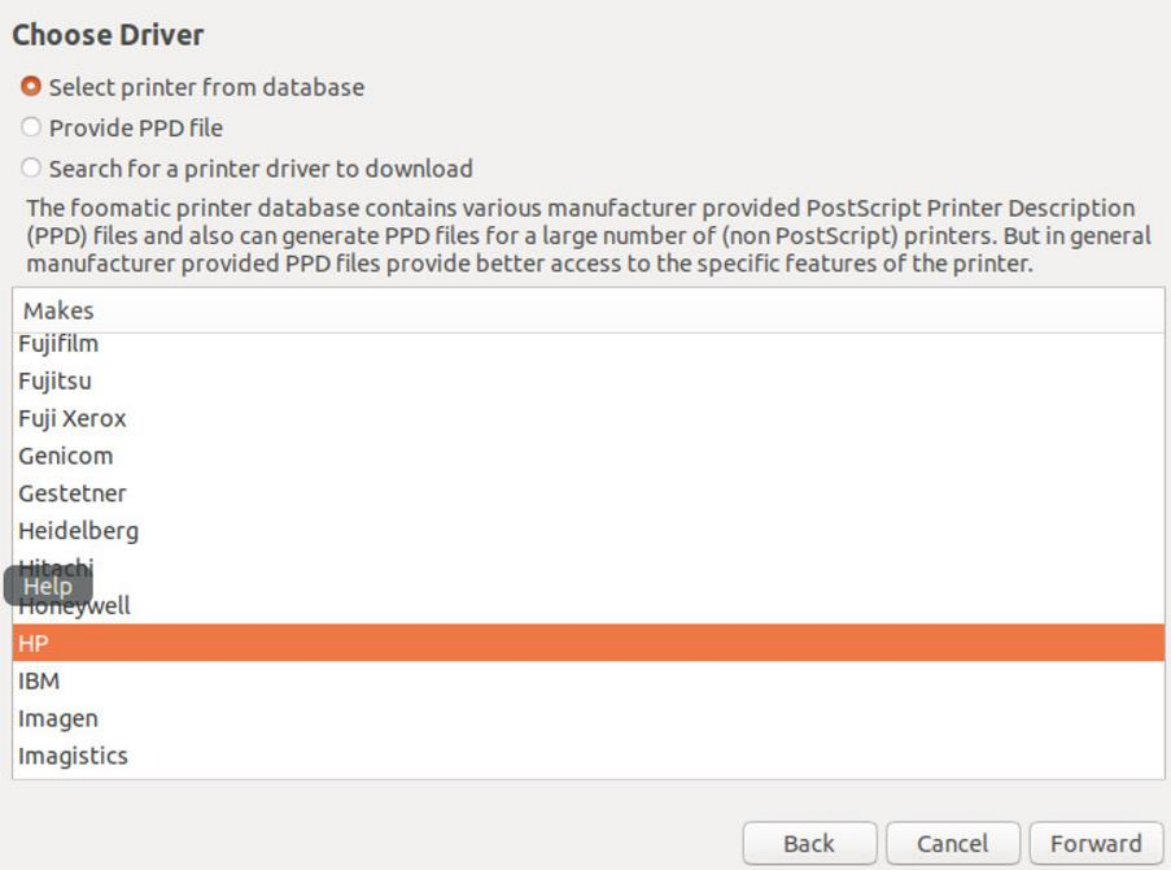

6. The preinstalled PS driver works correctly (with MFP HP PW 77740)

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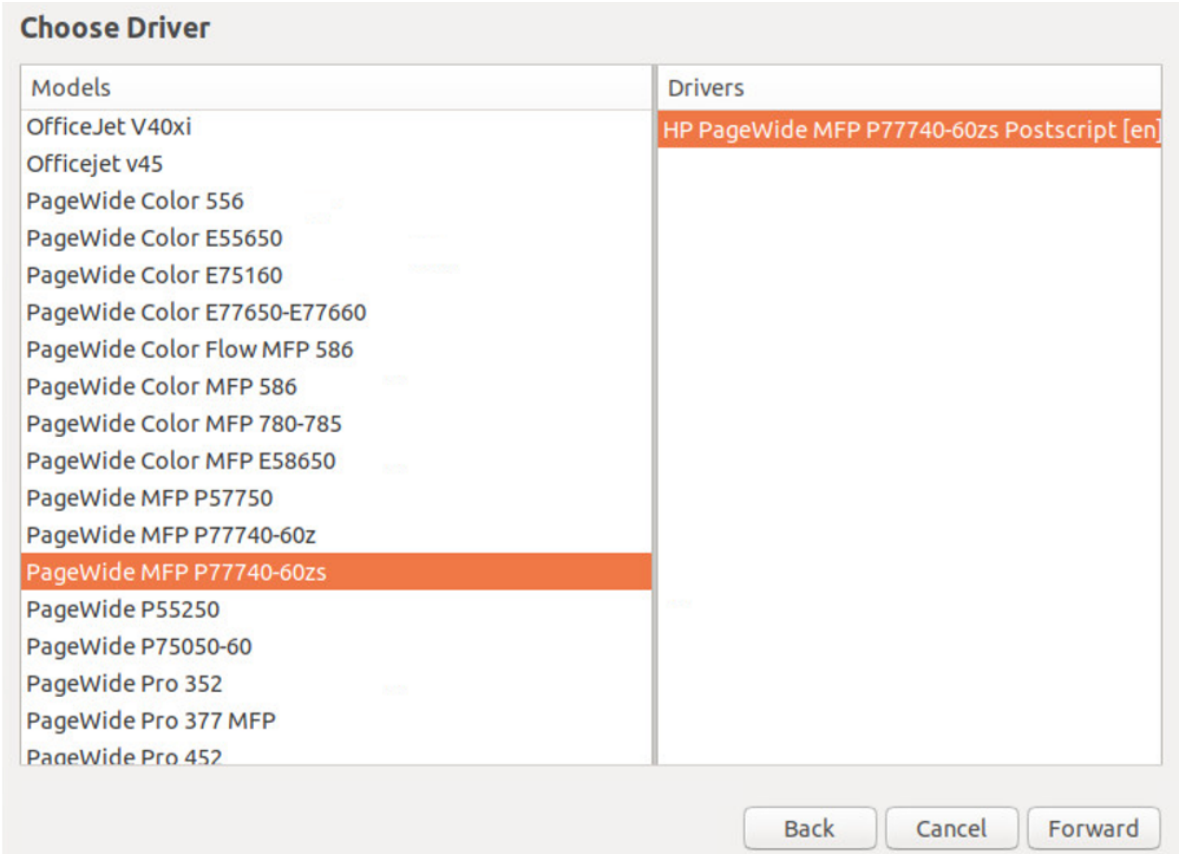

7. Select the printer name + location (Informative part of the installation) and then complete the installation with the "Apply" button

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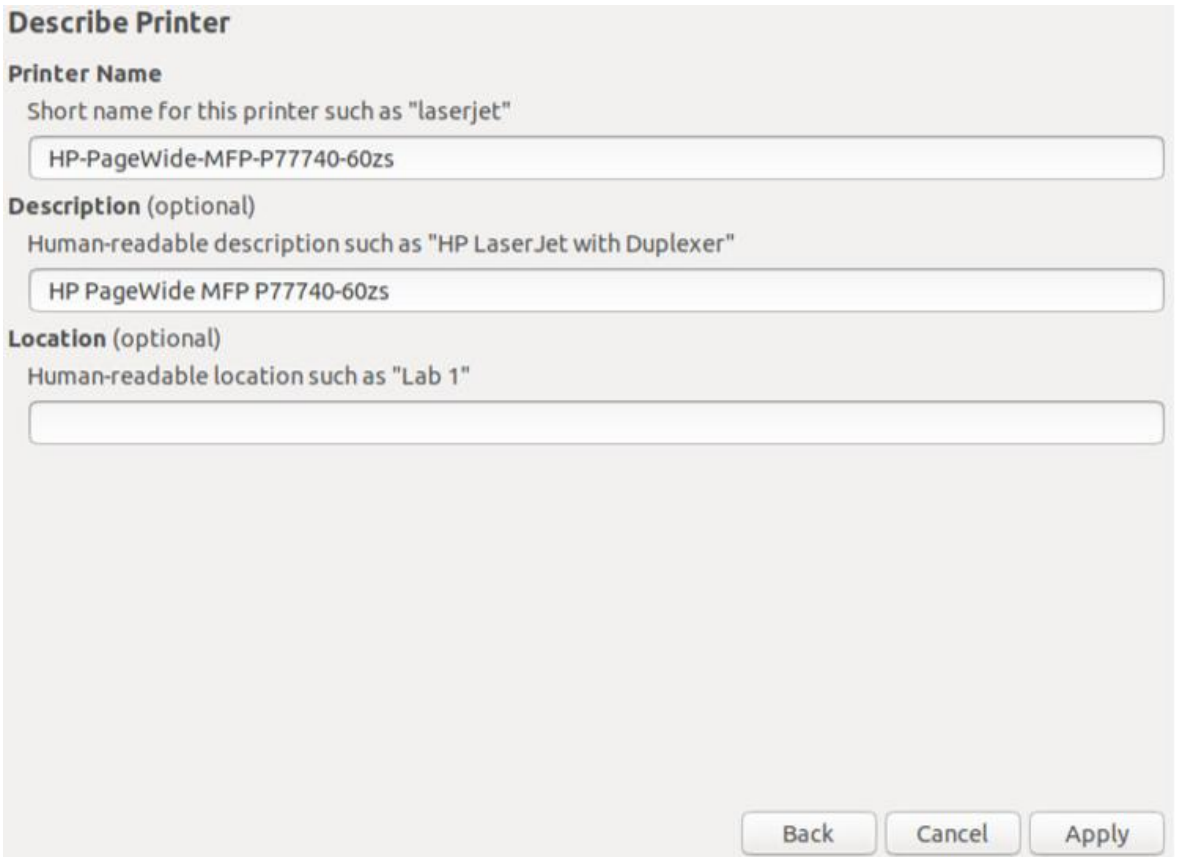

8. Try to print "test page"

PW 77740 Printer Driver - PostScript versions (including colors). You can edit the settings in the Printers / Additional Printers section. Select the printer and click on "Properties"

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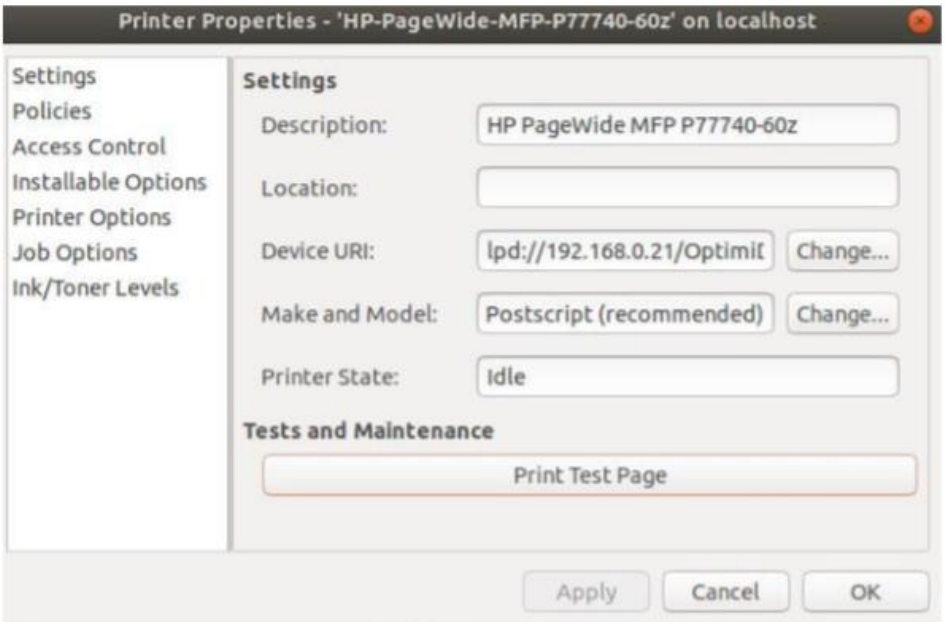

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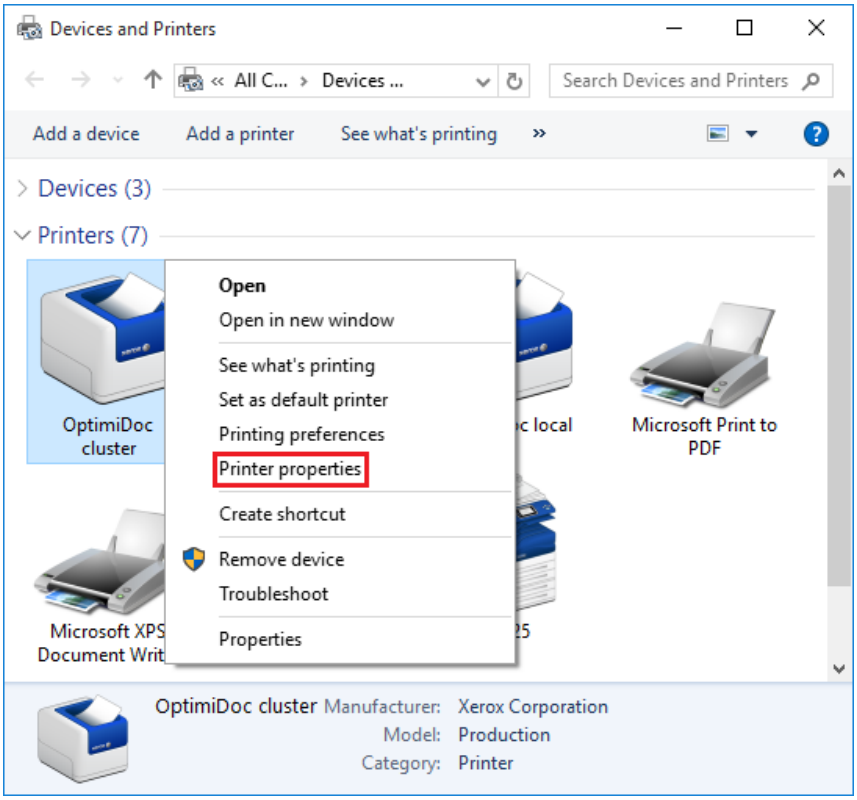
2.5.4 Printing using an LPR queue

This process requires an OptimiDoc printer to be set up on the workstation. If you don't have one, follow the instructions in the Quick Start Guide.

To print using an LPR queue, enter the project code into the printer's queue name. Below are instructions for Microsoft Windows.

1. Open the **Devices and Printers** from the **Start menu**

2. Right-click an OptimiDoc printer and click **Printer properties**



3. Navigate to the **Ports** tab and click Configure port

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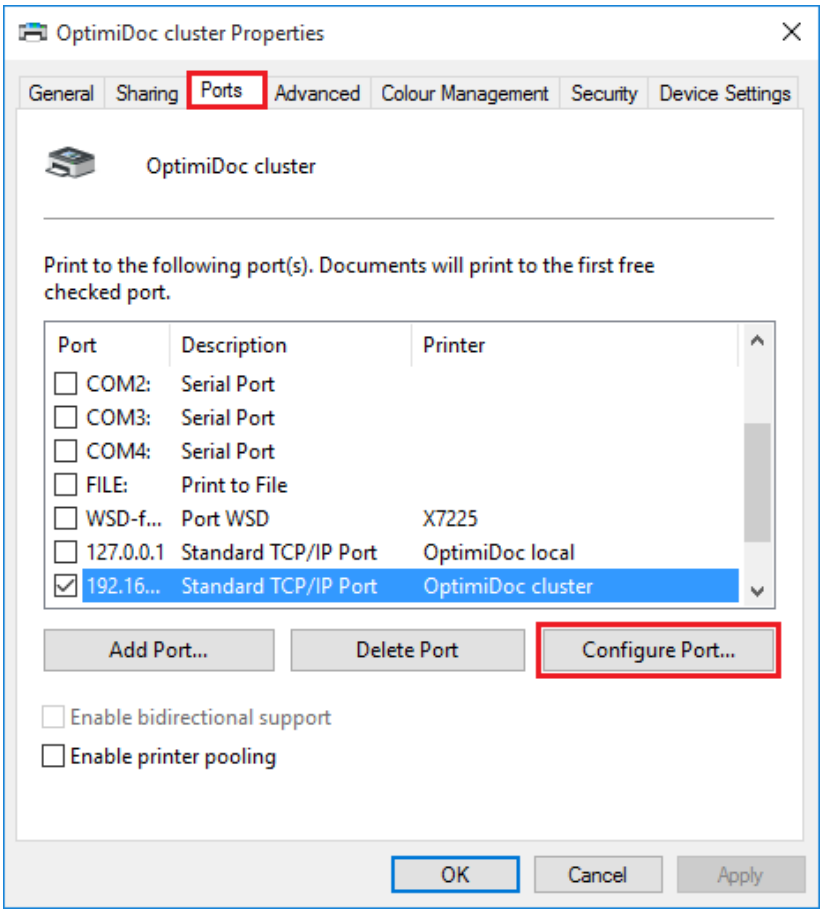

4. Make sure you have the **LPR protocol selected**

5. Enter the **project code** into the Queue name field

It is possible to specify a project as well as a queue name and/or user login, for more information see Advanced Queue Name settings

6. Click **OK** to save the settings

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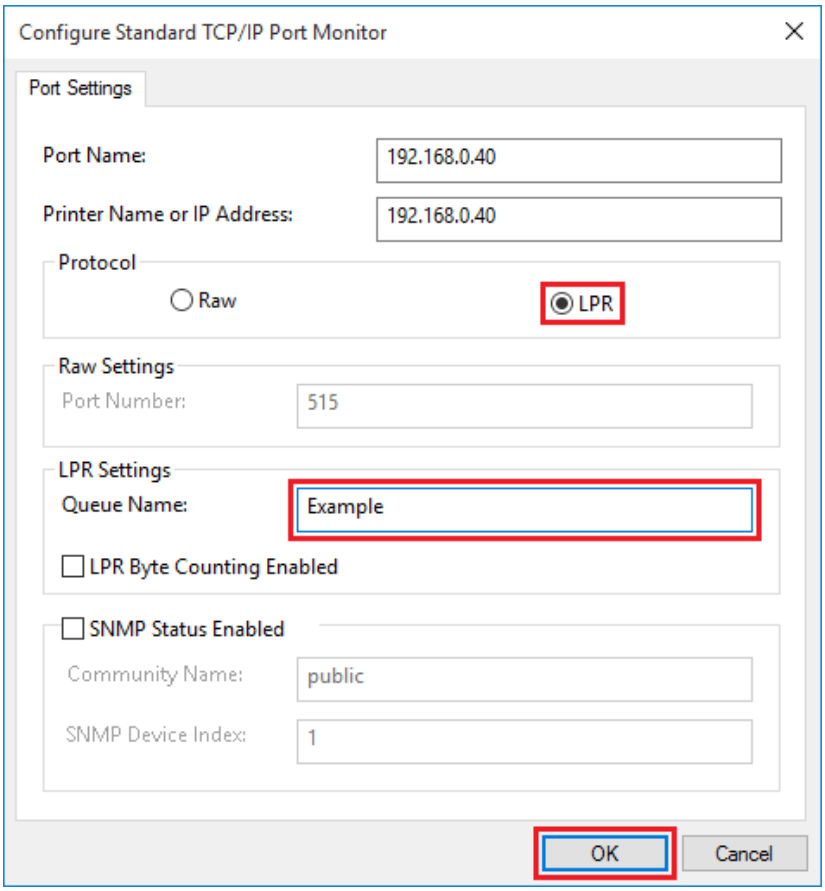

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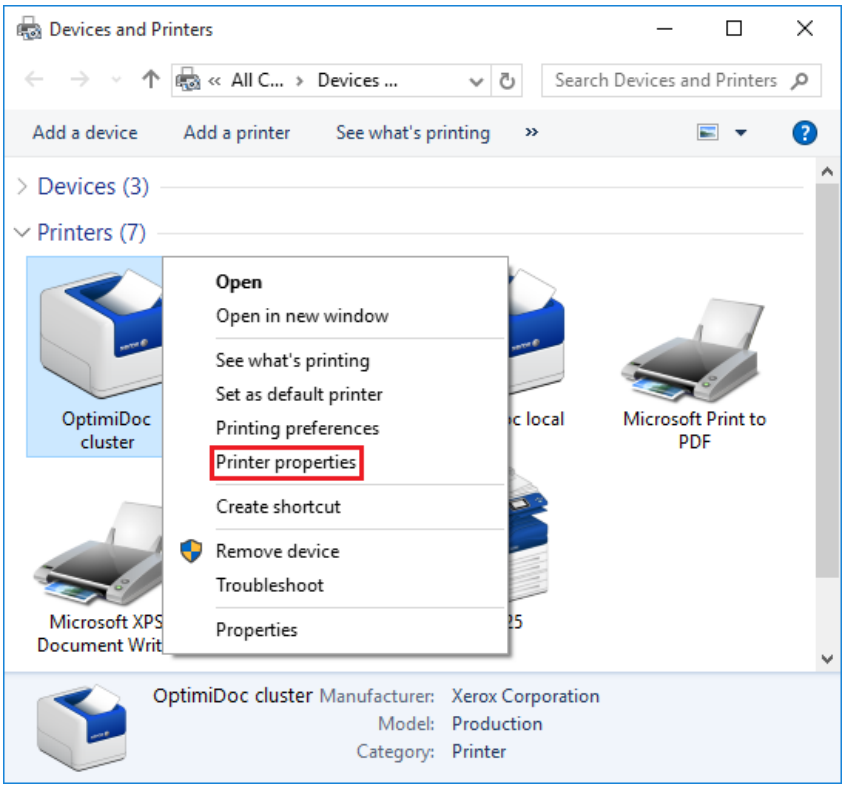
2.5.5 Printing using the OptimiDoc client

This process requires an OptimiDoc printer to be set up on the workstation. If you don't have any, follow the instructions in the Quick Start Guide.

The following instructions are for Microsoft Windows. In order for the OptimiDoc client window to show up, the printer's queue name must be set to OptimiDoc. If it has already been set, skip to step 7.

1. Open the **Devices and Printers** from the **Start menu**

2. Right-click an OptimiDoc printer and click **Printer properties**



3. Navigate to the **Ports** tab and click **Configure port**

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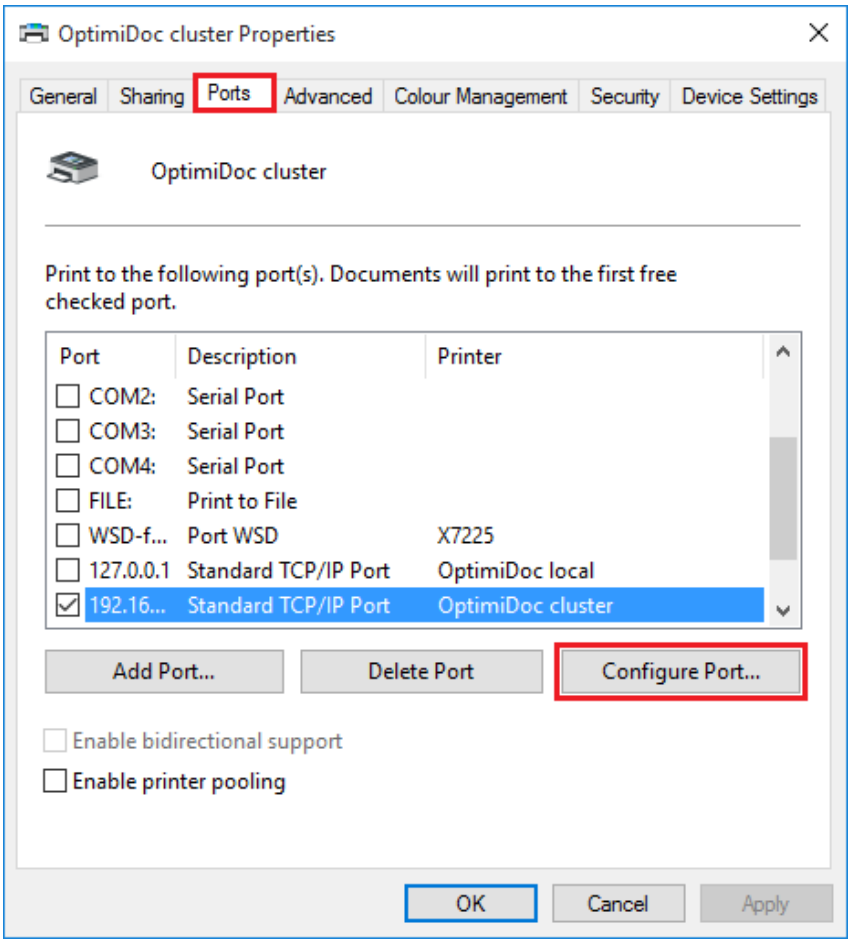

4. Make sure you have the **LPR protocol selected**

5. Enter the project **code** into the Queue name field

6. Click **OK** to save the settings

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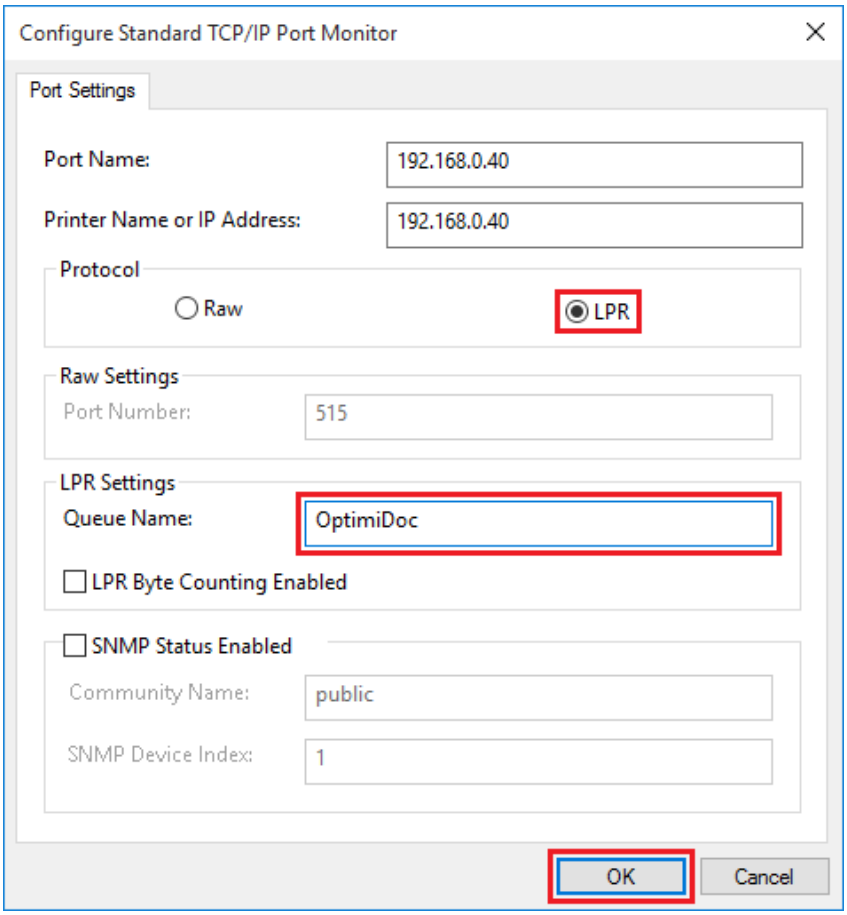

7. Install and start the OptimiDoc Client (an icon should show up in the system tray)

8. Initiate a print job on an OptimiDoc printer

9. An OptimiDoc client window should appear with a list of available projects

If the window does not appear, make sure you have the printer's queue name set correctly (steps 1 to 6)

10. Click the desired **project**

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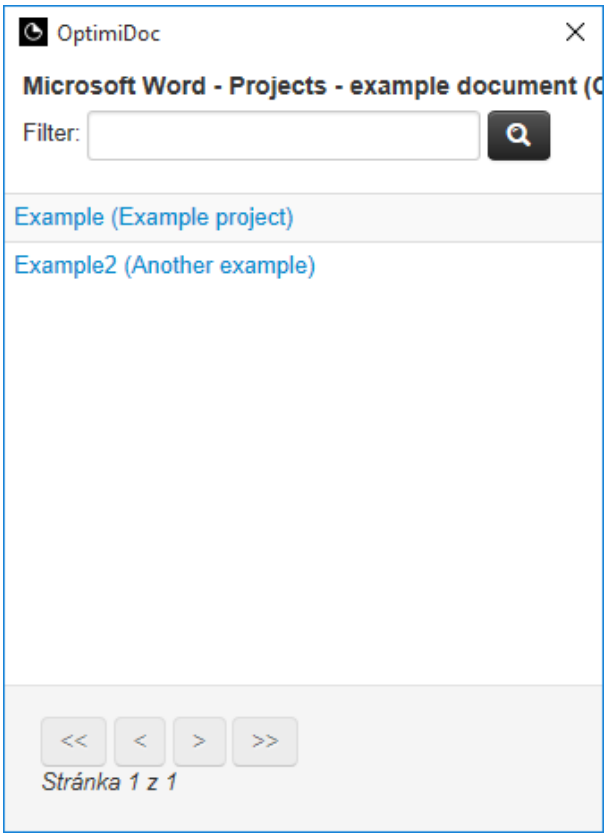

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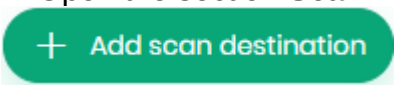
2.6 Step 6. Create basic scanning workflow

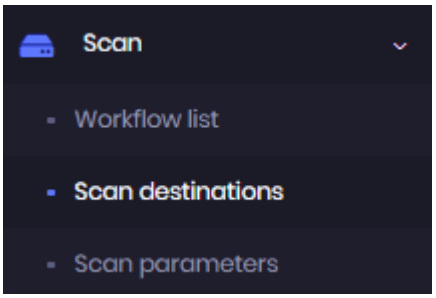
Scanning workflows are defined by destinations, parameters and an actual scanning workflow. In this example we will create a basic scanning workflow which will send a document to an authenticated user in Microsoft Office Word format via email. This part does not describe all the possible options of scan workflows. To see a detailed description, see Scan Workflows.

As a first step we need to create a destination which will be used in a workflow.

To create a destination please follow these steps:

1. Open the section **Scan > Scan destinations** and Click on the button 

to **add** a new scan workflow.



2. In Create scan destination, set the following parameters:
- **Title** - name of destination
- **Type** - select **Email** for delivering documents to user's email
- **SMTP server** - IP address or DNS name of SMTP server via which an email will be sent
- **Port** - port of SMTP server
- **Use SSL** - check if the SSL communication is required by the SMTP server
- **Login** - user login to SMTP server (if not required leave empty)
- **Password** - user's password
- **Sender** - sender's email address
- **Recipient** - email address to which the email shall be sent. You can use the parameter [user_email] which will be automatically replaced by the email of the authenticated user.
- **email subject** - subject of the email
- **Email body** - body of the email

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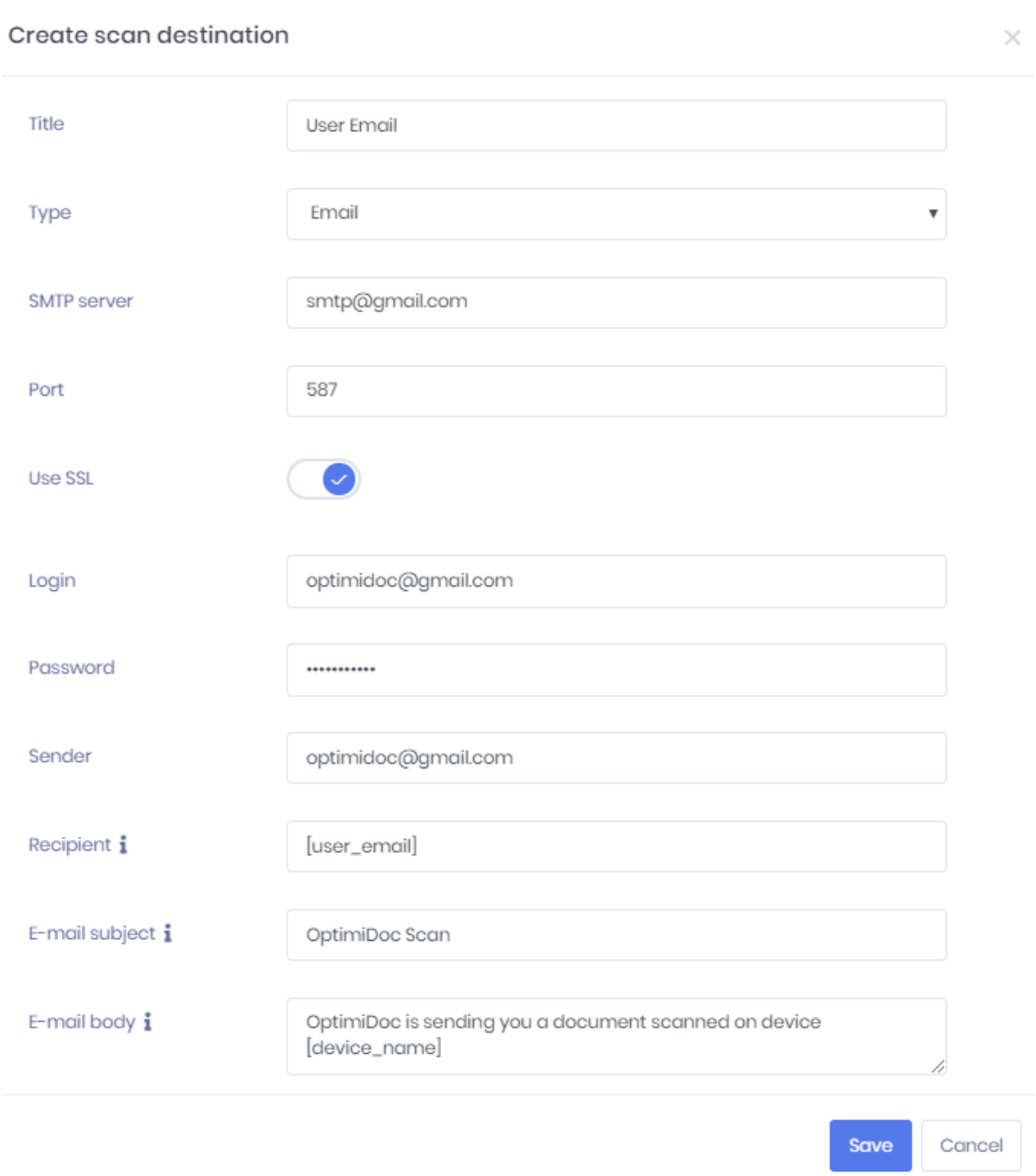
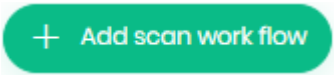
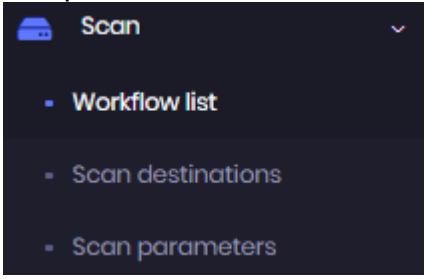


3. Click on **SAVE**.

Once the destination is created, we can approach the workflow creation:

1. Open the section **Scan > Workflow list** and click on the 

button.



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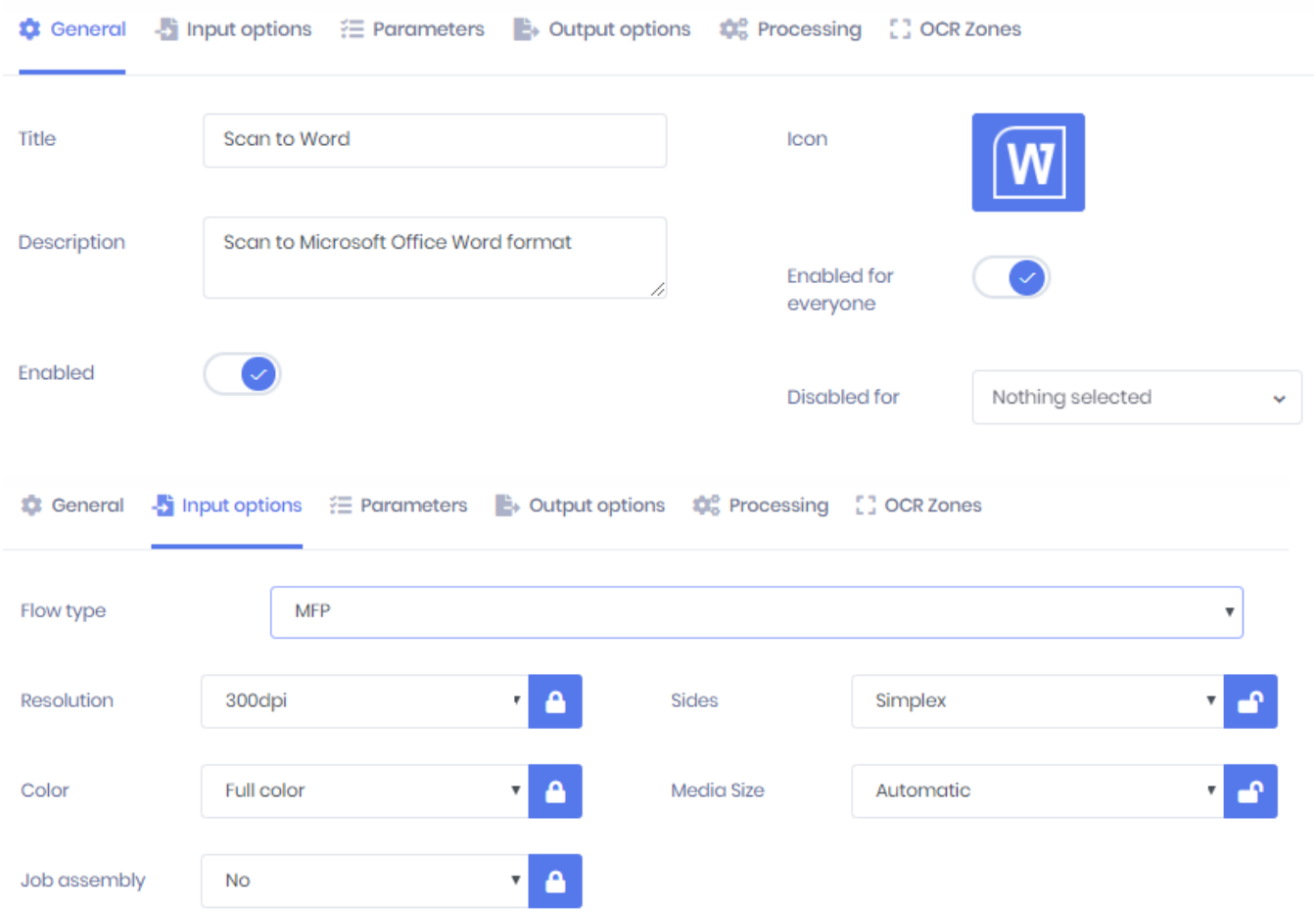
2. In Create/ Edit scan workflow dialog fill in the following settings:

- **Title** - enter the name of workflow
- **Icon** - select the icon of workflow

In scan settings unlock the sides, media size and job assembly by clicking on the button .



Skip the parameters and OCR zones.

In the output options fill in following settings:

- **Filename** - enter the name of file. In our case we will use the parameter [timestamp] which will be replaced by current timestamp.
- **Filetype** - select *.docx (Microsoft Word)
- **Save metadata** - none
- **Destination** - choose User Email created in previous step

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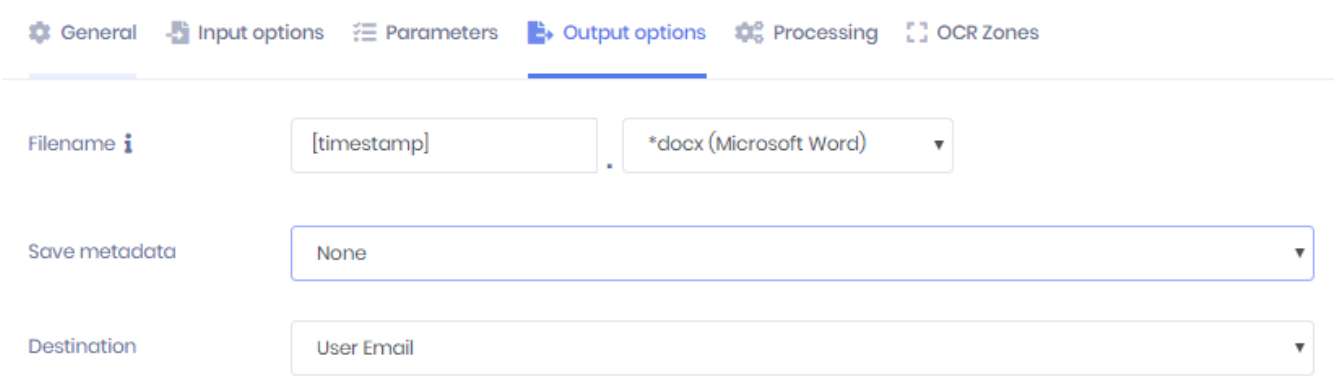
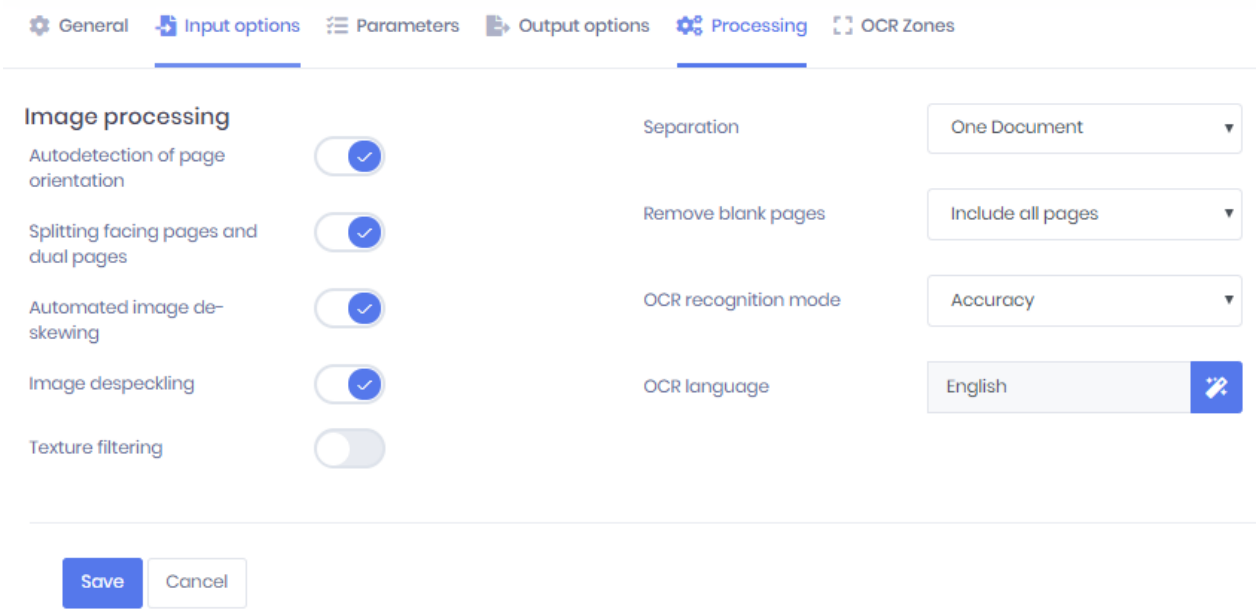


- **Image processing** - select the operation which shall be done up to the scanned document
- **Separation** - choose one document
- **Removal blank pages** - choose include all pages
- **OCR recognition mode** - choose accuracy
- **OCR language** - select the language of the document which you want to proceed



3. Click on **SAVE** when done.

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2.7 Step 7. Test your installation

Now when the basic setup of OptimiDoc is finished, test the installation and configuration. Authenticate on the device and release the print job or try to scan your document.

In case of any issues please check the Troubleshooting section.

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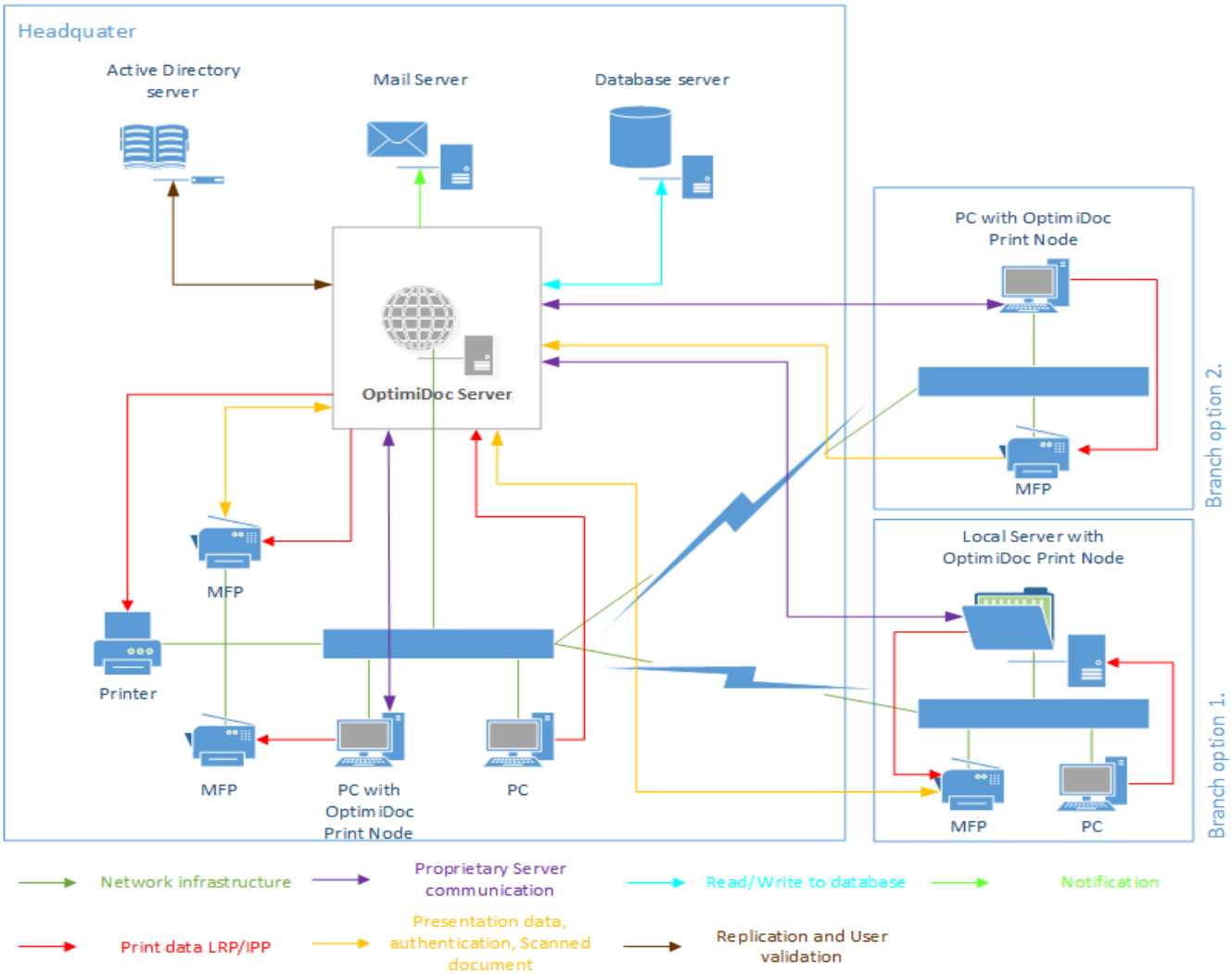
3 Distributed technology

OptimiDoc allows the implementation to the distributed environment with complete central administration via the web interface. This brings the major advantages in administration and management of the whole print infrastructure.



OptimiDoc Server

OptimiDoc distributed technology is based on OptimiDoc Server which provides following services:

- Administrative web interface, including
  - Reporting
  - User management
  - Device Management
  - Print and scan settings
- Device authentication, scan and print interface
- Scan processing
- Print jobs spooling

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Multiple central servers can be configured to provide the fail-over. All servers in fail-over need to be connected to one central database.

Configuration of multiple servers to fail-over is described in the following section: Fail-over configuration for Central servers

OptimiDoc Print Node

OptimiDoc Print Node manages prints locally and minimizes the traffic between location/workstation and the OptimiDoc Server.

OptimiDoc Print Node requirements are described in the section: OptimiDoc Print Node Requirements
OptimiDoc Print Node installation is described in the section: OptimiDoc Print Node Installation

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3.1 Fail-over configuration for Central servers

To provide the central server fail-over functionality it is necessary to utilize Microsoft Windows Network Load Balancing Services (NLB).

Requirements:

- Microsoft Windows Server 2012, Microsoft Windows Server 2012 R2

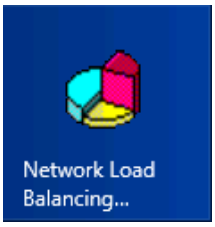
Limitations:

- Jobs stored on the server which is not available cannot be printed until you have specified a shared spooler.
- All central servers need to be on same subnet.

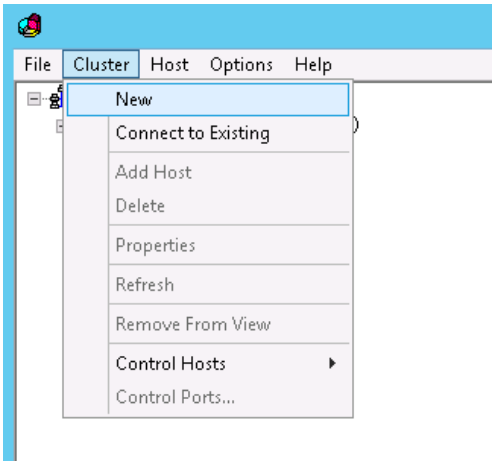
Configuration of NLB

1**. Install** NLB feature to all central servers.

2. **Start Network Load Balancing Manager**.



3. **Create new cluster** by clicking on Cluster > New.



4. **Enter the IP address** of the first cluster node, Click on connect and select the network card. Confirm by clicking on **Next**.

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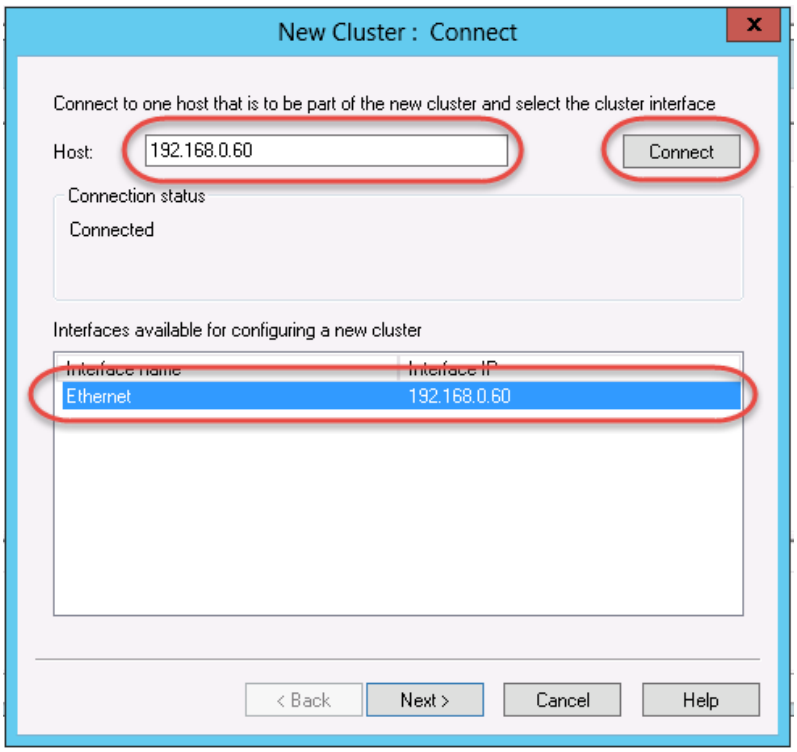
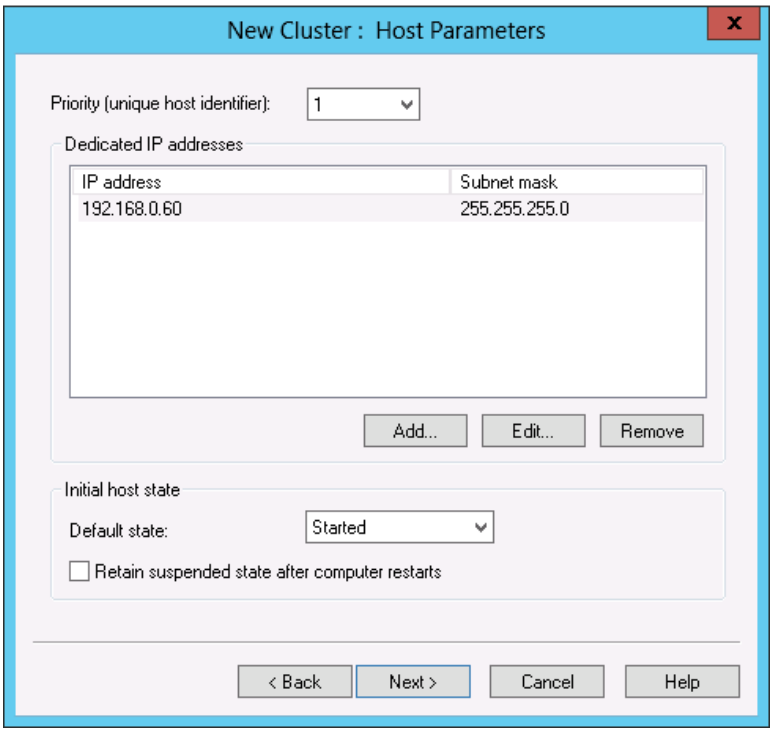


5. Leave the **default settings** and click on **Next**.



6. **Enter** the cluster **public IP** address and click on **Next**.

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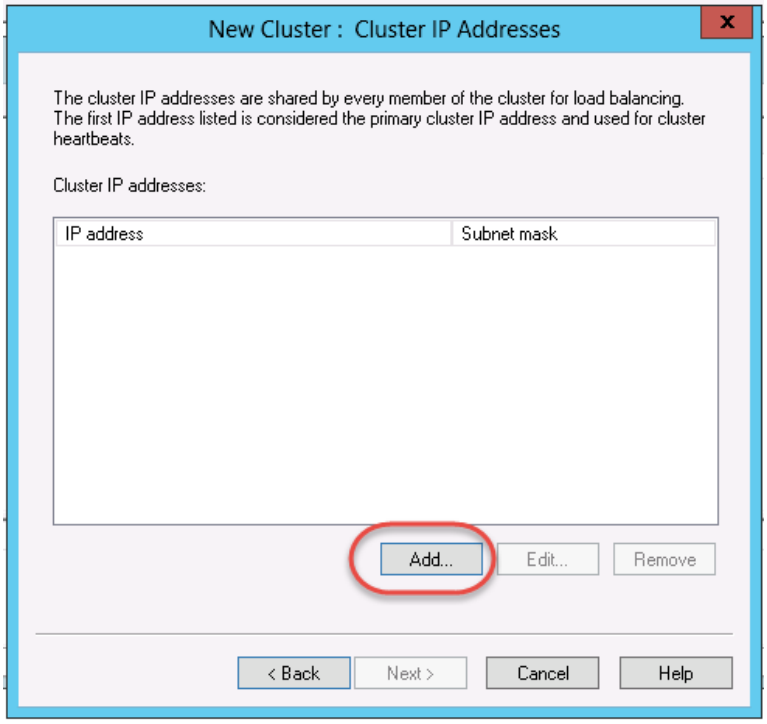

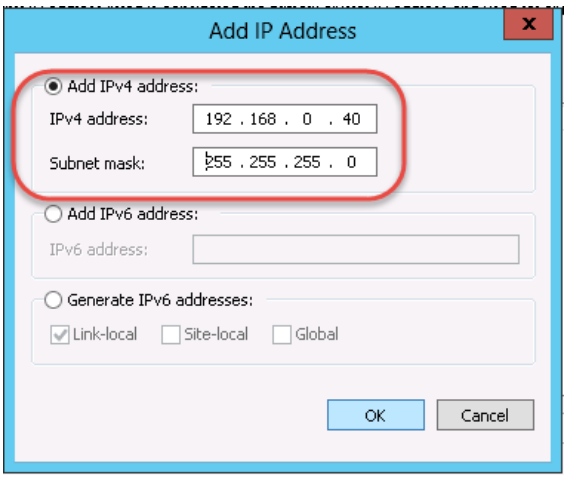

7. Enter **full Internet name** and select the operation mode based on your network.

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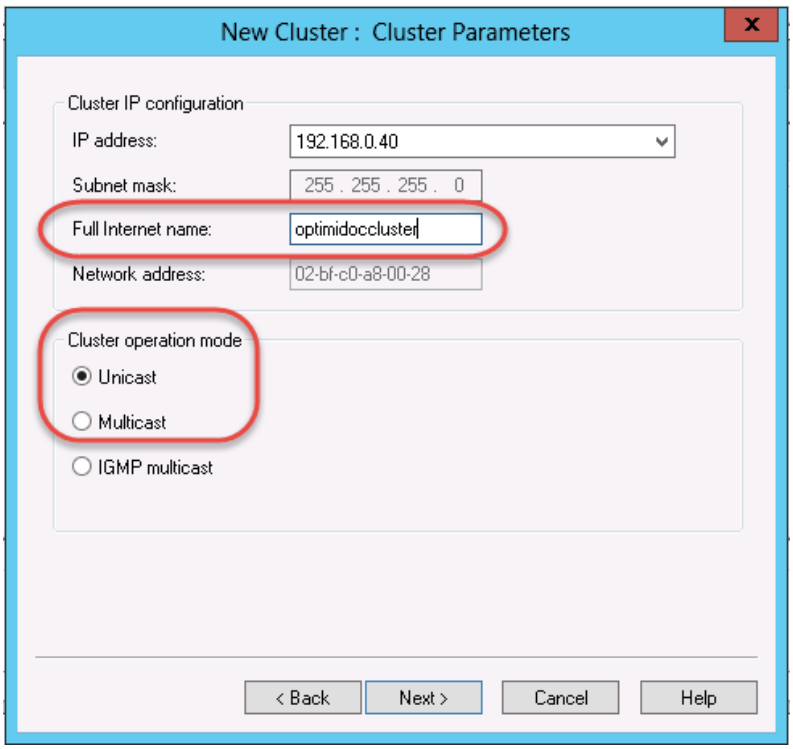
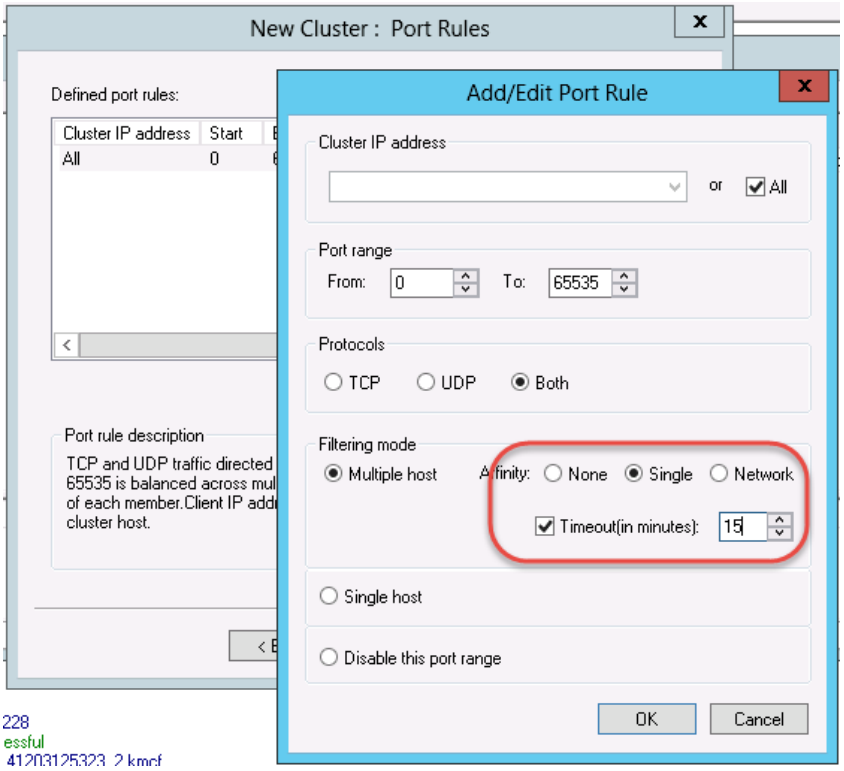


8. Edit the port rules:

- **Affinity:** Single

- **Timeout**: 15 minutes

and Click on **Finish**.



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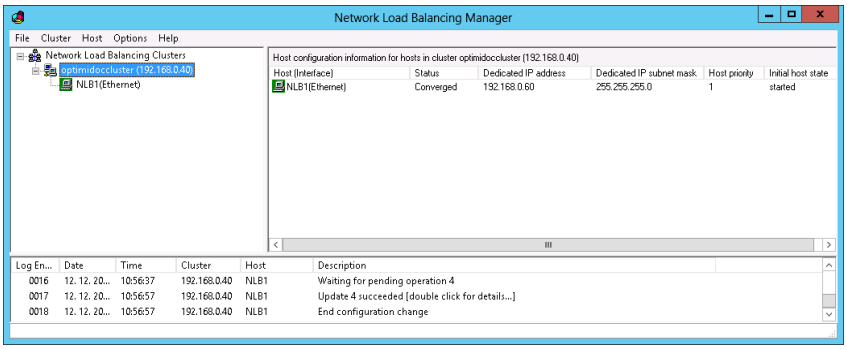
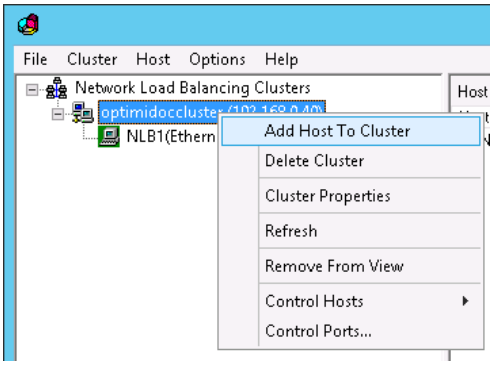
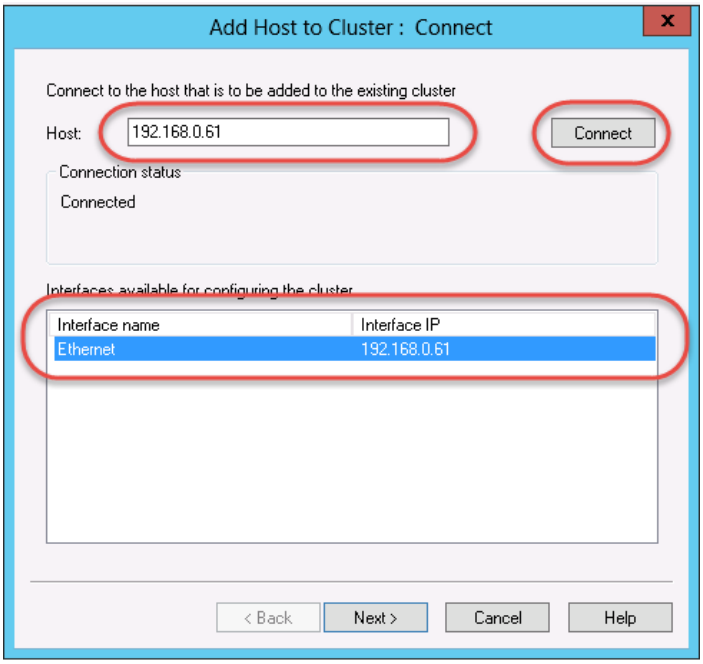


9. **Add** other central servers to cluster. Each server needs to have NLB feature installed.





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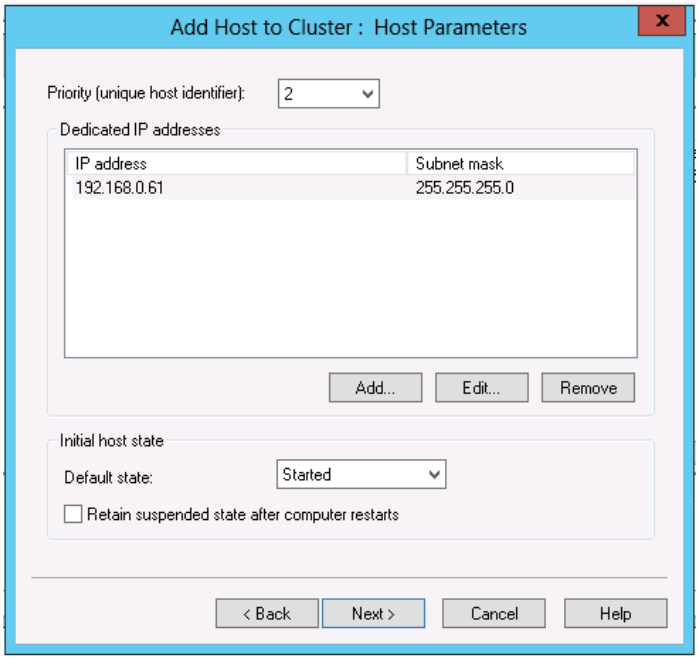

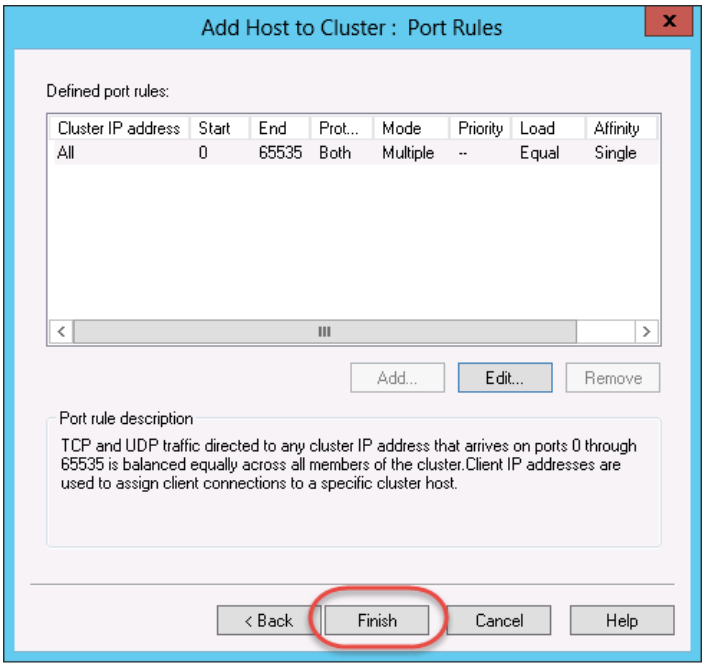

Installation of OptimiDoc Central Server

1. Install OptimiDoc based on Administrator Quick Start Guide with connection to external database server.

2. Login to OptimiDoc Administration and open Settings and enter the Public IP address.

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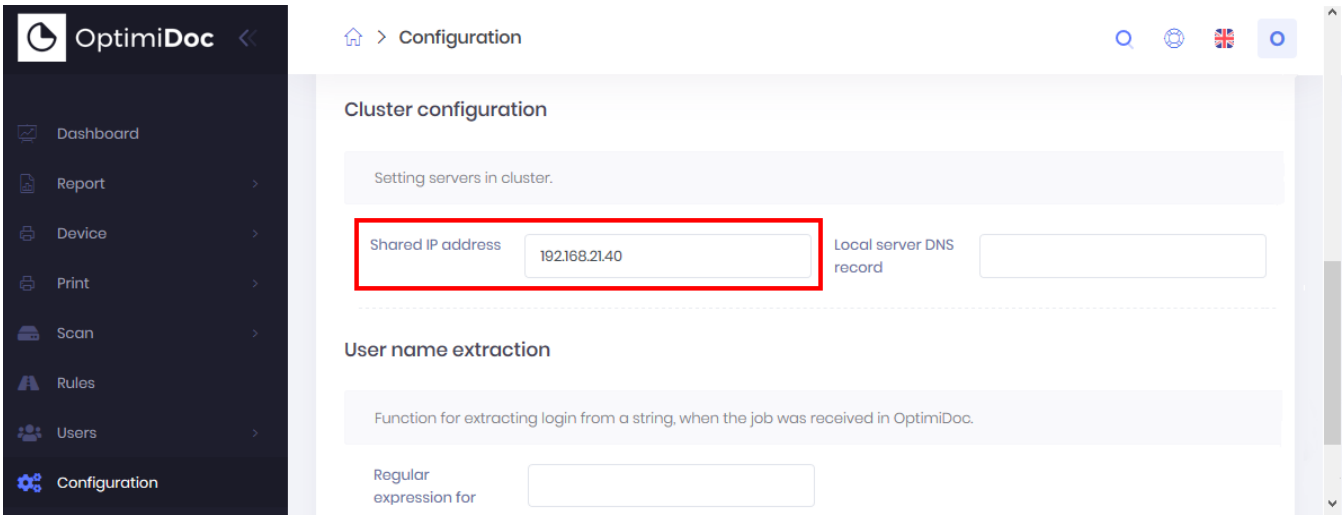

3. Restart OptimiDoc website.
4. Restart OptimiDoc Service
5. **Repeat steps on all servers**.

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3.2 OptimiDoc Print Node Requirements

Software requirements

Operating system

- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019
- Windows 8 64bit Professional or Enterprise
- Windows 8.1 64bit Professional or Enterprise
- Windows 10 Professional or Enterprise

Other software

- Microsoft .NET Framework 4.6

Hardware requirements

Minimal configuration

- CPU: 2.5 GHz
- RAM: 2 GB
- Free disk space: 2 GB
- Network connection: LAN 100Mbps
- Non server operating system

Open ports requirements

OPN ports

- 14260 (HTTPS)
- 515 (LPR)

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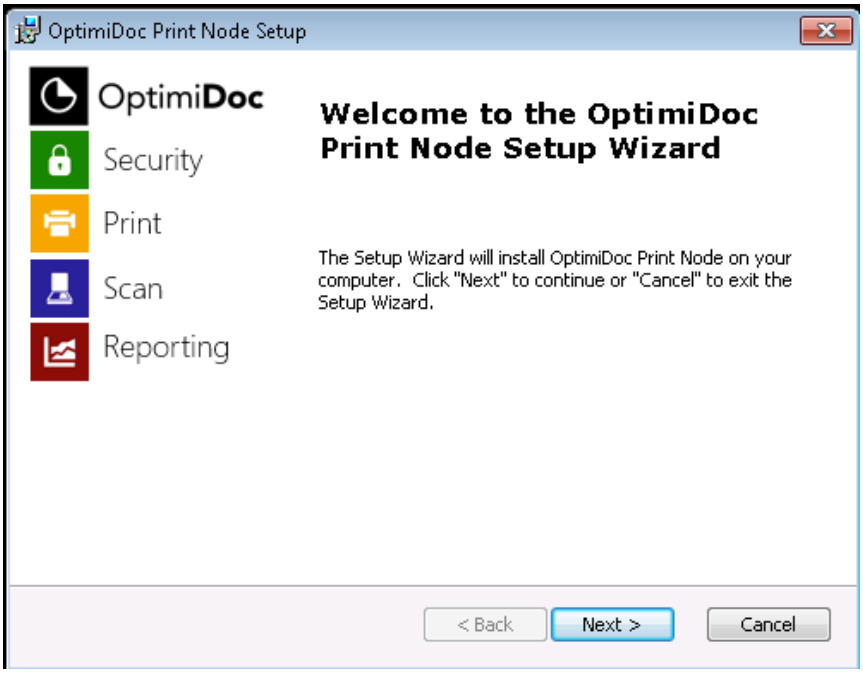
3.3 OptimiDoc Print Node Installation

To install the OptimiDoc Print Node start the installation package.

1. After the installation wizard starts click on the Next button.



2. In the configuration section enter the following information:

- OptimiDoc Server URL - URL address of the OptimiDoc server to which the Print Node will connect. In case of OptimiDoc Server Cluster, enter the public IP address.
- OptimiDoc Print Node IP address - IP address of workstation/server here the Print Node is installed. For automatic detection leave the text box blank.

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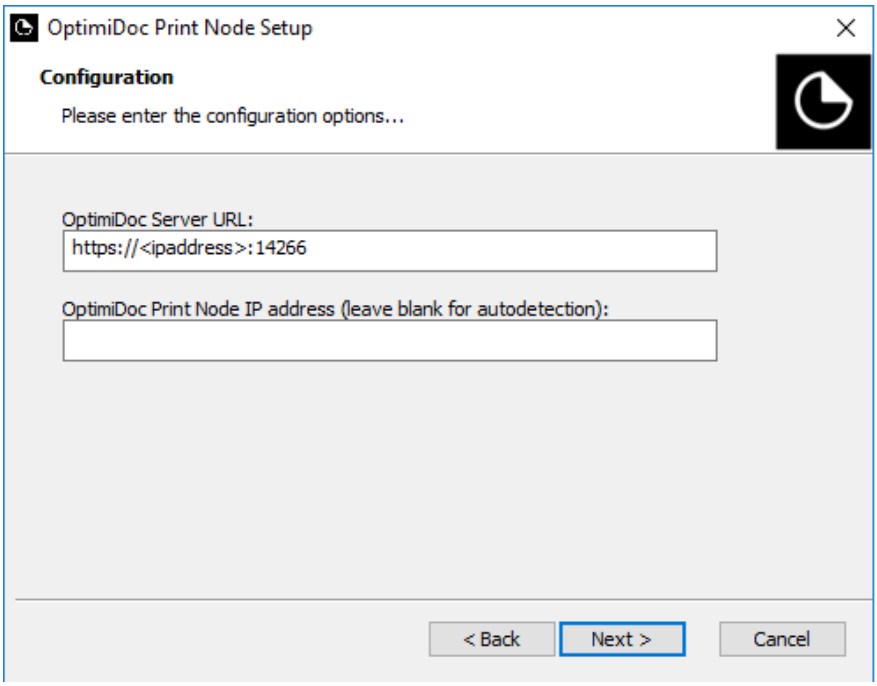
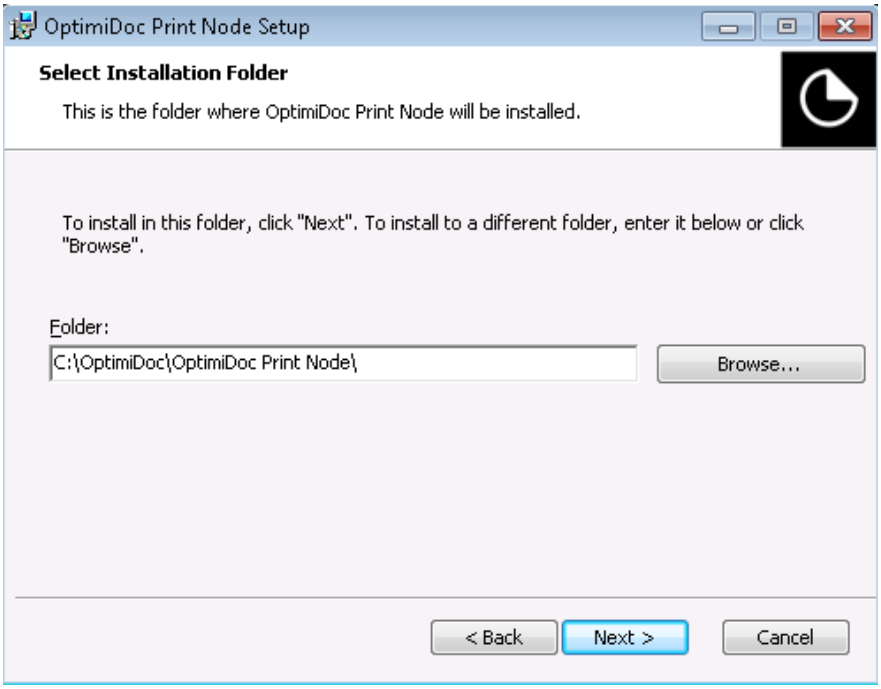


3. Folder definition - select the folder where the OptimiDoc Print Node will be installed.



4. Confirm the installation.

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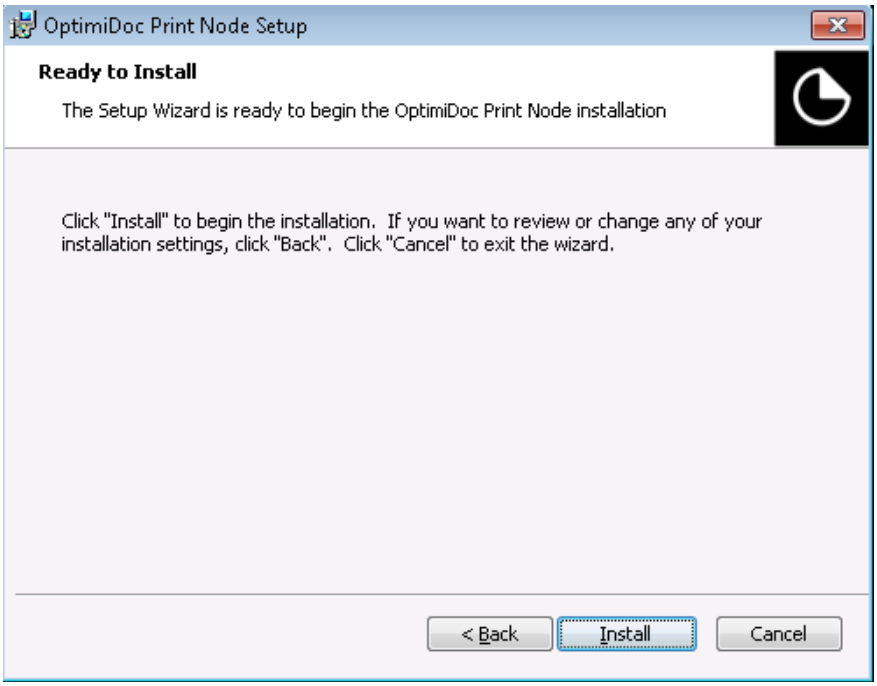
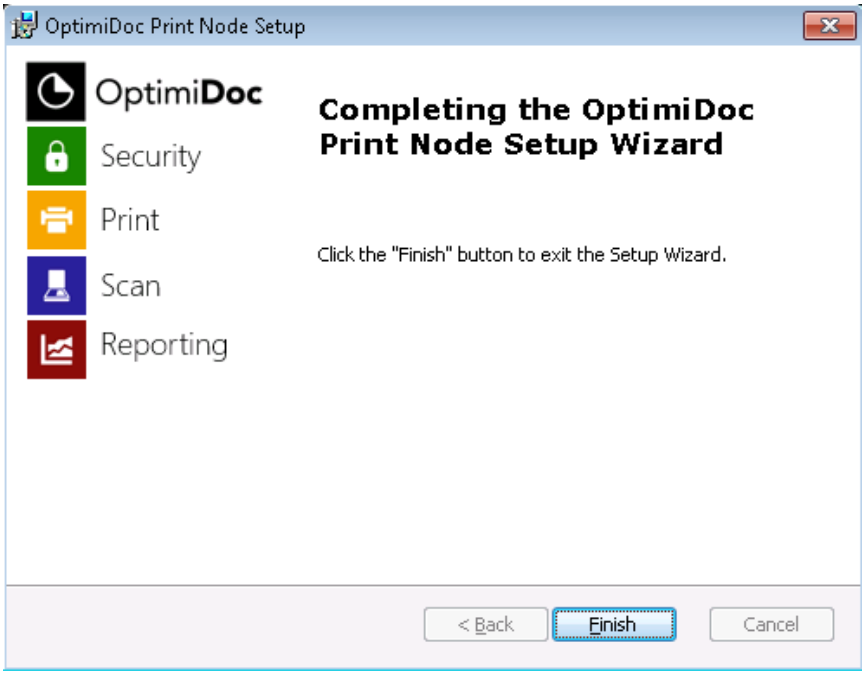


5. Finish the installation.



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4 Local device monitoring

Device monitoring is an additional function in the OptimiDoc Server. It checks the status of devices and, based on the checks, sends notifications.

The OptimiDoc Server periodically checks the device states for MFP and Network devices. SNMP is used for this functionality.

Through SNMP MIBs the OptimiDoc Server is capable to getting the following information:
- Toner levels
- Consumables
- Level of paper

OptimiDoc Print Monitor is also responsible for **USB printers** print jobs **accounting**.

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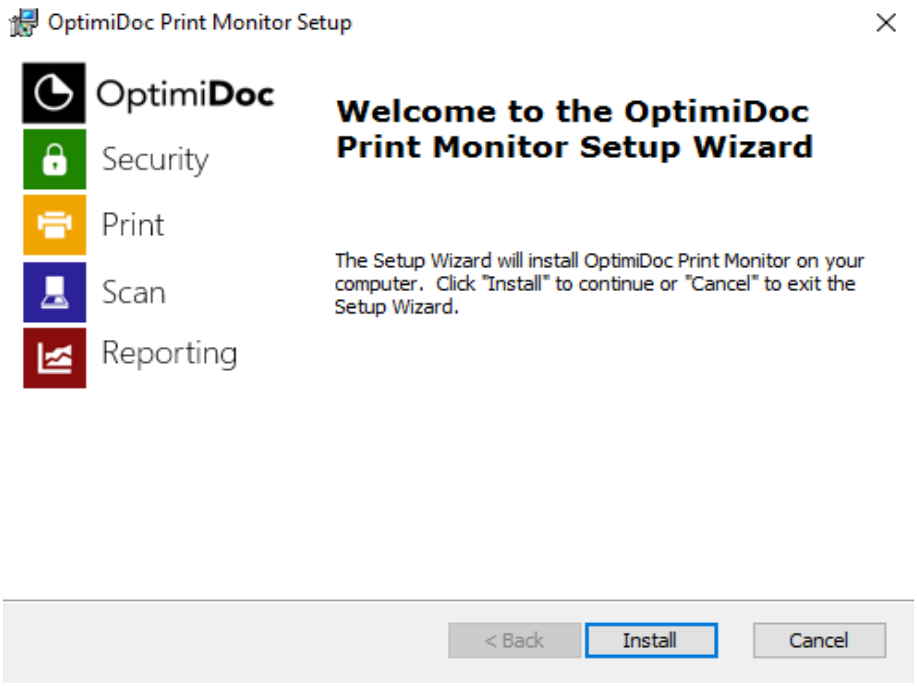
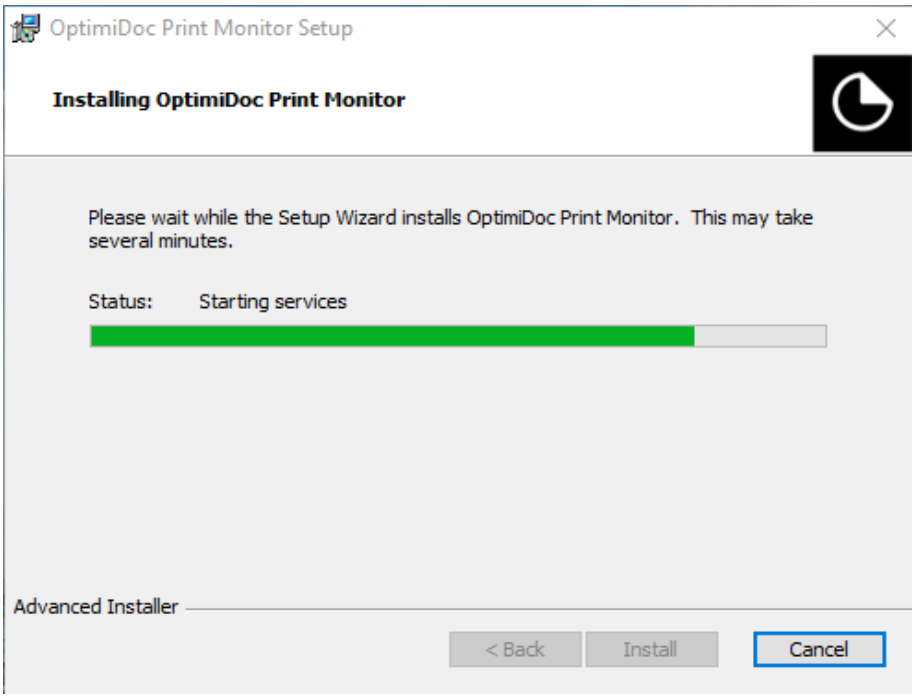
4.1 OptimiDoc Print Monitor Installation

To install the OptimiDoc Print Monitor start installation package.

1. After the installation wizard starts click on the Install button.



2. Wait for the installation to finish.



3. Click on the Finish button to complete the installation.

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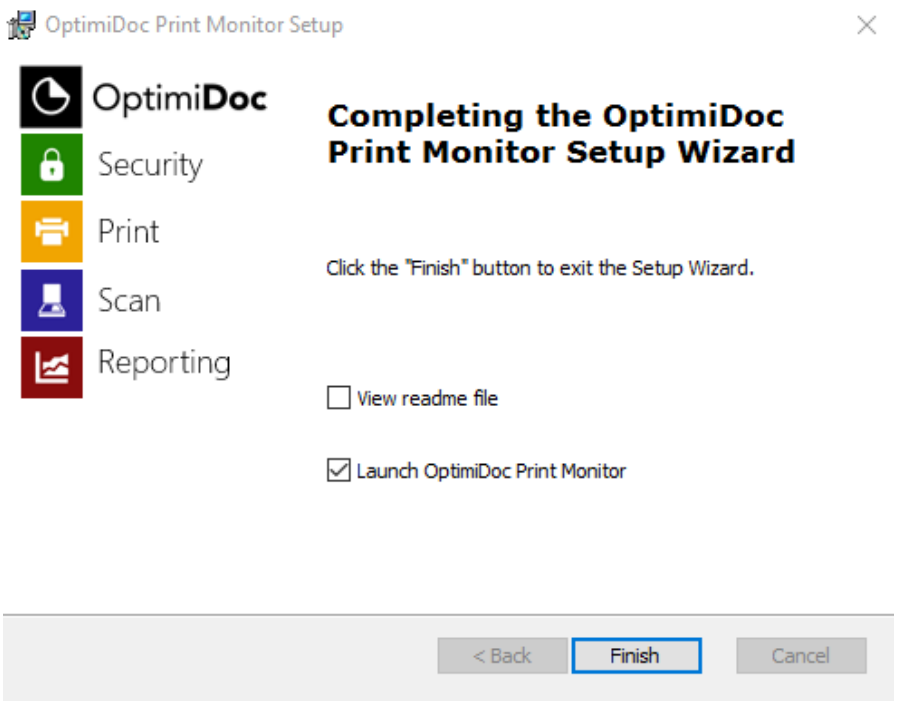

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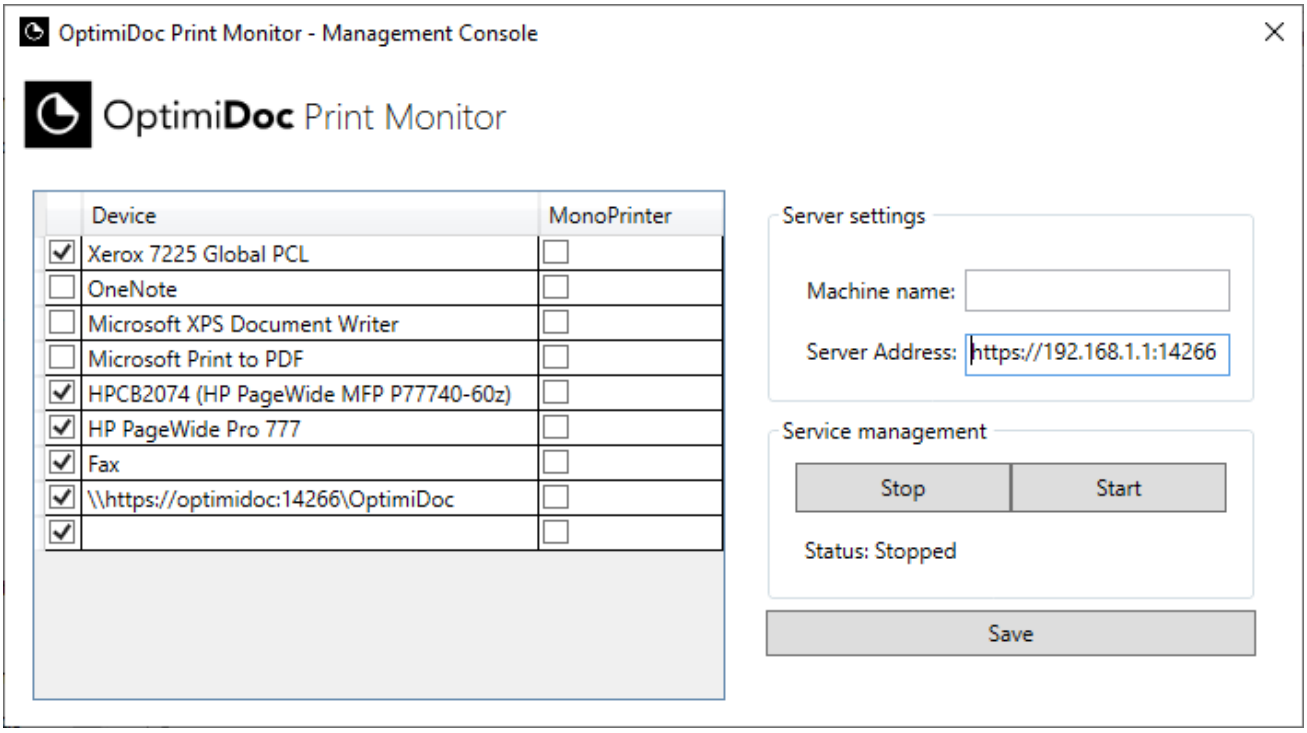
4.2 OptimiDoc Print Monitor Configuration

When the program starts, on the screen is the list of all printers which can be monitored.

Firstly, fill out the **Server Address** in format **https://IP:port**. Then tick all printers you'd like to monitor using the application and **click Save**.

Finally, click on the **Start button**. From this point onwards accounting information about jobs printed on selected printers will be sent to the OptimiDoc server.



> **Note** If you don't see accounting information on the OD server. Check whether the server address has the **correct format https://ip:port or if the IP address is correctly written**.

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5 OptimiDoc web interface

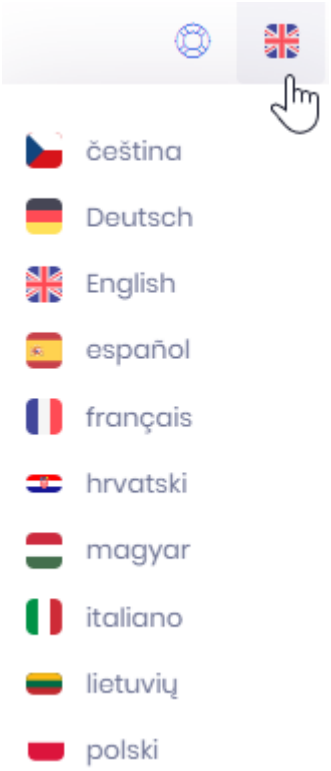
This section will guide you through the main areas of the web application and cover some common management tasks.

Localization

The OptimiDoc web interface is localized in the following languages:

- Czech
- German
- English
- Spanish
- French
- Croatian
- Hungarian
- Italian
- Lithuanian
- Latvian
- Polish

To change the OptimiDoc localization, click on the flag icon in the top right corner and select the desired language from the menu.



Help

The OptimiDoc web interface contains the complete help documentation accessible via the help icon on top of every page.

OptimiDoc access levels

OptimiDoc is completely managed via the OptimiDoc web interface. The interface provides two access levels:

Administrator access

Administrator access provides access to system management and administration. To login as an administrator use the following login information:

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- Username: admin
- Password: admin

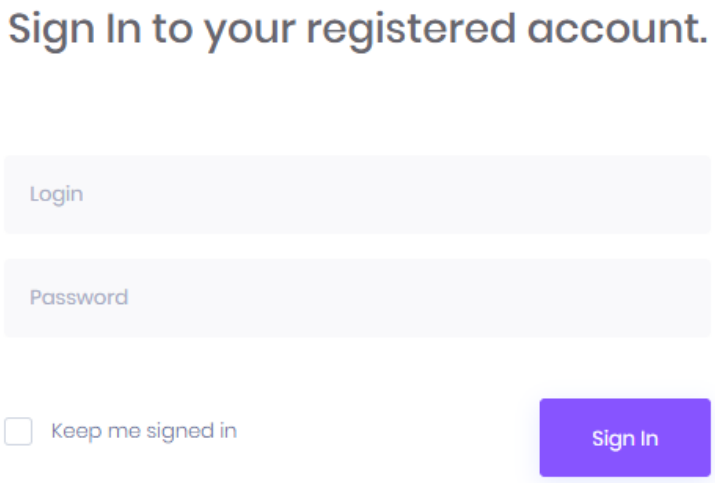
User access

Every OptimiDoc user has granted access to a set of basic pages providing the access to:

- User dashboard
- Job list
- Standard reports

Authentication

Authentication dialog appears when accessing the OptimiDoc web interface. To login enter your username (Login) and password.



Navigation

Application areas are grouped in tabs which create the logical parts of system.

The main menu on the left side contains the following items:

- **Dashboard** - general overview of user and system information.
- **Report** - section for monitoring and generation of usage and cost reports.
- **Devices** - device management to add, remove or modify a device.
- **Print** - configuration of print connectors.
- **Scan** - management of scanning workflows, destinations and parameters.
- **Rules -** definition of access and print rules.
- **Users** - for managing users, department and active directory connection.
- **Configuration** - OptimiDoc settings.
- **Diagnostic** - tools for system maintenance and access to logs.

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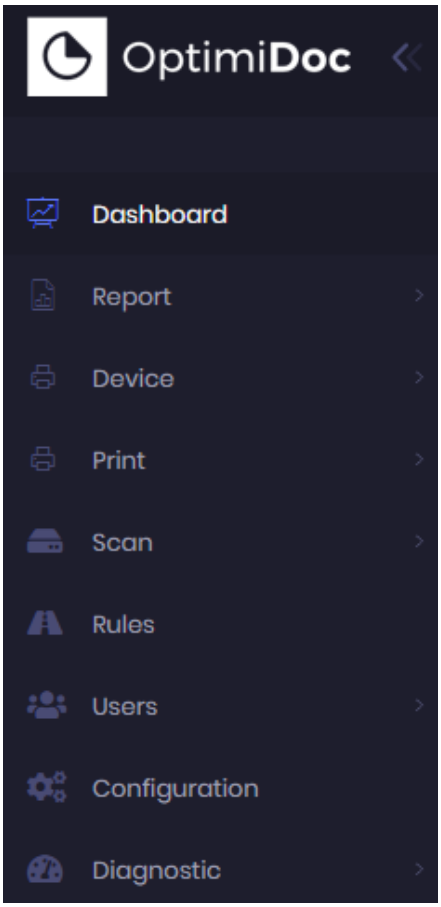

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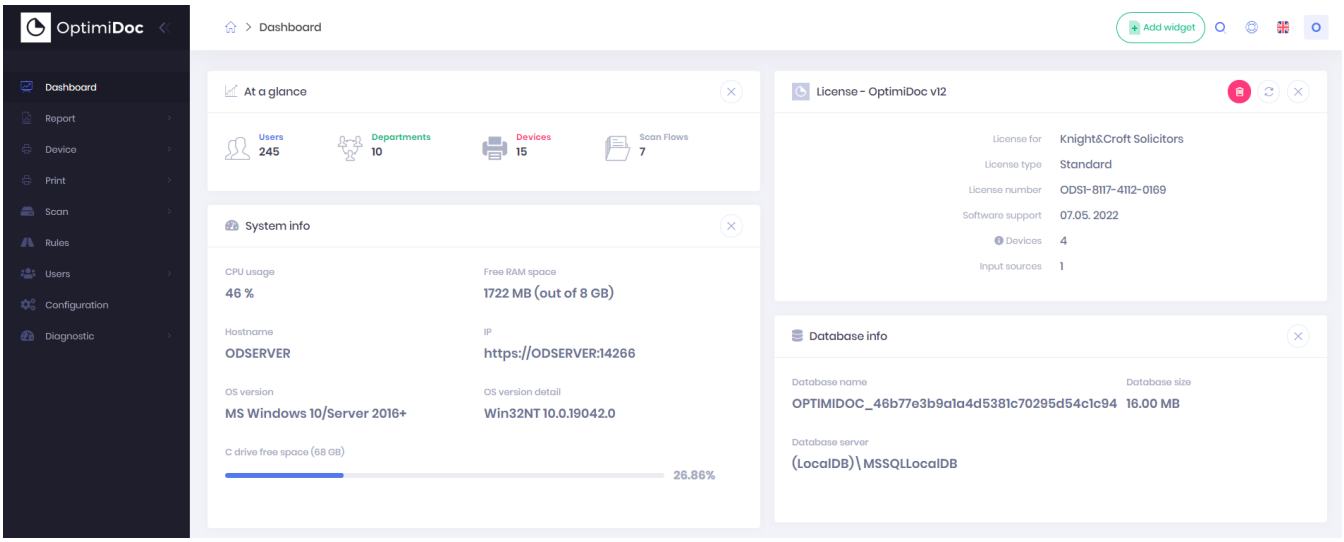
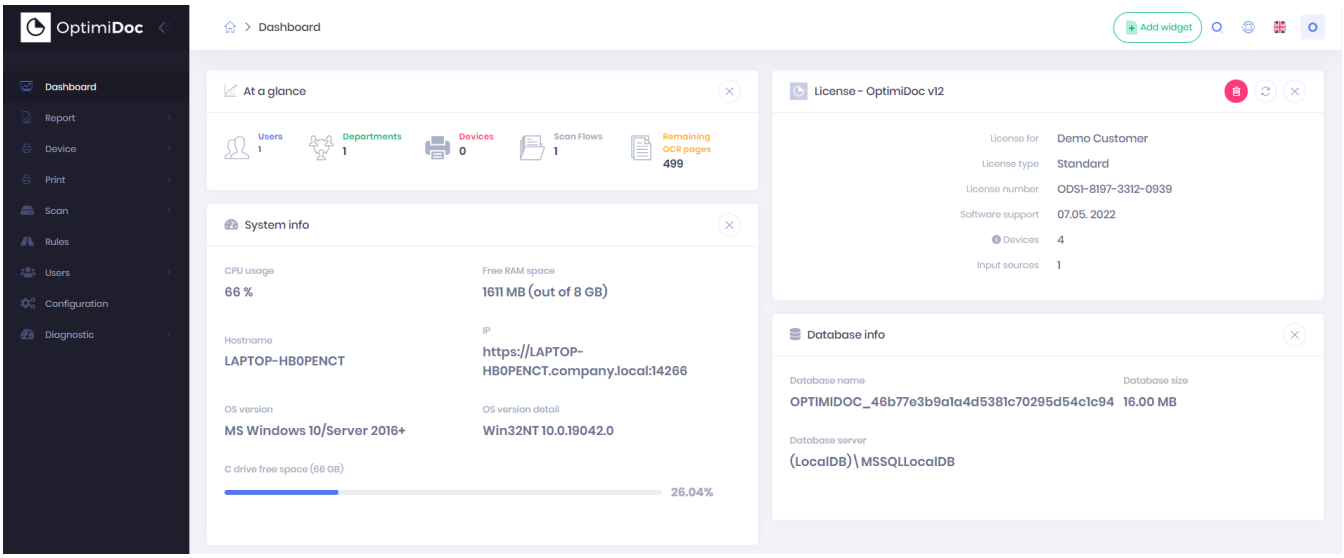
5.1 Dashboard

After successful login the **Dashboard** is displayed. It shows the basic overview of the OptimiDoc system and configuration. The content of the dashboard is collected from multiple widgets.



Dashboard view with ABBYY license activated - the difference is that remaining OCR pages are shown in the "At a glance" widget



The license widget show information about the license, its type, number, software support, how many devices are included and how many input sources you can use.

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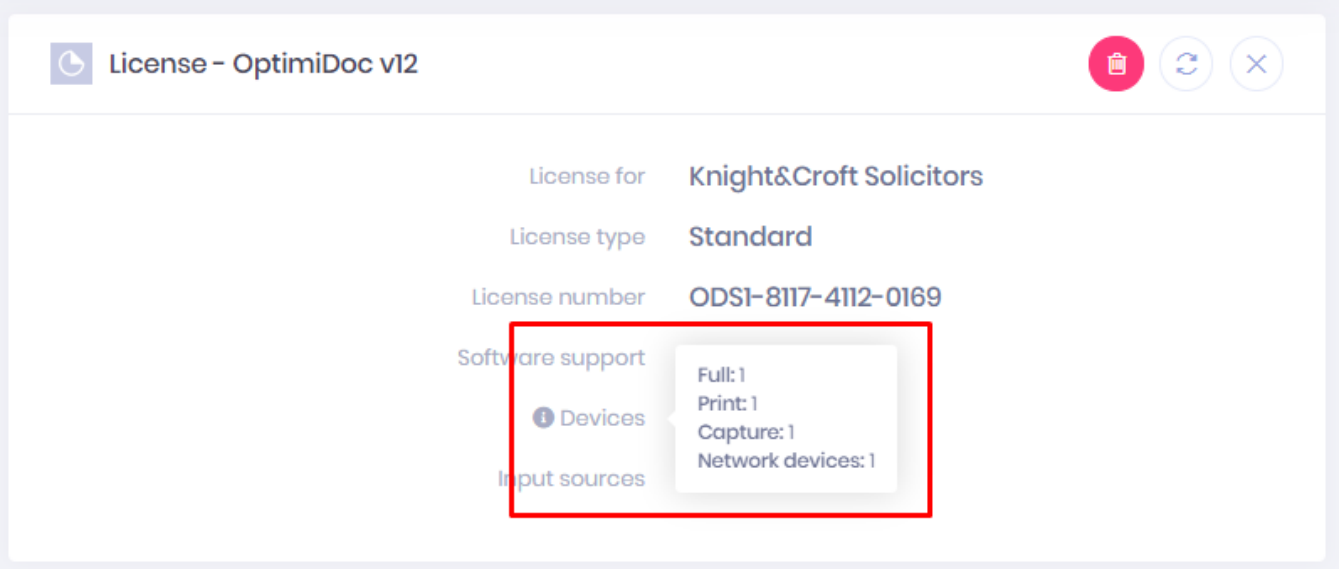
By hovering the "i" icon next to the "Devices" you will see detailed information on how many of each device types you have available in the license.



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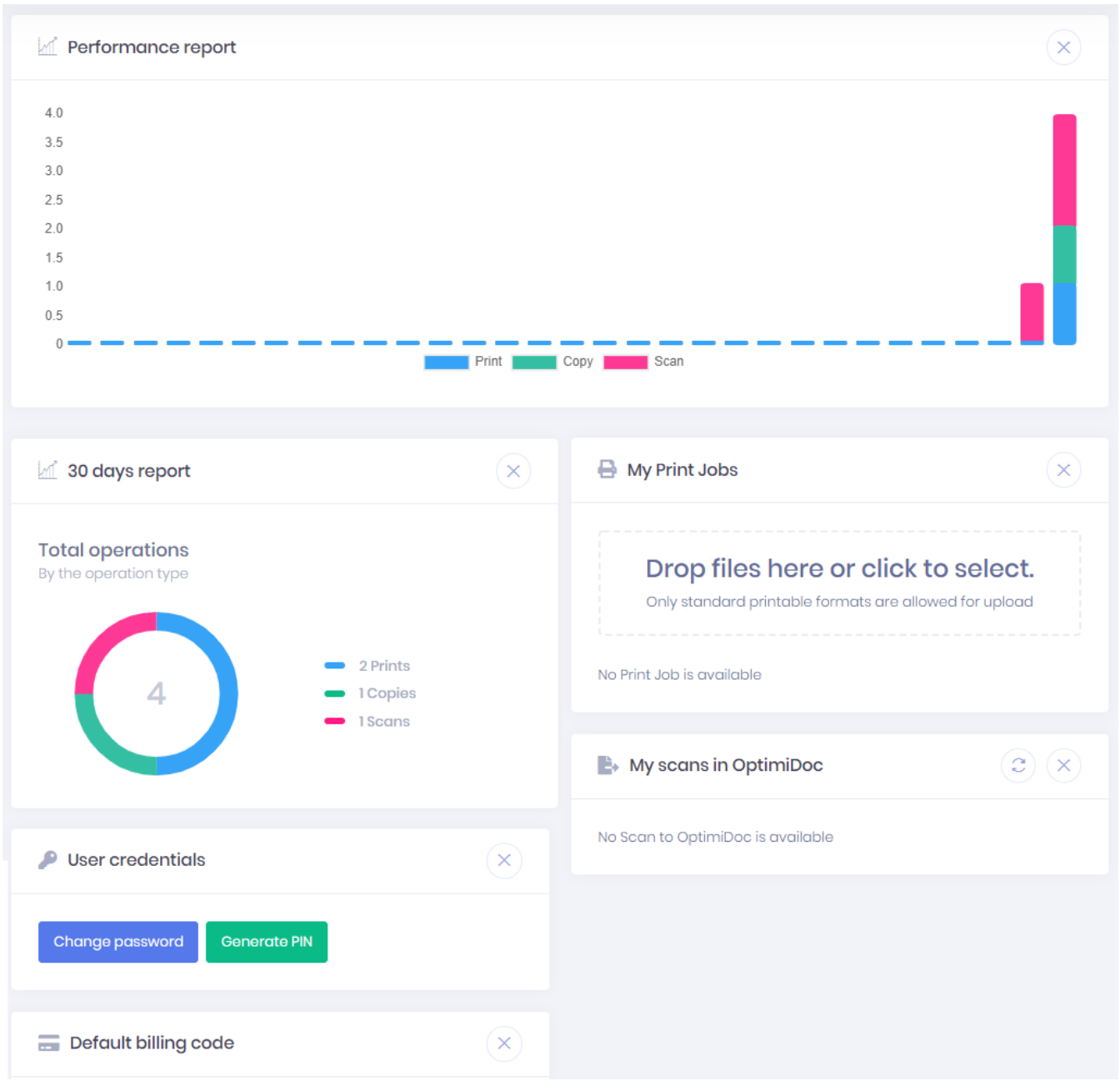

Widgets

At a glance	General overview of OptimiDoc configuration.
License	OptimiDoc **license information**. If you see a message "Your OptimiDoc is not activated. Please register your copy..." instead of your obtained license, use the button Activate to enter your license code.
System info	System information regarding CPU usage, free RAM, OS version and free disk space.

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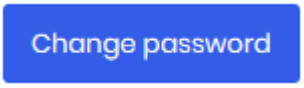
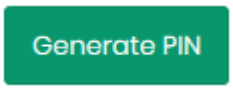
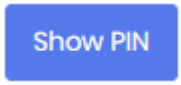
Database info	Shows the database name, its size and the database server name.
Performance report	Provides statistical data in the stacked column chart format, reporting all printed, copied and scanned documents for all users on all devices
30 days report	Shows a pie chart of all operations made within 30 days period.
My print jobs	List of user **unprinted jobs**. To delete the job, click on the button.
My scans in OptimiDoc	Contains a list of scanned documents which were stored in OptimiDoc. To **download the scanned document,** click on the button or you can **delete the scanned document** by clicking on the button.
User credentials	Allows user to - change his/her password with the  button. - generate PIN with the  button (if no PIN has been generated yet). - show the current PIN value with the  button (if the PIN has been previously set).
Default billing code	For setting a default billing code.
Submit document	special functionality, which will appear on the dashboard after creating scan workflow with Input Option -> Web. It allows the user to upload document for scanning process from the dashboard.

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5.2 Report

The Report section provides detailed information about user activities in the print environment and definition of price lists which are used for cost calculations.

Report contains six sections:

Job list	Overview of **all jobs** realized on **MFPs** or **printers** connected to OptimiDoc.
Activity log	Overview of **all jobs** from specific devices.
Standard reports	One click **reports** for a basic overview with filter options.
Automatic report	**Automatically generated report** for last month period.
Price lists	Definition of **price lists**.
Billing codes	Overview of **billing codes**.

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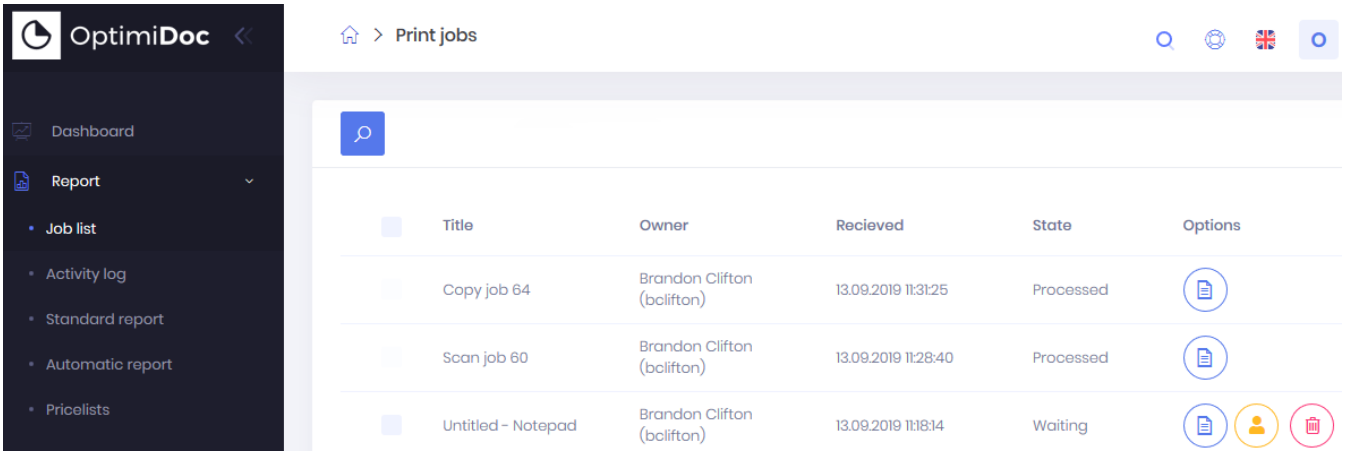
5.2.1 Job list

Job list provides information about the current activities in the system. The Administrator can view and manage print, copy and scan jobs, and can immediately see the status of the job if it was printed and how many times or watch the preview of all pages. Job list is also available for users who only see their jobs.

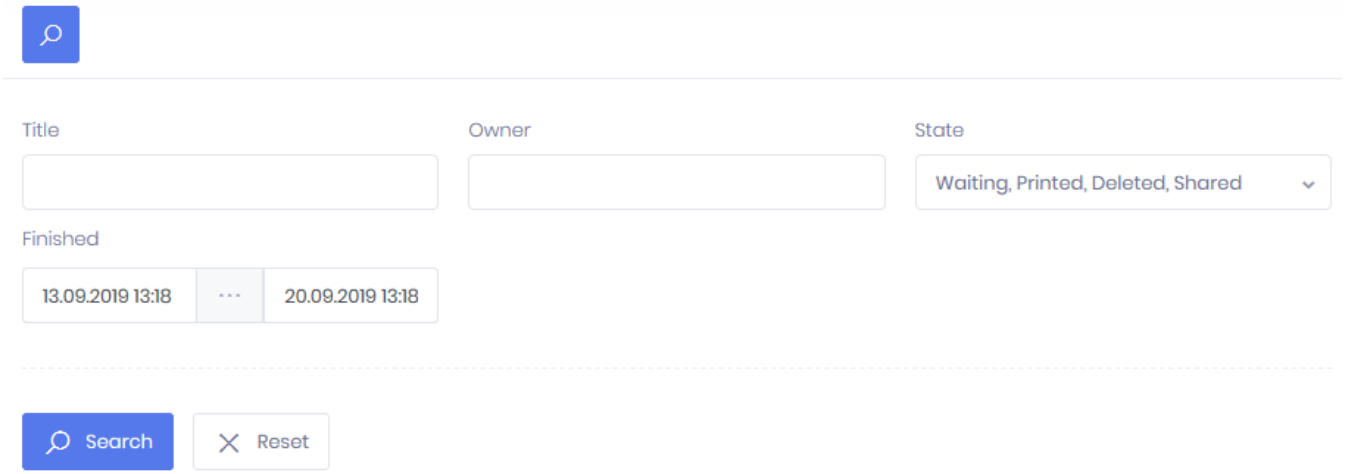


Filtering options

Job list can be filtered by the following options to list the specific operations:

- **Title** - name of job
- **Owner** - owner of job
- **Received** - date of job receiving
- **State** - status of job
- **Options** - show details, assign to user, delete job

To **use** a filter, click on the button and enter filtering string



Job detail

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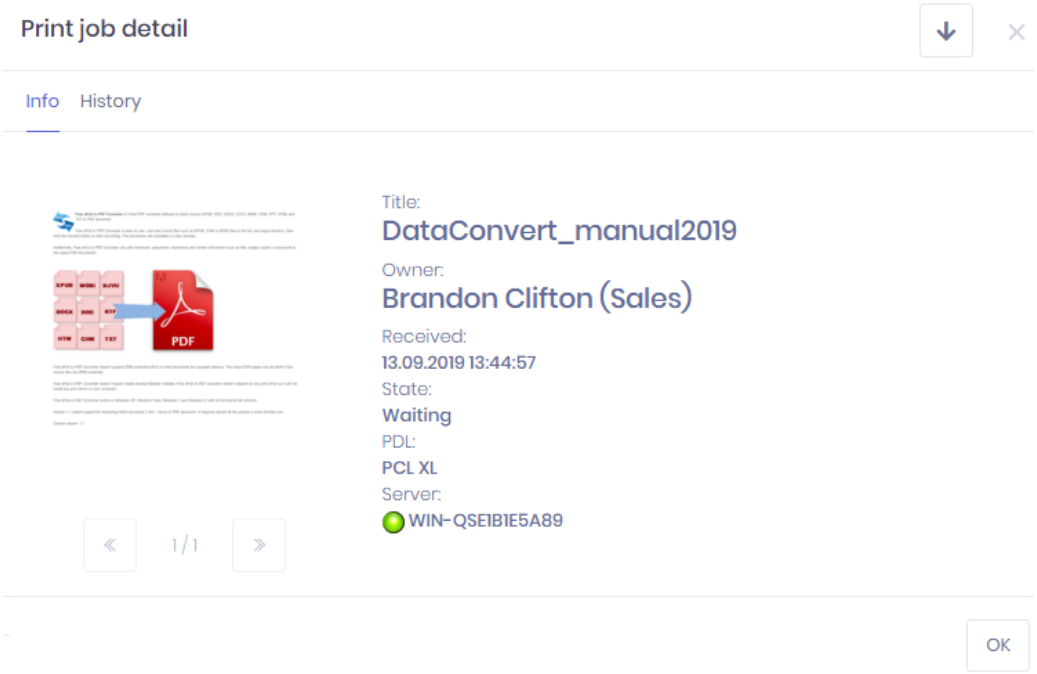
To get **more information** about each job, the administrator can click on the button. Job detail contains the following details:

Job Info

- **Title** - name of job
- **Owner** - owner of job
- **Received** - date of job receiving
- **State** - status of job
- **PDL** - print job language
- **Number of pages**
- **Server** - job location
- **Job preview**



Job History

- List of job operations including the time, status, accounting information and price.

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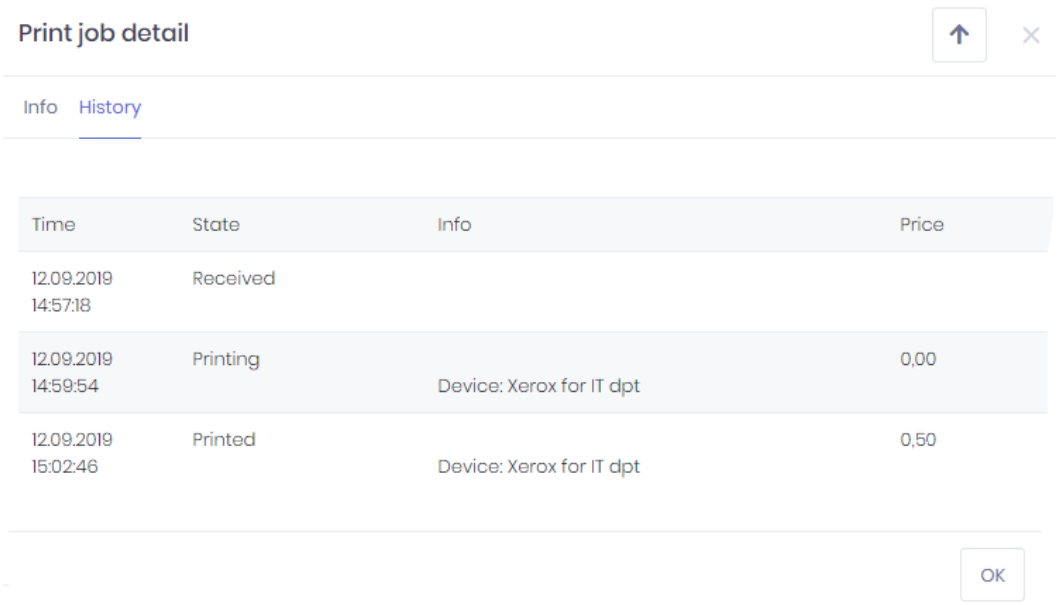

Accounting information is being shown in the following format: **sheets_count x sheet size (black & white, reduced color, full color)**. Here are some examples of what you can see in the job details:
1x A4 (1, 0, 0) - 1x A4 in Black & White
1x A4 (0, 0, 2) - 1x A4 duplex two pages in color
2x A4 (2, 0, 0) - 2x A4 simplex in B&W

Job assignment

To **assign** a job to another user, click on the button and enter a username.

Job delete

To **delete** a job, click on the button.

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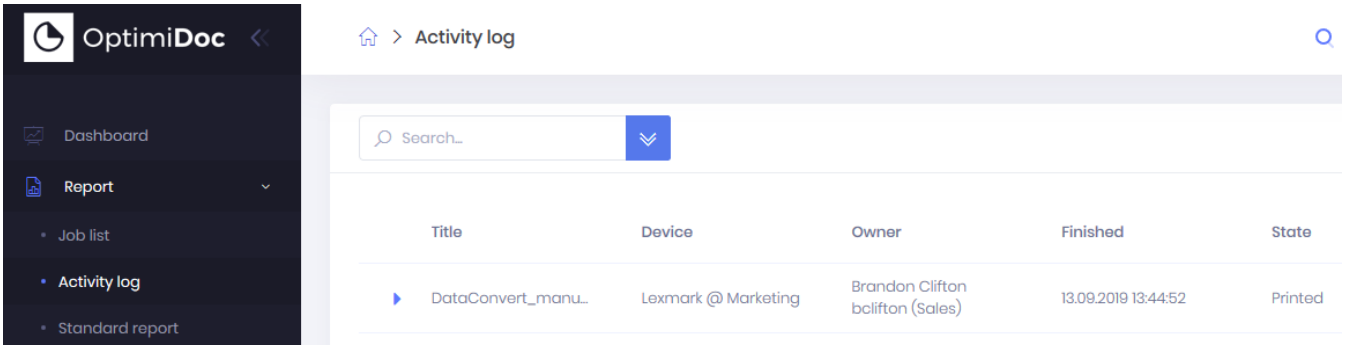
5.2.2 Activity log

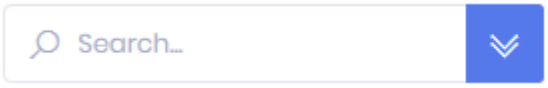
The Activity log provides information about the current activities in the system. The Administrator can view print, copy and scan jobs which were processed in specific devices. The Administrator can immediately see the status of the job and watch the preview of all pages. Activity log is also available for users who only see their jobs.



Filtering options

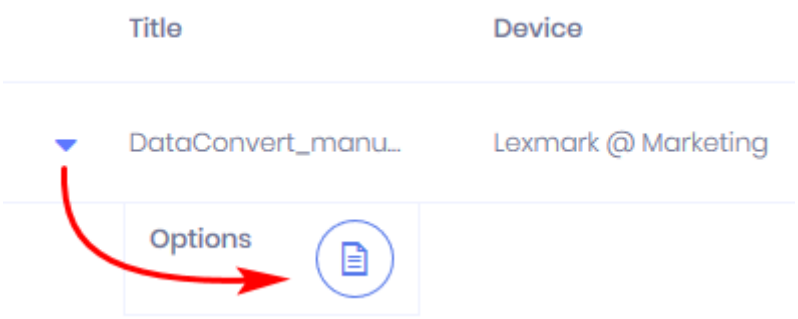
The Job list can be filtered by the following options to list the specific operations:

- **Title** - name of job
- **Device** - name of device
- **Owner** - owner of job
- **Finished** - date of job finalization
- **Department** – owner's department
- **State** - status of job

To **apply** the filter Click on button 

Job detail

To get **more information** about each job, the administrator/user can click on the button



Job detail contains following information:

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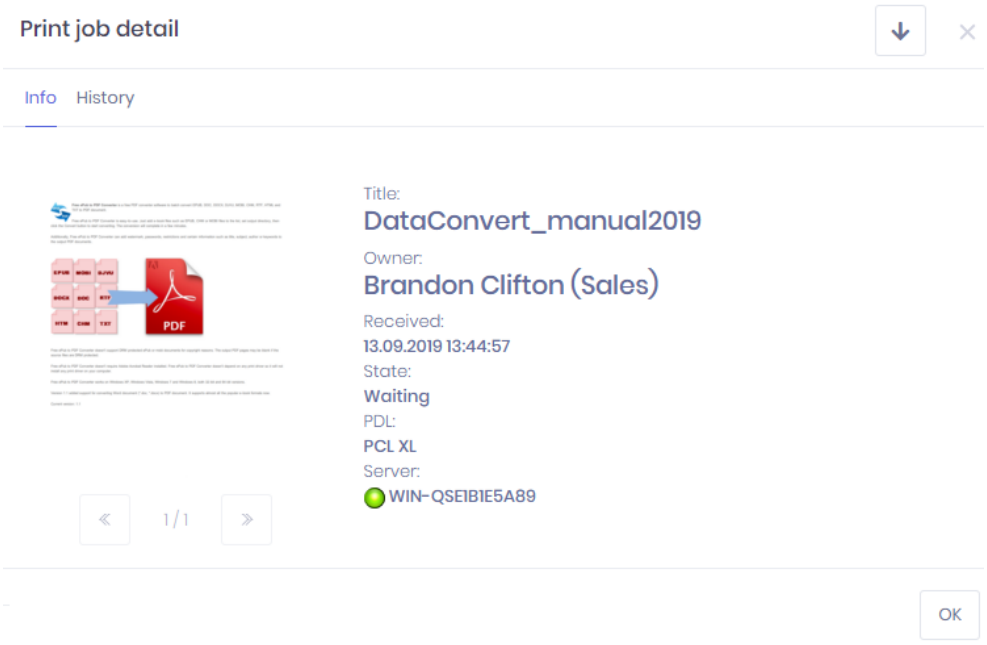
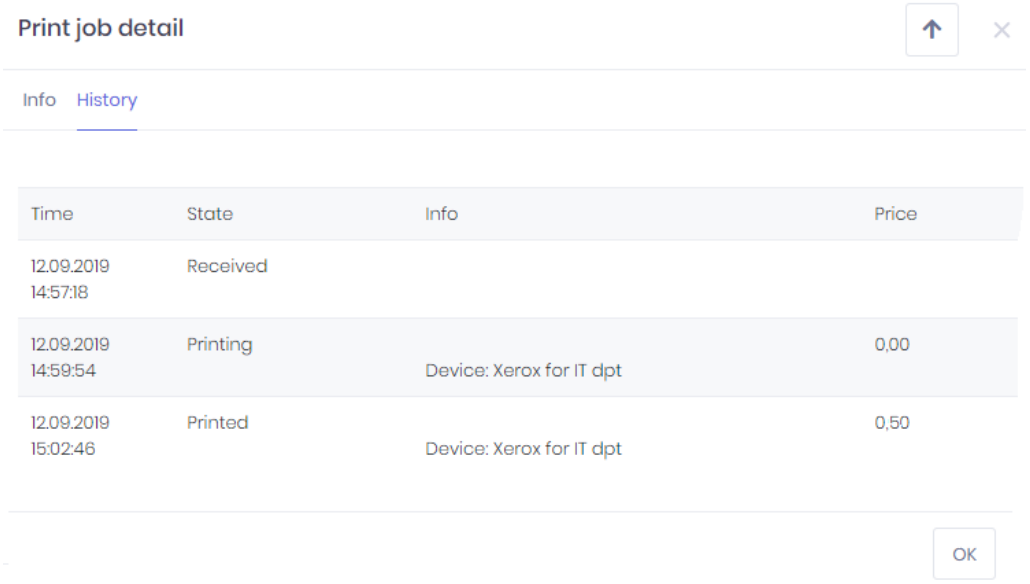
Job Info

- **Title** - name of job
- **Owner** - owner of job
- **Received** - date of job receiving
- **State** - Status of job
- **PDL** - Print job language
- **Number of pages**
- **Server** - Job location
- **Job preview**



Job History

- List of job operations including the time, status, accounting information and price.



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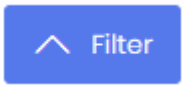
5.2.3 Standard reports

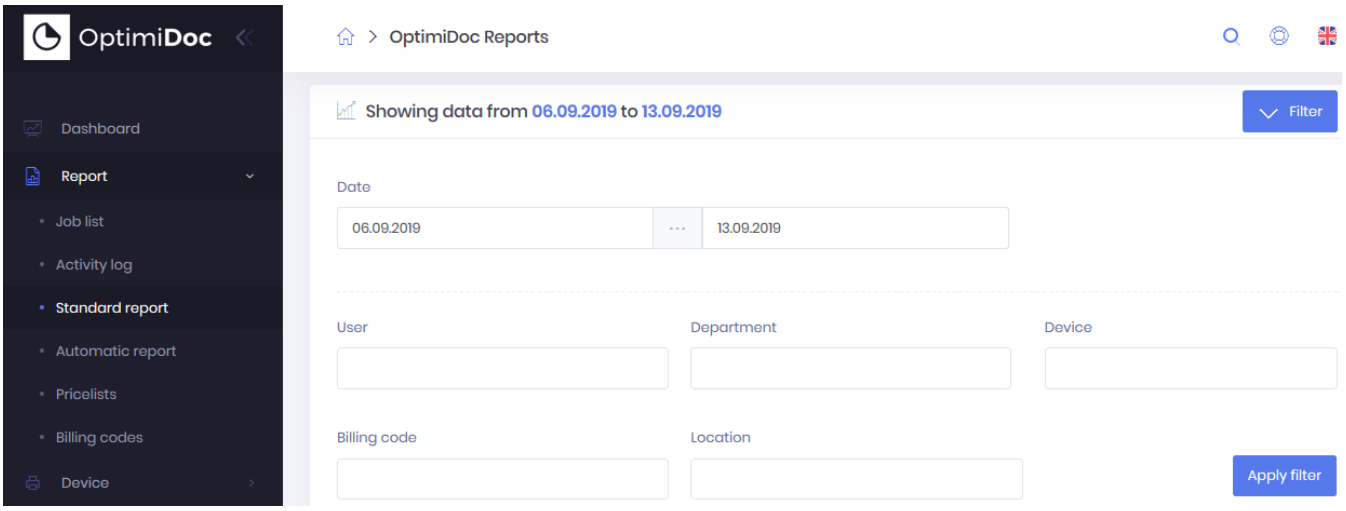
The Standard report provides a basic overview of print, copy and scan operations. The section is divided into six categories showed in the middle section of the page.

- **Overview**
- **Users & departments**
- **Devices & locations**
- **Projects**
- **Documents**
- **Data export**

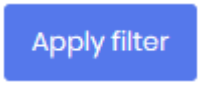
Filtering options

It is possible to filter certain types of operations. To use filtering, click on the button 

and enter matching criteria into the fields:



- **Date**
  - From - starting date for statistics
  - To - end date for statistics
- **User** - filter by selected user
- **Department** - filter by selected department
- **Device** - filter by selected device
- **Project** - filter by selected billing code
- **Location** - filter by selected location

To **apply** your filter, click on the button 

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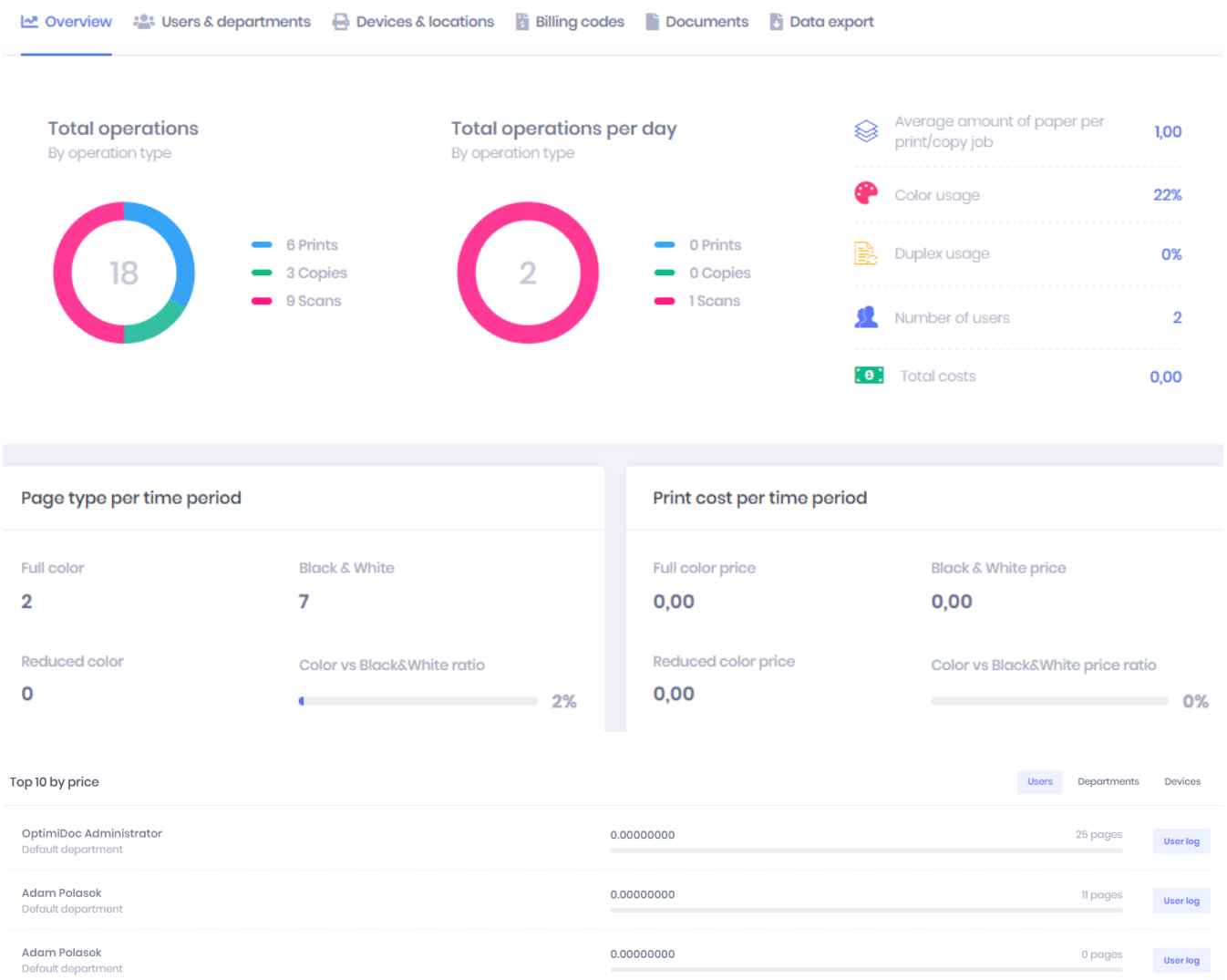
5.2.3.1 Overview

The Overview page gives a quick overview of the number of operations, divided by the operation type and displayed in graphs.



5.2.3.2 Users & departments

This section shows information about users and departments, i.e. the total number of users, who uses OptimiDoc, job details e.g. number of pages printed/scanned per user or statistics of print/scan jobs.

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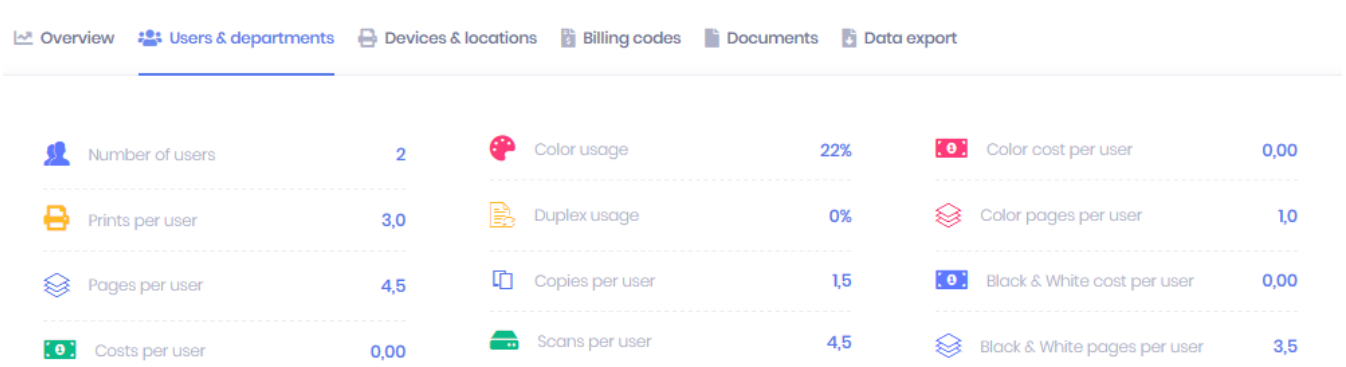
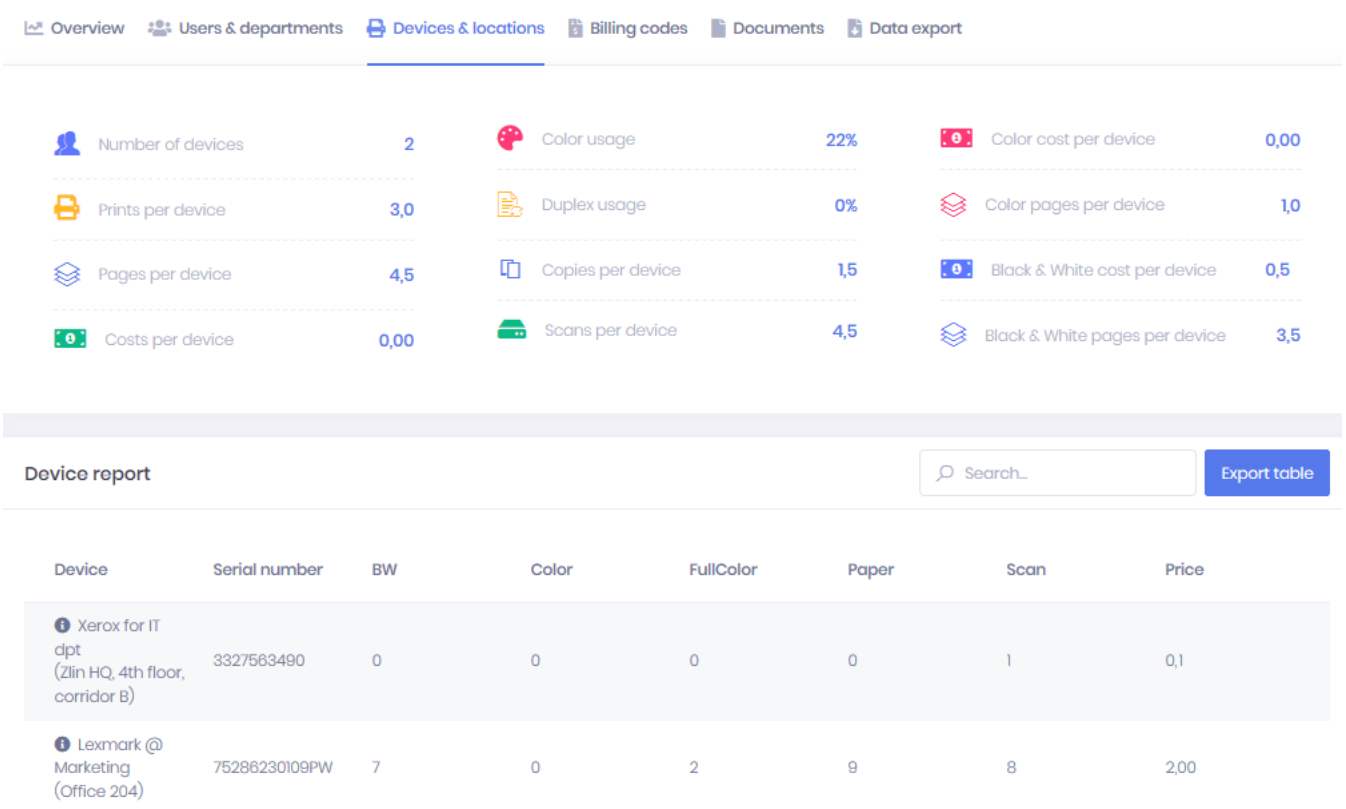


5.2.3.3 Devices & locations

This section gives you details about devices and their locations, i. e. the total number of devices being used, and general statistics for a single device.



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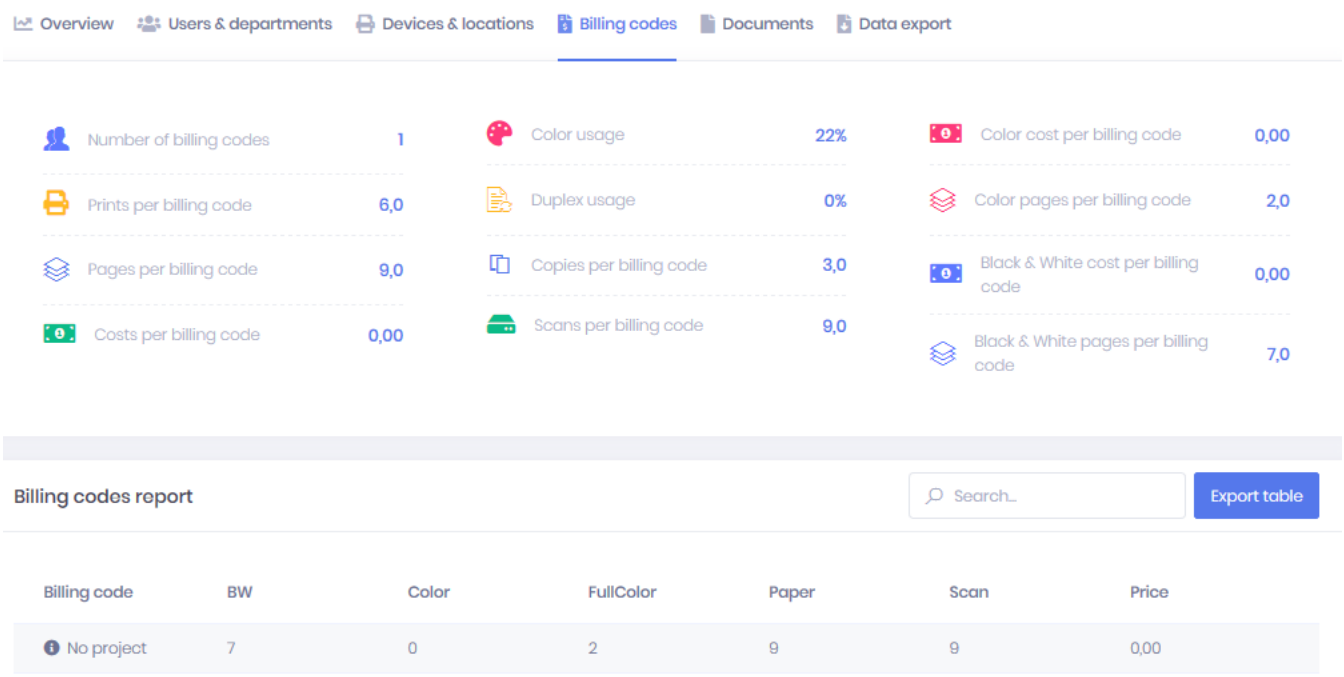
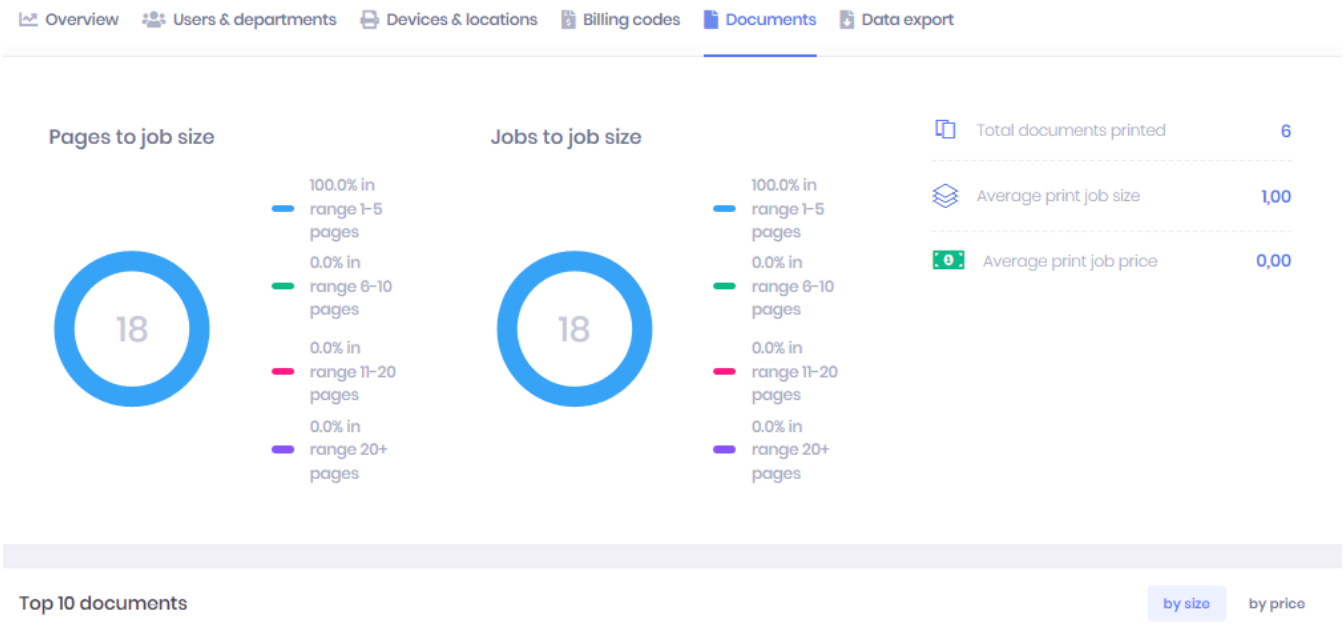
5.2.3.4 Billing codes

Billing codes shows information about billing codes used in OptimiDoc. The second table displays billing codes report, which collects information from each project used in OptimiDoc.



5.2.3.5 Documents

In this category the user can see the statistics related to jobs. In the second table the user can see the list of top 10 documents, which can be ordered by size or price.



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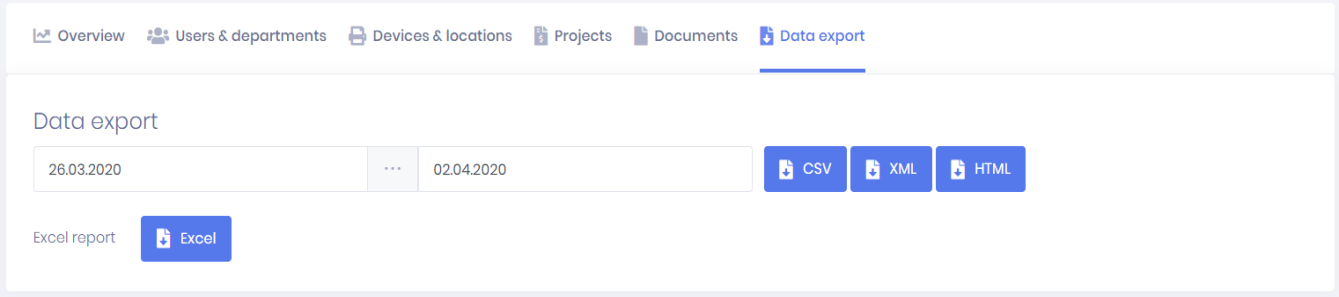
5.2.3.6 Data export

Data export serves for exporting all this data from specific date range into document file types CSV, XML, HTML or to download an Excel report.



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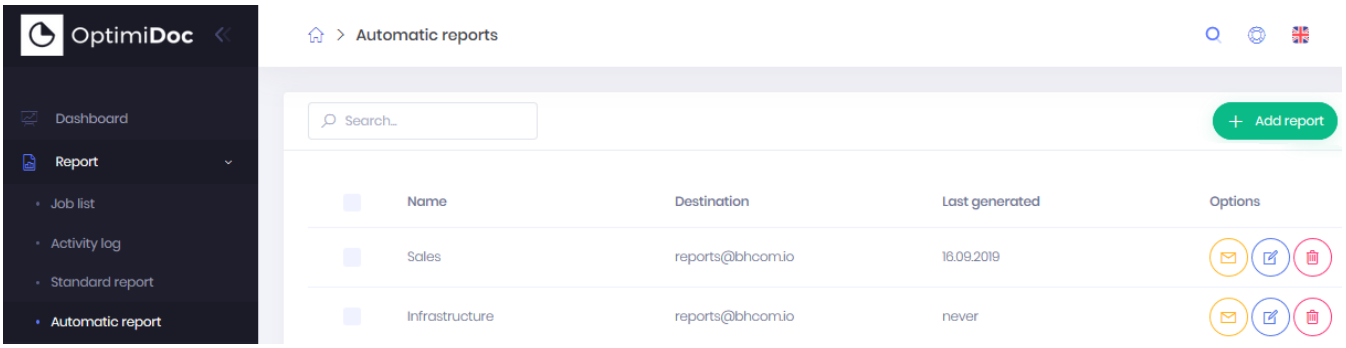
5.2.4 Automatic report

Automatic report creates an **Excel file** containing the complete overview of statistics for **the previous month**. Automatic report is generated at the start of period day (see Start of period in the table below).

Automatic reports

The list of automatic reports destination provides a basic overview of all defined reports. On this page you can add a new report, edit or delete existing reports or generate new.



Automatic report - Settings

Editing/Adding an automatic report:

- **Title** - report name
- **Start of period** - the day in month on which the automatic reports will start and end (for example if you use 5 as start of period then for example following interval is used: 5th January 00:00:00 to 4th February 23:59:59)
- **Recipient** - email addresses where the report will be sent. More email addresses will be separated by commas.
- **email subject** - subject of the email sent to recipients with generated report
- **email body** - body of the email sent to recipients with generated report
- **Localization** - localization of the Excel file

Filter - a filter definition of the report. The Administrator can limit the report by users, departments, devices, locations, project.

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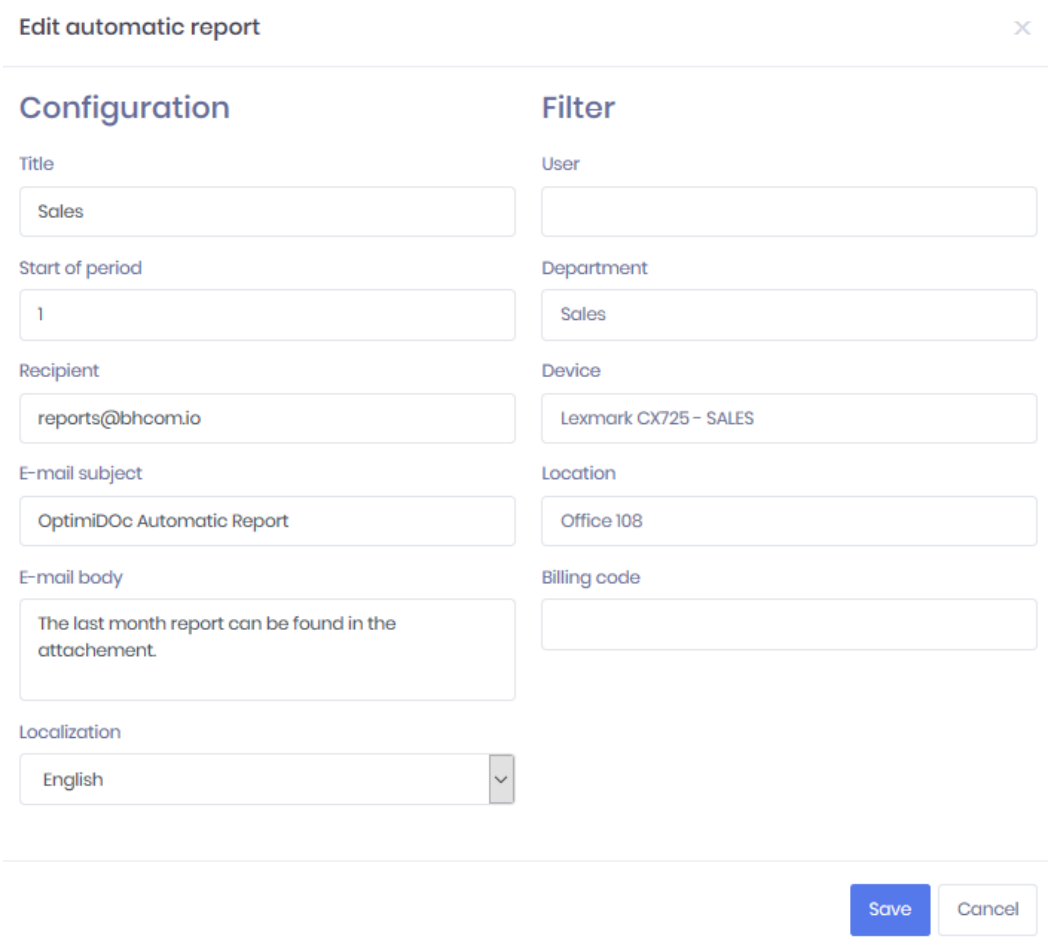
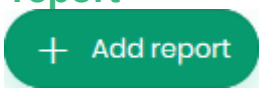


Automatic report - Add report

To **add** a report, click on the  button.

Automatic report - Generate now

For **immediate report generation** click on the button.

Automatic report - Delete

To **remove** a report, click on the button.

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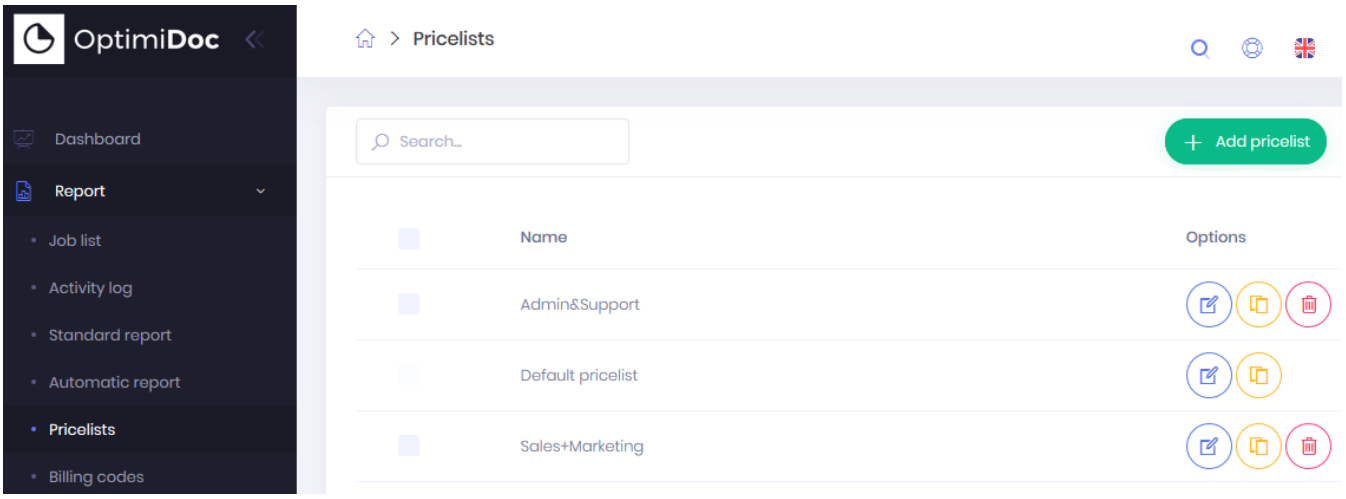
5.2.5 Pricelists

The section on **Pricelists** defines pricelists for operation costs calculations. Every device can be assigned to a different pricelist.



Pricelist settings

- **Title** - name of the pricelist
- **Price** - every operation cost is calculated based on:
  - Document format
  - Number of papers
  - Black & white pages
  - Reduced color pages
  - Color pages
  - Scanned pages

* if OptimiDoc does not find defined prices for operation document format then the costs for such operation are 0.

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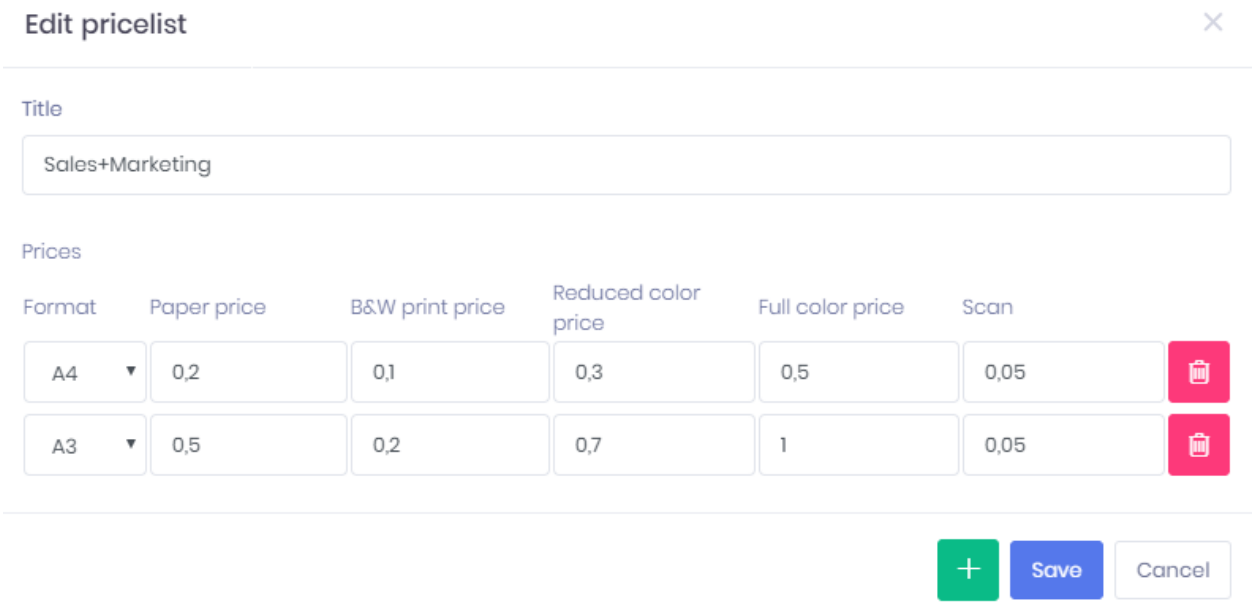

New pricelist

To **add a new** pricelist on the OptimiDoc system, click on the button.

Edit pricelist

To **edit a pricelist,** click on the button and change the settings based on pricelist settings.

Delete pricelist

To **delete a pricelist,** click on the button.

Duplicate pricelist

To **duplicate a pricelist,** click on the button.

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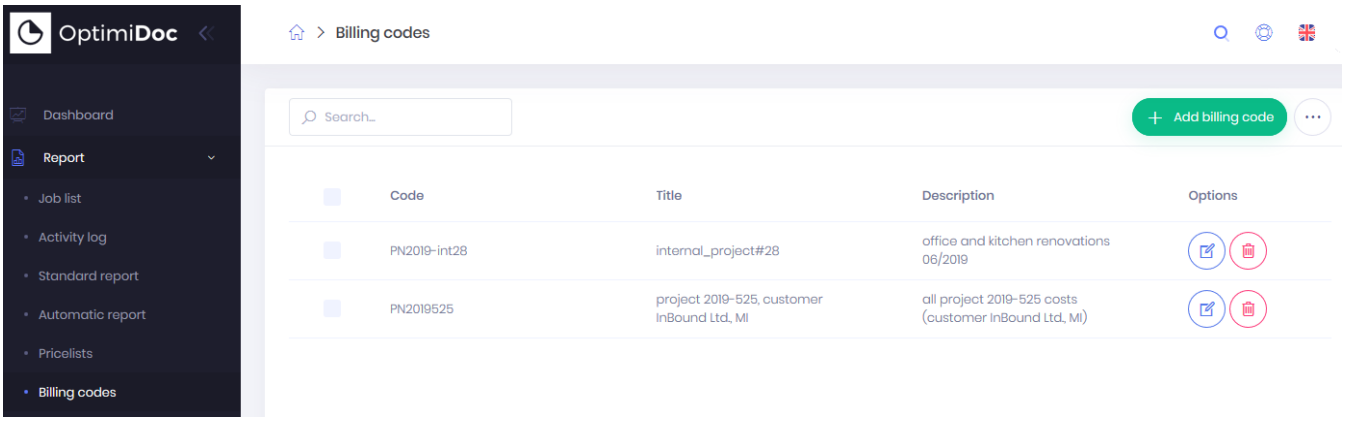
5.2.6 Billing codes

This section lists **billing codes** which can be used to separate print jobs in **accounting** and **reports**.



Billing codes management

To **add** new billing code, click on the

To **edit** a billing code, click on the

To **delete** a billing code, click on the

Setting/editing billing code

- **Code** - name of the queue used for printing.
- **Title** - name of the project used for identification throughout the OptimiDoc system.
- **Description** - description of the project.
- **Enabled for** - Enable a billing code for a certain user group or for everyone.
- **Disabled for** - If Enabled for everyone is checked, you can specify a certain user group which cannot use the billing code.

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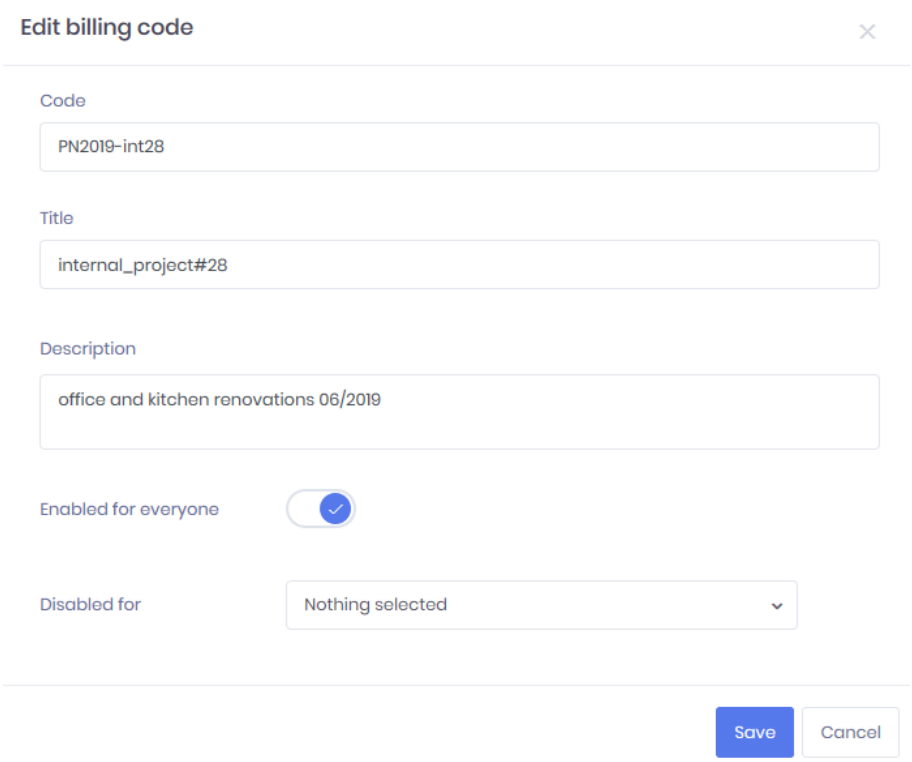

Enabling or disabling a billing code for multiple groups

To allow a user to use a certain project, it must be enabled in one of the groups the user belongs to. This can be done when editing project settings, under Enabled for and/or Enabled for everyone.

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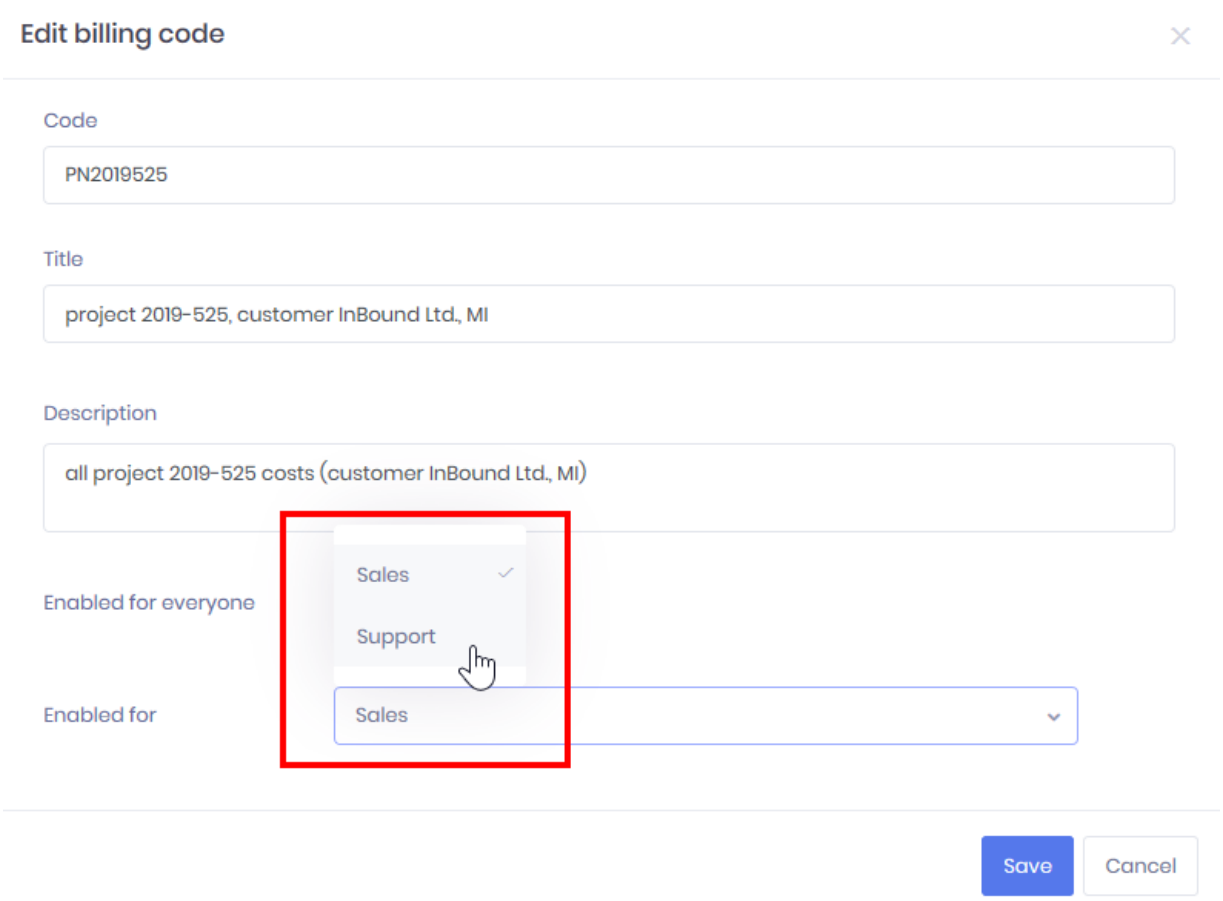
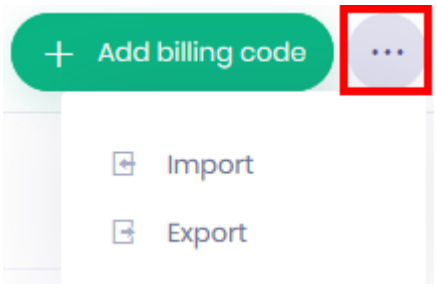


Export or import a billing code

You can export current list of billing codes to CSV file or import CSV with billing codes to you don't have to add them manually.



Example

Structure of CSV file for import is the following:

Code,Name,Description
600 - Private,600 - Private,600 - Private
650 - Private,650 - Private,650 - Private
.
.
.
code,name_of_the_code,code_description

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5.3 Device

In this section you manage the **devices** connected to **OptimiDoc**. OptimiDoc has two types of devices:
multifunction devices and **network devices**.

Konica Minolta/Develop

Konica Minolta/Develop multifunction devices with OpenAPI technology offer full functionality including authentication, scan, print and accounting.

Xerox EIP device

Xerox EIP device includes complete feature set including authentication, print/scan application, pull print and accounting.

Hewlett-Packard Enterprise

Hewlett-Packard multifunction devices provide authentication, scan, print and accounting.

Hewlett-Packard Pro

Hewlett-Packard Pro multifunction devices provide authentication, scan, print and accounting.

Lexmark

Lexmark devices include authentication, print and accounting.

Epson

Epson multifunction devices provide authentication, scan, print and accounting.

Network device

Network device can be a standard printer or MFP with an Ethernet connection and IPP job delivery type support. When a network device is used OptimiDoc is capable to monitor and account print jobs.
Printing to such device is realized via direct queue.

Fiery

Fiery Digital Print Server

Ricoh

Ricoh multifunction devices offer authentication, print, scan and accounting.

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Canon

Canon multifunction devices offer authentication, print, scan and accounting.

The complete management is done on the device list page.

Comparison of supported functionalities for each type of device can be found in Embedded terminals comparison.

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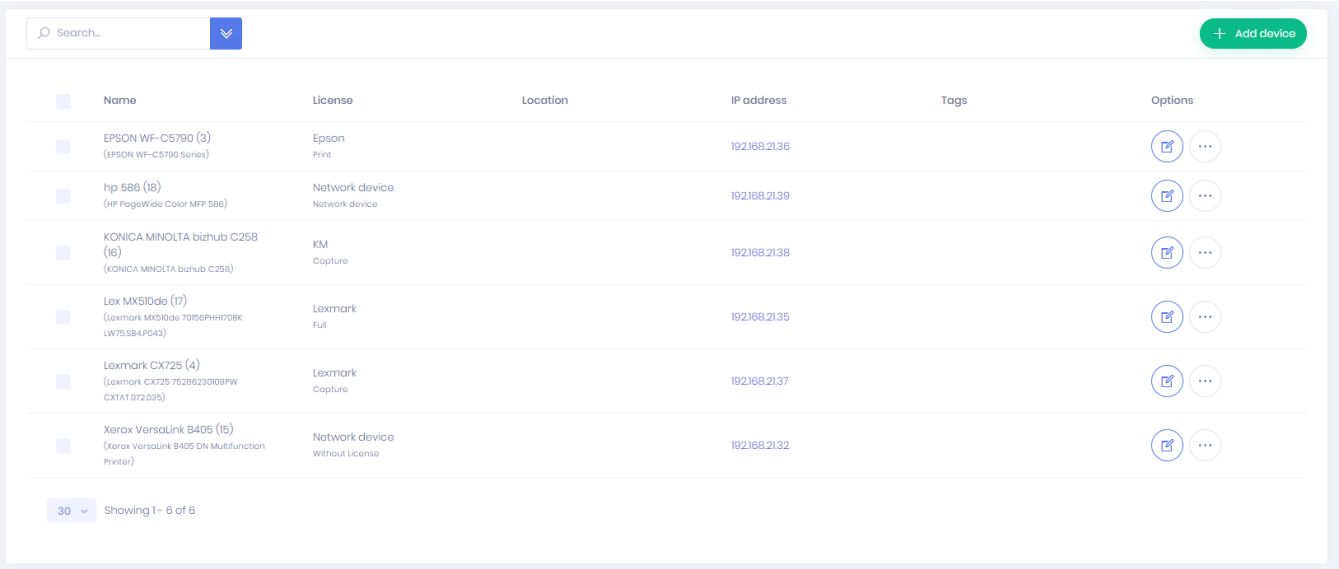
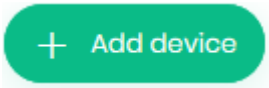
5.3.1 Devices

Device list is used to define and manage the devices connected to OptimiDoc. Every device needs to be added to OptimiDoc before it can be used.



Devices operations

To **add** a device to OptimiDoc, click on the 

button and enter settings.

To **edit existing** device, click on the button and change the settings based on Device settings.

For more options, click on the button to pop-up a menu with the following options:

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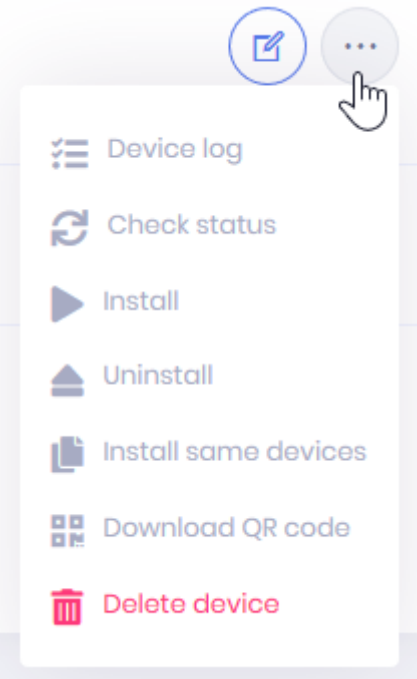

Device settings

Device settings contains the following information:

Device type

- **Konica Minolta/Develop -** OpenAPI capable device
- **Xerox -** ConnectKey, EIP (Extensible Interface Platform) devices
- **Hewlett-Packard Enterprise** - FutureSmart 3, 4 or 5 and OXPd platform support
- **HP Pro** device
- **Lexmark -** FW 4, 6, 7, ESF (Embedded Solution Framework)
- **EPSON -** EOP 1.1 and higher (WorkForce, MFP, PCL/PS device)
- **Ricoh -** SmartSDK, SOP G2 and G2.5 devices
- **Fiery -** Fiery Digital Print Server
- **Canon -** MEAP support, starting from FW version 4.8 and PF (platform version) 302 - Ewloe series, Web
- **Network device -** device with ethernet and IPP delivery

License

- **Full** - this license type allows you to use all functionalities on the MFP
- **Print** - this license type allows you to use only printing functionalities on the MFP
- **Capture** - this license type allows you to use only scan functionalities on the MFP
- **Without license** - non-licensed device, will be created only in the system but terminal will not be installed on the device
- **Network device** - available only for "Network device" type

General

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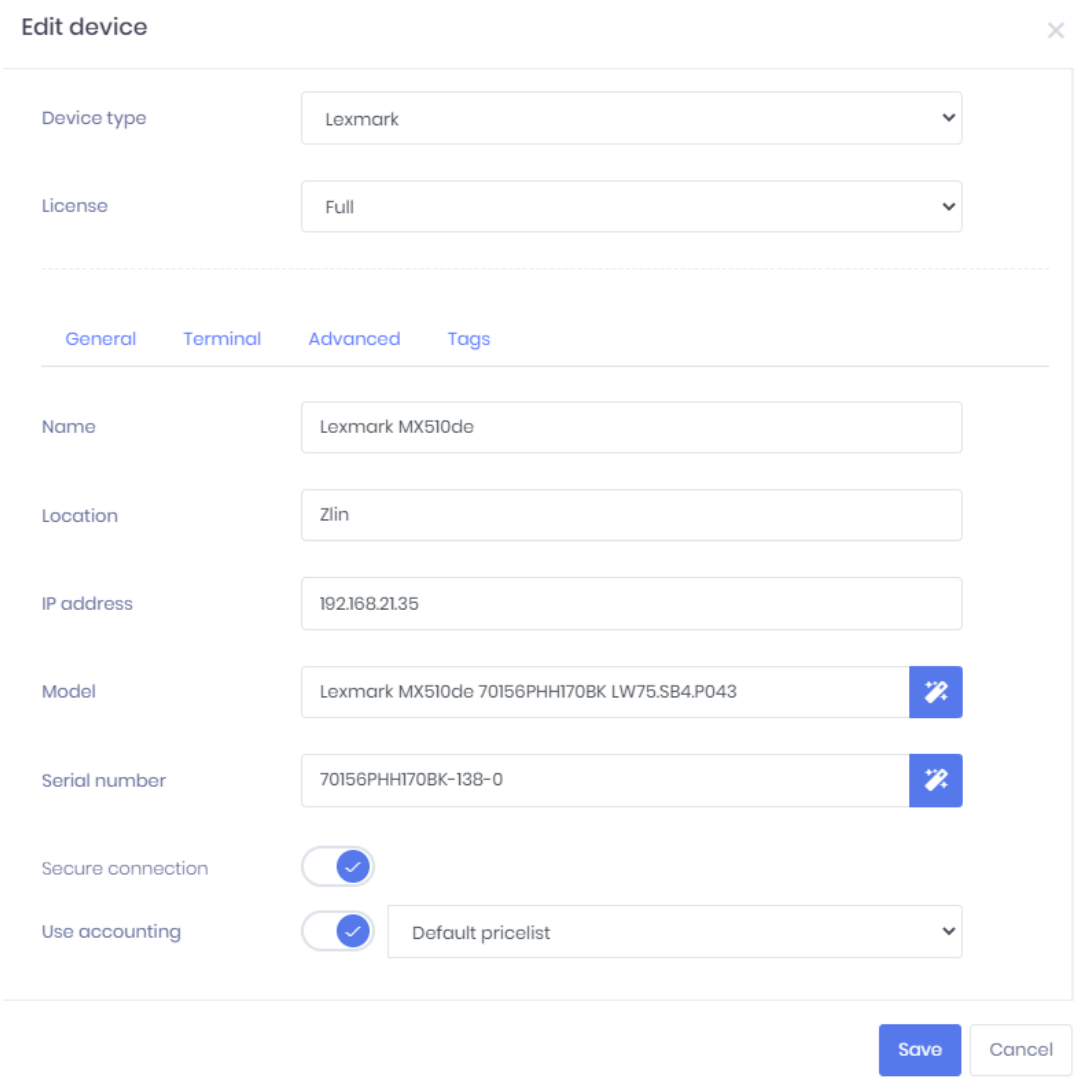
- **Name** - a unique name of the printer. Use any information that will make it easy to identify the printer throughout OptimiDoc
- **Location** - optional information about the printer's location
- **IP address** - device IP address. The IP address must be unique in OptimiDoc
- **Model** - device model (by clicking the icon next to the text field, device model will be automatically detected).
- **Serial number** - serial number of the device
- **Secure communication** - prefer encrypted communication between MFP and server.
- **Use accounting** - using this option, accounting information will be downloaded to OptimiDoc

Important To ensure factual secure communication, HP requires server certificates to be installed in Certificate Management.



Terminal - Konica Minolta, Develop, Xerox, Hewlett-Packard, Lexmark, Epson, Ricoh, Canon

- **Device authentication** - enable or disable authentication to the device. When checked

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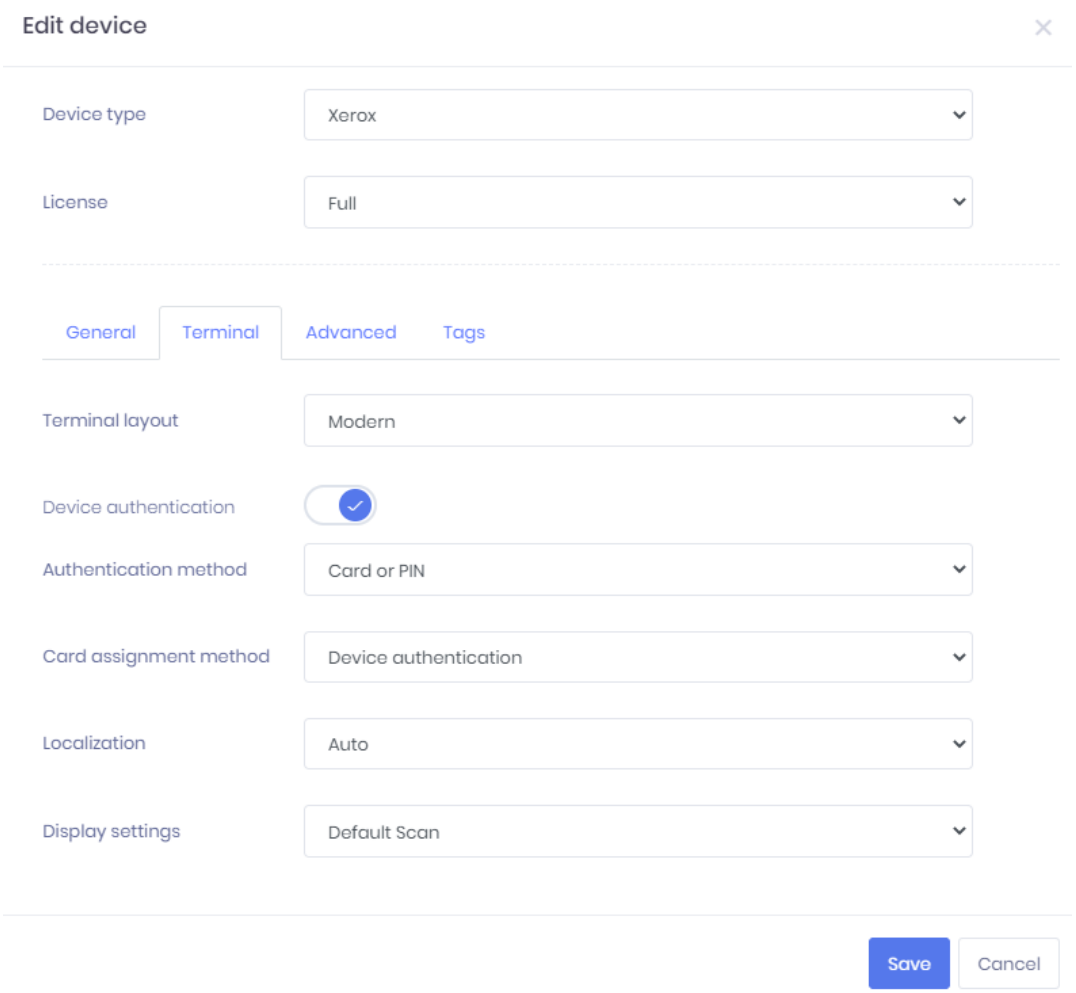
users must login to use the device

- **Authentication method** - authentication type of user interface embedded in device.
  - **User list** - users authenticate by selection of their name from user list.Can be used only without the authentication to device
  - **PIN** - users authenticate by PIN number
  - **Login and Password** - users authenticate by primary login name and password
  - **SingleSignOn** - user information is obtained from 3rd party systems like YSoft SafeQ or Equitrac
  - **Card** - user authenticates by card
  - **Card or PIN** - user authenticates by card or PIN
  - **Card and PIN** - user authenticates by card and PIN (dual authentication)
  - **Card or Login & Password** - user authenticates by card or Login & Password
  - **Card and Login & Password** - user authenticates by card and Login & Password
  - **External authentication** - special method for authentication from external devices. For implementation of this functionality customization is required.
- **Card assignment -** selection of authentication method for user card assignment functionality
- **Localization** - force the language of the embedded user interface
- **Display settings** - selection of default tab



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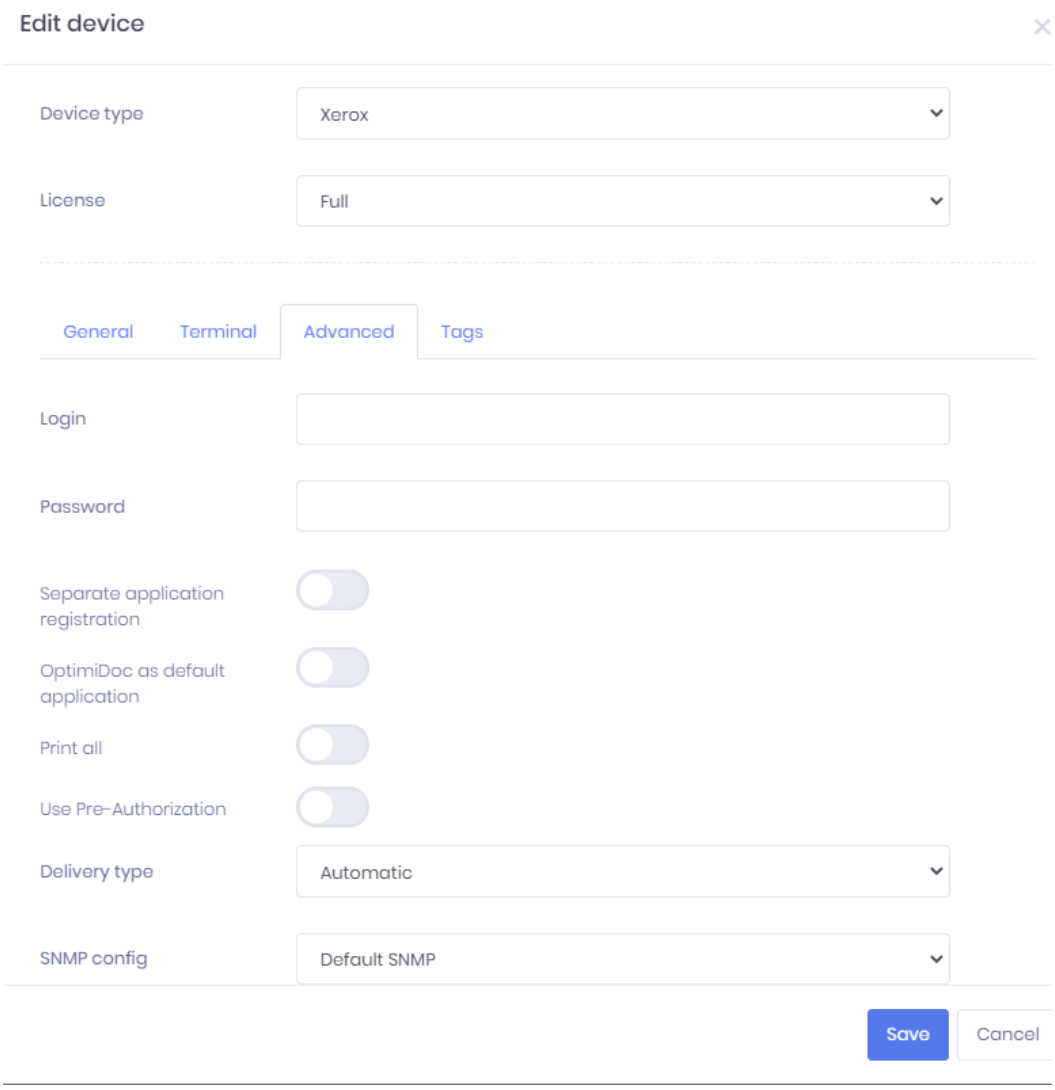
Advanced - only for Konica Minolta, Develop, Xerox, Hewlett-Packard, Epson, Ricoh

- **Login** - MFP administrator login name
- **Password** - MFP administrator password
- **Separate application registration -** on the device panel there will be two registered application icons: one for scanning and the other for print. Available on Xerox
- **OptimiDoc as default application** - OptimiDoc embedded application is started immediately after a user logs to a device. Available on Xerox and HP Ent.
- **Print All -** option to enable print all items after user authenticates.
- **Use preauthorization** - option to enable Xerox preauthorization. This is mandatory to support access rights for Xerox devices.
- **Delivery Type -** selection of print protocol for job delivery. We recommend using LPR protocol



Tags

For selecting tags, the user needs to click on them; their background color will change after that from grey to color which was selected when the user was creating the tag. This indicates that the tag was assigned to the device. Click again to unassign the tag. It is possible to assign

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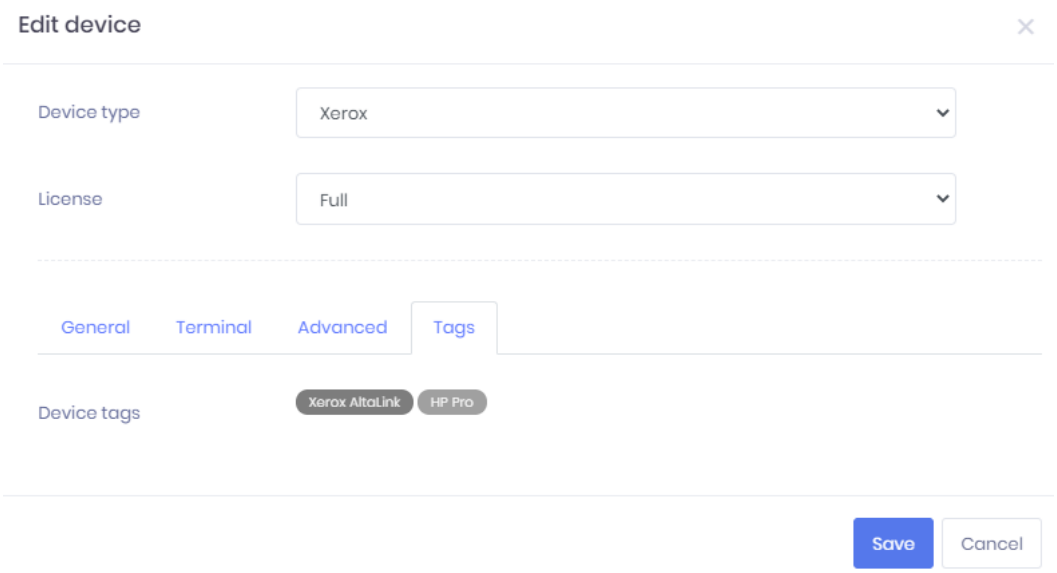
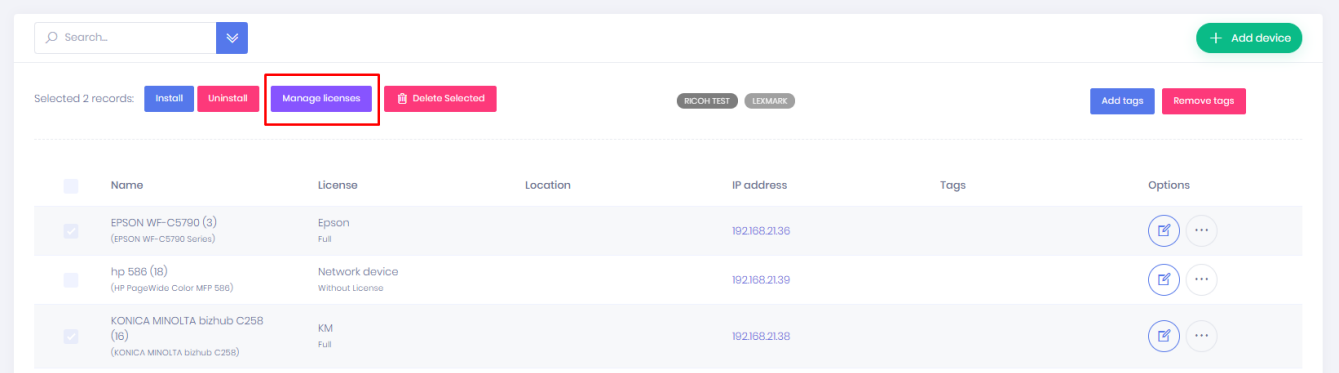
more or even all listed tags to the device.



5.3.1.1 Mass edit License Manager

To manage devices' licenses you can either assign license in device edit window or use License manager, available when using mass edit of the devices.



There are certain options available depending on the devices selected and license types availability and its quantity.

Only MFPs selected

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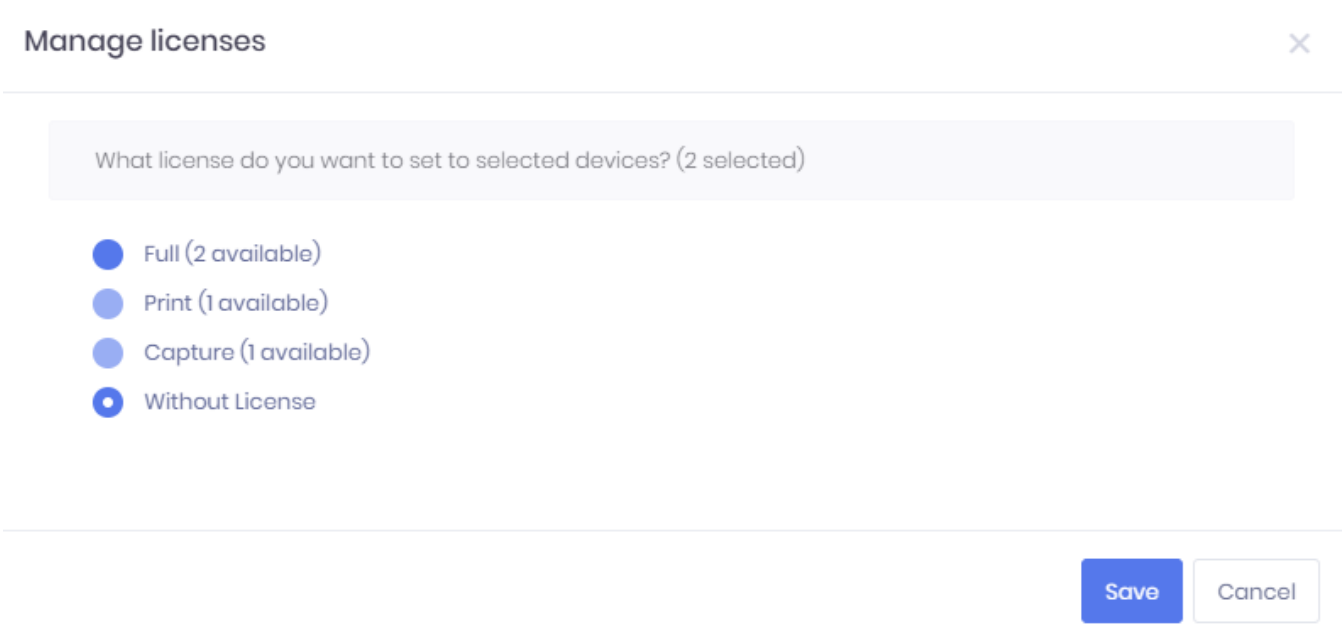
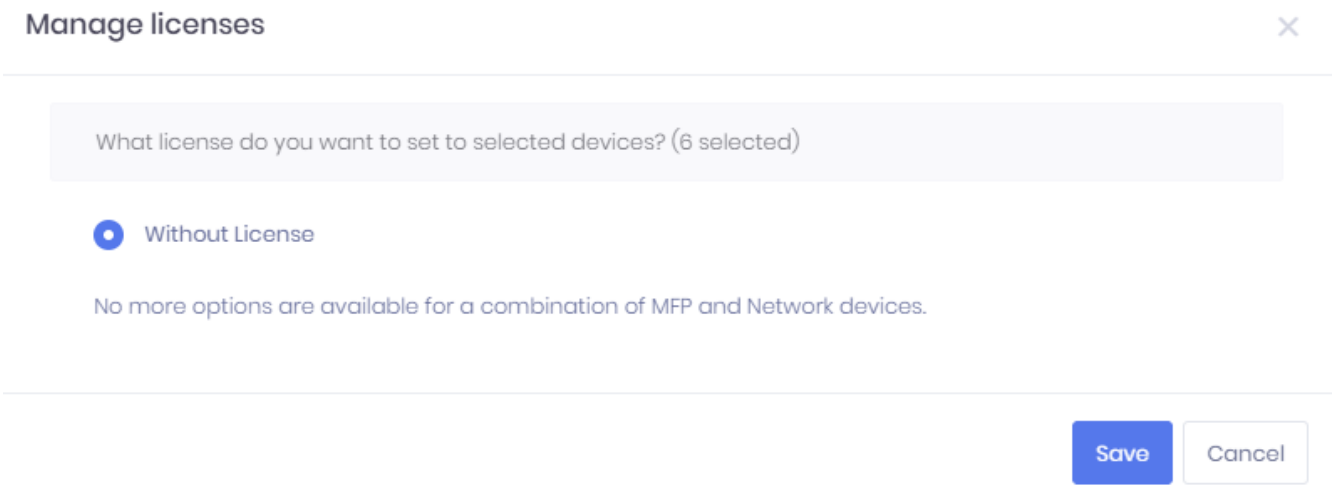


MFP + Network device selected



5.3.1.2 Single device license assignment

To assign a license to a device you can select one of the available options from the list.

MFP device type, license options

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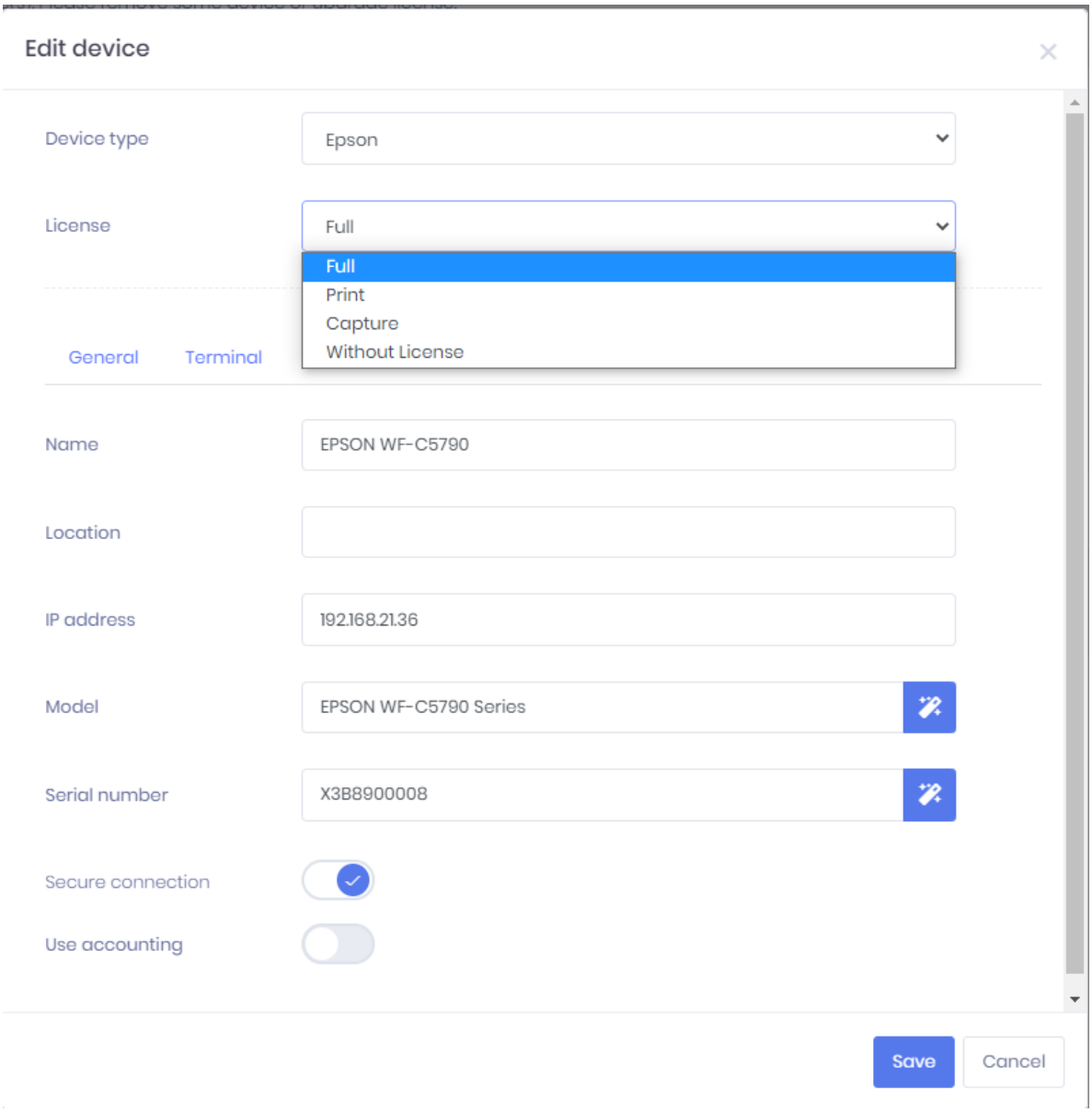
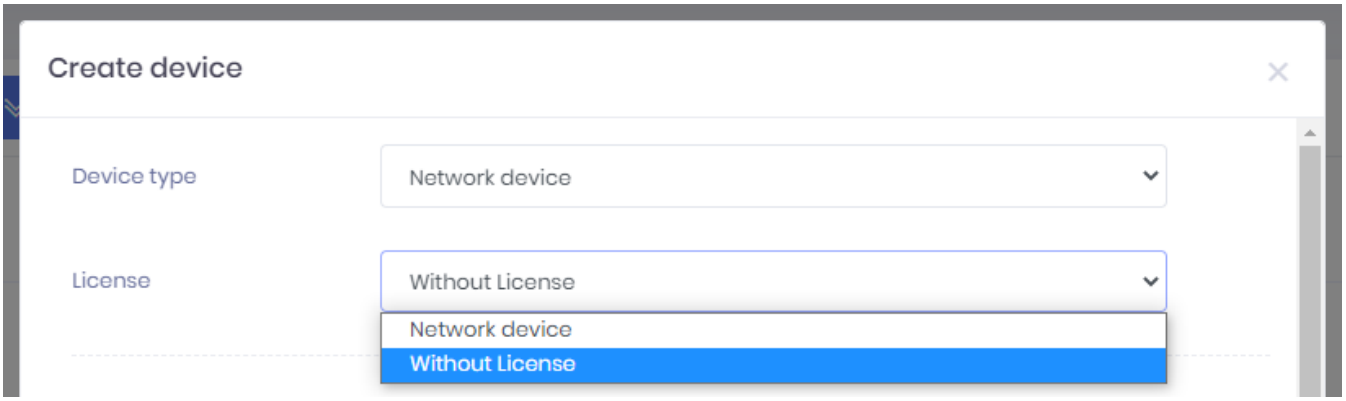


Network device, license options



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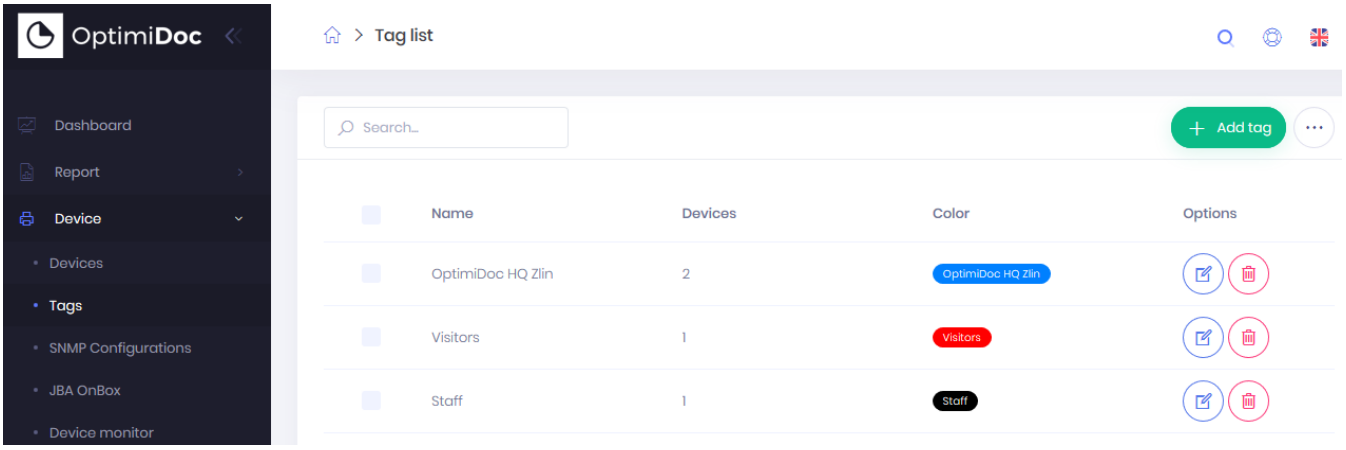
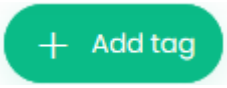
5.3.2 Tags

Tags allow you to mark devices with one or more tags.



Tags management

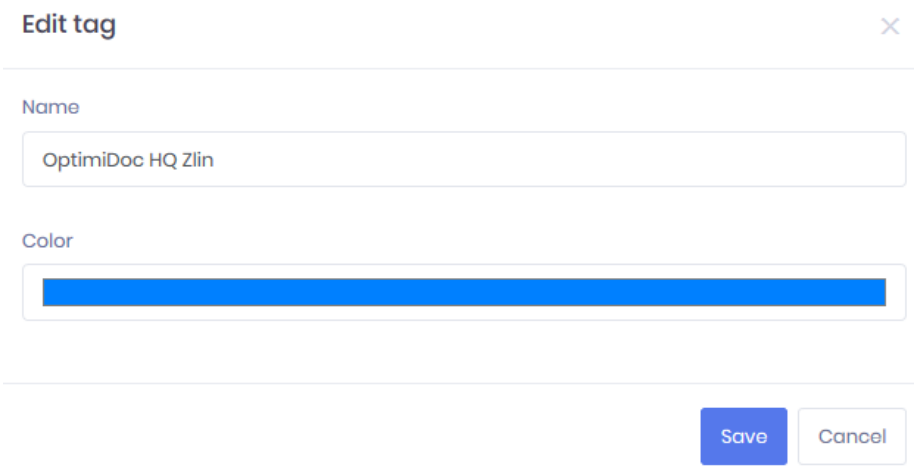
To **add** a new tag, click on the  button.

To **edit** a tag, click on the button.

To **delete** a tag, click on the button.

Add/edit tag dialog

When **adding** or **editing tag** fill in its name and choose a color to differentiate tags easily. Click on Save when completed.



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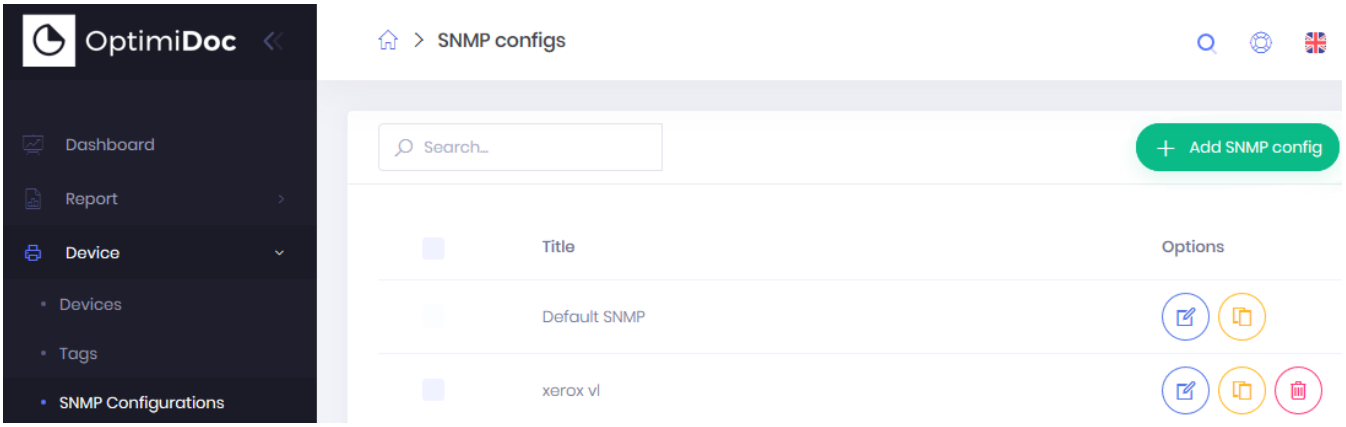
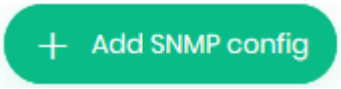
5.3.3 SNMP Configurations

SNMP configuration allows you to define custom SNMP settings in OptimiDoc.



New configuration

To **add** a new SNMP configuration, click on the  button.

Edit configuration

To **edit** the existing SNMP configuration, click on the button and change the settings as desired.

Delete configuration

To **delete** an SNMP configuration, click on the button.

Duplicate configuration

To **duplicate** an SNMP configuration, click on the button.

You can choose between SNMP v1/v2c and SNMP v3.

SNMP v1/v2c

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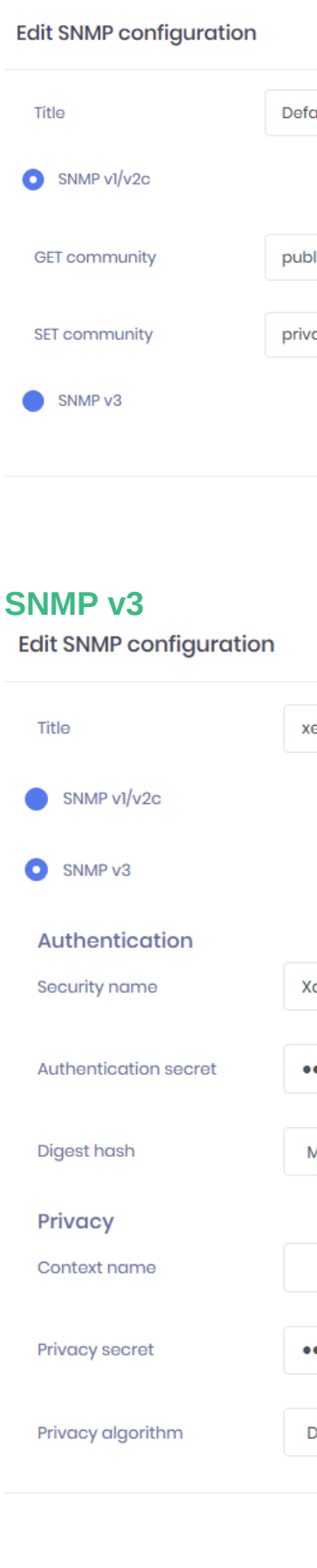
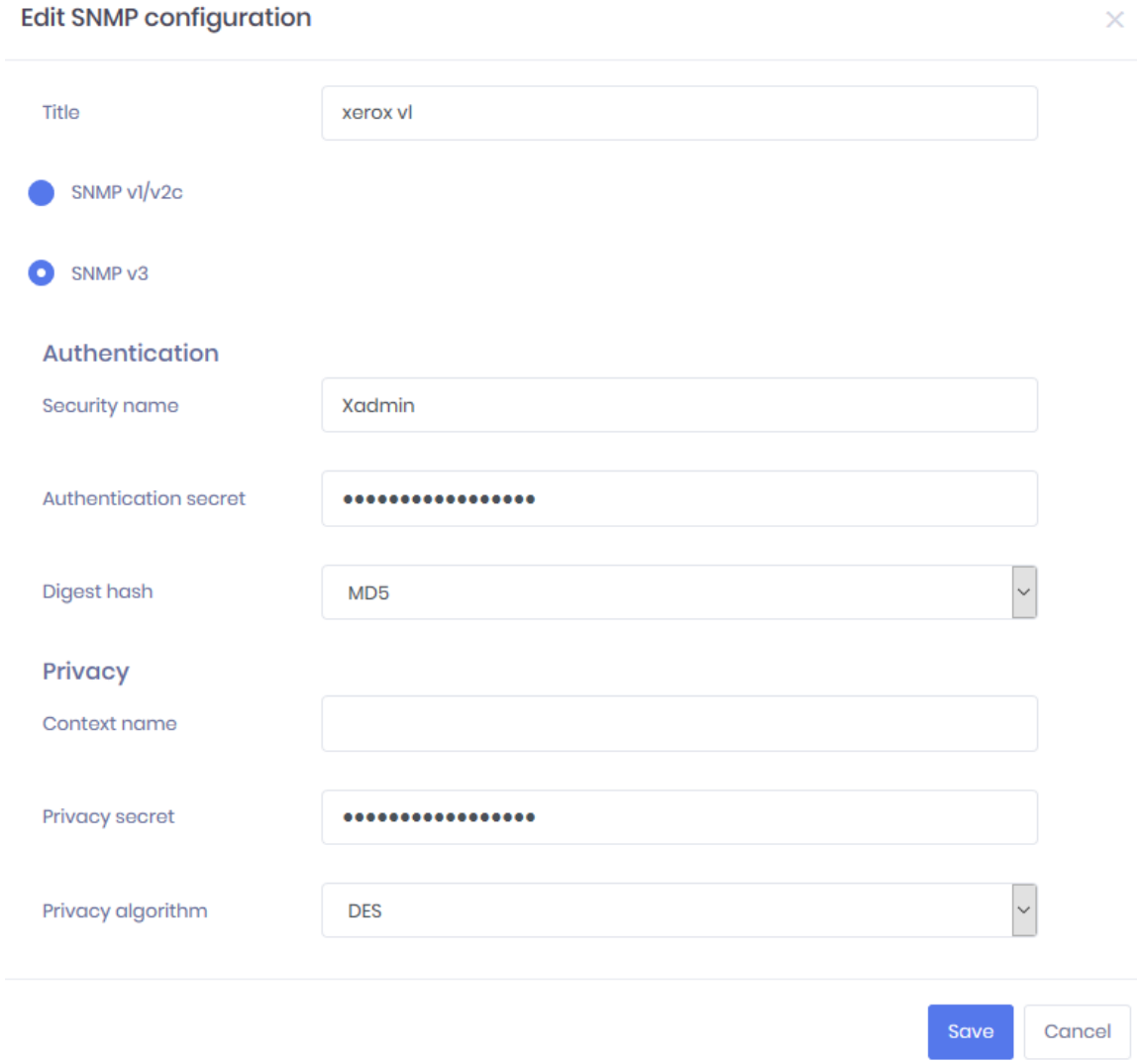


SNMP v3



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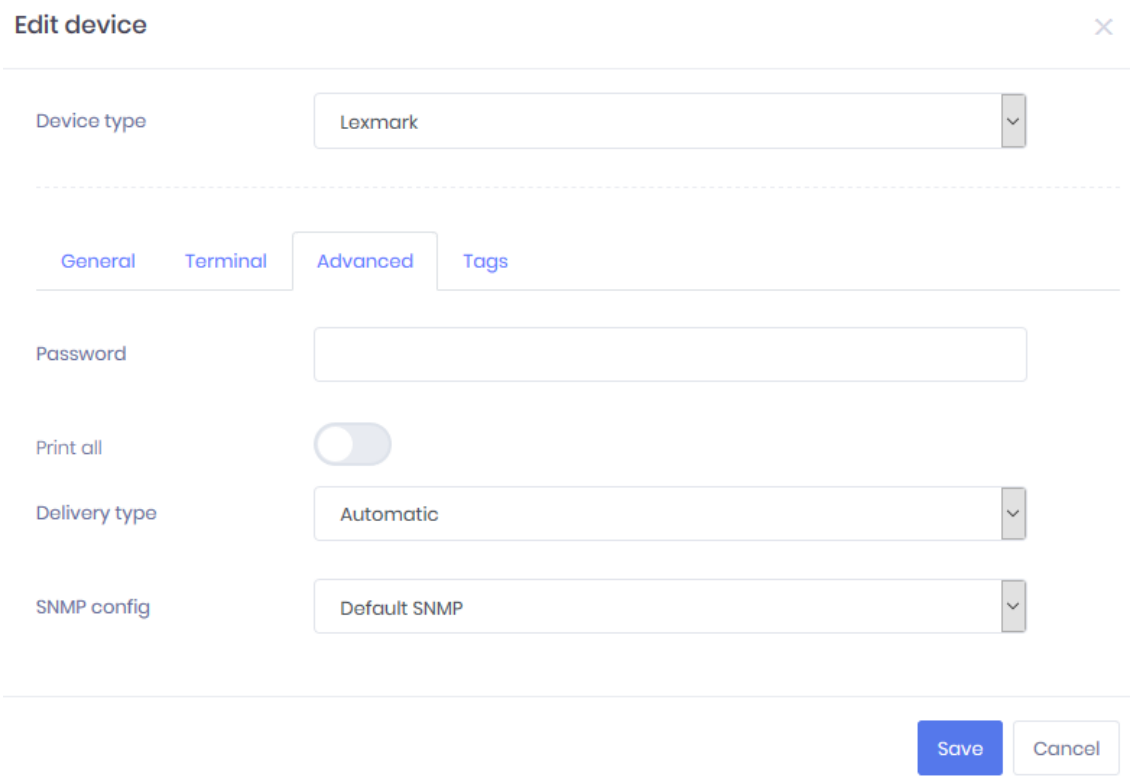
Device settings

You can choose an **SNMP configuration** in device settings on the Advanced tab or leave it default.



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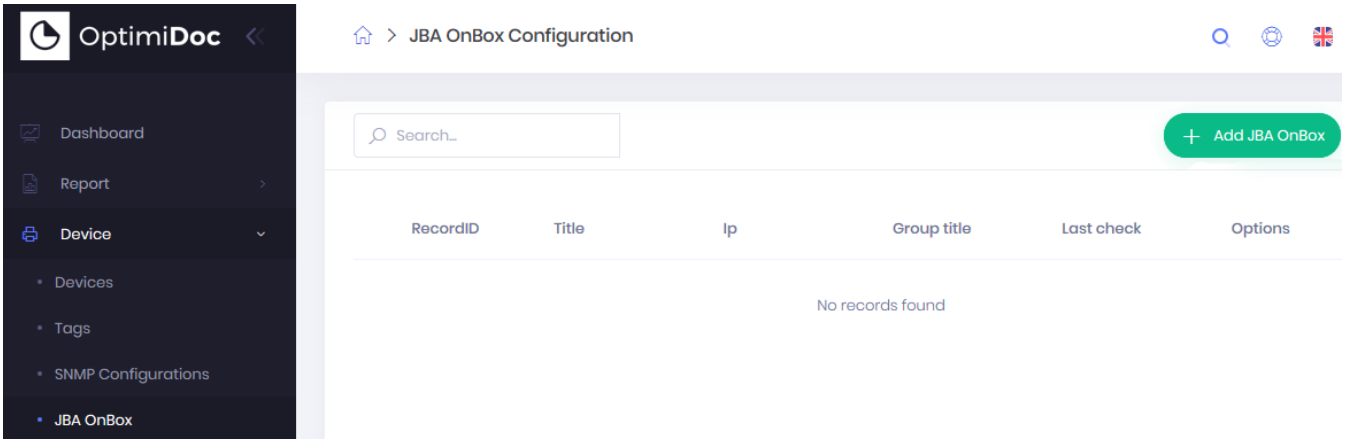
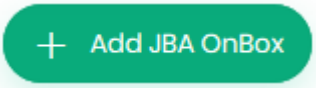
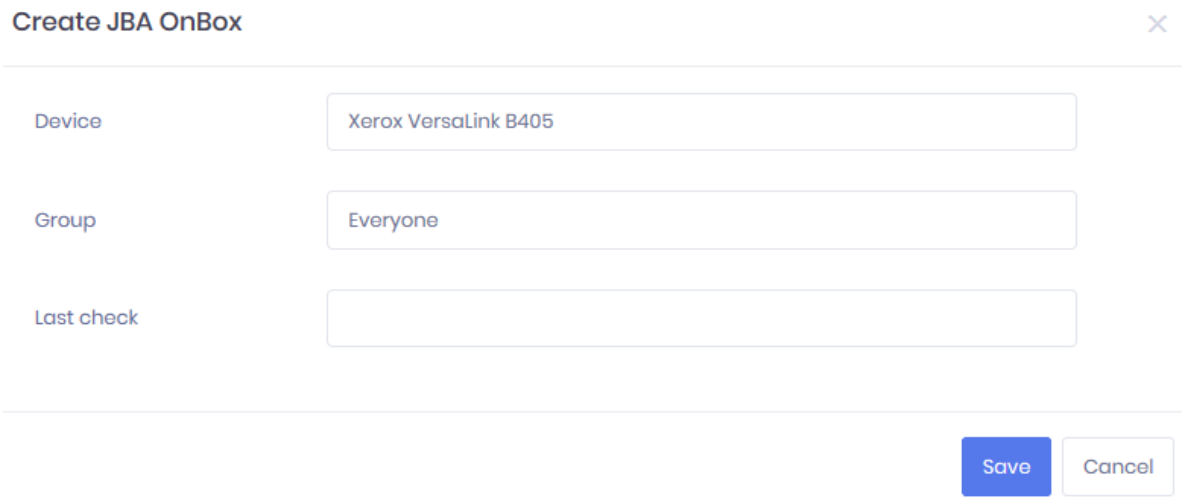
5.3.4 JBA OnBox



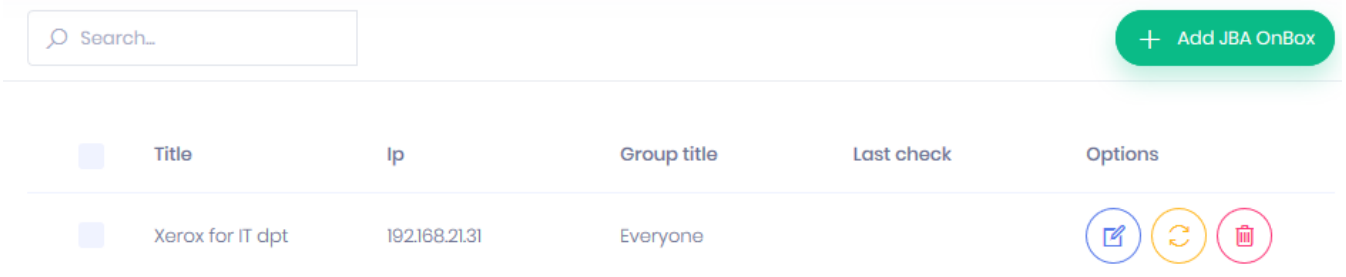
FIrst of all, add this keyword "**onbox**" to the Model field in device's configuration.

To **add OnBox configuration,** click on the 

button.



Fill out the **Device field -** start typing a device name from your current list of devices and it will fill in the Device field automatically.
Group - select the user role/department, e.g. "Everyone"



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Now device is configured to use JBA OnBox. The JBA log will be downloaded and user synchronization will be ran every hour. At 2 AM the full user accounts synchronization will be initiated.
You can also force OptimiDoc to synchronize accounts on the device using the refresh button . To run a full synchronization manually you must clear the last check field first.

Please know that:
- adding a user to a group or department is not considered as user change hence these changes are not replicated immediately. In this case you must wait until full sync.
- if PIN authentication is used, deleted PINs are functional until the next full sync.

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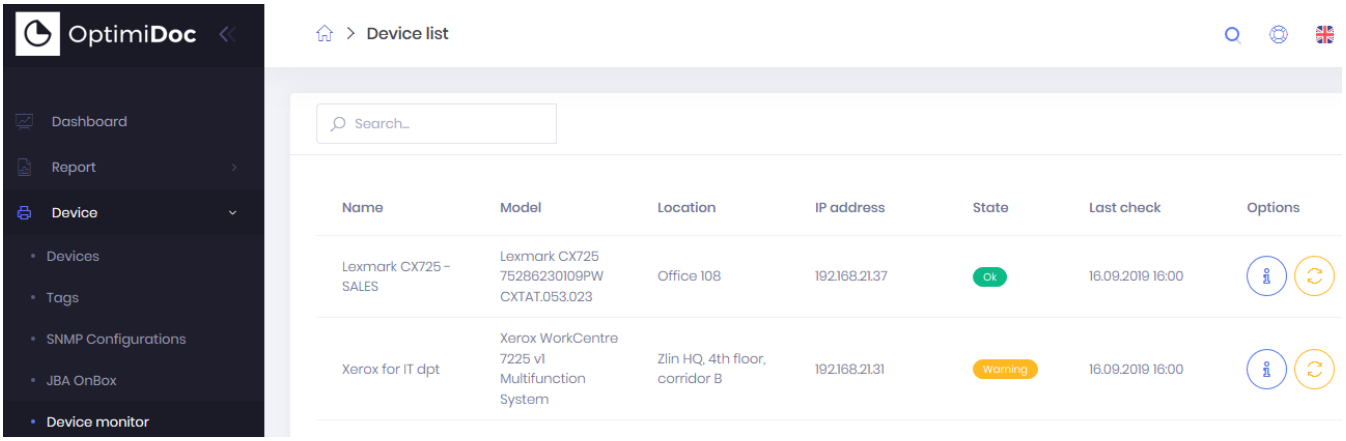
5.3.5 Device monitor

Device monitor is used to check the state of devices.



The column State displays the current state of the device. The possible states are the following:

- Ok - OK
- Warning - Warning; this might mean that the device is in sleep mode
- Critical - Critical
- Down - Down

To display the **detailed information**, click on the button.

To refresh **the state manually**, click on the button.

Device settings

The Info tab displays basic information about the device.

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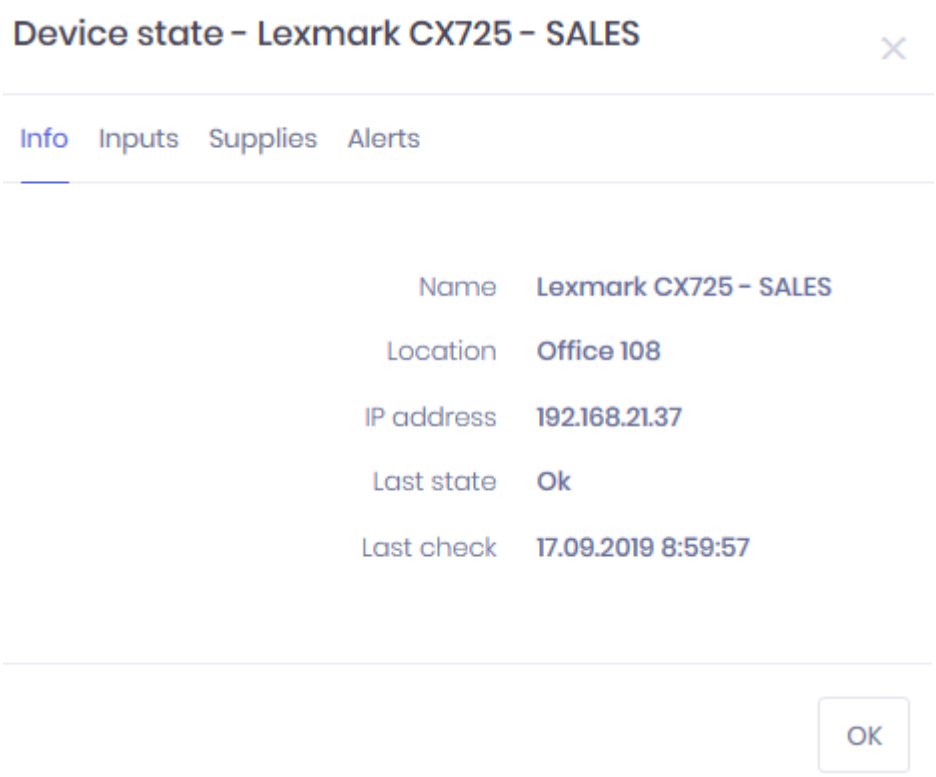
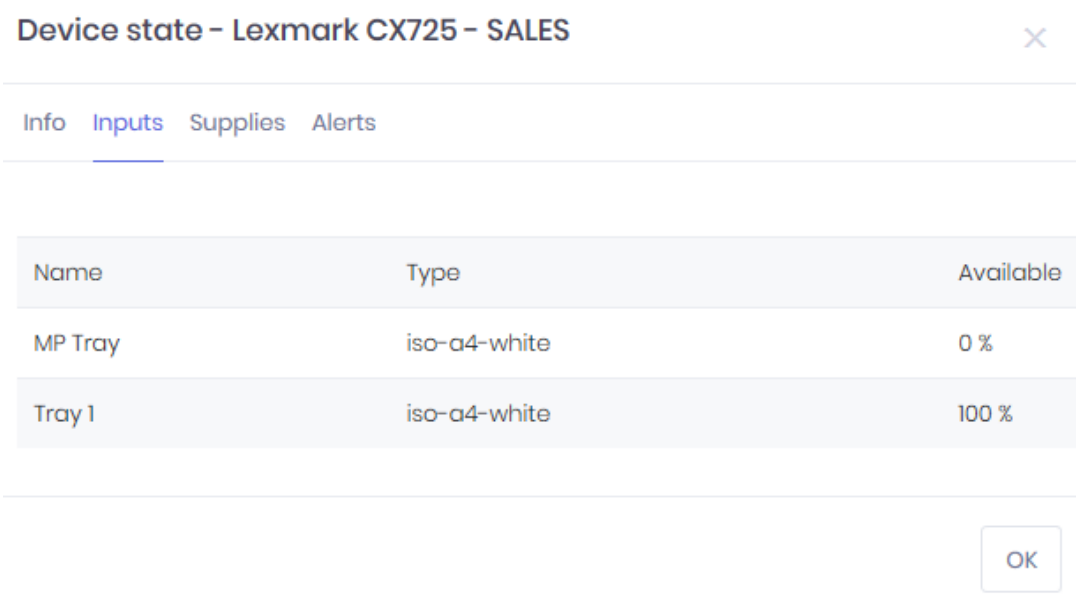


The Inputs tab displays a list of paper trays and the type and amount of paper:



The Supplies tab lists the installed cartridges and how much toner/ink is available.

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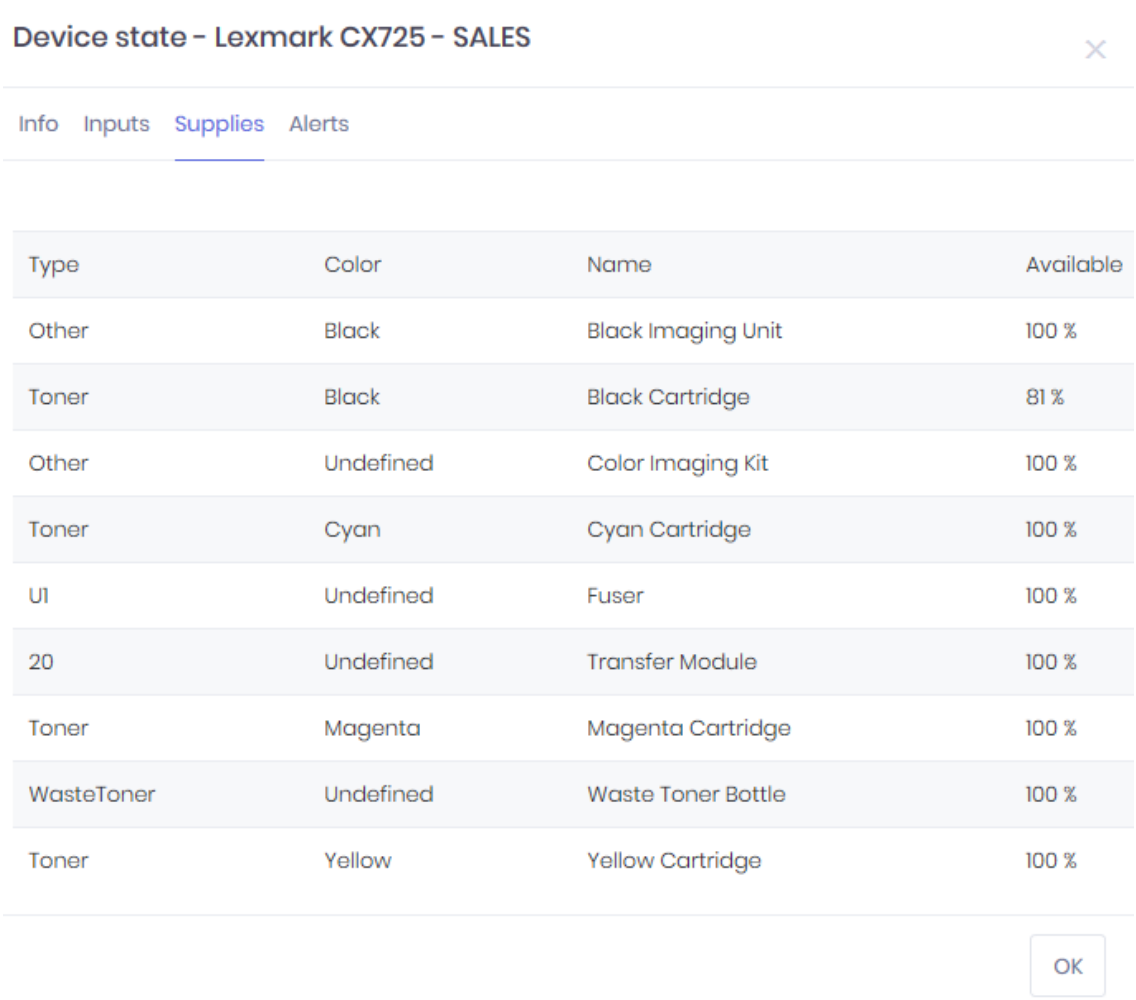
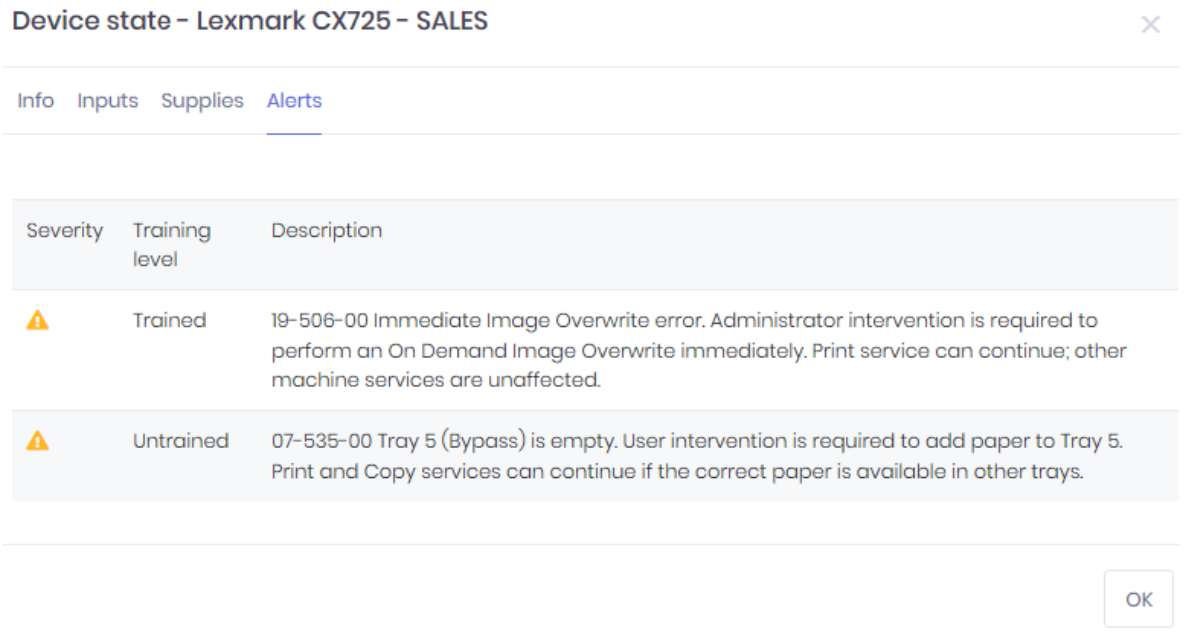


The Alerts tab displays any alerts regarding the device.

- **Severity** - severity of the alert
- **Training level** - the level of training required to deal with the problem
- **Description** - description of the problem



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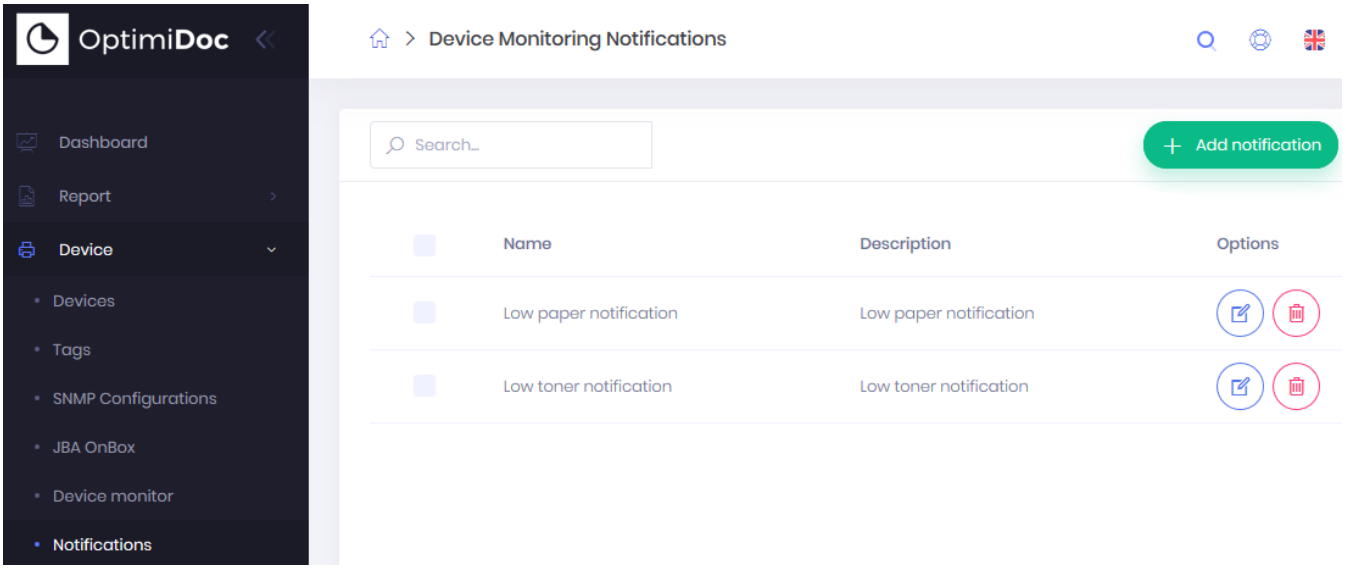
5.3.6 Notifications

Notifications are used to automatically send an email in case there is an issue with a device.



Notification settings

Basic notification settings

- **Name** - name of the notification displayed in OptimiDoc
- **Description** - description of the notification
- **Recipients** - email addresses to which the notification will be sent. It is possible to specify multiple addresses separated by a comma.
- **Email subject** - subject of the notification email
- **Email body** - body of the notification email
- **Filter location** - location of the target device

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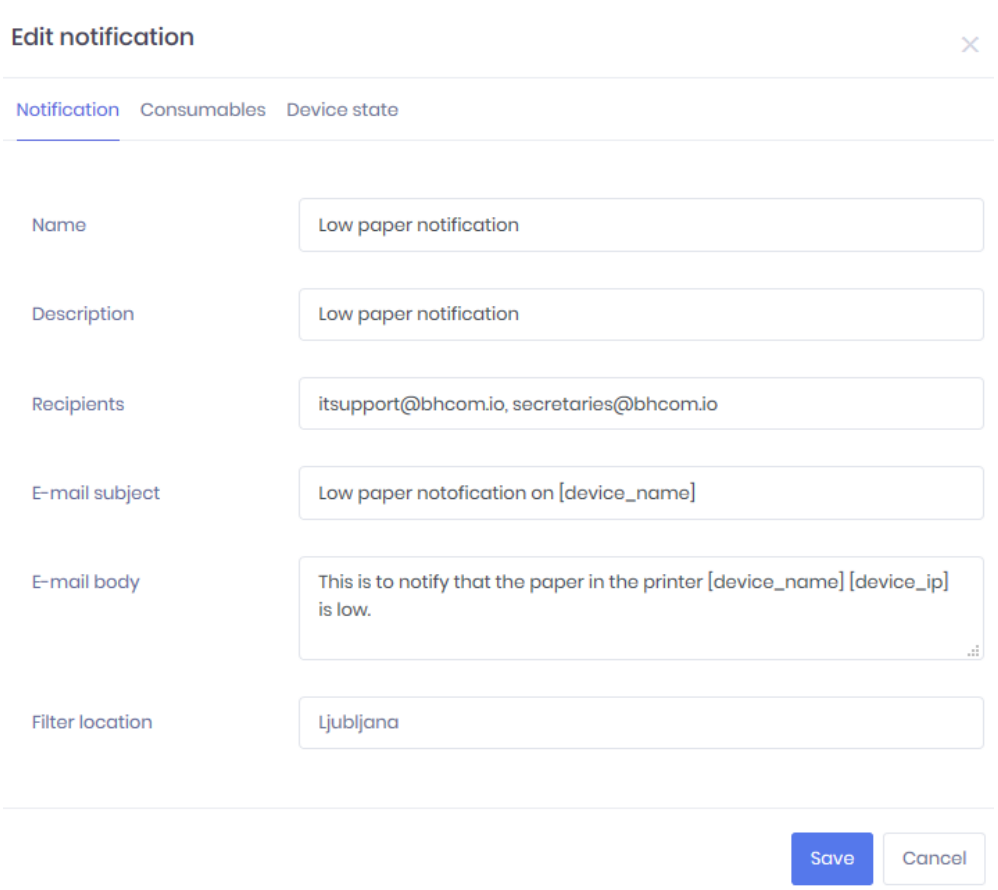

Note There are multiple parameters you can enter in the email subject and body. The complete list can be found in the Notification parameters.

Here you can set the minimal level of consumables. If the current level gets lower than the specified amount, a new notification will be sent to the recipients.

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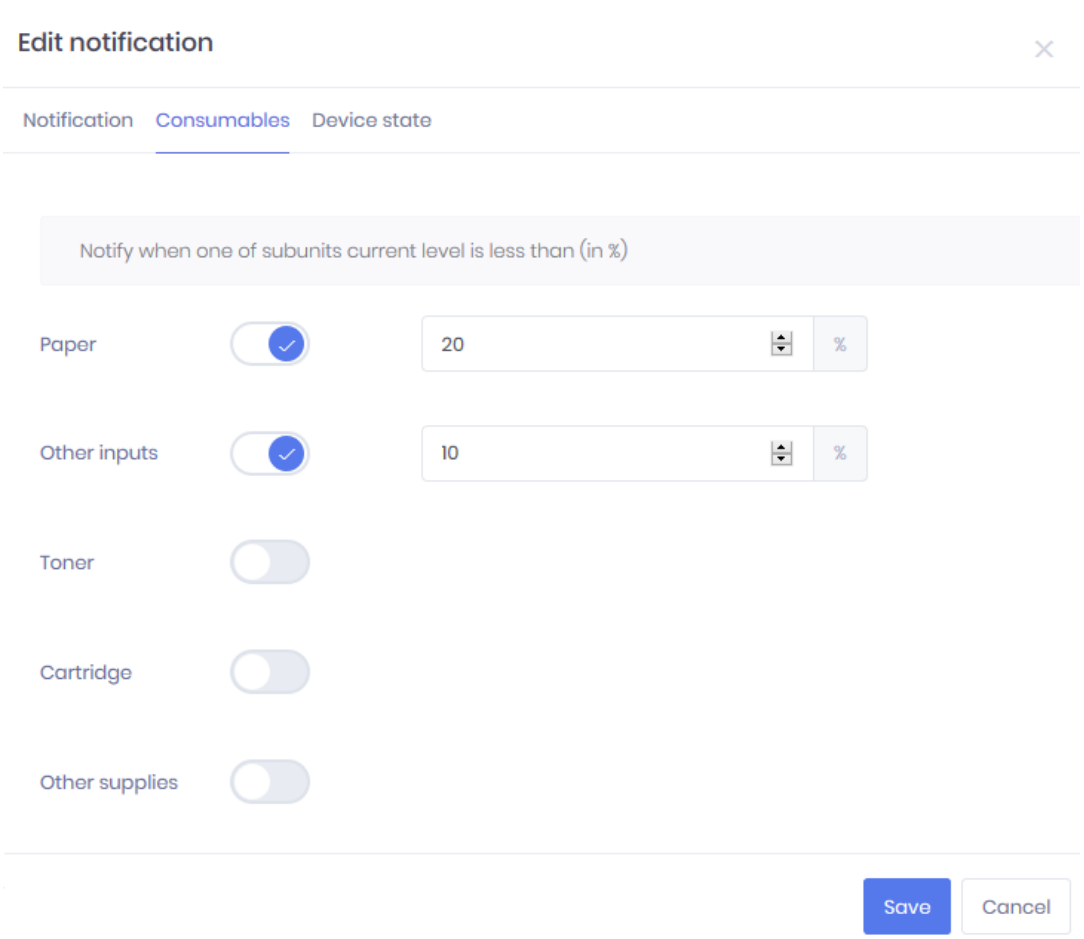
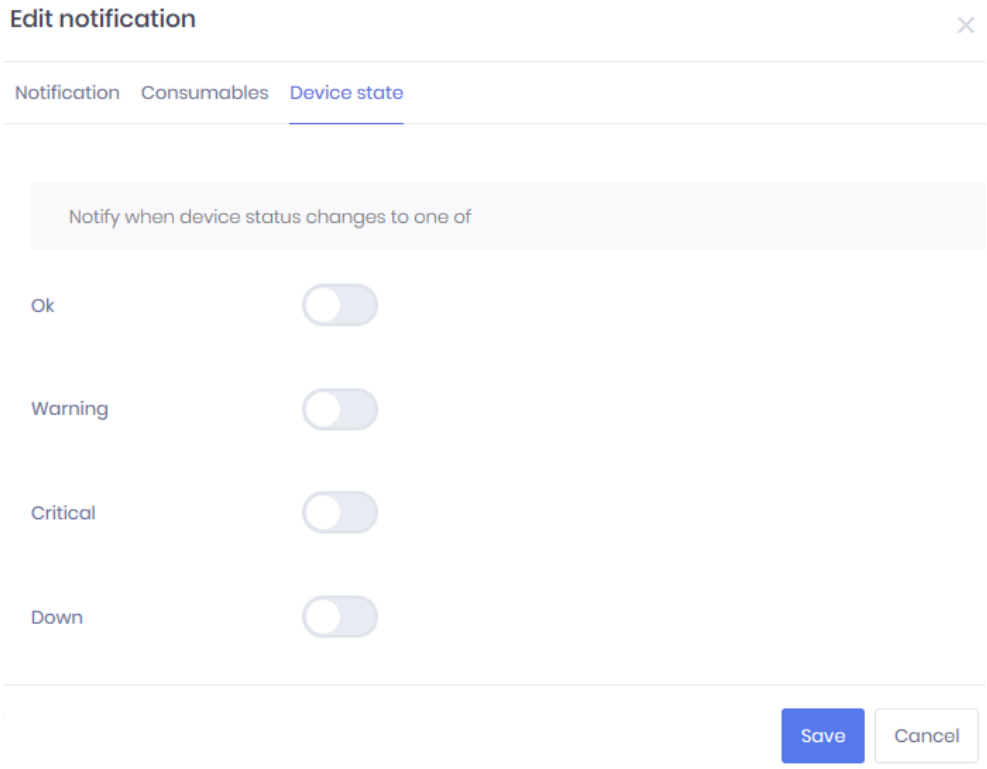


This tab allows you to choose the device states for which a notification will be sent. A notification will only be sent when the device changes its state.



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5.3.6.1 Notification parameters

These **parameters** can be used in the email subject or body when sending a notification.

- **[device_detail]** - detailed information about the device including device state, current level of toner/ink and paper, all errors etc.
- **[device_ip]** - the IP address of the device
- **[device_name]** - name of the device in the OptimiDoc system
- **[device_state]** - current state of the device
- **[timestamp]** - current date in following format: YYYYMMddHHmmss
- **[current_year]** - current year in following format: YYYY
- **[current_month]** - current month in following format: MM
- **[current_day]** - current day in following format: DD
- **[alerts]** - all the alerts associated with the device
- **[violations]** - the cause of the notification

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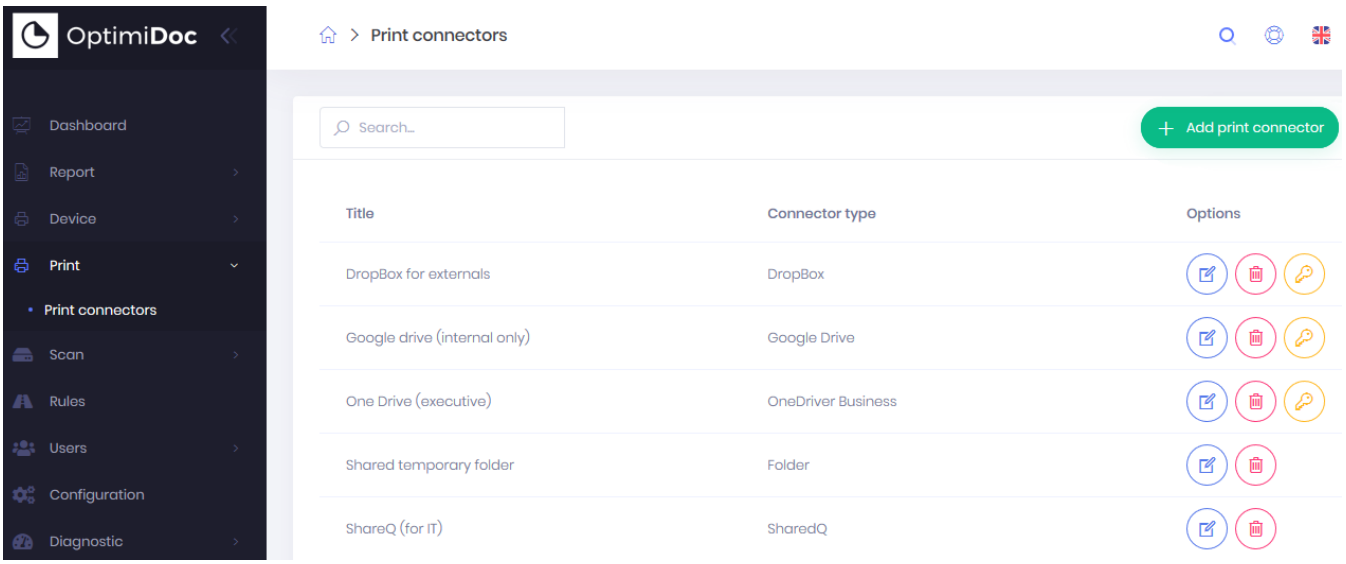
5.4 Print

Important note for printing: Although this section describes the print connectors, generally for printing via OD it is necessary to have two identical accounts; one in the OD and second with the same name for logged user on Windows!

Print section contains configuration and management of Print connectors.

Print connectors allows the option to print documents from different locations directly from the device panel.



Print connectors - Edit connector

To **edit** a print connector, click on the button and change the settings based on connector settings.

Print connectors - Delete connector

To **delete** a print connector, click on the button.

Print connectors - Authorize

To **authorize** your account connection, click on the button. Use the authorize button for the following services:

Google Drive
DropBox

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OneDrive Personal
OneDrive Business
Box.com
Sharepoint Online

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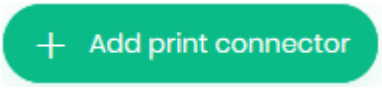
5.4.1 Print connectors

Print connectors - New connector

To **add a print connector** to OptimiDoc, click on the 

button. Print connectors allow the following types:

- Folder
- Google Drive
- DropBox
- Mailbox
- SharedQ
- OneDrive Personal
- OneDrive Business
- Box
- SharePoint Online
- WebDAV

Print connectors - Edit connector

To **edit** a print connector, click on the button and change the settings based on connector settings.

Print connectors - Delete connector

To **delete** a print connector, click on the button.

Print connectors - Authorize

To **authorize** your account connection, click on the button. Use the authorize button for the following services:

Google Drive
DropBox
OneDrive Personal
OneDrive Business
Box
SharePoint Online

Note Don't forget to grant the proper access rights in Group list.

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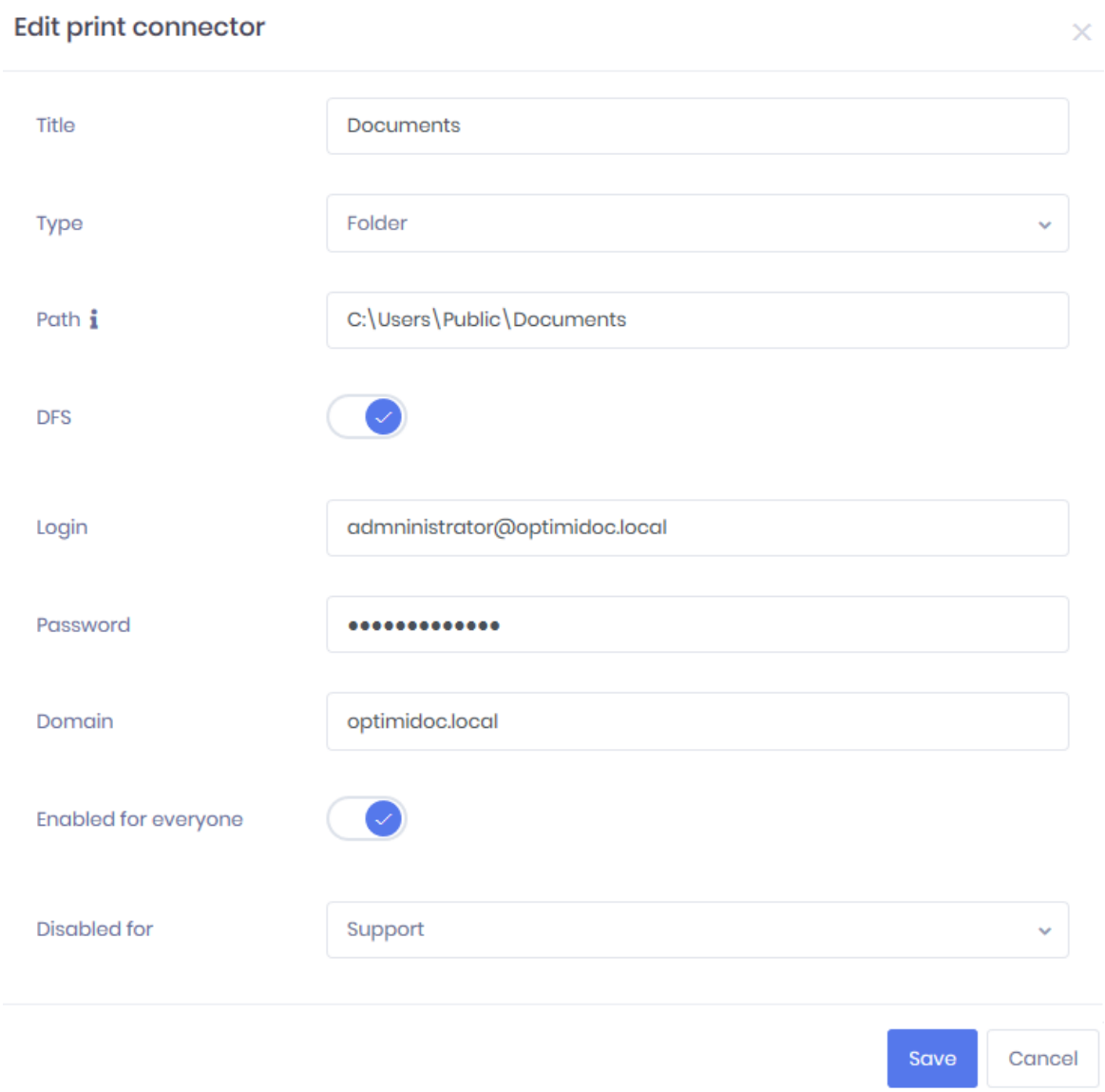
5.4.1.1 Folder

This print connector allows you to print from defined folder or browsing subfolders and print from them.

Title - destination title
Type - type of print connector
Path - path to required folder where the document will be stored
DFS - check if the destination Distributed File System
Login - user login name
Password - user password
Domain - computer domain in case of local computer without connection to domain use the name of computer



5.4.1.2 Email

Mailbox (Email) print connector periodically downloads emails from the mailbox and sends them to the print queue of users identified based on email addresses. Emails with attachments

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are stored as separate documents in print jobs.

Caution **All emails will be deleted after downloading them from a mailbox!**

Guest printing allows printing to guests with a new email address. If OptimiDoc does not recognizes the email address in the active list of users, then it automatically creates a new account with predefined parameters and sends back a PIN for user authentication. Such user can login to device and realize operations based on predefined rights.

Title - destination title
Type - type of print connector
Type - protocol of email server (IMAP/POP3)
Server - IP address or domain name of mail server
Port - server port number
Secure communication - enable/disable secure communication
Login - login name for mailbox/domain user
Password - password for mailbox/domain user

Allow guests - enable guest printing
email subject - subject of email which will be sent to guest with info about created PIN
email body - body of email message. To place the PIN number please use parameter {0}
Account expiration - definition of account validity period
Assign to department - definition of department where guest account will be assigned

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Create print connector

Title	Gmail
Type	Mailbox
Type	Imap
Server	imap.gmail.com
Use SSL	✓
Port	993
Login	brandon.clifton@gmail.com
Password	••••••••••••
Allow guests	✓
E-mail subject	Your password
E-mail body	Your new password for OptimiDoc is:
Account expiration	7 days
Assign to department	Others
Enabled for everyone	✓
Disabled for	Support

Save Cancel

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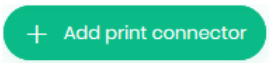
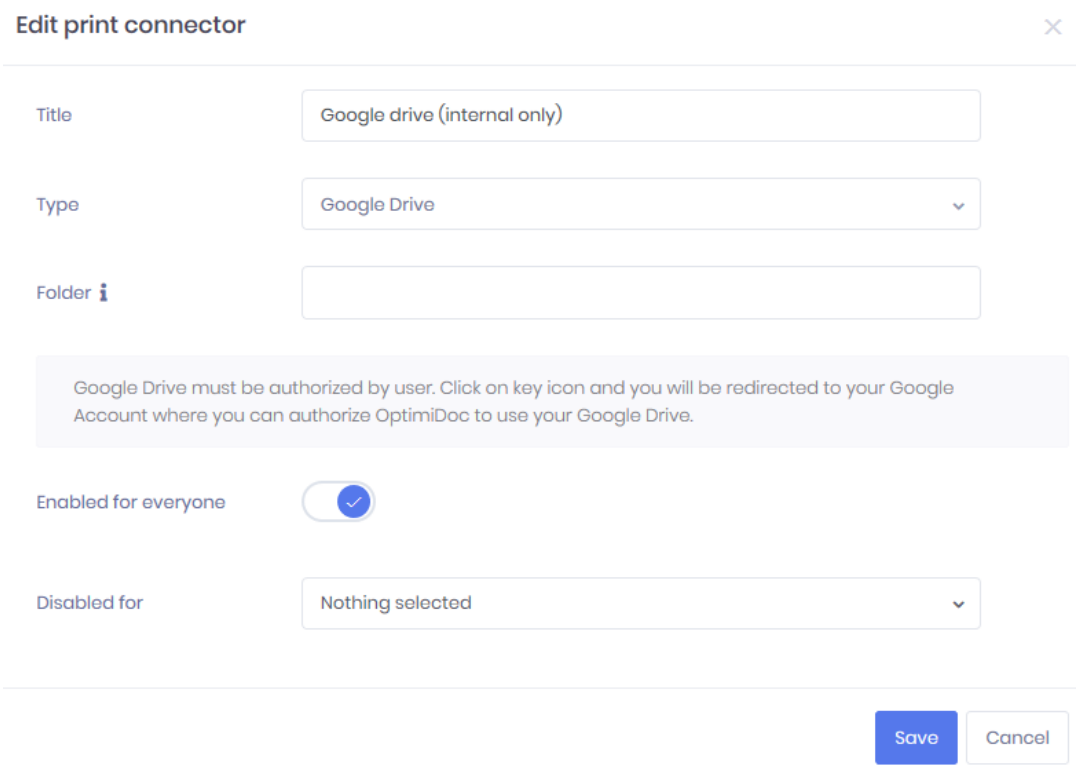
5.4.1.3 Google Drive

Google Drive type shows documents from Drive on device's panel.

1) Go to **Print > Print connectors** and create new print connector by 

2) Fill in the labels
Title - destination title
Type - choose "Google Drive"
Folder - folder in selected Google Drive.
The Google Drive destination requires authorization via a Google account. To authorize the destination click on the button.

You will be redirected to the Google page where you can allow the access to the Google Drive. To allow access, click on the Allow access button



When a standard user logs into OptimiDoc web, there is Google drive authorization at the bottom of the dashboard.

After the authorization of Google drive, users will have the access to print from their folders.

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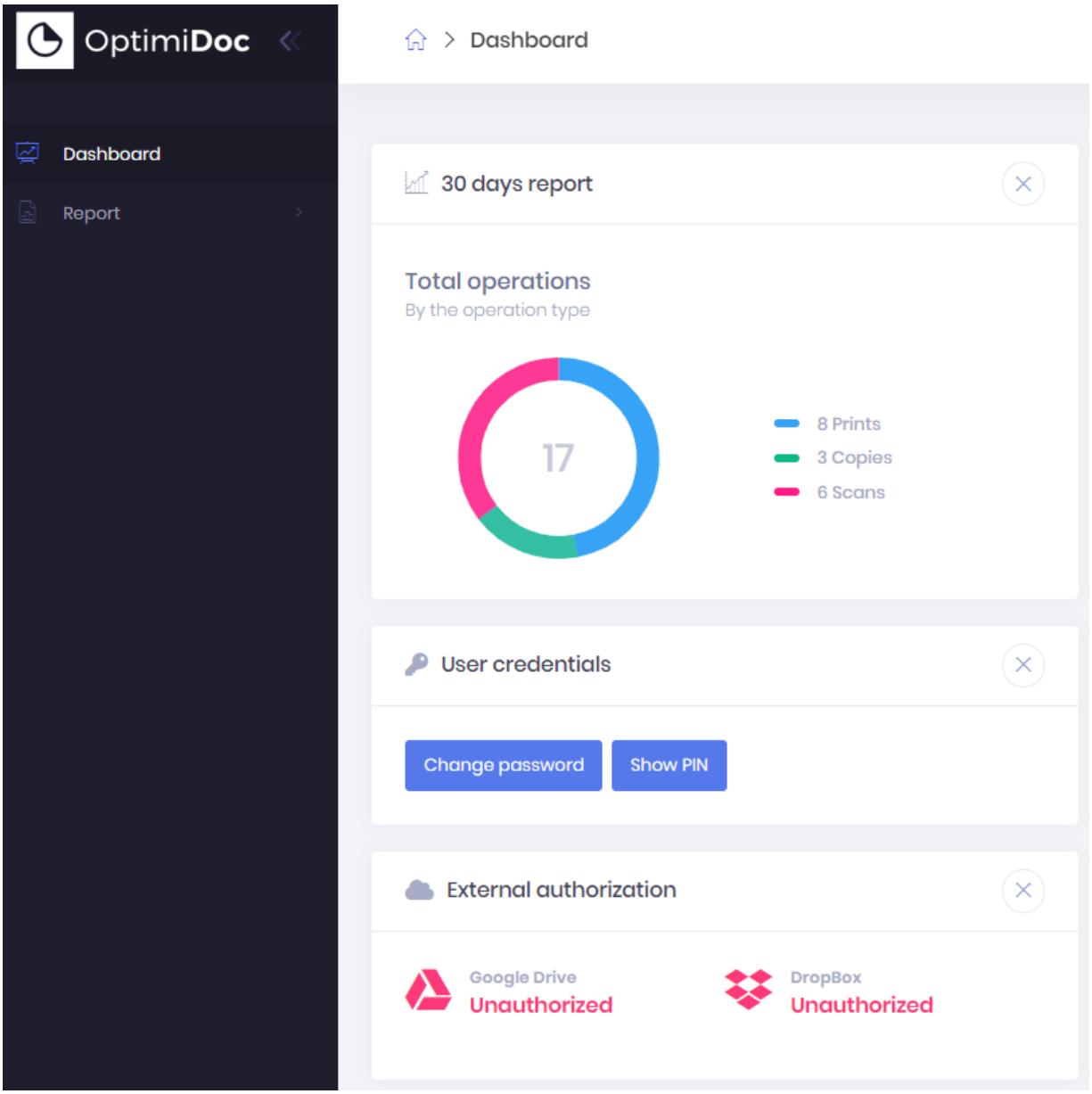
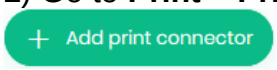


5.4.1.4 DropBox

DropBox type allows access to documents from the DropBox directly on the device panel.

1) Go to **Print > Print connectors** and create a new print connector with the button



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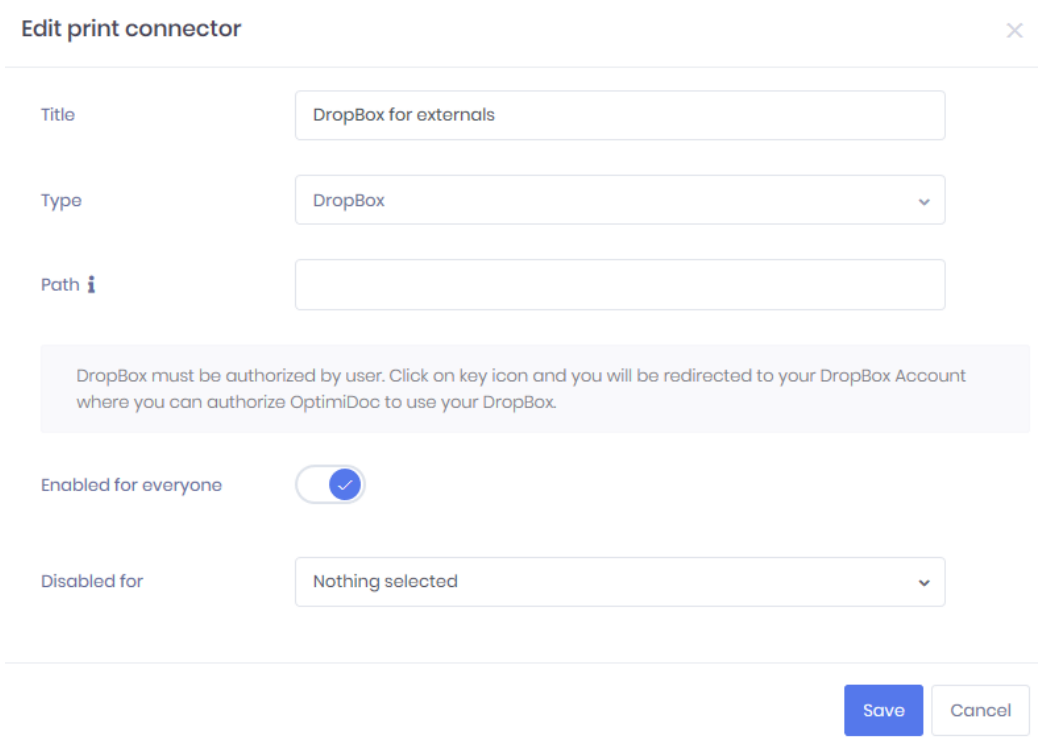

2) Fill labels
Title - destination title
Type - choose "DropBox"
Folder - folder in selected DropBox account.
The DropBox destination requires DropBox account authorization. To authorize the destination click on the button.

You will be redirected to the DropBox page where you can allow the access to the DropBox. To allow access you need to sign in via your Google account or DropBox account. After login, click on the Allow access button.

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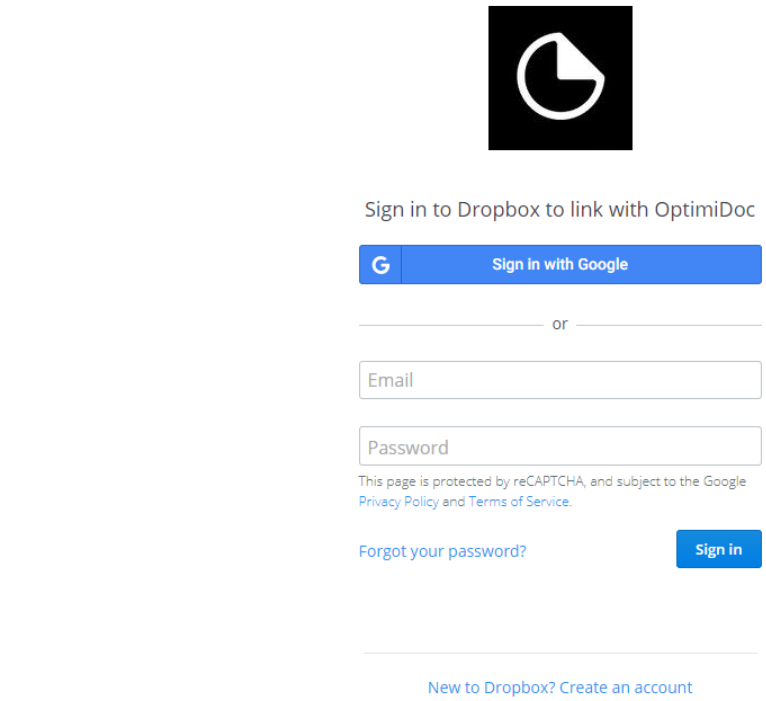

When a standard user logs into OptimiDoc web, there is DropBox authorization on the bottom of dashboard.

After the DropBox authorization, users will have access to print from their DropBox folders.

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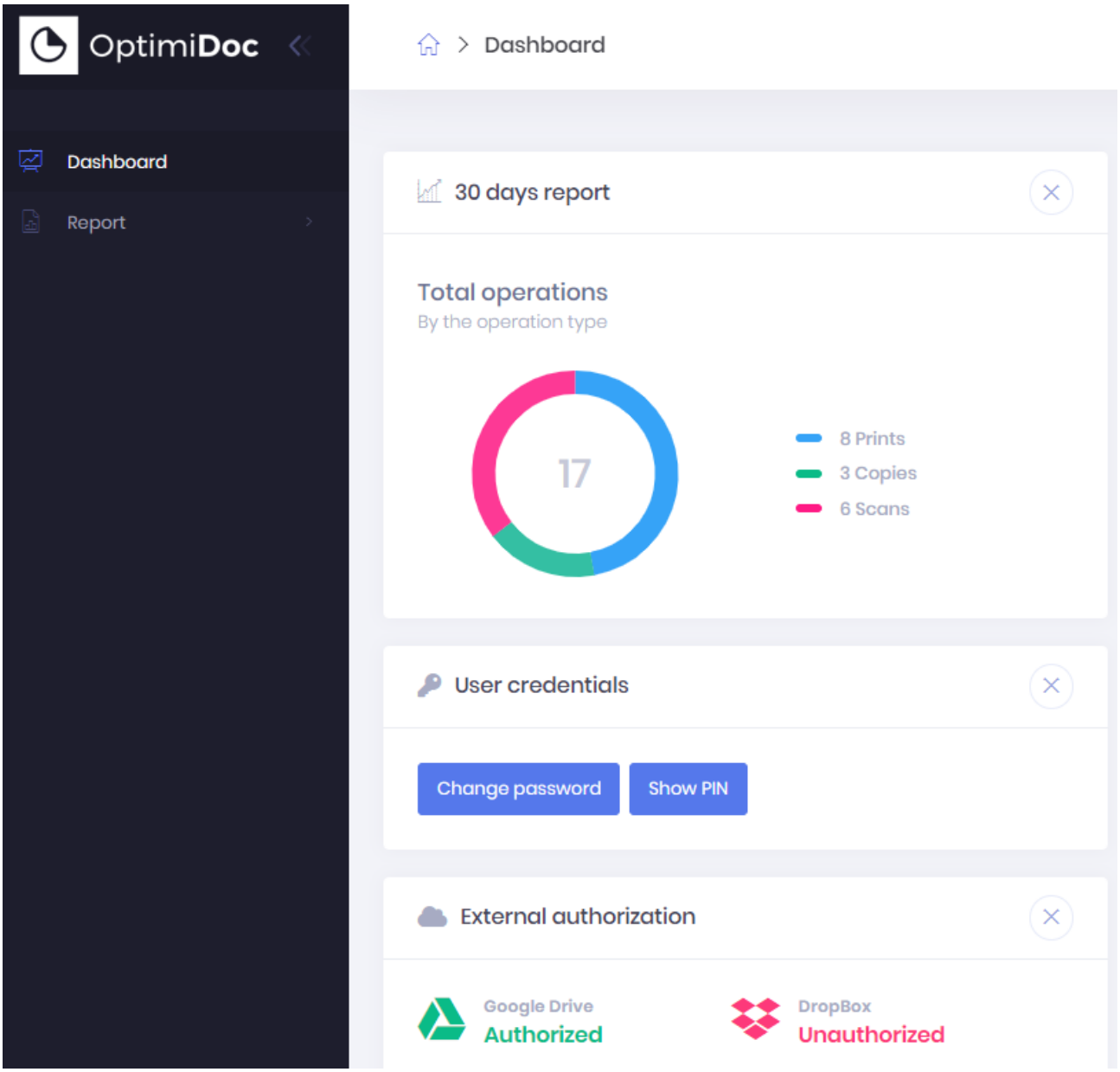
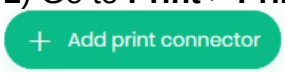


5.4.1.5 SharedQ

Usage of **SharedQ** (shared queue)

Tasks of all users, who are sharing this queue, are visible mutually for them. In the section Print, Print connectors, you can create a connector with type SharedQ and during the installation of the device on Windows, you save the name of this created shared queue. The tasks of users will be visible to each other.

1) Go to **Print > Print connectors** and create a new print connector by clicking on the button



2) Fill in the labels and set type to "SharedQ", then click **save** when completed.

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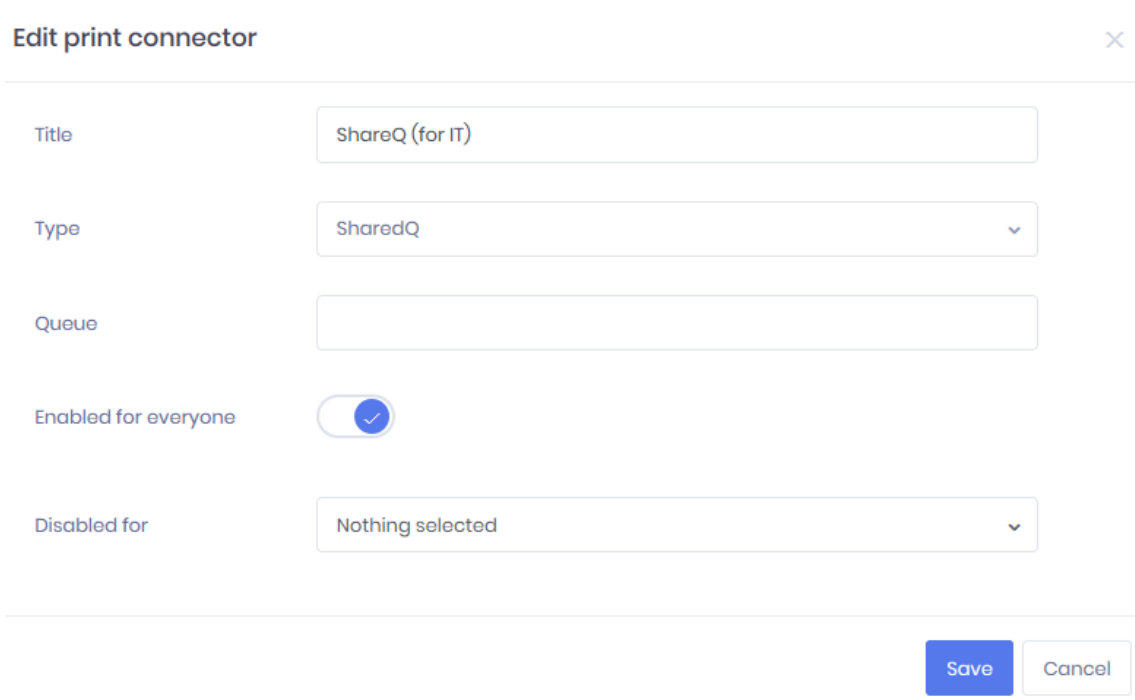
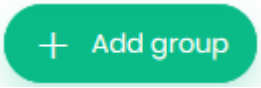
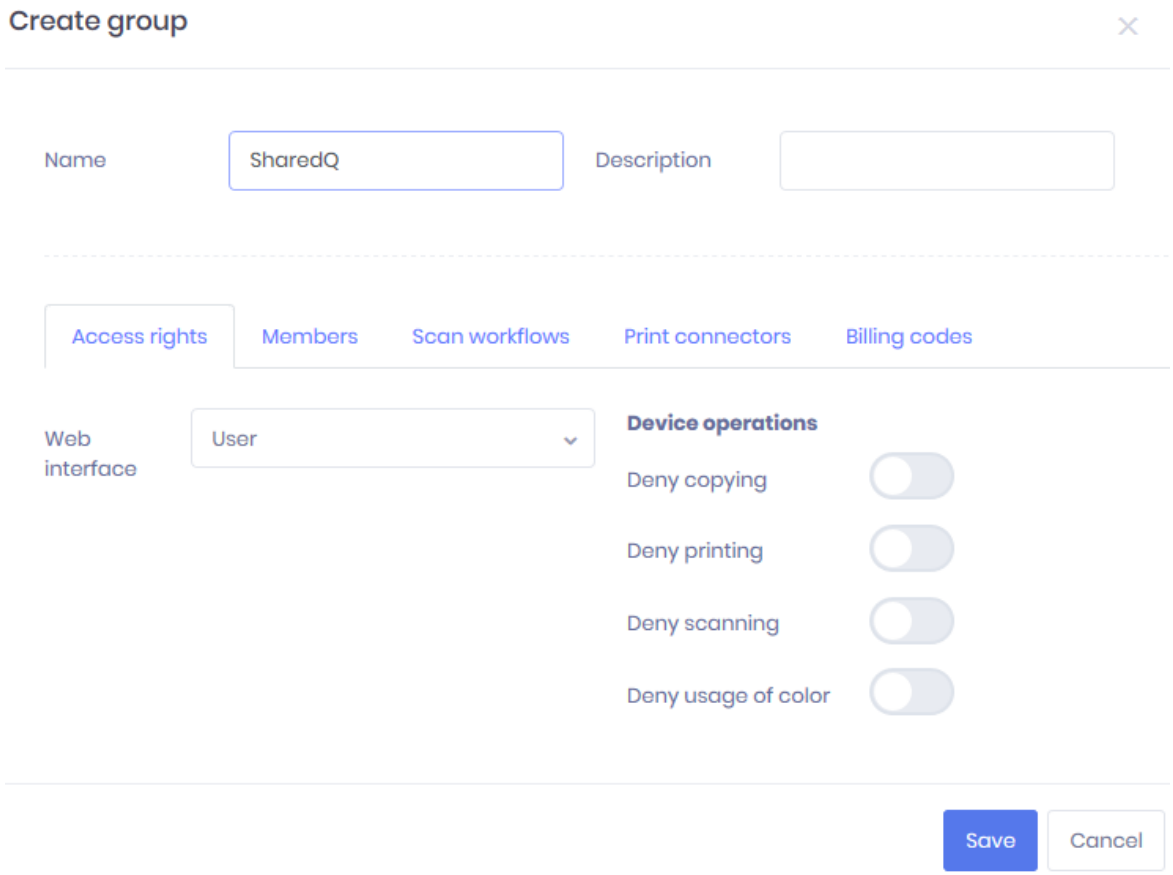


3) Go to **Users > Group list** and create a new group by clicking on the button





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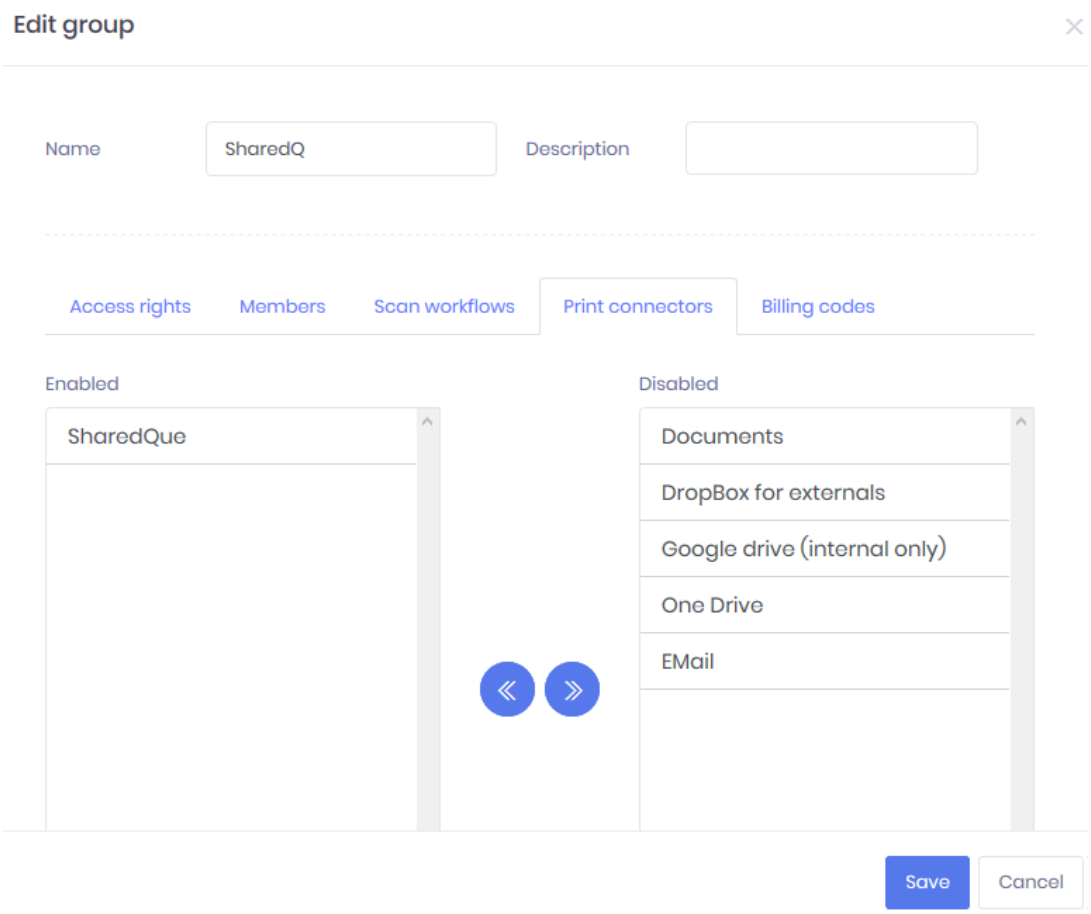
4) Set the name of group (the description is optional)

a) on the **Members** tab you can group members (i.e. select departments, specific users or a combination of these two options).

b) on the **Print connectors** tab check which print connectors will be allowed for this group.

c) When you are done, click Save to save the settings.



5) Find your printer in the Windows
Control Panel under Devices and Printers.
Right click to bring up the menu and select "Printer properties".

6) Choose the "Ports" tab, find a port which your printer is using and click on the Configure Port button.

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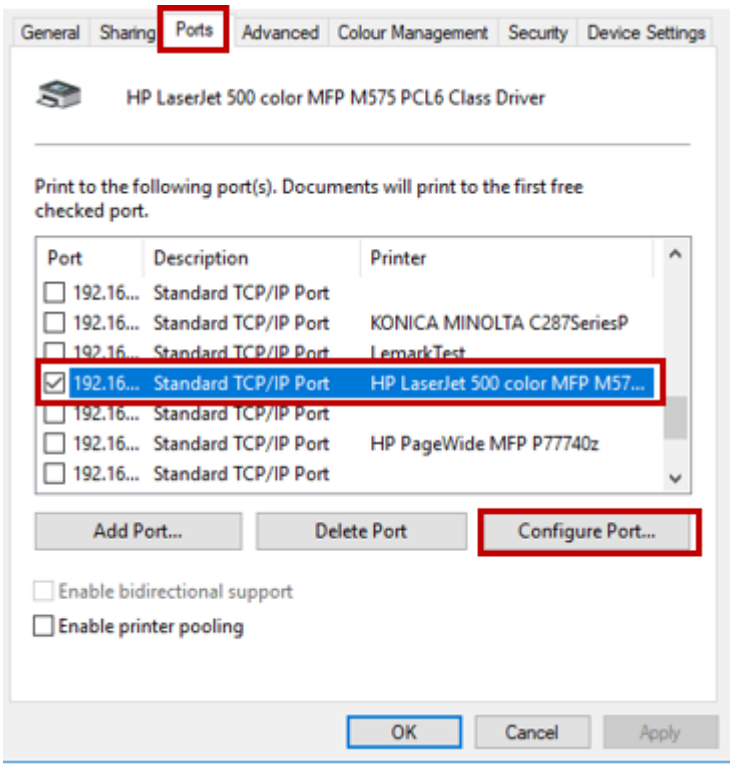
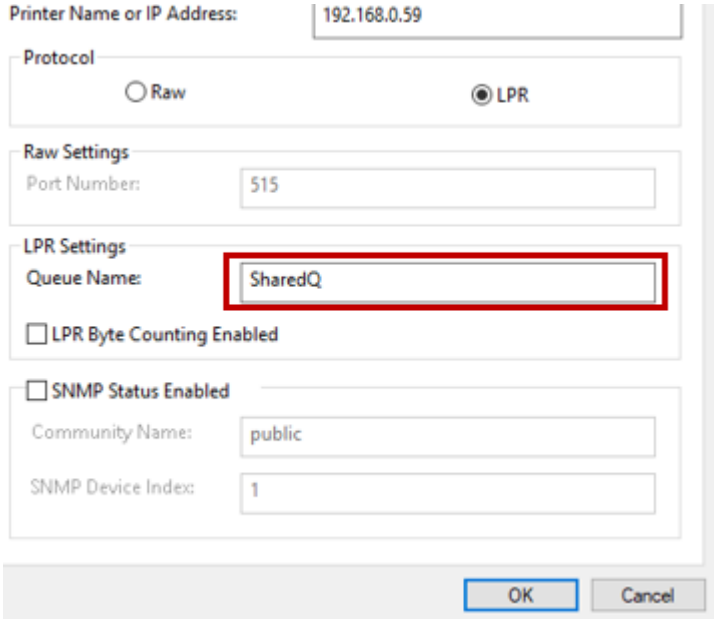


7) Keep the settings except for "LPR Settings - Que Name". Replace the "Queue Name" value, which was OptimiDoc to the name of your queue and click on OK.
It is SharedQ in our example.



In OptimiDoc Print Connector, you can set up to write to the Port settings of your device.

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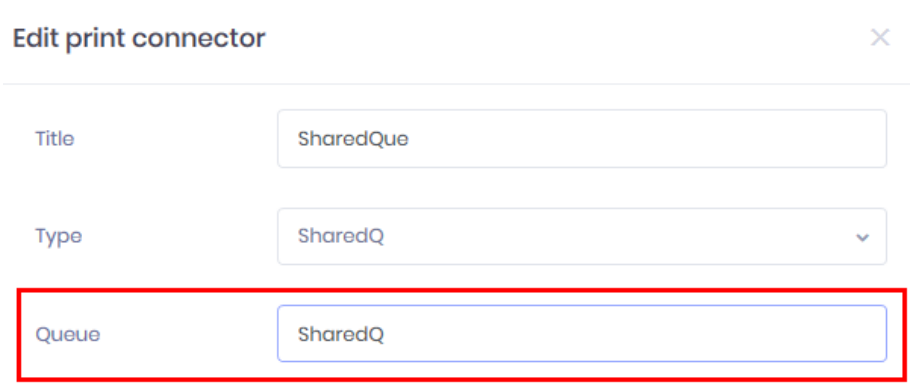
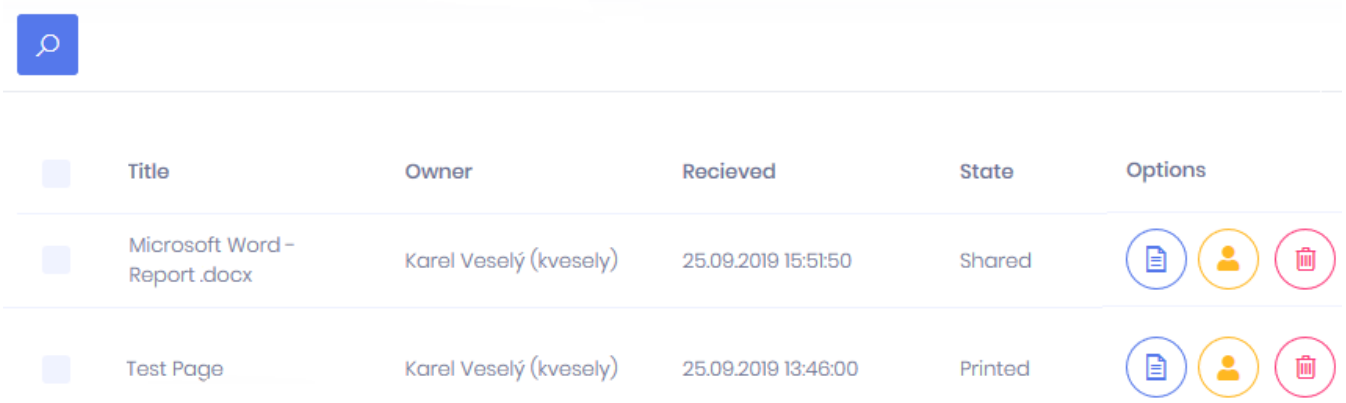


An example of a print job made through SharedQ Print connector.



5.4.1.6 OneDrive

OneDrive type shows documents from Drive on the device panel.

- **Title** - destination title
- **Type** - type of print connector
- **Folder** - folder in selected OneDrive.

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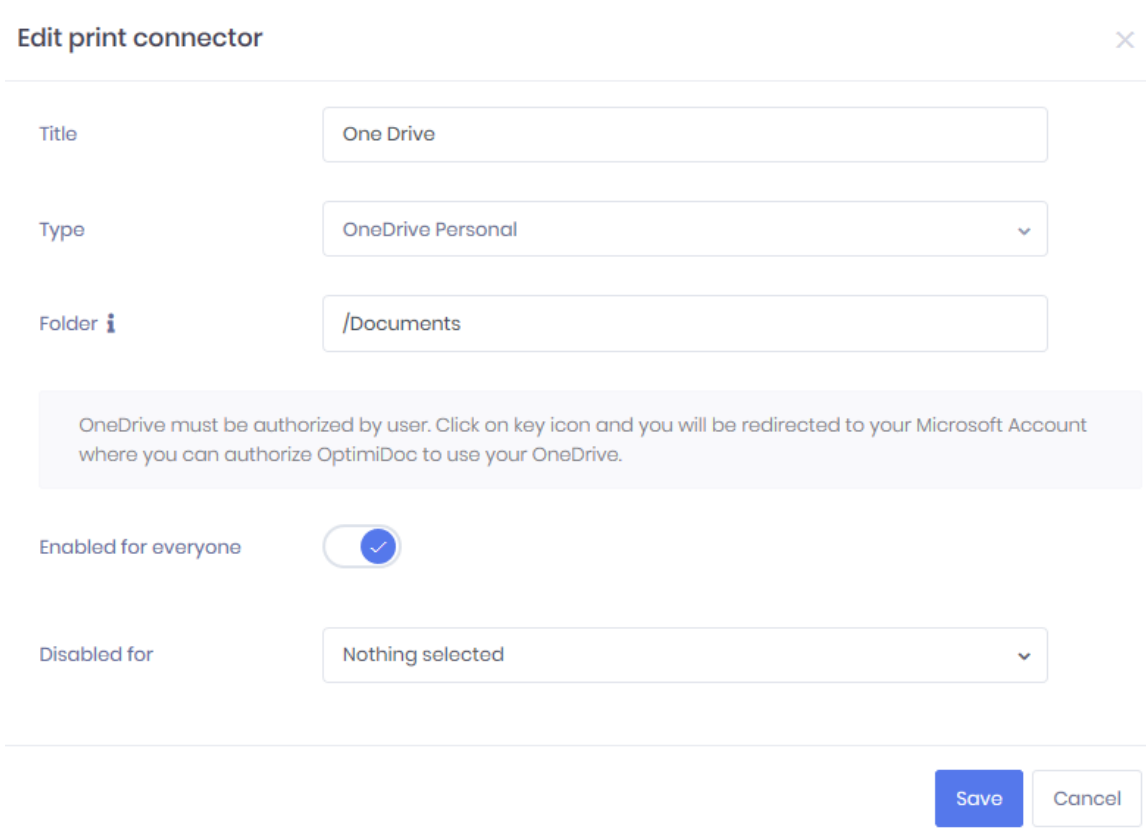

5.4.1.6.1 OneDrive Personal

The OneDrive destination requires authorization via a Microsoft account. To **authorize** the destination, click on the button. You will be redirected to the OneDrive page where you must **allow the access** to the OneDrive.

- To allow access, click **Yes.**

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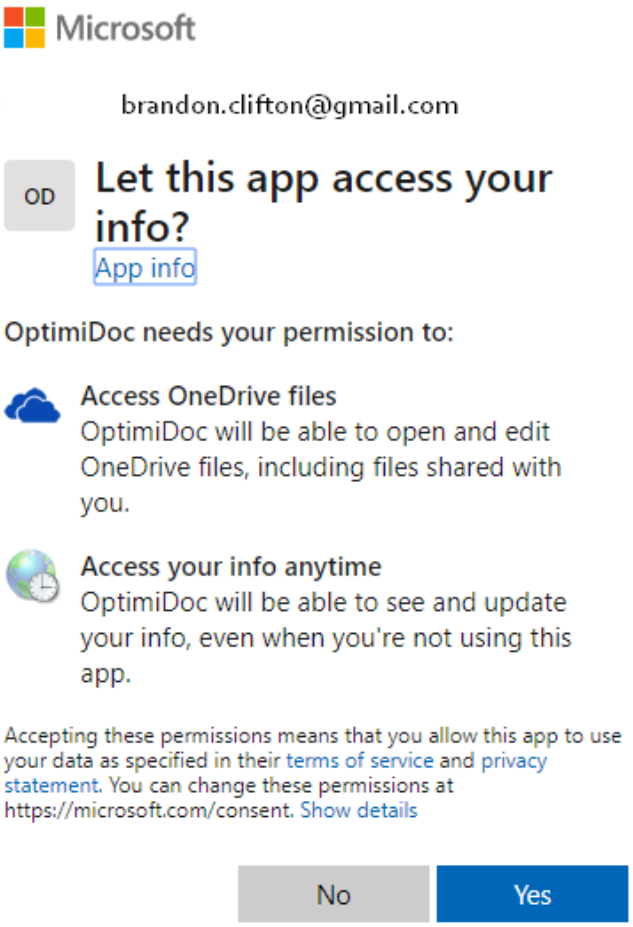
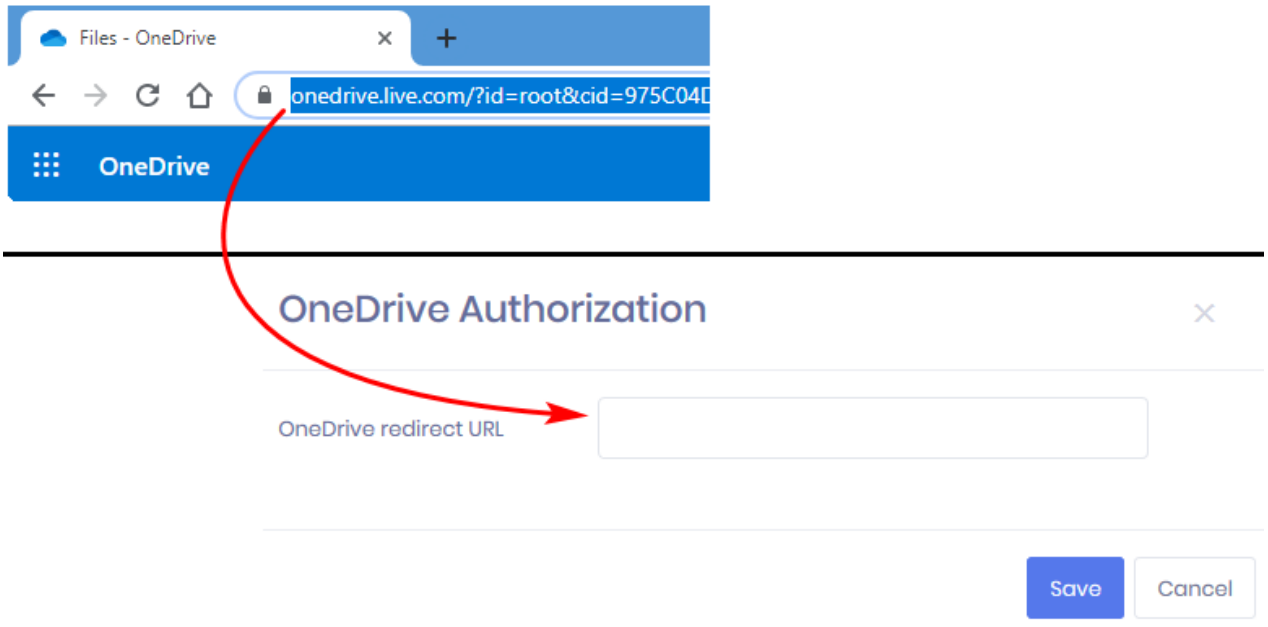


- **Copy URL** address from browser input and insert to OneDrive Authentication code dialog
- Click **Save**



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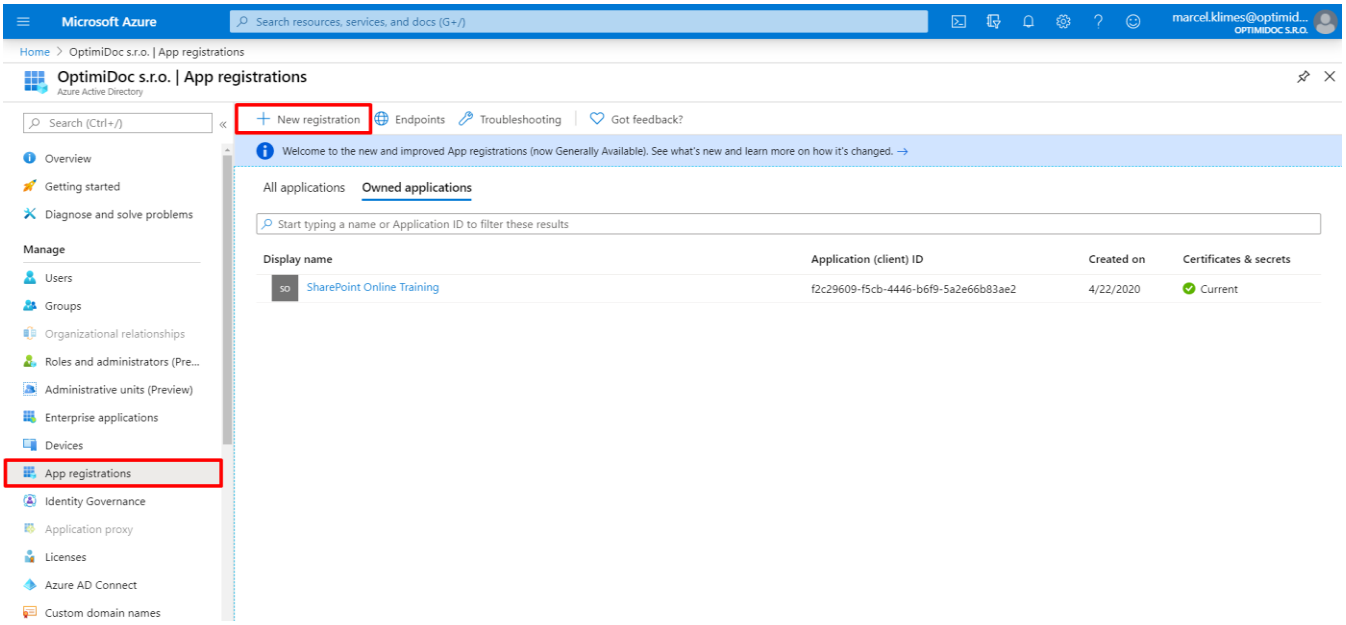
5.4.1.6.2 OneDrive Business

Before you start using OneDrive Business there are manual steps required. Follow the steps below.

1. Login to the Azure Management Portal - https://portal.azure.com/

2. Go to the Azure Active Directory section > App Registrations and click on New registration.



3. Enter the application name, select native application type and Redirect URI.

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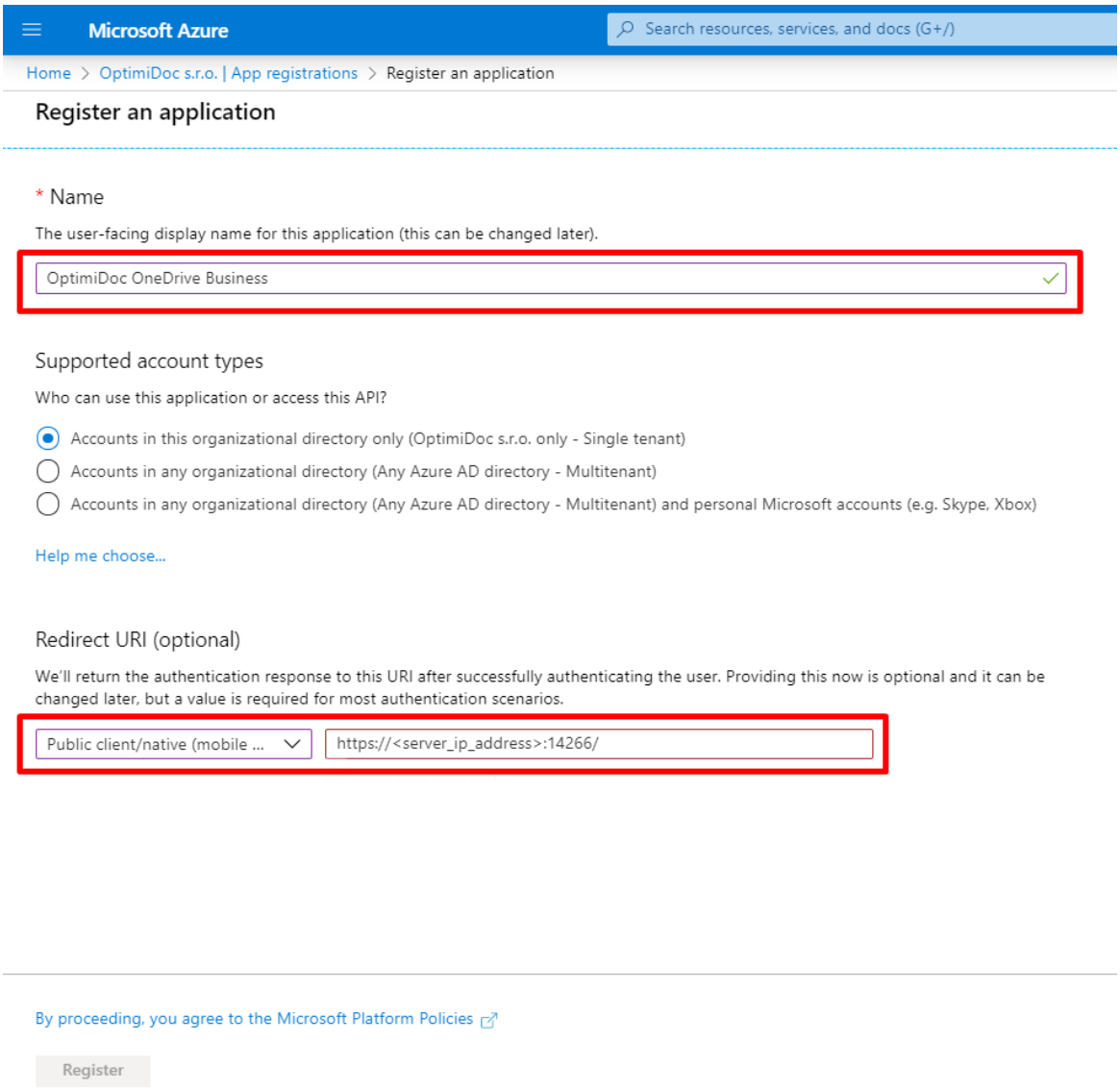

4. After creating the application, go to API permissions > Add a permission and search for SharePoint.

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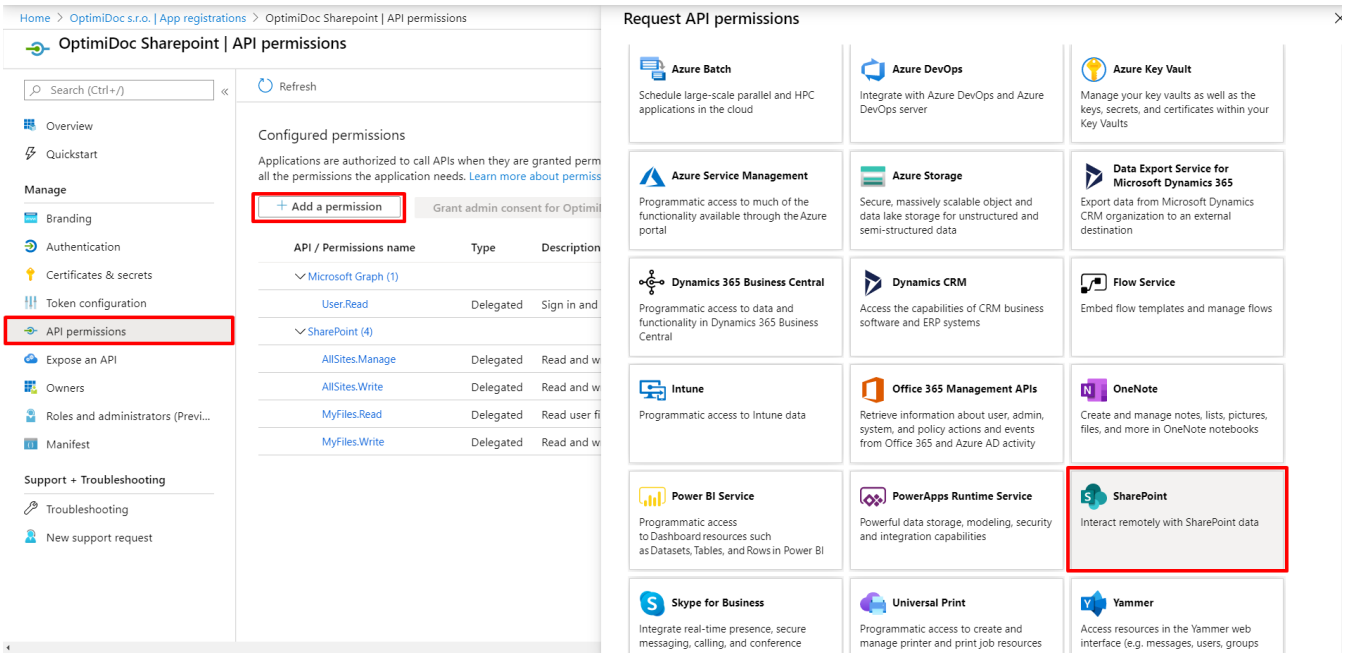

5. Select the Microsoft.SharePoint API and in permissions select rights based on the image below and click on Select. Add permissions for SharePoint Online and save.

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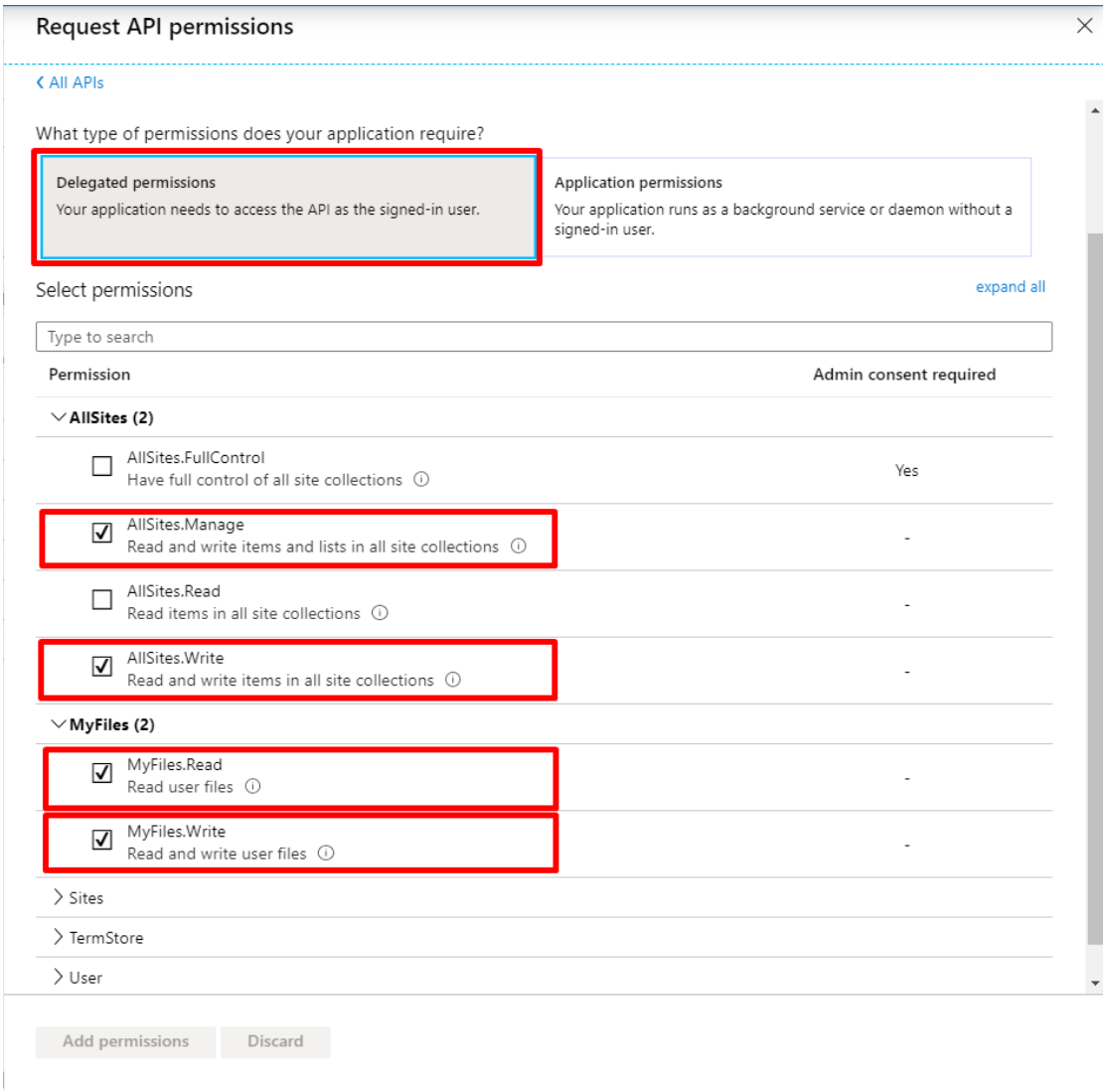

6. Configure the redirect URIs in Authentication section. Add the following two redirect URIs https://<server_IP>:14266/Dashboard/OneDriveConfirm/, https://<server_IP>:14266/Destination/OneDriveConfirm/

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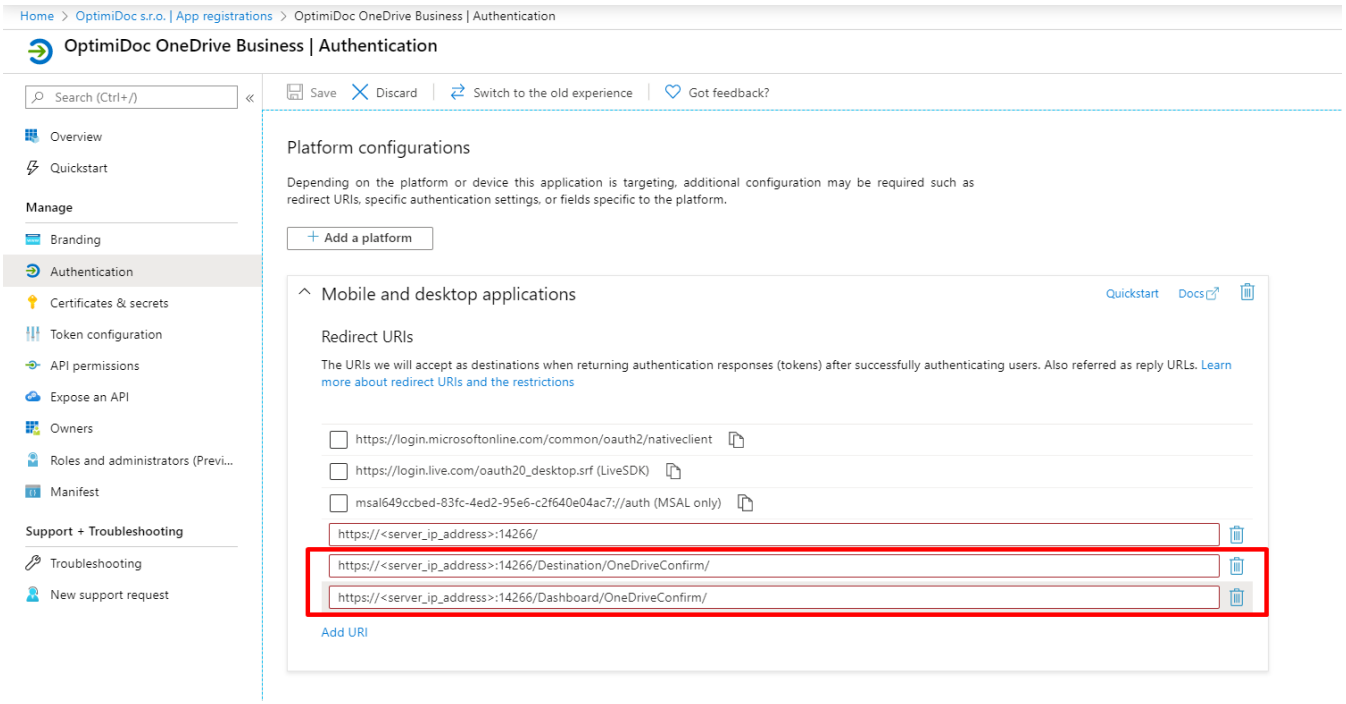
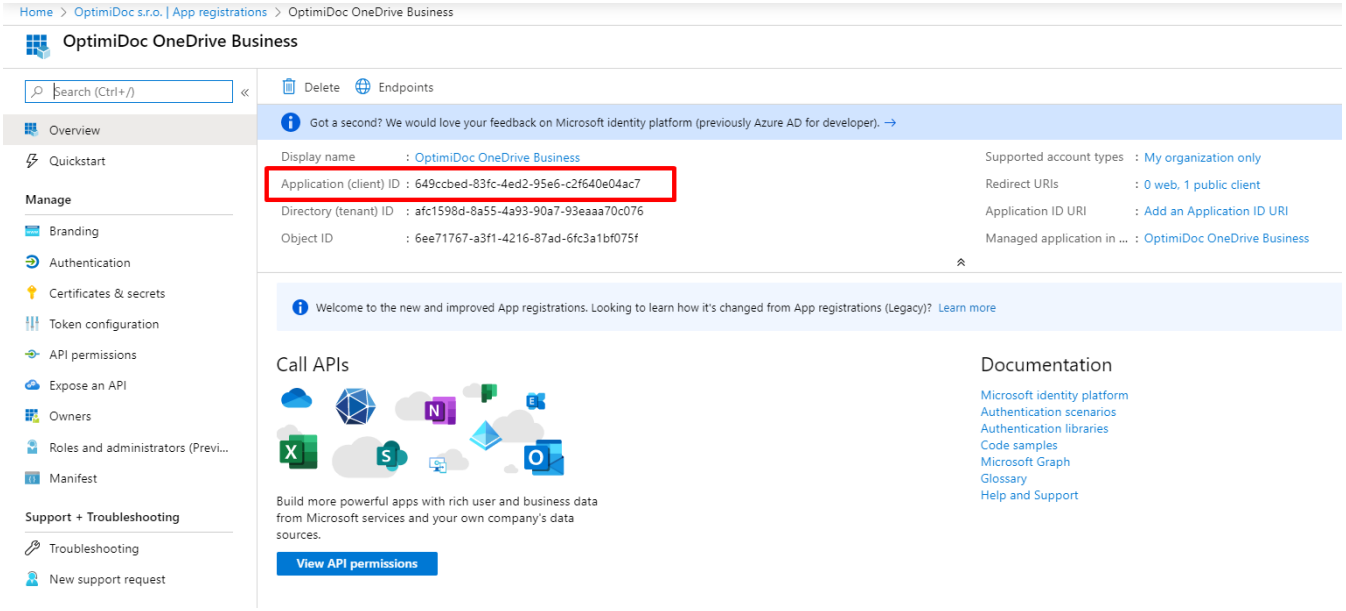


7. Now you have completed configuration in Azure.

8. To start the configuration of OptimiDoc you will need the Application ID.



9. In OptimiDoc setup the print connector.

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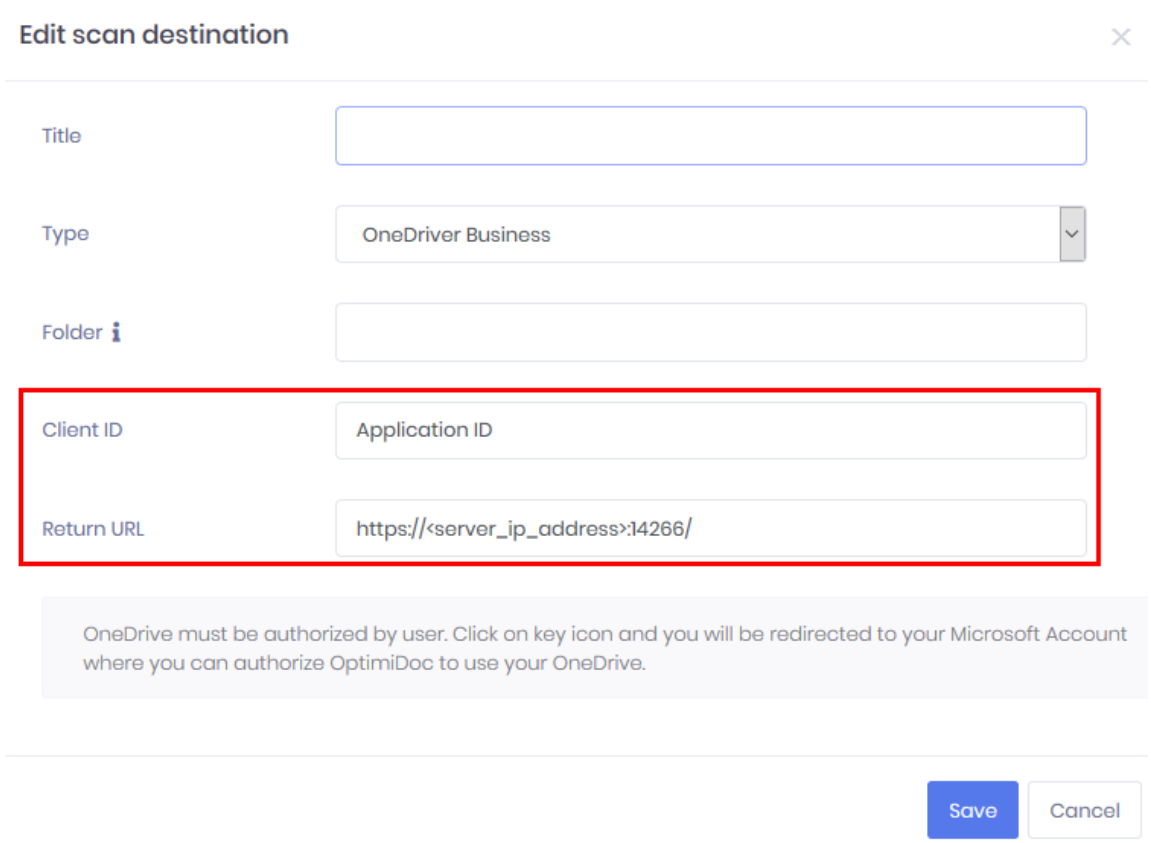
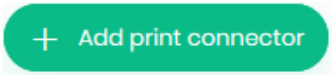


10. Authorize access by clicking on the button. For general account use the button in Scan Destinations. For personal OneDrive the user needs to authorize the access in Dashboard.

5.4.1.7 Box

To create a **box.com** print connector, click on the button 

and select the connector type **Box.**

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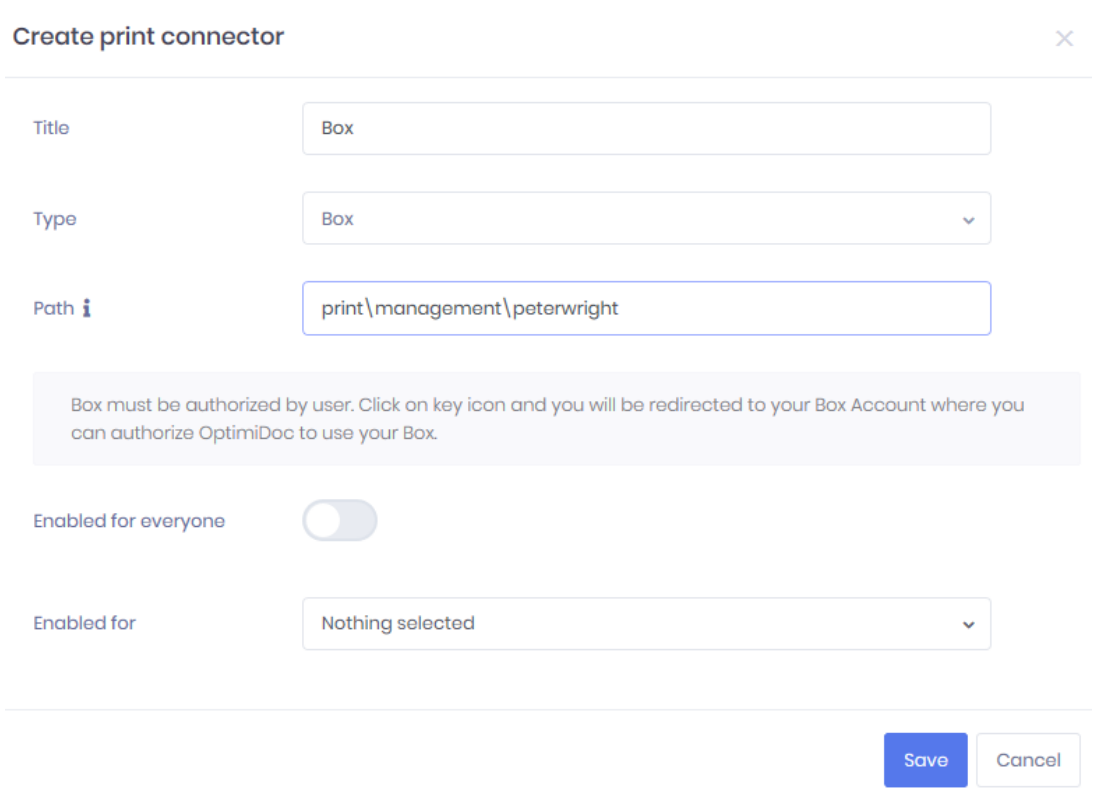

Leave path input box blank for root.

Save it and authorize with the button or let users authorize the connector themselves.

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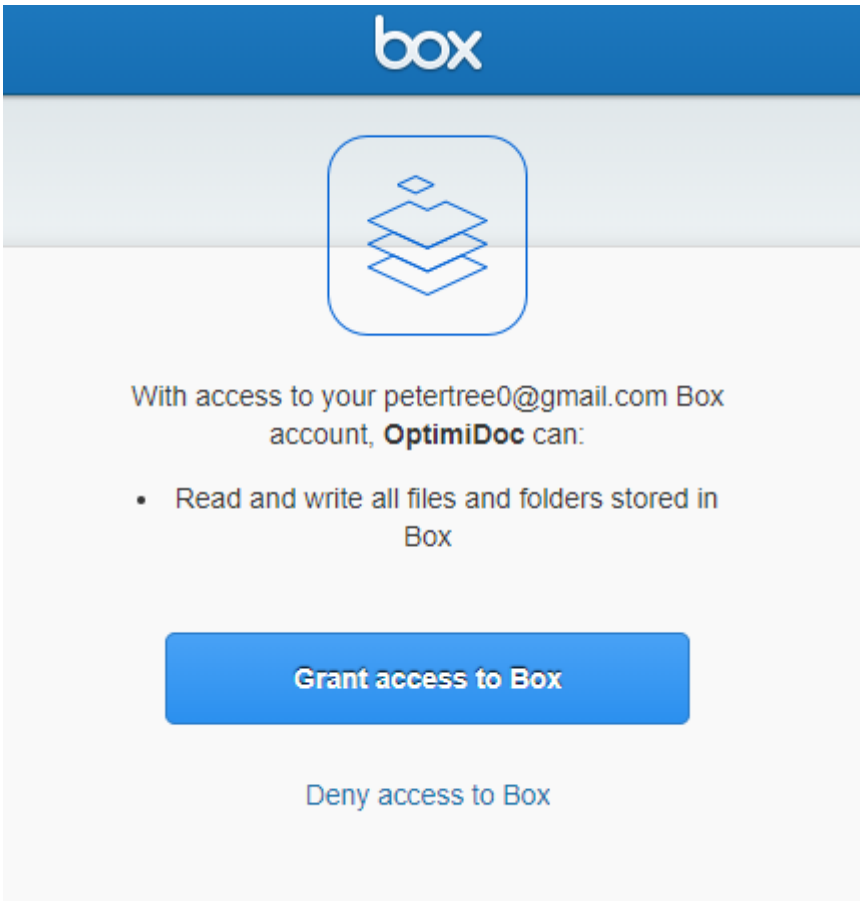

5.4.1.8 SharePoint Online

1. Login to the Azure Management Portal - https://portal.azure.com/#
2. Go to the Azure Active Directory section > App Registrations and click on New registration.

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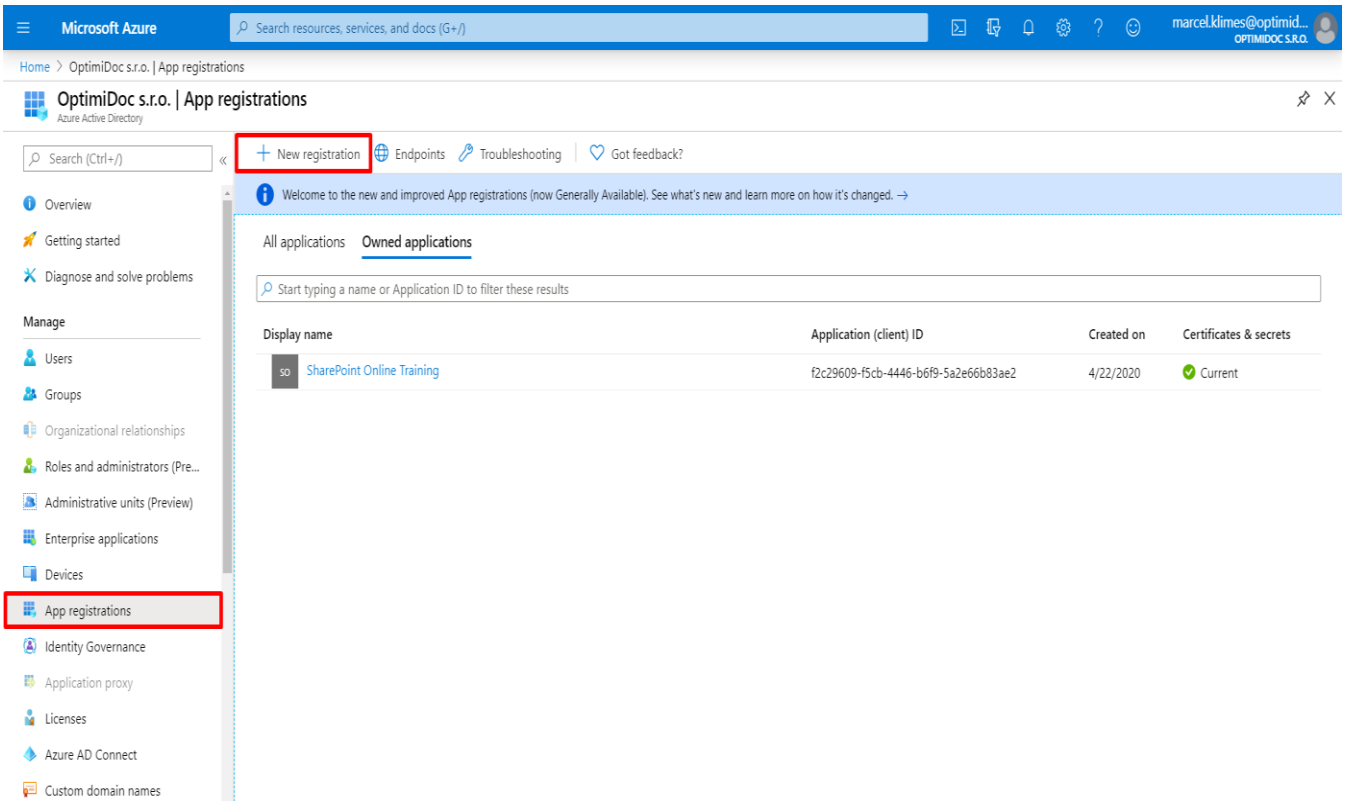

3. Enter the application name and Redirect URI: https://oauth.optimidoc.com/MicrosoftOnline/

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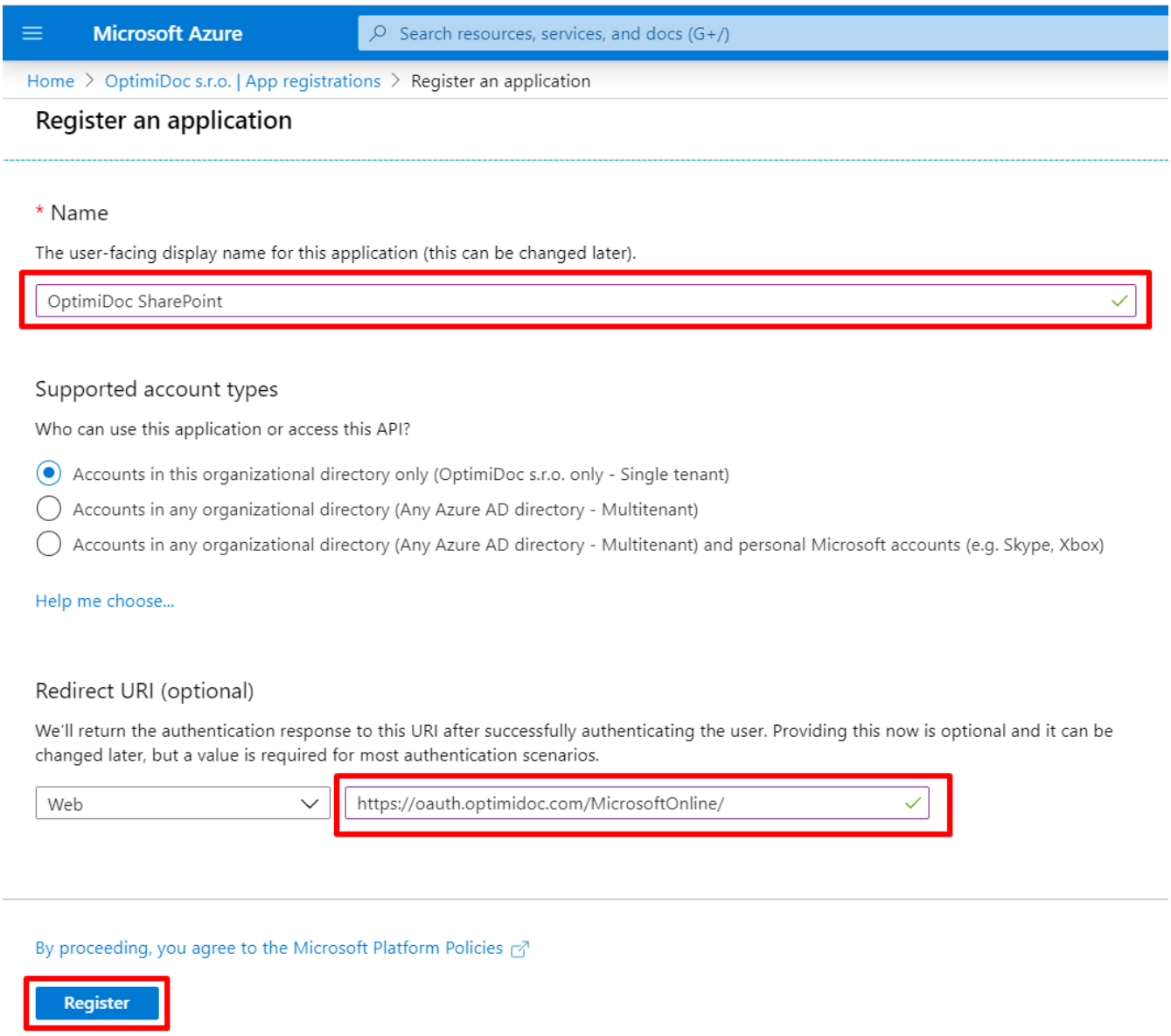

4. After creating the application, go to API permissions > Add a permission and search for SharePoint.

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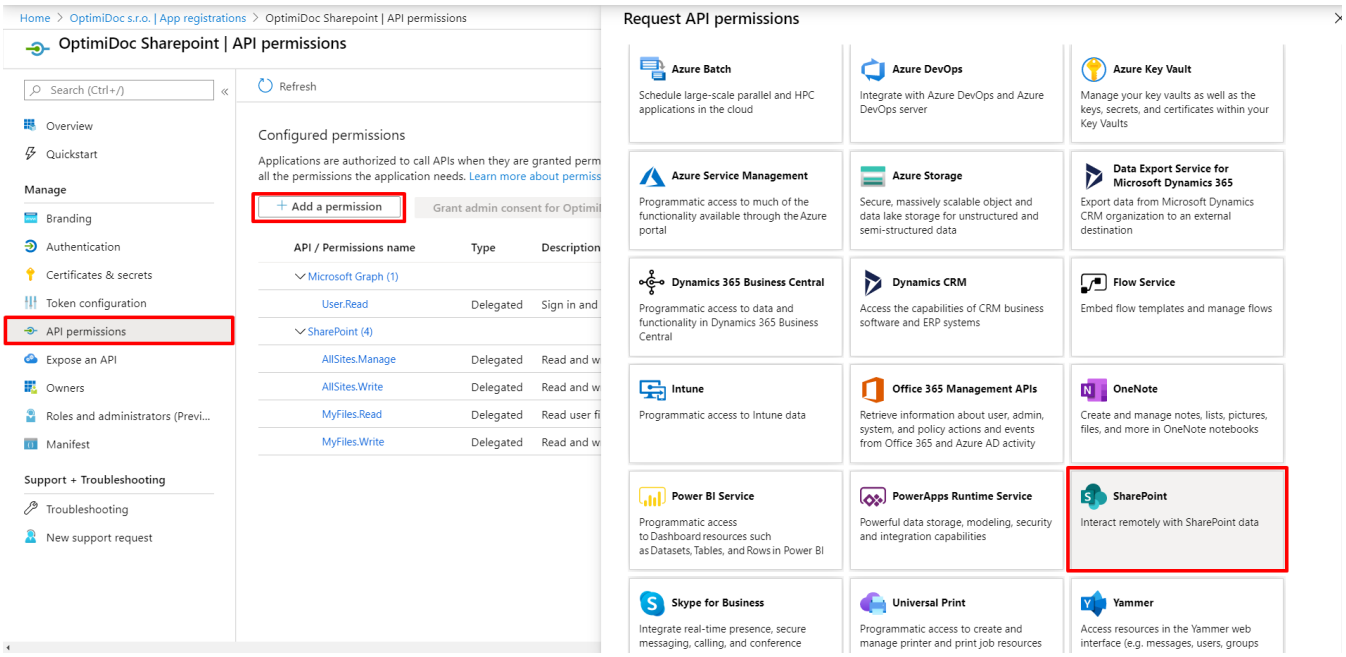

5. Select the Microsoft.SharePoint API and in permissions select rights based on the image below and click on Select. Add permissions for SharePoint Online and save.

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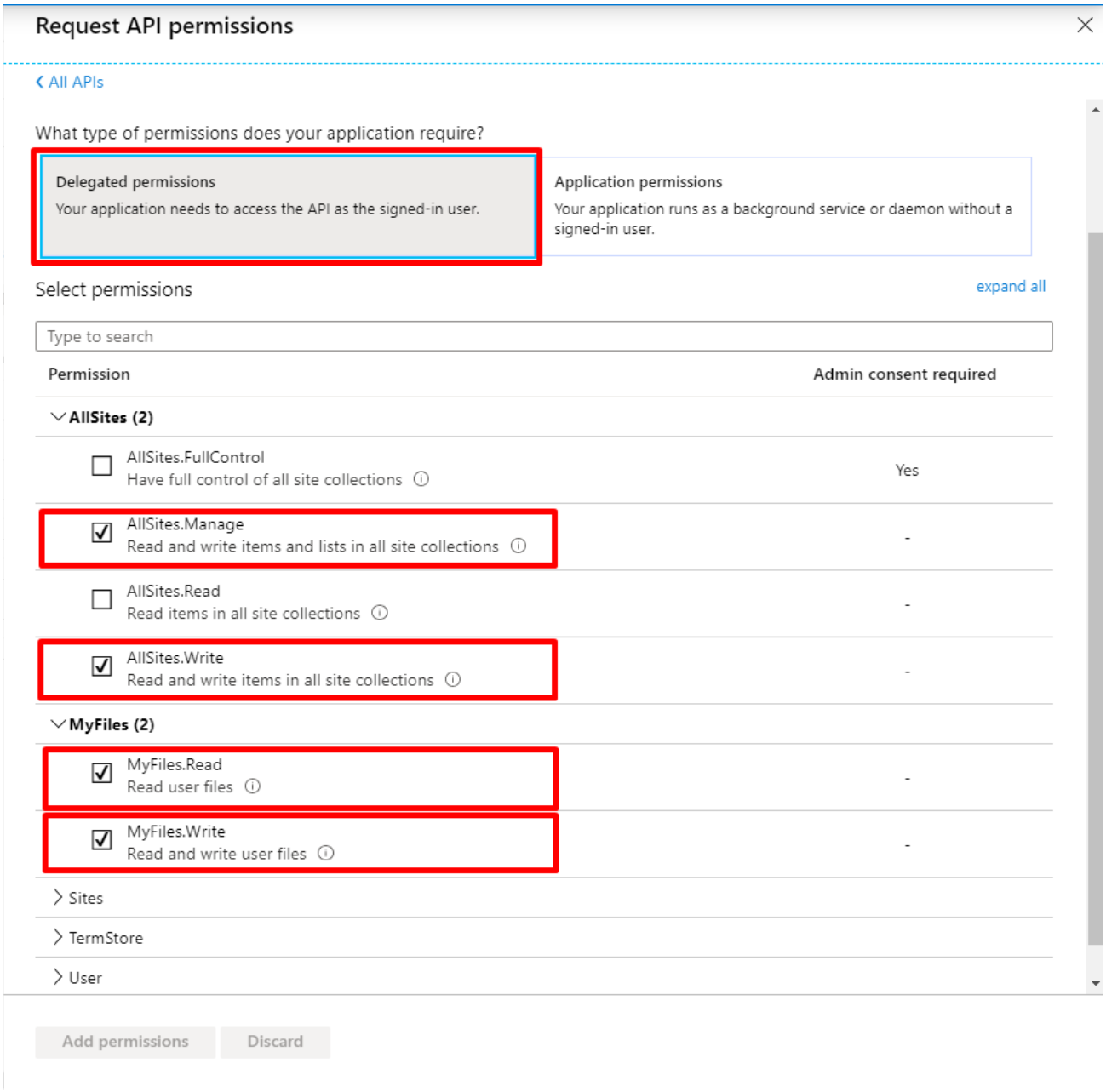

6. Now, when you have finished with application registration create the print connector in OptimiDoc.

Title - name of scan destination
Type - type of scan destination
SharePoint server - add your SharePoint online URL
SharePoint web - leave empty if you want to upload scans in SharePoint root folder
SharePoint path - name of the folders on SharePoint

- **See below points on how to add Client ID and Client Secret**

In case you are using sites in SharePoint, you need to set and split URL address like e.g.

URL "https://optimidoc.sharepoint.com"

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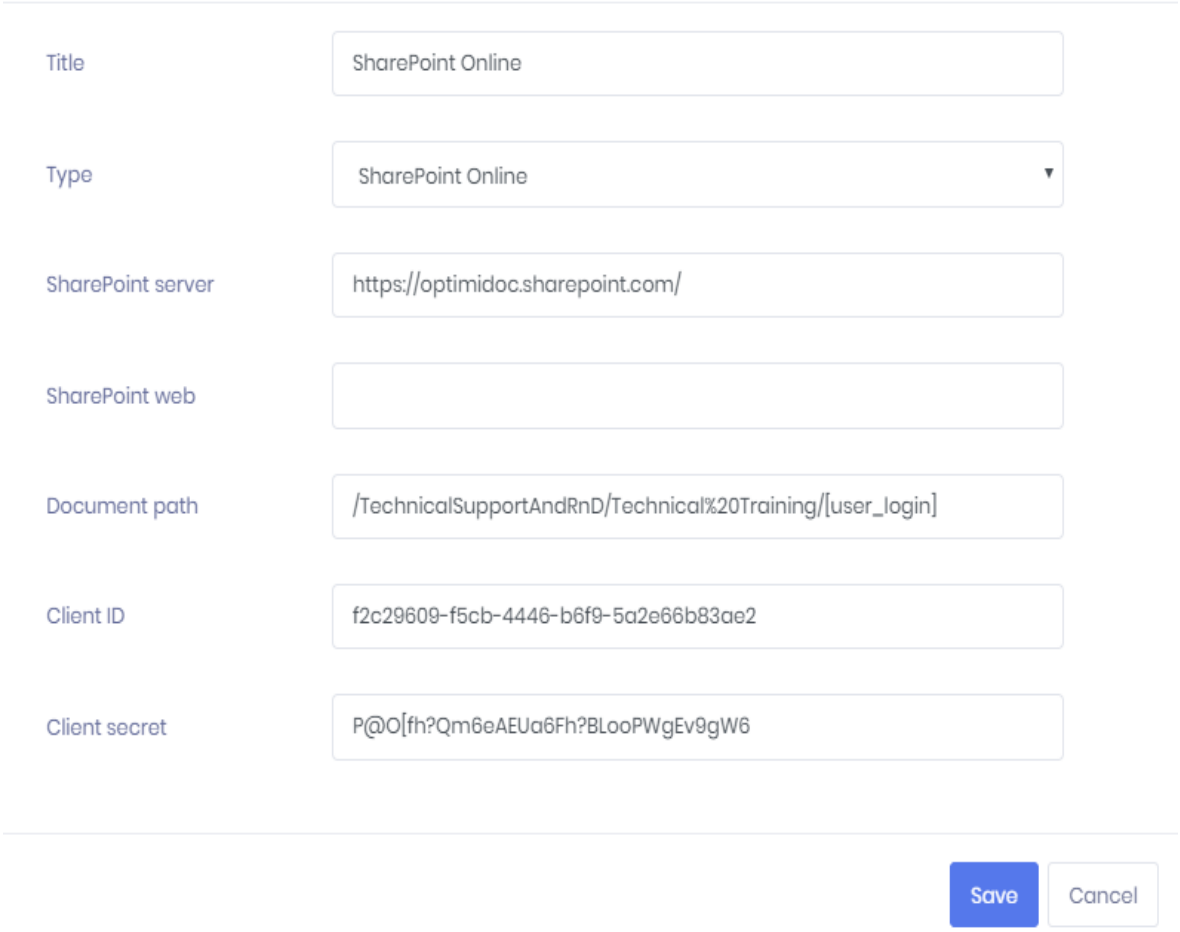
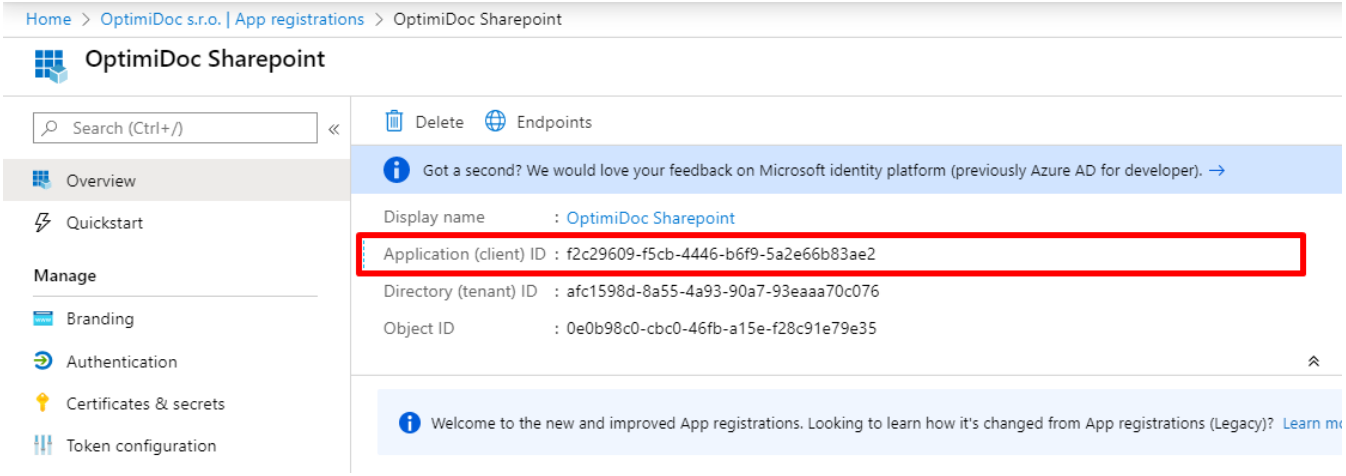
Web = "/sites/OptimiDocNorthAmerica"
Path = "/Shared%20Documents/test"



7. Add a Client ID -> Copy your Application ID and paste into scan destination "Client ID".



8. Add a Client Secret -> Certificates & secrets -> New client secret -> fill in description -> click Add and copy key value -> paste key value in scan destination "Client Secret" -> then click Save

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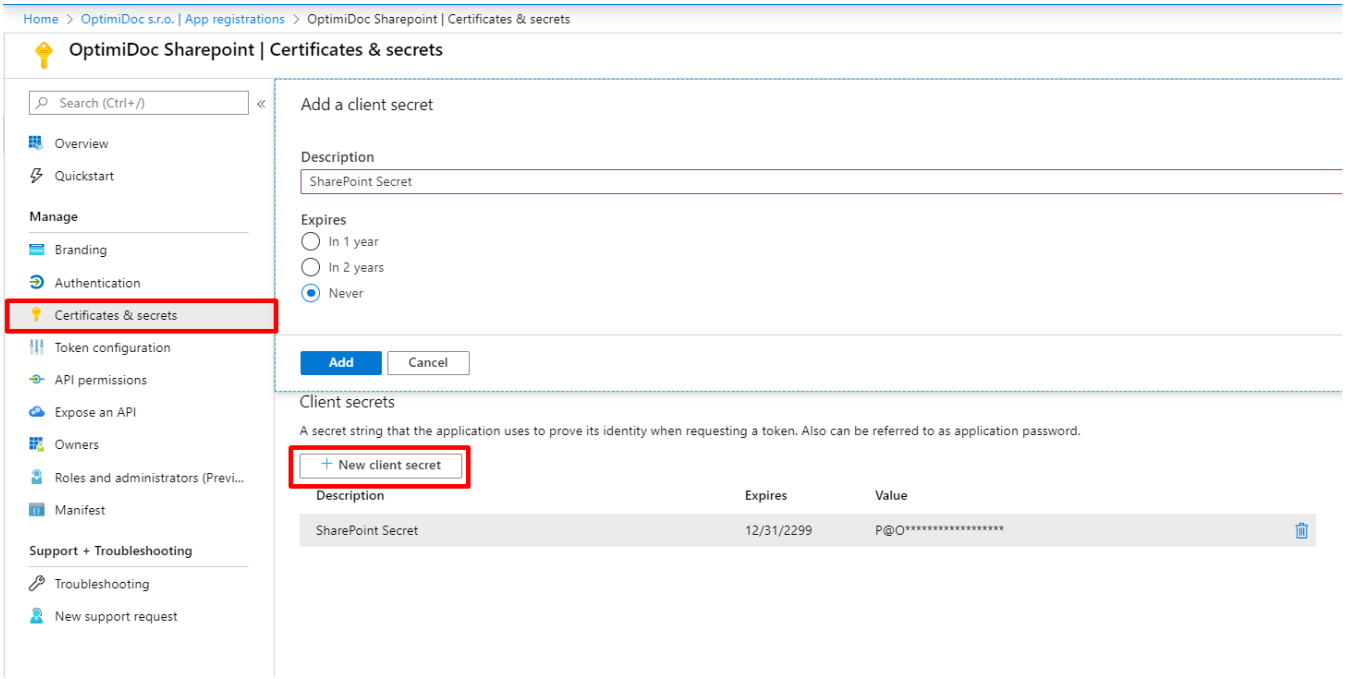
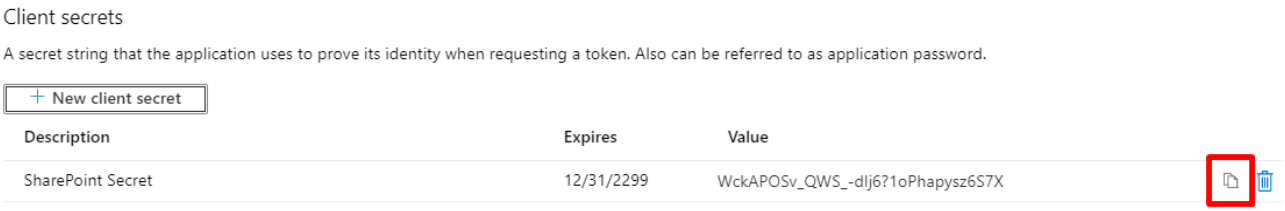
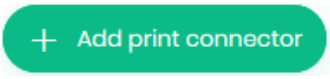




9. Then authorize access by clicking on the button on the user's dashboard. For general account use the button in Print Connectors.

5.4.1.9 WebDAV

To create a **WebDAV** print connector click on the button  and select the connector type **WebDAV.**

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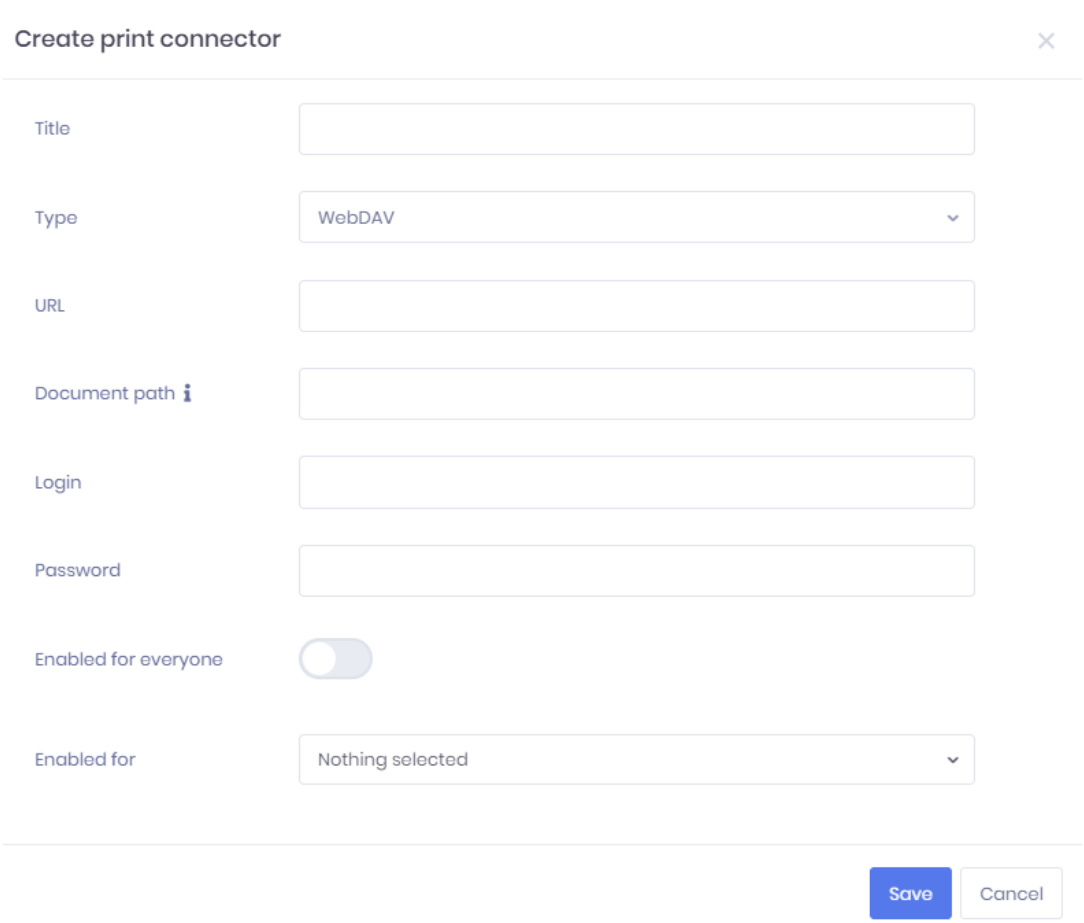

Fill in the title and URL Address of print connector and you can also choose document path.

Don't forget to Enable it for everyone or a specific group. After that Save the print connector.

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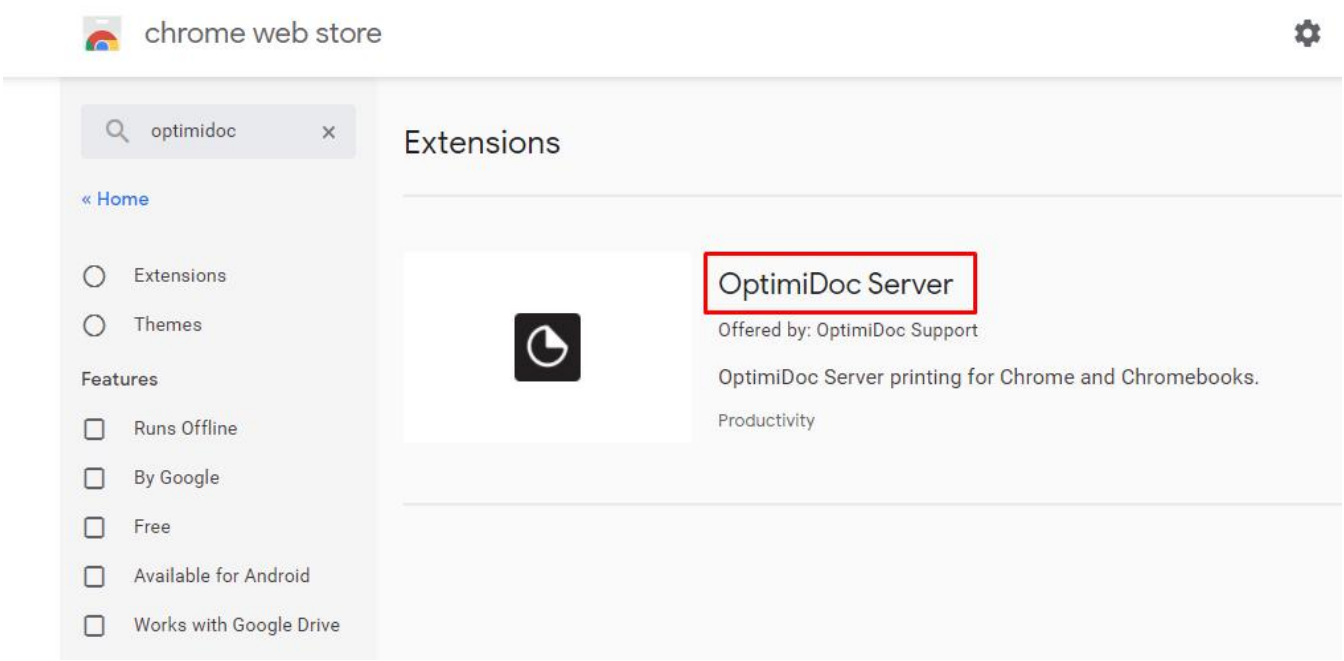
5.4.2 Google Chrome Print Extension

1. Search for the OptimiDoc Chrome Extension



2. Add the extension to Chrome

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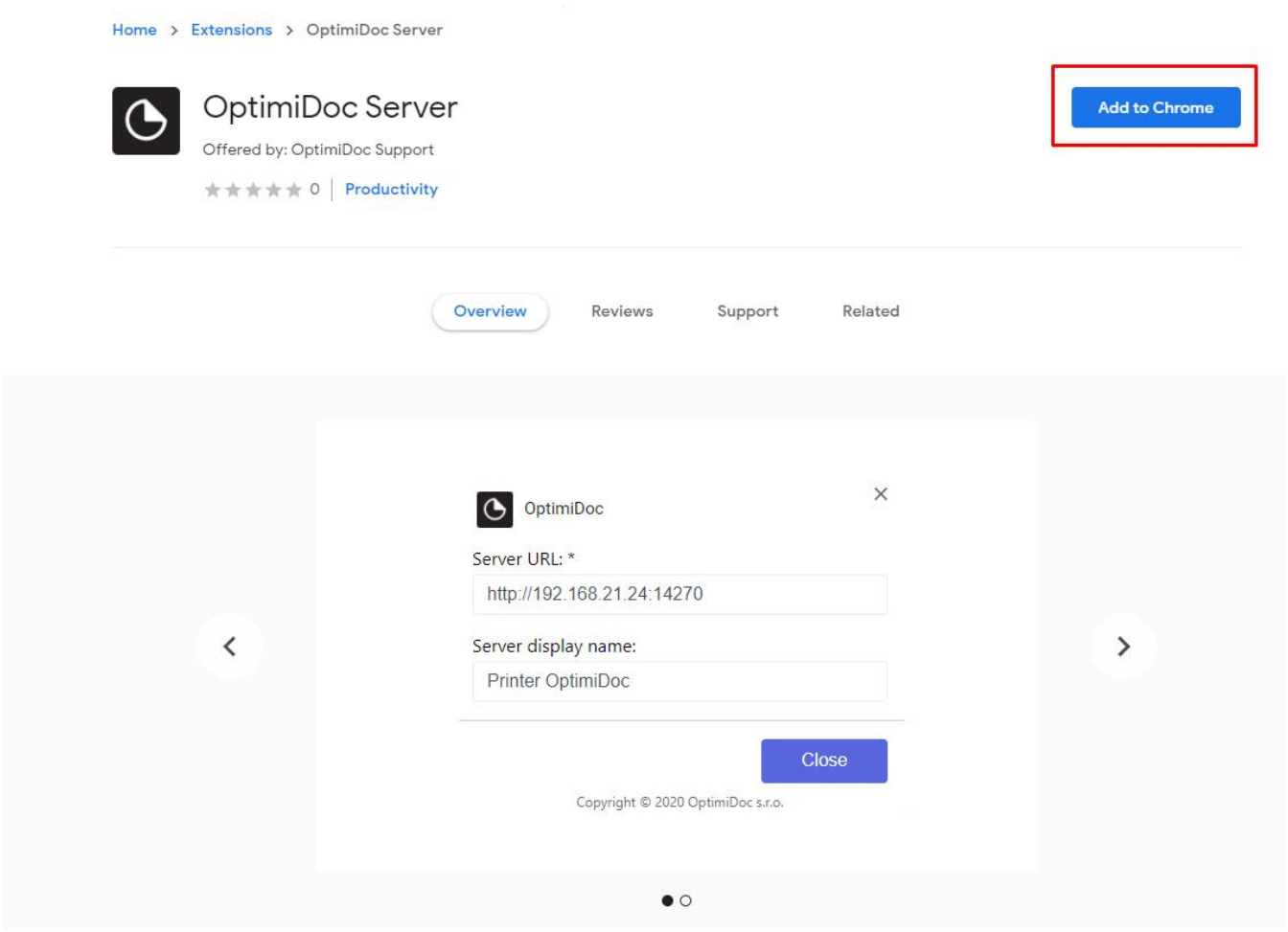
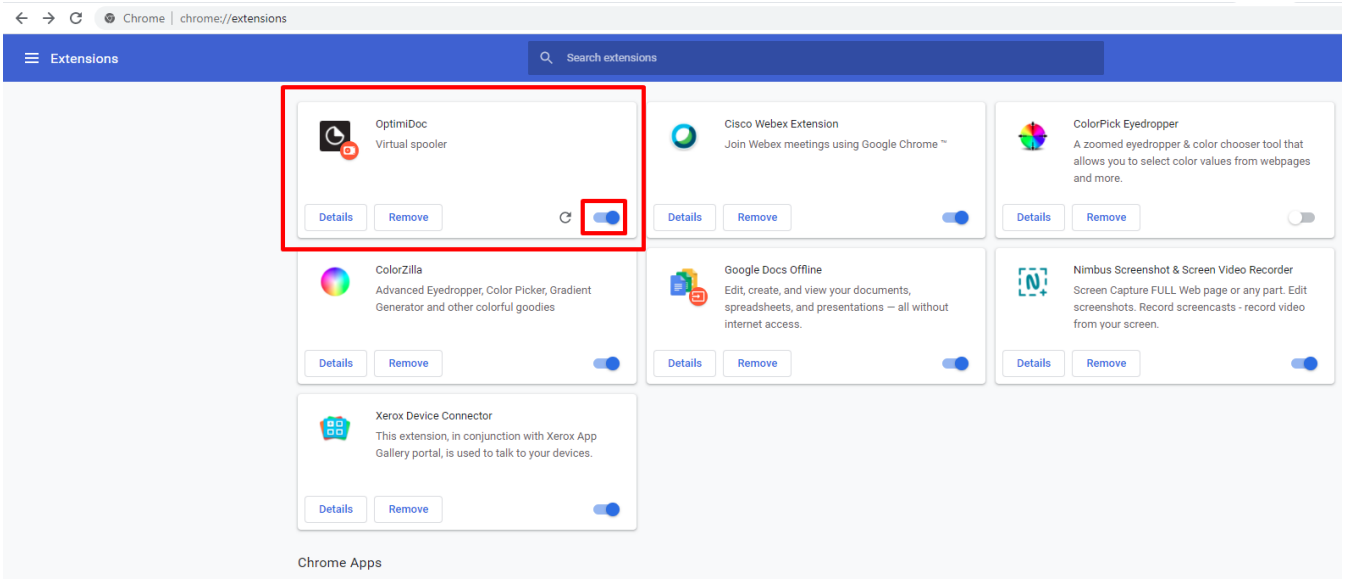


3. Find the extension among others in Chrome Extensions and if not enabled, enable it



4. Within the details click the Extension options or by clicking the extension icon edit settings of the OptimiDoc printer

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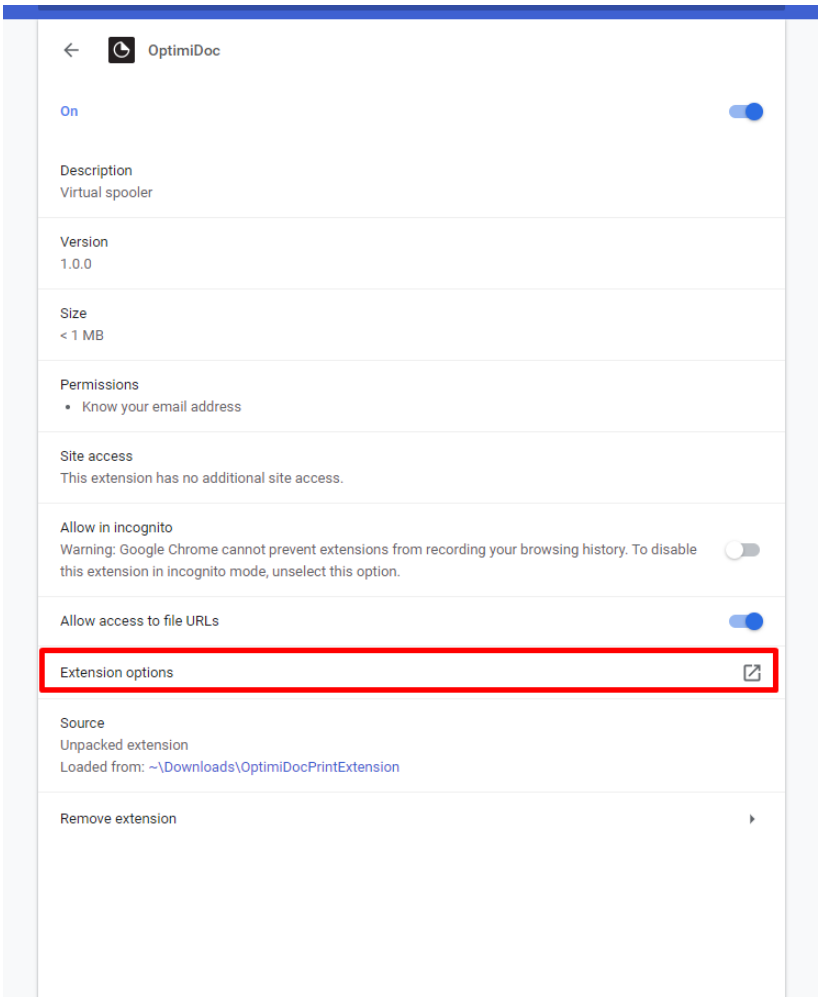

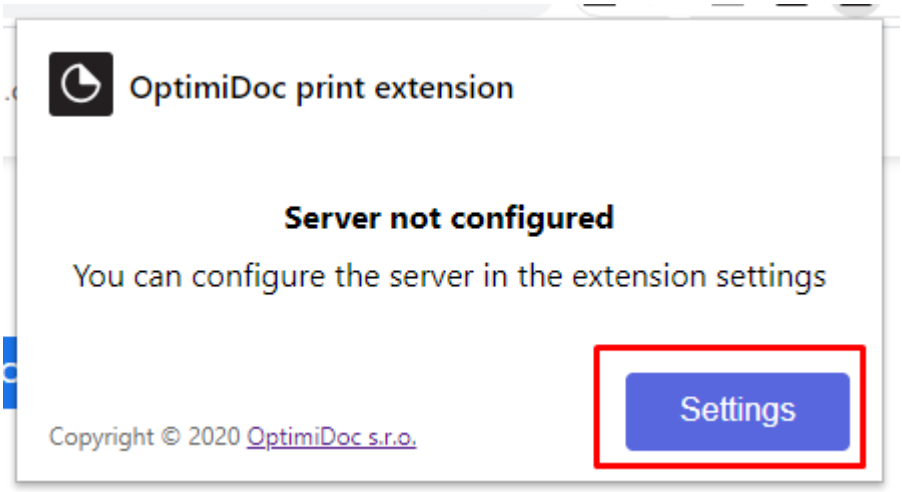

5. Enter the OptimiDoc Server IP and display name of the printer (when using HTTPS the OptimiDoc Server must have valid certificate)

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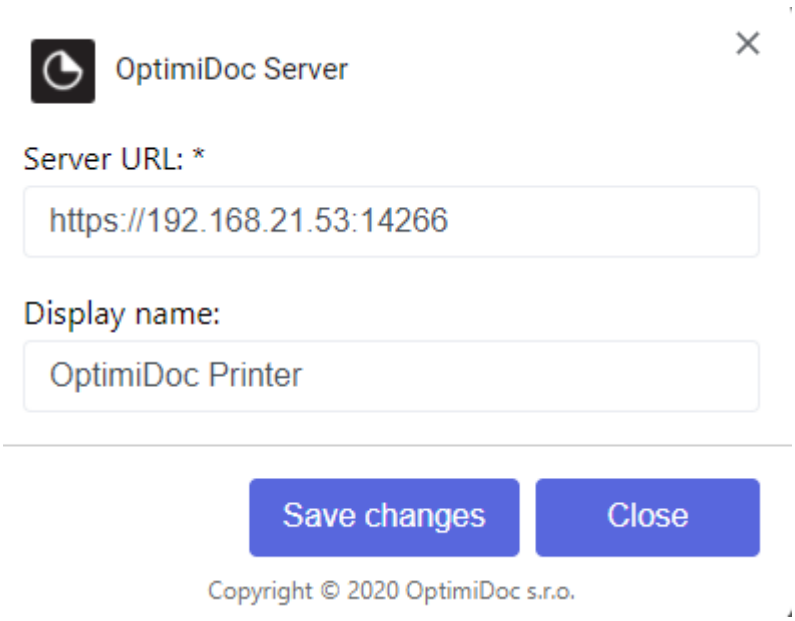
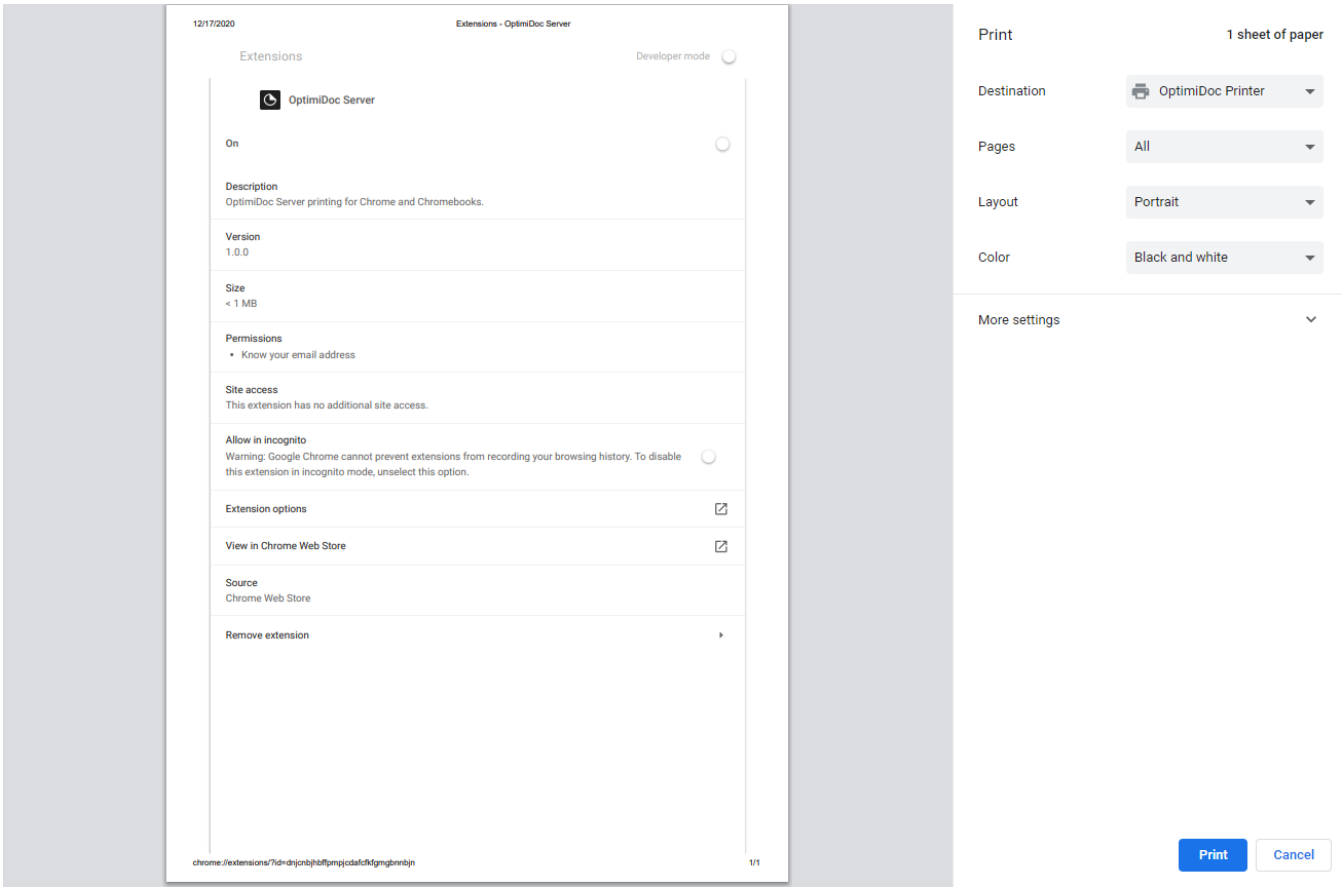


6. Once the extension is configured you can print using it. In the print dialogue select the printer name entered in the previous step and print the document.



7. Check whether the job has arrived to the OptimiDoc Server.

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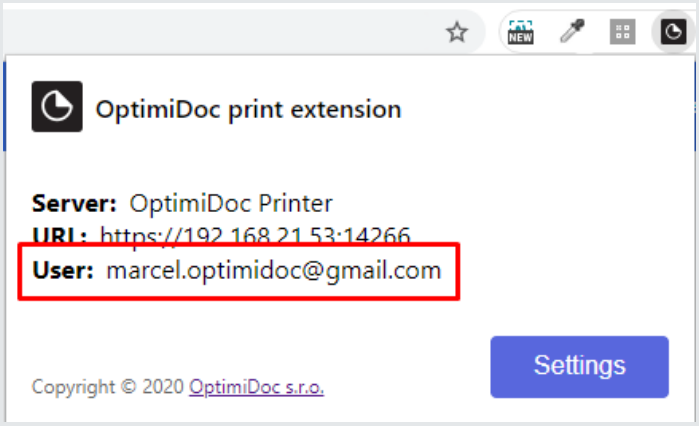
Note

User must have the email address from which the job has been sent to the OptimiDoc Server among logins in OptimiDoc user profile.



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5.5 Scan

The section on **Scan** workflows defines the document capture, processing and routing to final destination.

A document can be captured from a multifunction device, web, mobile, mailbox or a predefined hot folder:

- For definition of scan workflow for multifunction devices create the workflow at Workflow list.

Each Workflow requires a predefined destination where the document will be routed. OptimiDoc uses general destinations for document routing and thanks to this the destination can be used by multiple scanning workflows. Destinations are defined in the section Scan destinations.

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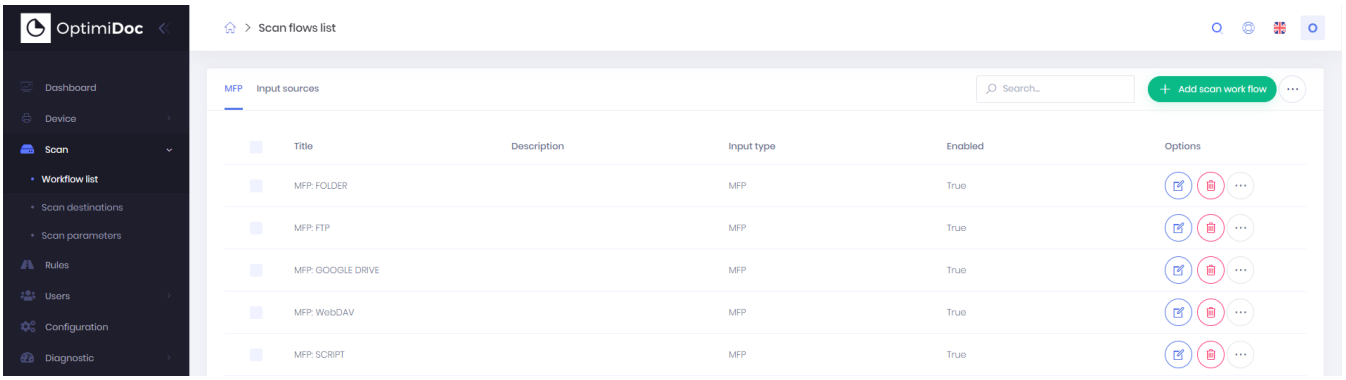
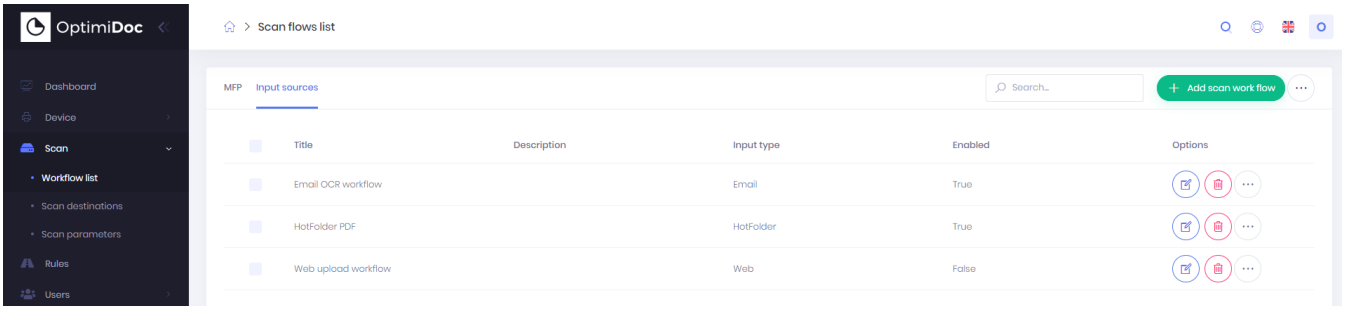
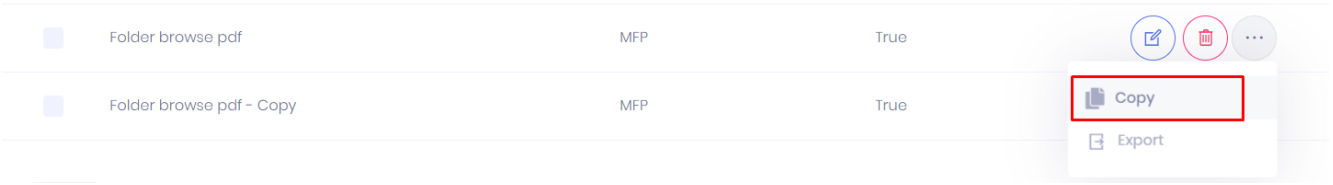
5.5.1 Workflow list

The Workflow list contains a set of scanning workflows (which are offered on a multifunction device) or input sources (HotFolder, Email, Web or Mobile flow).

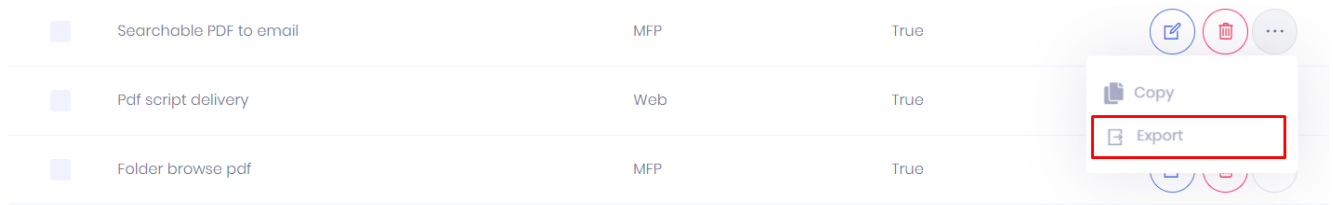




The Workflow **copy function** will allow you to create a duplicate workflow based on settings of the original one. Clicking on the button will automatically redirect you to new scan flow editing.



Workflow **export** functionality allows you to easily export your workflow and use it on another OptimiDoc server. Once you click the button a **.json file will be downloaded.** This **JSON** file contains the **settings of the workflow** as well as **delivery destination** and **parameters' settings**.



On the other hand, workflow **import** functionality allows you to import previously exported workflow (customers will appreciate this functionality as you, the partner can pre-create the

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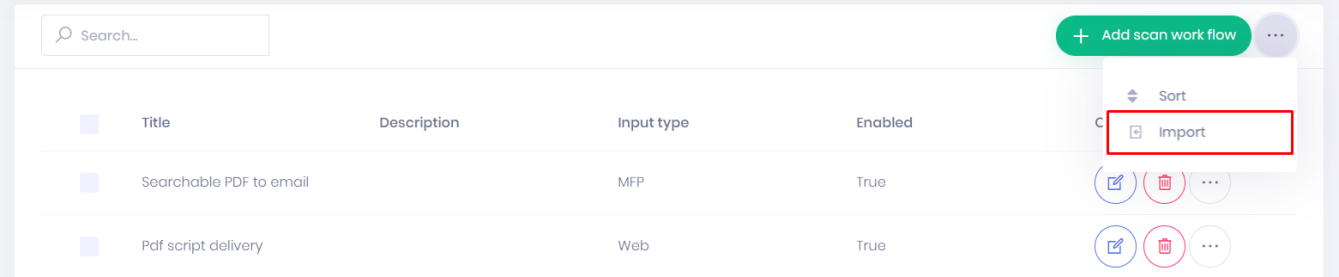
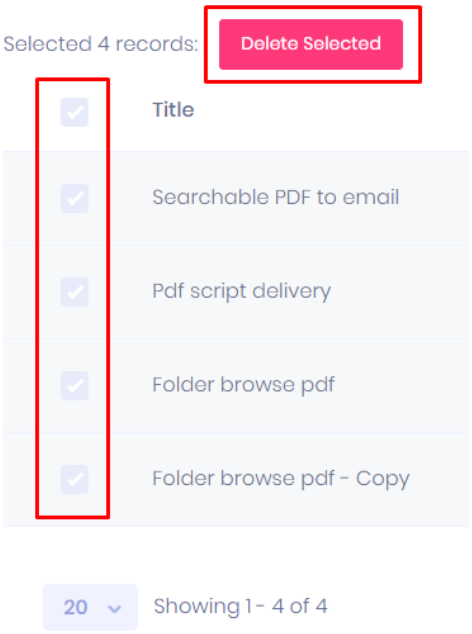
workflow and - once fully functional - you can import it). Upon clicking the select button the .json file of workflow exported. This import will add all the necessary settings including destination and parameters.

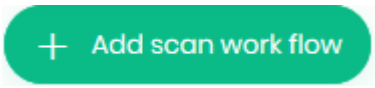


Deleting workflow can be done one-by-one or by selecting multiple workflows.



5.5.1.1 Workflow settings

Scan workflows - New workflow

To **add** a workflow to OptimiDoc, click on the 

button.

Scan workflows - Edit workflow

To **edit a** workflow, click on the button and change its settings.

Scan workflows - Delete workflow

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To **delete** a workflow, click on the button.

Scan workflows - Copy or Export a workflow

To **copy and/or Export** a workflow, click on the button and select the desired operation

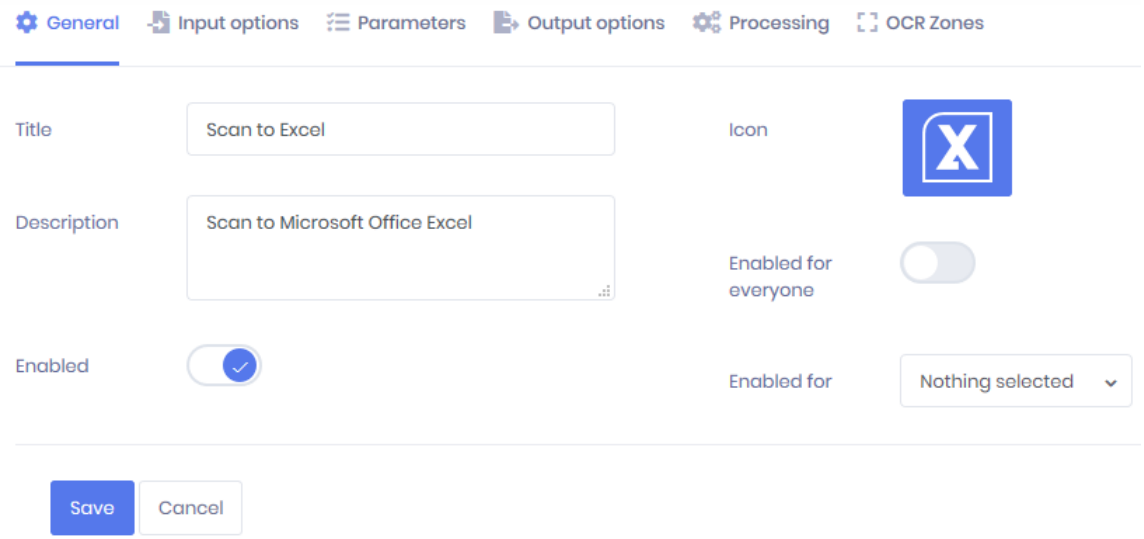
Copy

from the list Export

Scan workflows - Workflow settings

General settings of scan workflow:

- **Title** - workflow name
- **Description** - description of workflow (optional)
- **Enabled** - if the Enabled checkbox is check then the scan workflow will be offered to users.
- **Icon** - workflow icon on the embedded user interface. To change it, click on the icon.



Input Options

Scan setting define the default setup of scanning for defined workflow.

- **Flow type** - select the source of input data. For detailed information see **Flow types** section
- **Resolution** - definition of scanned document quality
- **Sides** - original document sides (Simplex/Duplex)
- **Color** - definition scan color (Auto color/Full color/One color/Grayscale)
- **Media Size** - original document size
- **Job assembly** - document will be collected from job assembly scans

Scan settings can be unlocked or locked for modifications by users. To **lock/unlock** setting,

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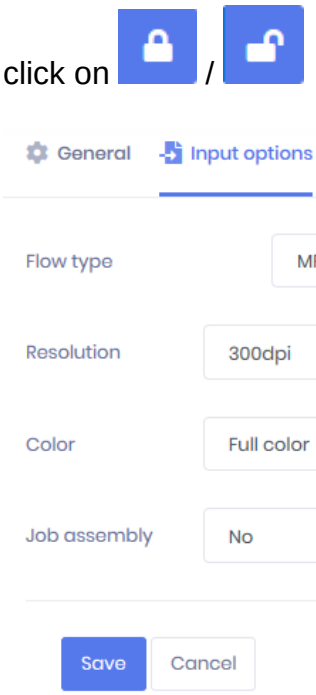
click on / 

Parameters
Each scan workflow can have assigned none, one or multiple scan parameters. Such assigned parameters can be used in the document name, destination or saved as metadata. Workflow can only have assigned parameters created in the scan parameters section.

Add parameter

1. To **add** scan parameter, click on button and select preset parameters.

2. Define the parameter settings
- **Default value** - default value of parameter when workflow is selected
- **Editable** - if Editable is checked then the user can define own value

3. Click on **Save**

Remove parameter

To **remove** a parameter, click on button.

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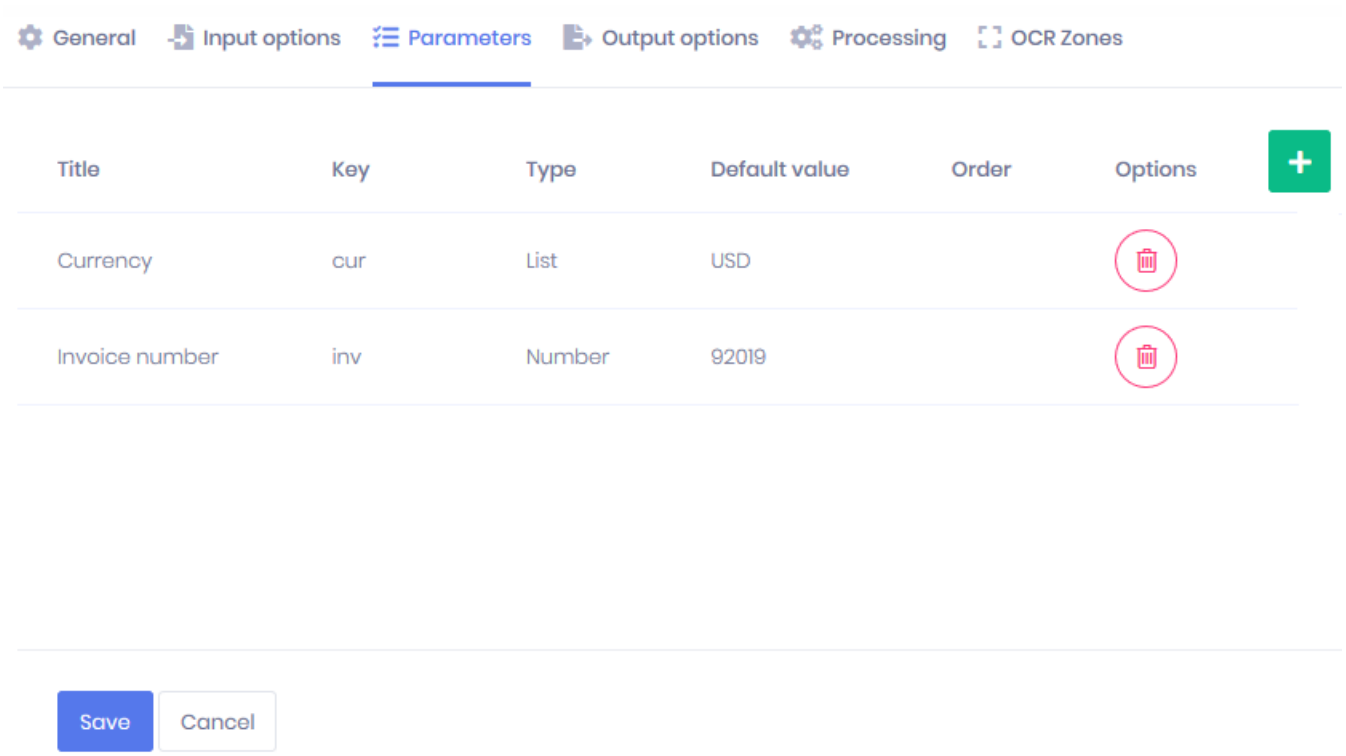
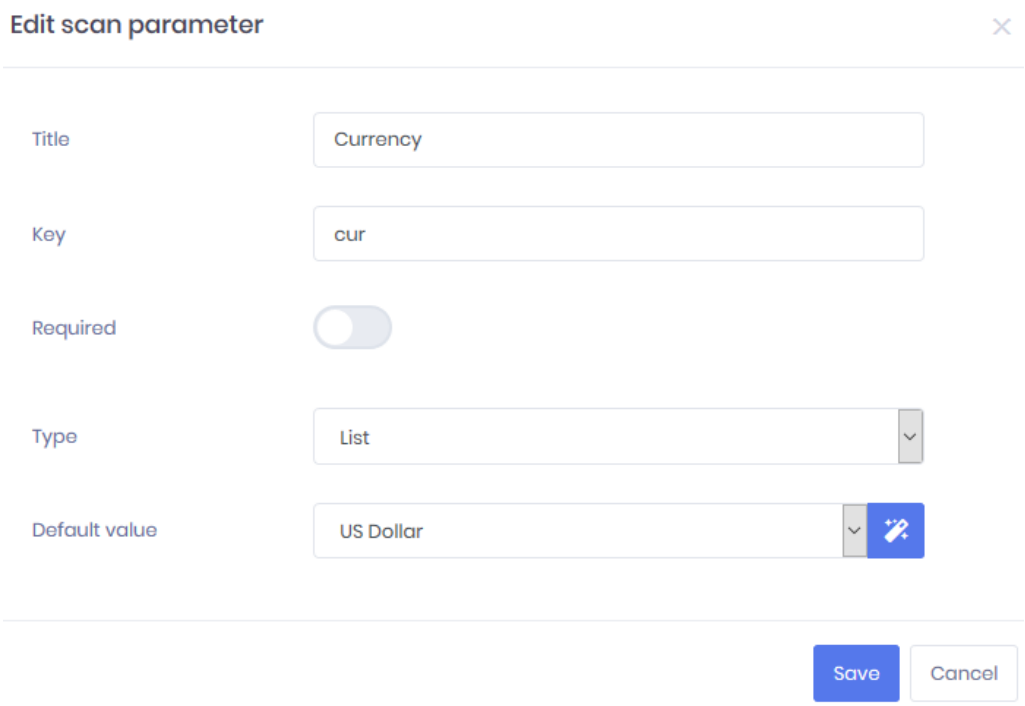


Go to Scan parameters for adding the parameter:



OptimiDoc OCR output type and processing options

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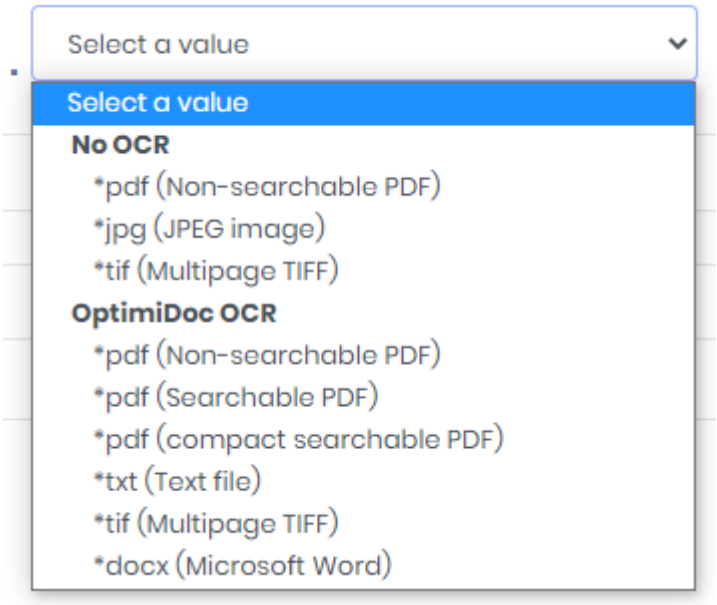

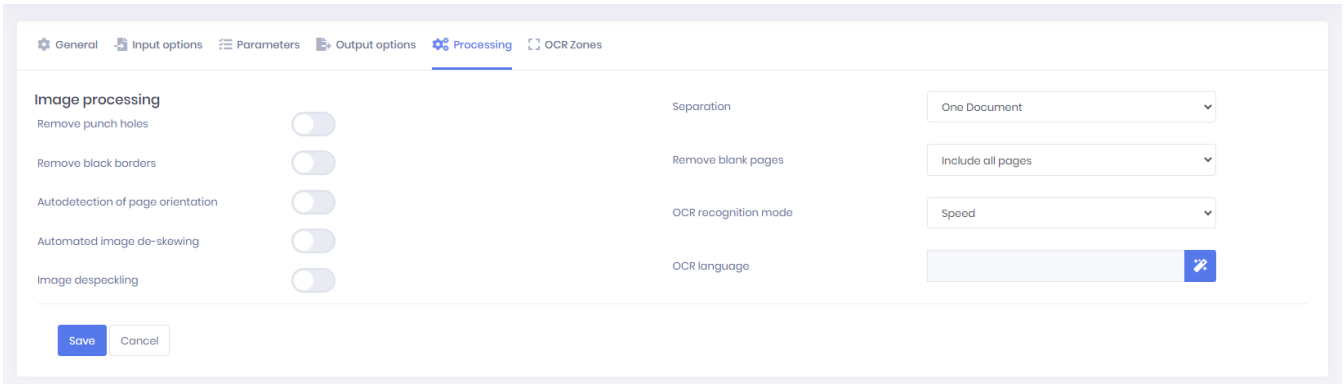

- **Image processing**
  - Remove punch holes - OCR engine will detect the hole leaving black dot over places where the punch hole is and will remove it from the final document.
  - Remove black borders - if yes, OCR engine automatically recognizes black borders of the document and removes them.
  - Auto-detection of page orientation - the system automatically checks the orientation of each page and corrects it if required.
  - Automated image de-skewing - automated image de-skewing is an essential document imaging function which is applied to scanned documents requiring compensation for image skew. It does not require leading edge borders or lines.
  - Image despeckling - when scanning poor to medium quality documents, you may get very noisy images with lots of dot speckles on them. These speckles, when they appear close to letters or numbers, may affect the quality of OCR. This feature removes such noise.

- **Separation -** separation by the zone is missing, the rest of options stays the same.[

Output and processing options available with ABBYY extension, define the document processing and distribution.

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- **Filename**
  - Name - name of final document
  - Type - type of final document
- **Image processing**
  - Auto-detection of page orientation - the system automatically checks the orientation of each page and corrects it if required.
  - Splitting facing and dual pages - recognition and layout analysis are then performed separately for each page.
  - Automated image de-skewing - automated image de-skewing is an essential document imaging function which is applied to scanned documents requiring compensation for image skew. It does not require leading edge borders or lines.
  - Image despeckling - when scanning poor to medium quality documents, you may get very noisy images with lots of dot speckles on them. These speckles, when they appear close to letters or numbers, may affect the quality of OCR. This feature removes such noise.
  - Texture filtering - Texture filtering technology helps to filter out background “noise” such as color and texture, accuracy for difficult to read documents such as newsprint, color documents, faxes, etc.
- **Remove blank pages**
  - Include all pages - all pages will be included in document
  - Use device - blank pages will be removed by device (supported only by selected Xerox devices)
  - Use OCR - OCR engine will be used for blank page removal
- **Separation**
  - One Document - scanned documents will be processed as one document.
  - Barcode - scanned documents will be separated to multiple documents by barcodes. Barcode represents first page of the new document.
  - Barcode - defines the barcode type
  - Remove page with barcode - OptimiDoc removes the page with barcode
  - Regular expression - definition of regular expression
  - BlankPage - scanned documents will be separated by a blank page. Blank page is automatically removed.
  - One Document with Barcode - scanned documents will processed as one document with barcode recognition.
    - - Remove page with barcode - OptimiDoc removes the page with the barcode
  - Number of pages - document will be separated based on a predefined number of pages.
  - Zone - selected zone will be used for document separation.
- **OCR recognition mode** - type of recognition processing.
  - Accuracy - accurate mode for achieving the highest quality of recognition.
  - Speed - designed for high-volume document processing.
- **OCR language** - language of document. It is recommended to select just language of the scanned document for better result of recognition.
- **Save metadata** - system parameters and scan workflow parameters will be saved to selected document format Json/Xml.
  - JSON
  - XML
  - CSV
- **Destination** - definition of scanned document storage

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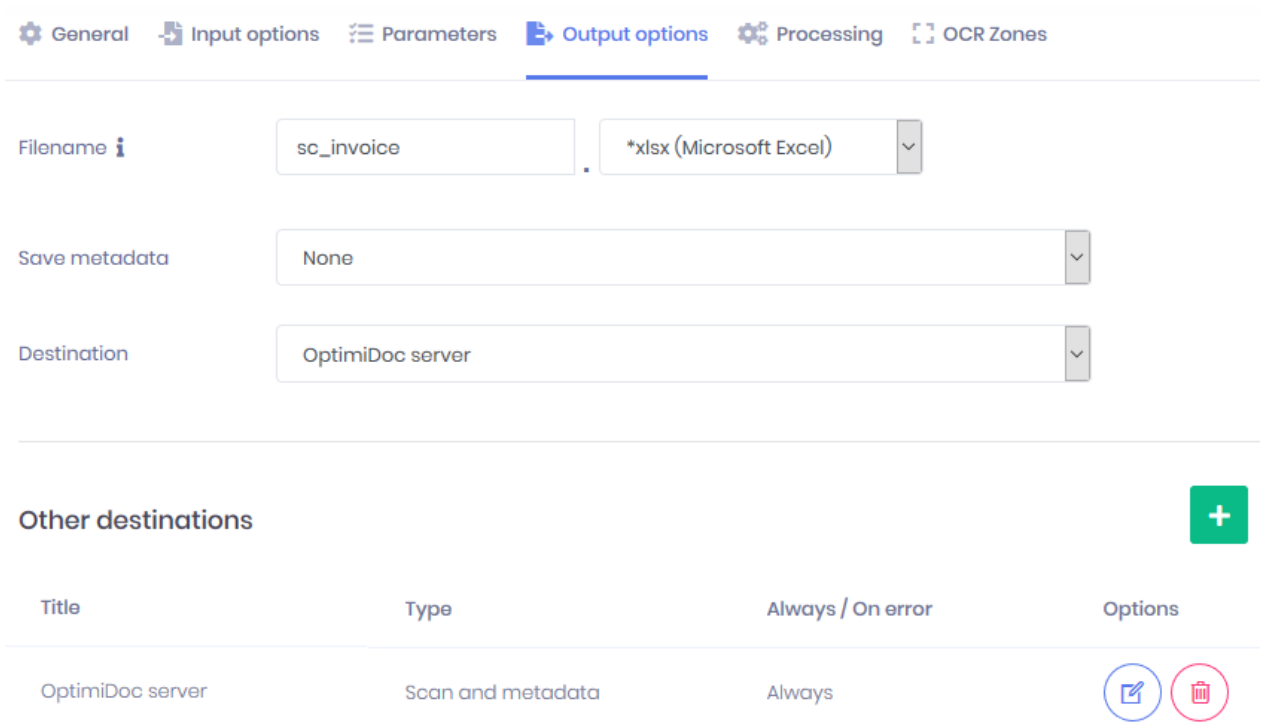
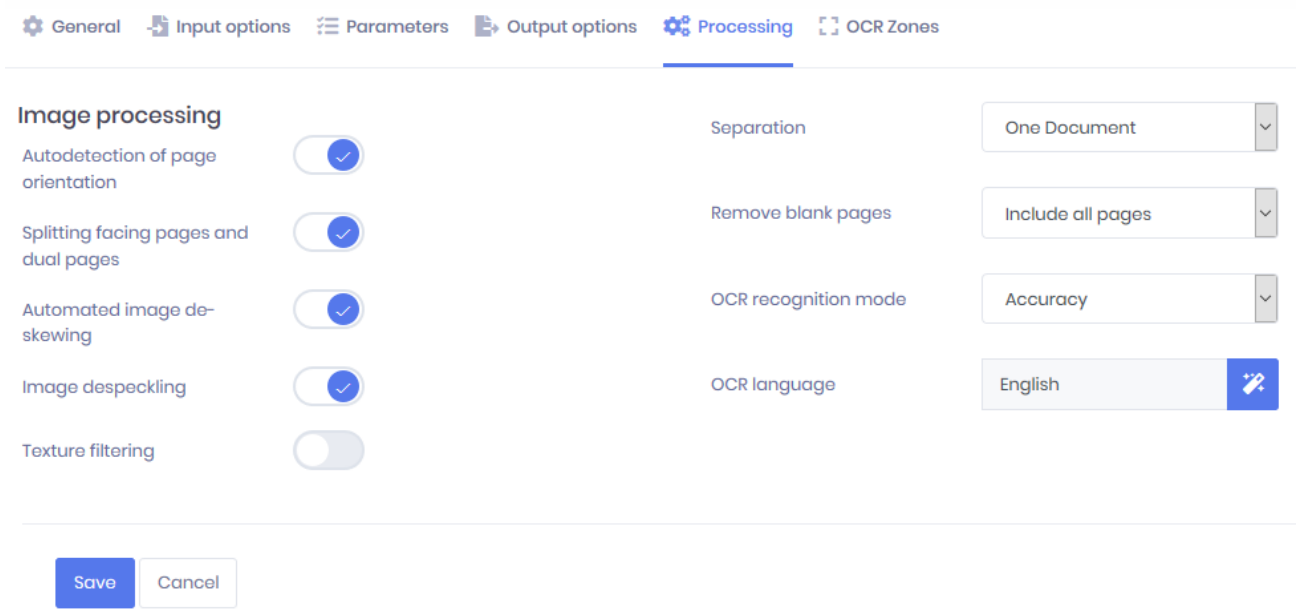
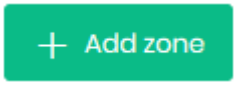


Processing



OCR Zone

Multiple OCR zones of a document can be selected from which the contents can be used as metadata. These zones can either contain plain text or barcodes. The data extracted from these zones can be used as metadata in any other property field, File or Folder name. It is also possible to use barcodes to separate jobs.

To **manage** OCR zone click on 

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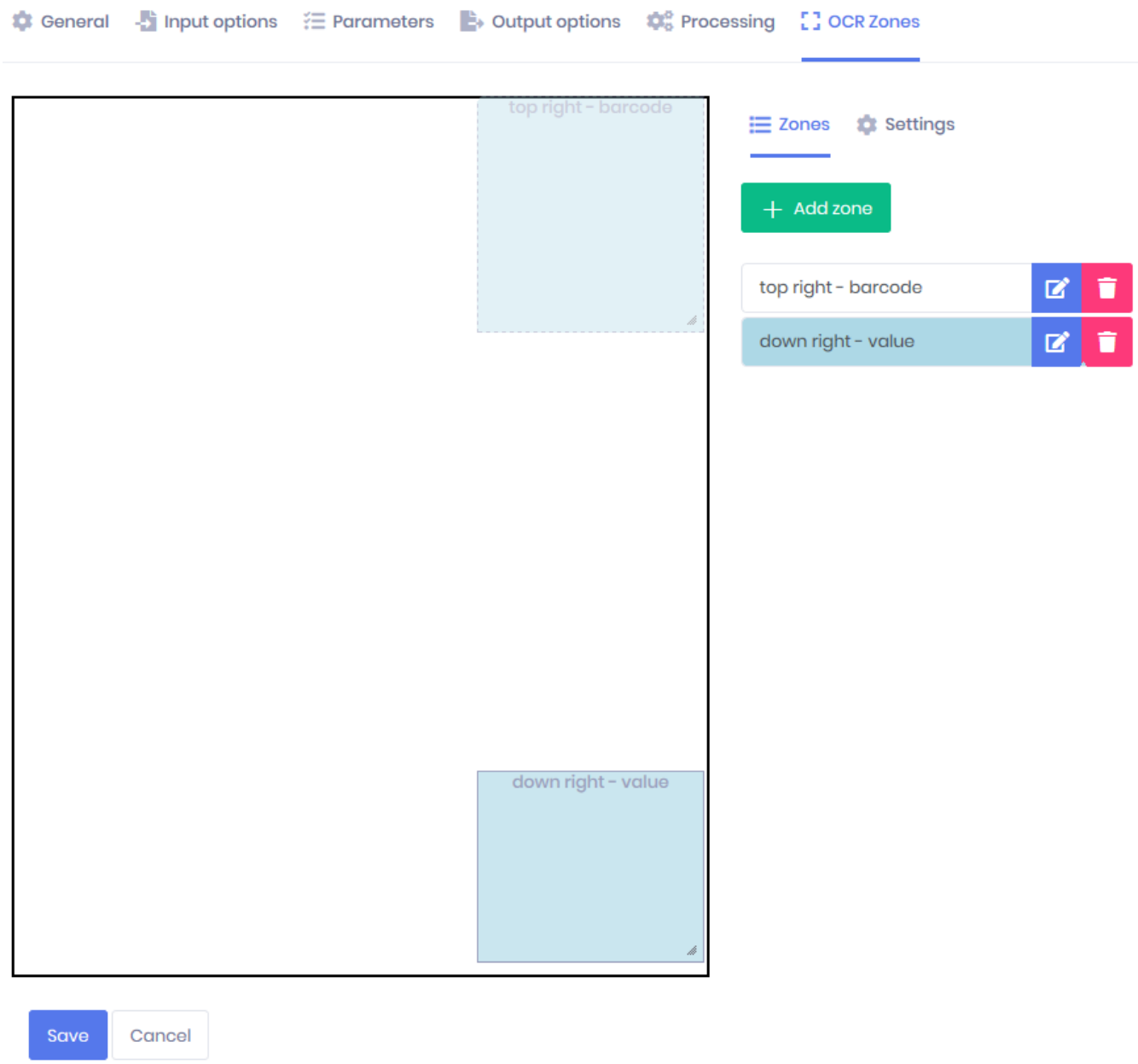
For more details, see the OCR Zone designer section



5.5.1.1.1 Flow types

OptimiDoc offers the selection of multiple input flow types to be processed for each Scan flow.

Select a desired Flow type under Input options settings when adding/editing a Scan workflow.

When creating workflow from MFP tab you will be able to select only MPF in Input options

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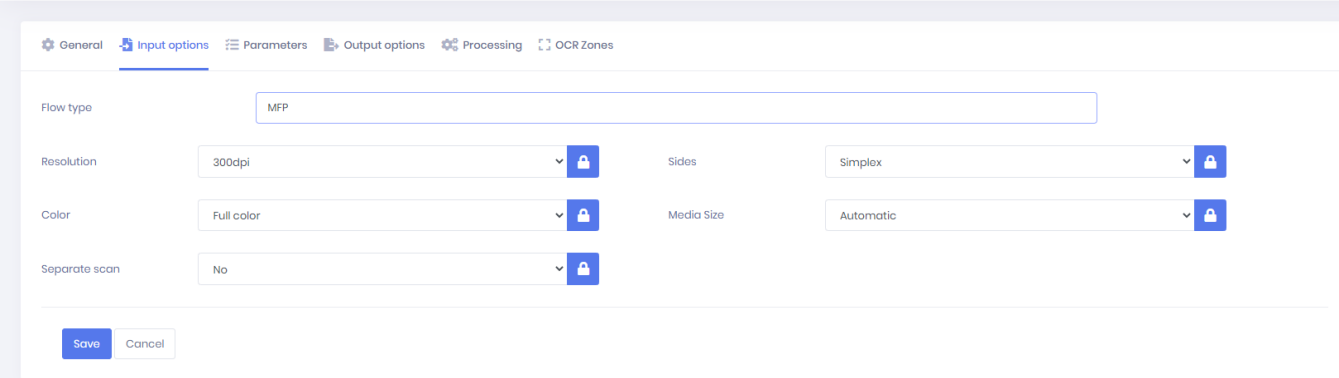
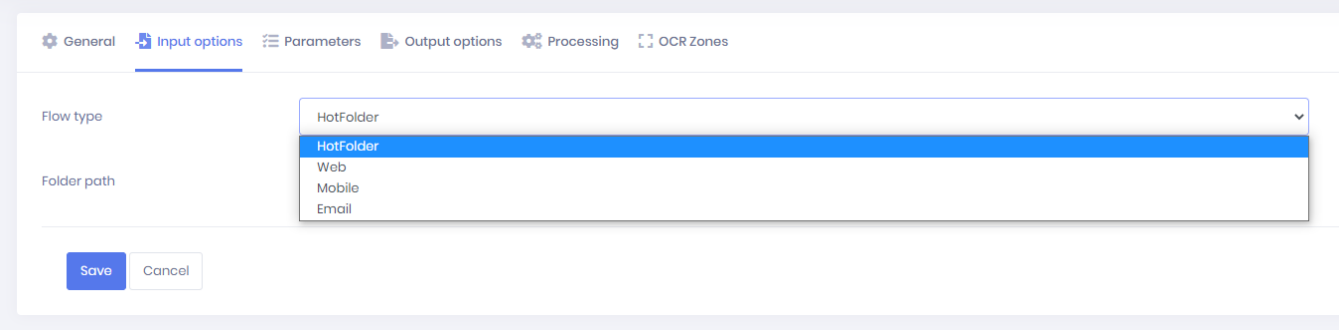


Other flow types are created from Input sources tab



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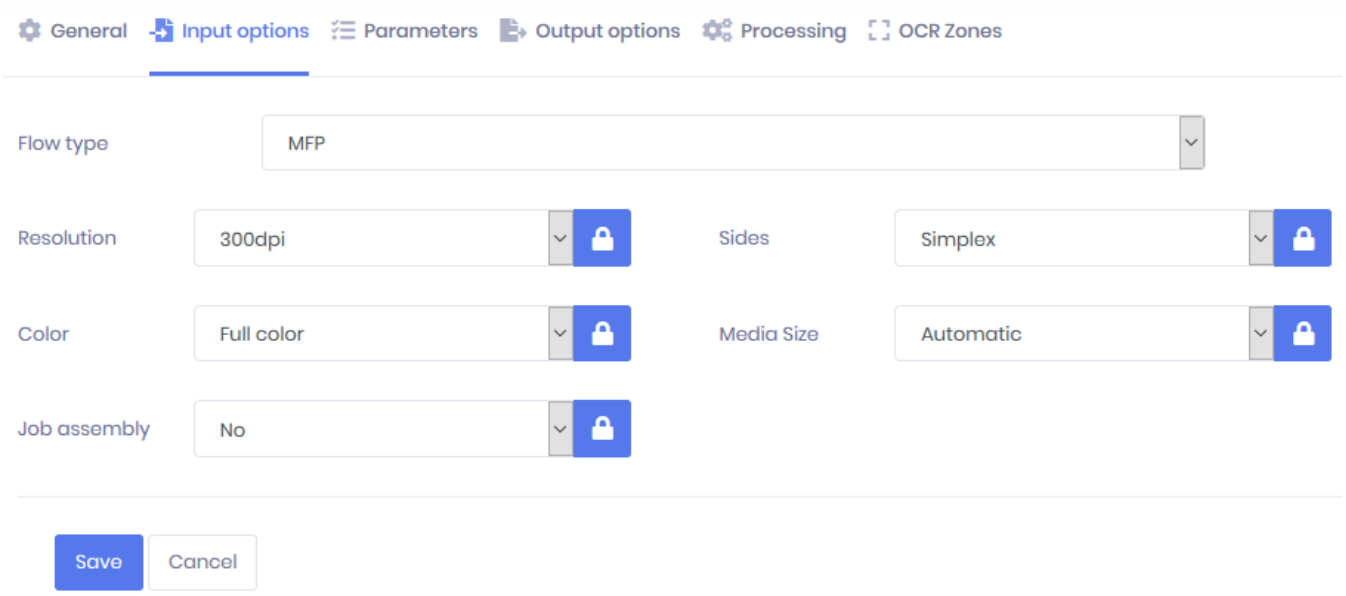
MFP

With the **MFP** flow type there is a possibility to affect these kinds of input settings:
Input settings define the default scanning setup for a defined workflow.

- Resolution - definition of scanned document quality
- Sides - original document sides (Simplex/Duplex)
- Color - definition scan color (Auto color/Full color/One color/Grayscale)
- Media Size - original document size
- Job assembly - document will be collected from job assembly scans



Scan settings can be locked or unlocked to modification by users. To lock/unlock setting, click on /

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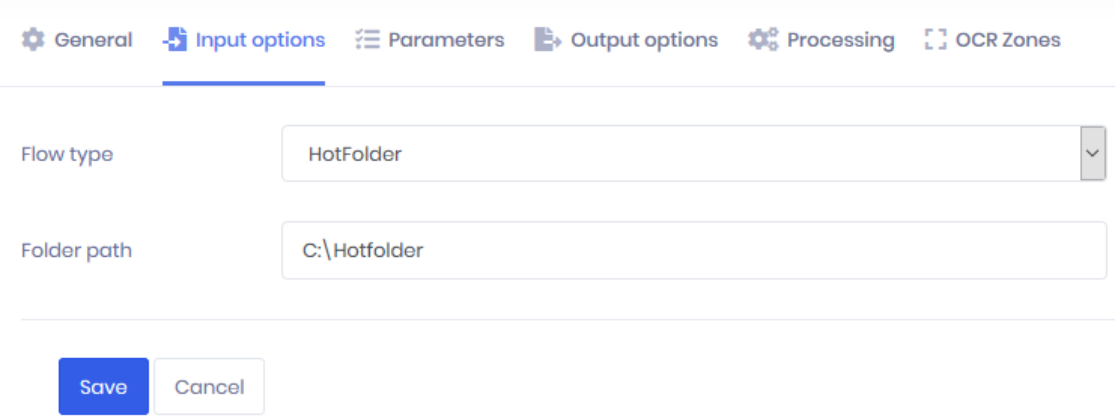
Hot folder

Hot folders are similar to Workflows, but instead of being applied to a scanned document they are applied to the contents of a certain folder. By entering the “Path” parameter you can choose from which folder the documents will be taken.

Hot folder settings

Basic setting of scan workflow:

- **Title** - workflow name
- **Description** - description of HotFolder (optional)
- **Enabled** - if the Enabled checkbox is check than the HotFolder will be enabled.
- **Folder path -** path to the HotFolder. It is required to add full control right to this folder for IIS_IUSRS group.



Important HotFolders input function processes PDF and TIFF files.

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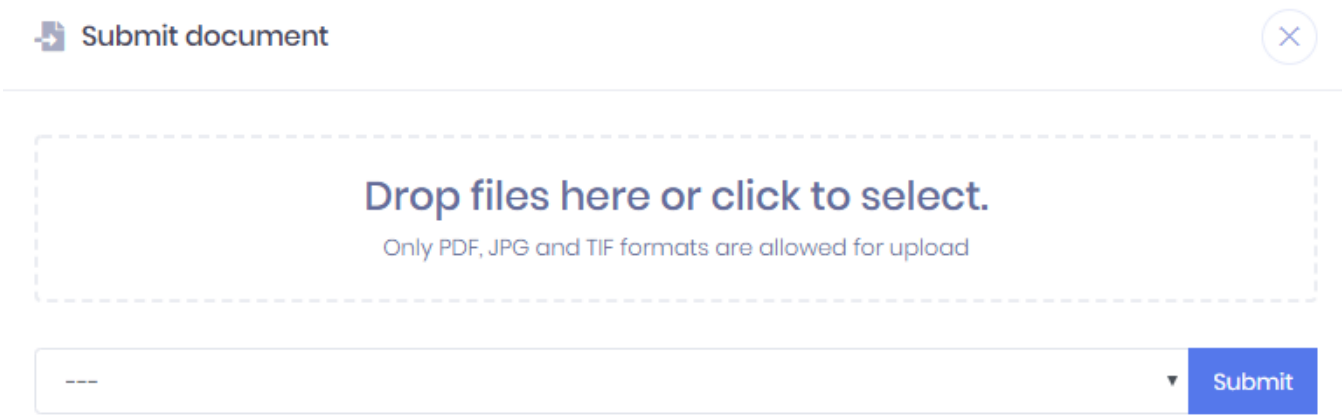
Web

Allows users to process their jobs, which have been uploaded through the Web interface by this workflow.

On the dashboard a new widget will appear, where the user needs to upload a document, which they would like to send to OptimiDoc for scan process.
The next step is to choose Scan workflow by which you would like to proceed to scan. The last step is to send it via the Submit button.



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Mobile

Flow that can be proceed with a mobile application.

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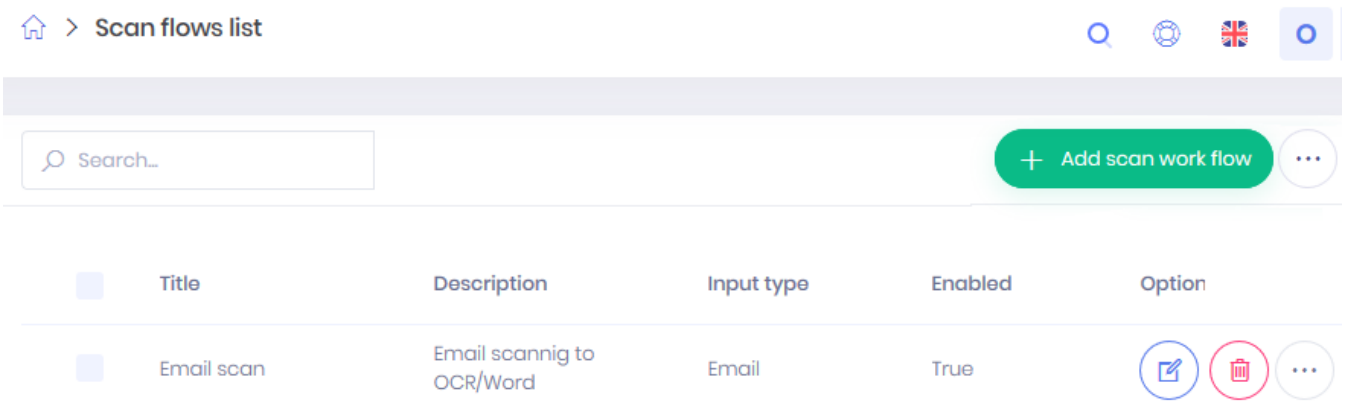
E-mail

Email OCR provides functionality similar to Scan workflows or Hot folders, but instead of being applied to a scanned document (on the device itself) or contents of the hot folder, **it is applied to the attachments of the email which you are sending to a specific email address and then by return you'll receive your scanned document to your mailbox, folder or any other destination used in Scan workflow**. It comes in handy especially on the go, for example when you're out of the office and need your PDF file in DOC format, etc. Hence the name **Email OCR**, because you can take functionality of your scanner with you, wherever you are.

Caution **All emails will be deleted after downloading them from a mailbox!**



Email flow settings

Email flow uses previously created Scan workflow to process email attachments. So you can create a new Scan workflow particularly for email OCR or use current one. *While creating or using created Scan workflow don't forget where you have specified, where the document should be stored or sent.* You can also create a new or use a created Destination for Scan workflow.
Users are identified by their email address, if the email address is not recognized among registered users, attachments are not processed.

Basic setting of Email Flow type:

- **Type** - IMAP or POP3
- **Server** - IP address or domain name of the mail server
- **Secure communication** - enable/disable secure communication
- **Port** - server port number
- **Login** - username for the mail account - from where will be attachment picked up and processed **or** credentials of the domain user
- **Password** - password for the mail account or domain user.

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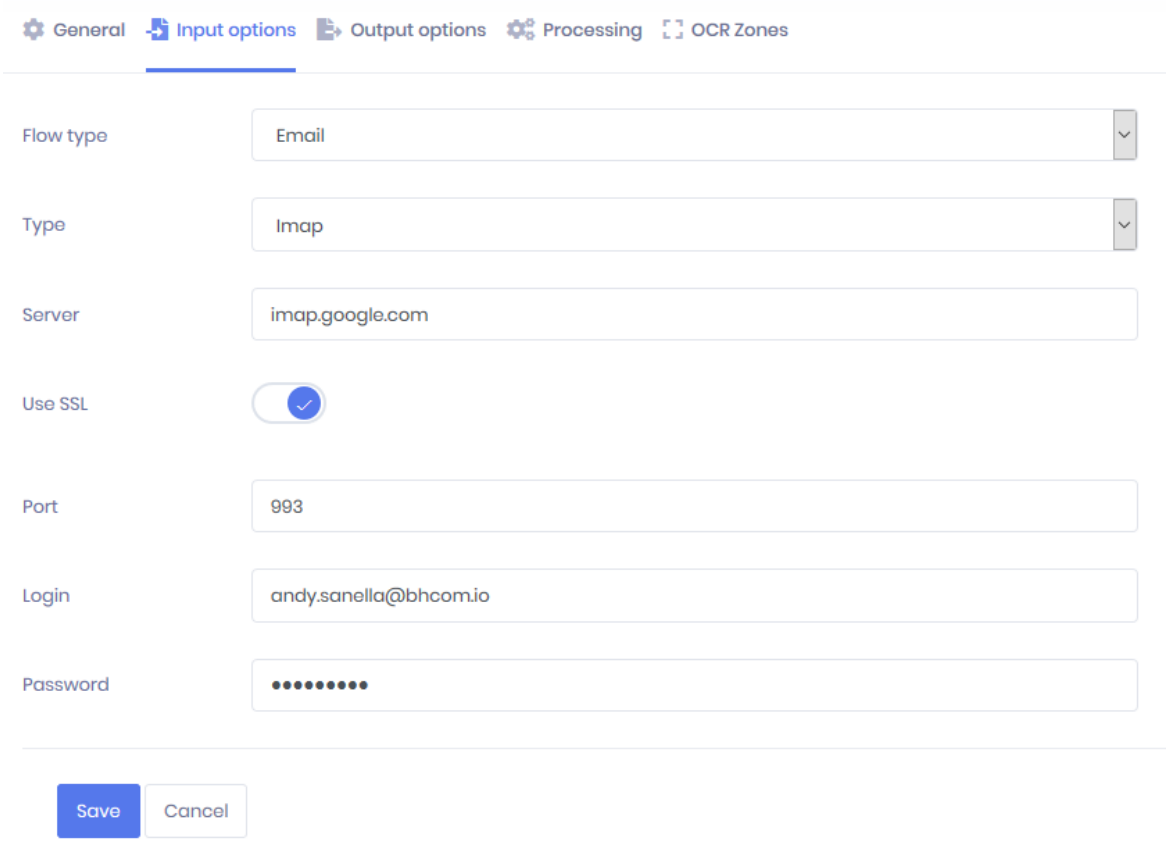

Important Email OCR processes PDF, JPG and TIFF files.

5.5.1.1.2 Other destinations

Other destination settings are used to either send the scan result to more than one destination, or to send a report about the scan to a certain destination.

Saving the scan result

- **Destination** - destination of the scan.

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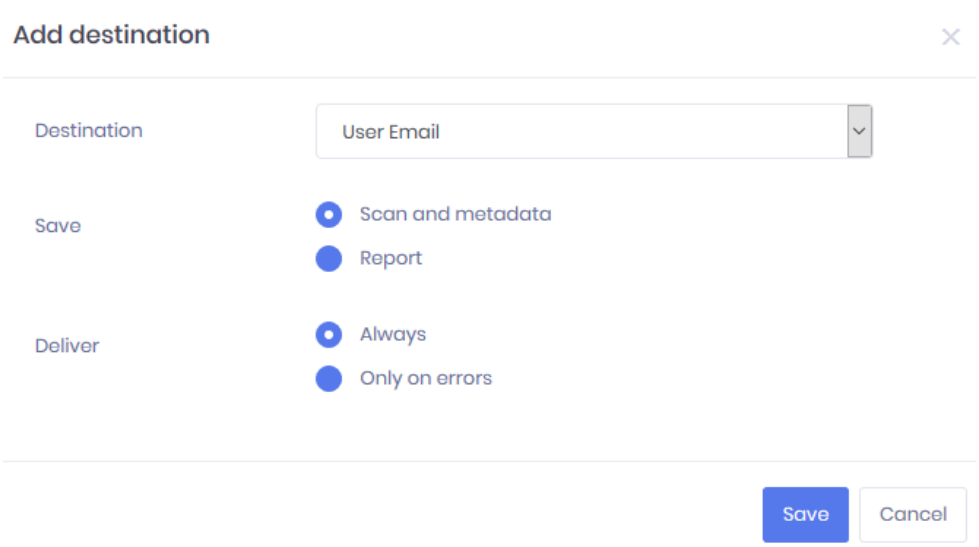
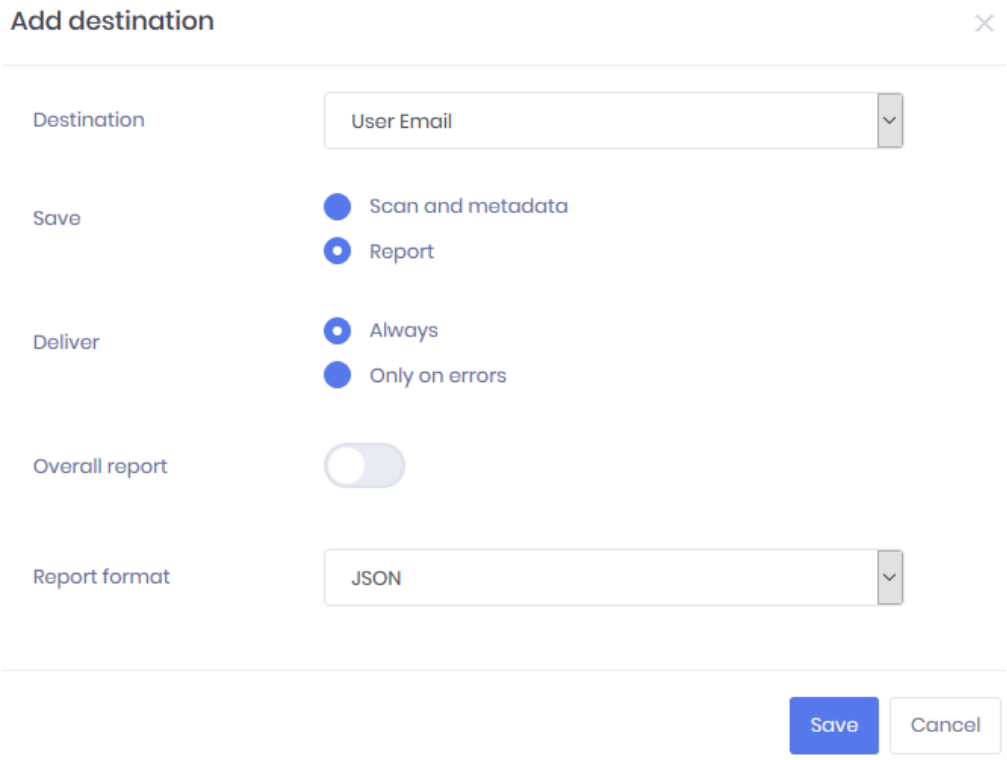


Saving a scan report

- **Destination** - destination of the scan
- **Overall report** - if not selected, a report will be created for each scanned document. It this is selected, only one report will be created for the whole batch when scanning multiple documents consecutively
- **Report format** - format of the output
    - Custom format described below



- **Report text** - text of the whole report.
- **File report text** - text of the report of the individual files

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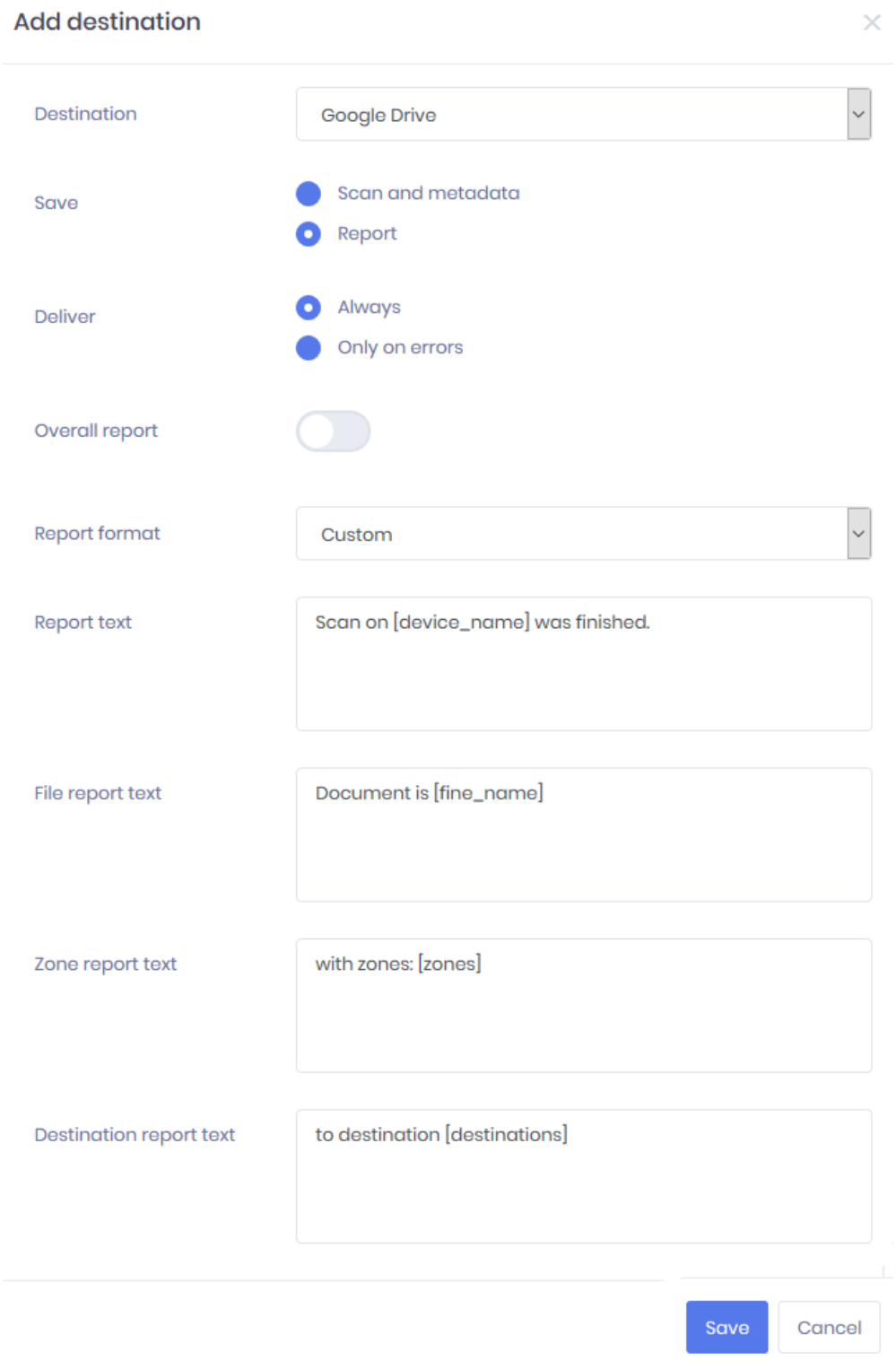
- **Zone report text** - text of the report of the individual OCR zones
- **Destination report text** - text of the report of the scan destinations

In these text fields, you can use special parameters to provide more detail. See Scan report parameters for more info.



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Scan report parameters

Report parameters

- **[device_id]** - ID of the device
- **[device_ip]** - IP address of the device
- **[device_name]** - name of the device within the OptimiDoc system
- **[device_location]** - location of the device
- **[user_name]** - name of the user who initiated the scan
- **[user_givenname]** - user first name
- **[user_surname]** - user last name
- **[user_login]** - login of the user who initiated the scan
- **[flow_name]** - name of the scan flow
- **[files_count]** - number of generated files
- **[pages_count]** - overall number of pages from all documents
- **[status]** - overall status - the worse status from all scanned documents
- **[files]** - reports of all created files (see File parameters for more info)
- **[errors]** - same as [files], but includes only reports of files with errors (see File parameters for more info). Note that it won't be a complete report, only the items in which the error occurred will be written out

File parameters

- **[status]** - status of the file
- **[pages]** - number of pages in the document
- **[file_name]** - resulting file name
- **[zones]** - reports of all zones (see Zone parameters for more info)
- **[destinations]** - reports of all destinations (see Destination parameters for more info)

Zone and destination parameters

- **[status]** - delivery status
- **[name]** - name of the zone or destination
- **[message]** - if no error occurred, the value inside the zone will be written out. If there was an error, the error message will be written out instead

5.5.1.1.3 System and Scan parameters

System parameters

In selected places like a Recipient in Email destination or a Path in Folder destination you can use the System parameters. Such system parameters will be replaced by the value from currently performed scan.

- **[flow_name]** - name of selected scan workflow
- **[device_name]** - name of device where was performed scan*
- **[device_ip]** - IP address where was performed scan*

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- **[device_location]** - location of device
- **[user_name]** - user name**
- **[user_department]** - user department**
- **[user_login]** - user login**
- **[user_email]** - user primary email address**
- **[user_homedir]** - user home folder**
- **[timestamp]** - current date in the following format: YYYYMMddHHmmss
- **[current_year]** - current year in the following format: YYYY
- **[current_month]** - current month in the following format: MM
- **[current_day]** - current day in the following format: DD
- **[current_hours]** - current hours in the following format: HH
- **[current_minutes]** - current minutes in the following format: mm
- **[current_seconds]** - current seconds in the following format: ss
- **[filename]** - absolute path to the scanned file in temp location: C:\Windows\ServiceProfiles\NetworkService\AppData\Local\Temp\optimidoc\
- **[metadata]** - absolute path to the metadata of the scanned file in temp location
- **[file_name]** - original file name
- **[file_name_extension]** - original filename with extension
- **[number_of_pages]** - number of pages of the scanned document

* can be used only for documents captured via multifunction device interface.
** for usage in HotFolder is necessary to specify login parameter.

Scan parameters

Next to the system parameters you can use also the values from the entered scan workflow parameter. To put the current value, enter field parameter key value in the following format **[key_value]**.

Barcodes

Last parameter are the values of recognized barcodes. To use the value, enter **[barcode]**.

Operations with bar codes.

Barcode substring
[barcode;<first_character>;<last_character>]

example:
[barcode;1;3] - returns substring from fisrt letter to third letter

with barcode 65874113 returns the example 658

Barcode sepatartion
[barcode;<separation_character>;<barcode_part>]

example:
[barcode;-;3] - returns third part of barcode

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with barcode 658-741-13 returns the example 13

Conversion tables
Barcodes substring or part can be converted by a conversion table. OptimiDoc uses the Lists Scan Parameters as a conversion table, which means that the barcode will be replaced by value of item from list with same key as the barcode value.

[barcode;<separation_character>;<barcode_part>;<scan_parameter_key>]
or
[barcode;<first_character>;<last_character>;<scan_parameter_key>]

5.5.1.1.4 OCR Zone

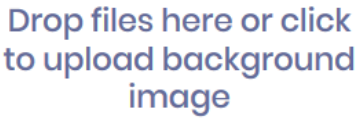
OCR Zone is used for definition of zonal parameter for particular workflows.

OptimiDoc allows two basic parameters text and barcode. Each type has specific settings and functions.

New zonal parameters

The complete steps with the Zonal OCR designer are explained in the example below.

1. Document background image
To **upload** the document template which will be used as a background image for definition of zones, click on



or drag-and-drop the image file to this field.

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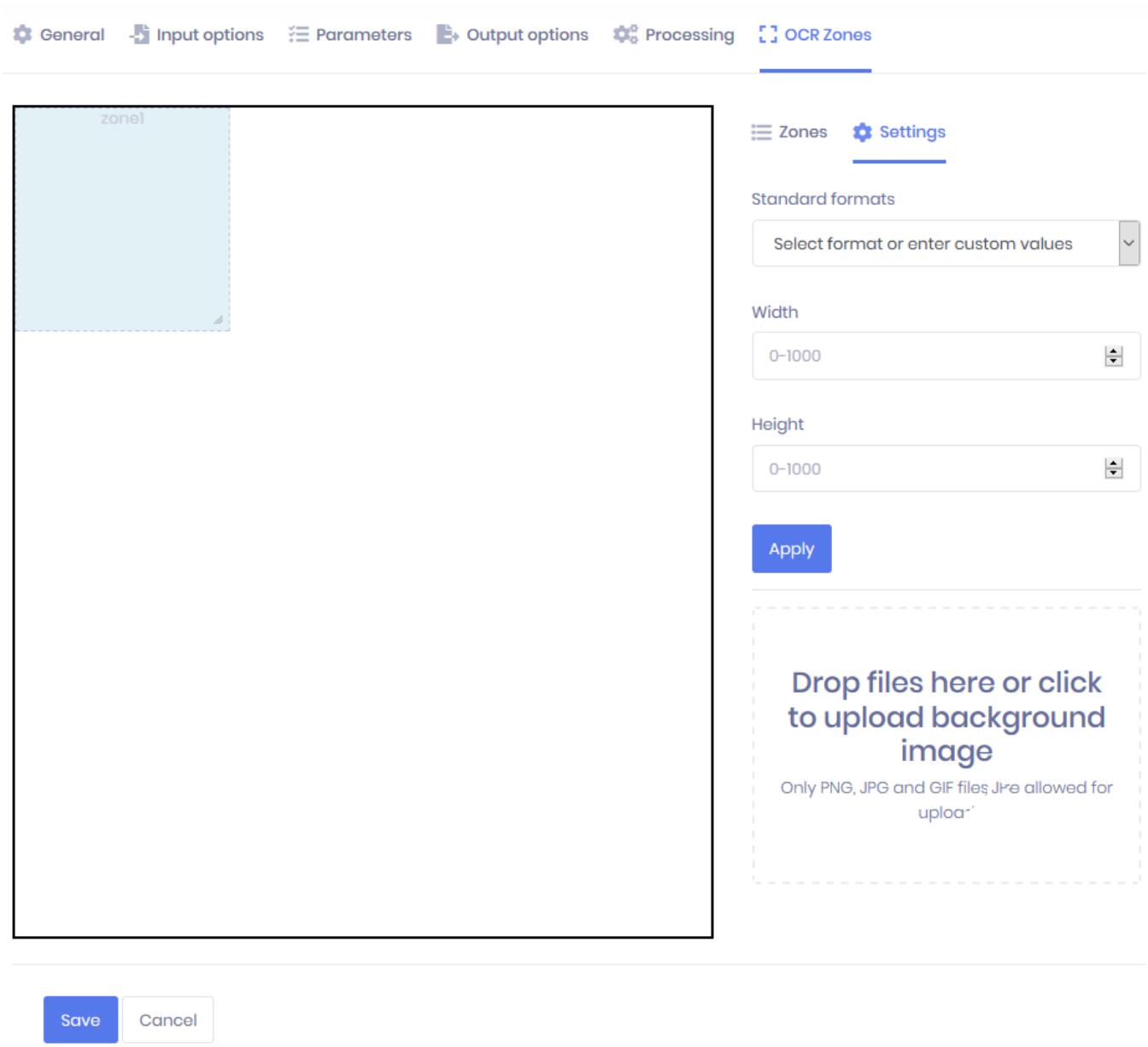

2. New parameter definition

To **add** a new zone, click on Zones - Add zone.

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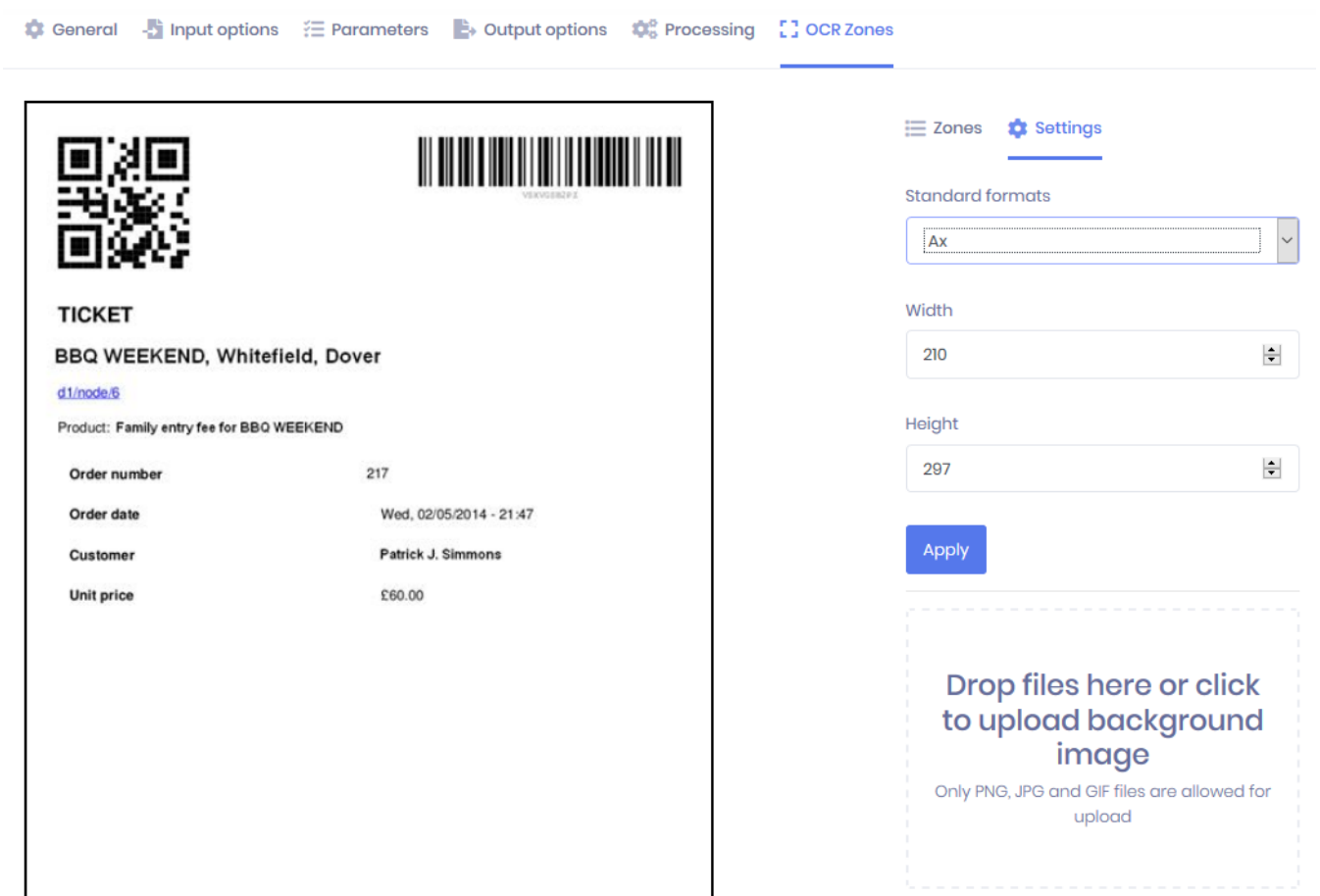

3. Parameter position and size definition

To **change the position** of zone, you can use the drag and drop functionality.
To **change the size** of zone, move the mouse to bottom right corner, press the left button, change the size and release left button.

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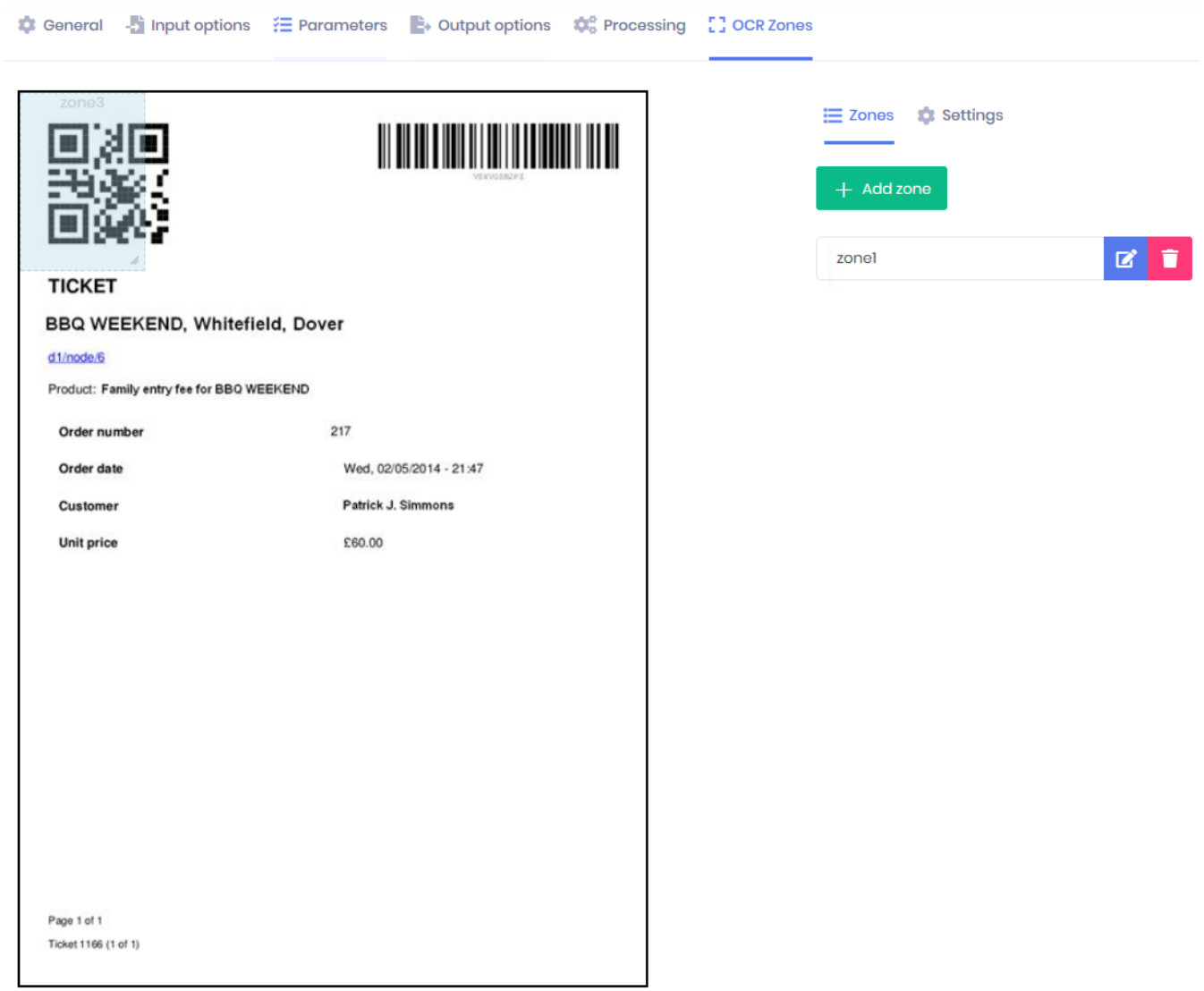

4. Definition of parameter

To define the parameter settings, double click up to the zone.

- **Title** - name of parameter (can be used for definition of document name or location), the title has to be different from system parameters
- **Type** - OptimiDoc supports two types of parameter; the first parameter is text and second is a barcode.
- **Use as a document separator -** if in the zone will be found the barcode the OptimiDoc use the page as a first one of new document (valid only for barcode type)
- **Text filter -** use the filter to match string to the predefined value based on regular expression (valid only for text type)
  Please refer to Character Classes in Regular Expressions or Wikipedia for more information about Regular Expressions.

  Examples of regular expression:
  - Select number with length **5-10**:
    - [0-9]{5,10}

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Example:
- Input Value:
  456487
- Result:
  456487

- **Input Value:**
  123
- Result:
  nothing because the number does not fit to length

- Search text "Date:" and take the date after the text
  - Date: ([0-9]{1,2}.[0-9]{1,2}.[0-9]{4})

Example:
- Input Value:
  Date: 12.5.2013
- Result:
  12.5.2013

- **Input Value:**
  Date: 12.5.2013
- Result:
  nothing because of white spaces; to solve the problem with white spaces use parameter \s+ as in the last example

- Select the number without length limitation:
  - [0-9]+

Example:
- Input Value:
  54798746546546
- Result:
  54798746546546

- Search the "TAX ID:" and take the next string with first two letters and 10 numbers:
  - TAX ID:\s+([A-Z]{2}[0-9]{10})

Example:
- Input value:
  TAX ID: CZ1234567890
- Result:
  CZ1234567890

To select specific part of searched text use (). Text out of the bracket is automatically **removed**.

- **Apply on page** - definition of page where the zone will be search

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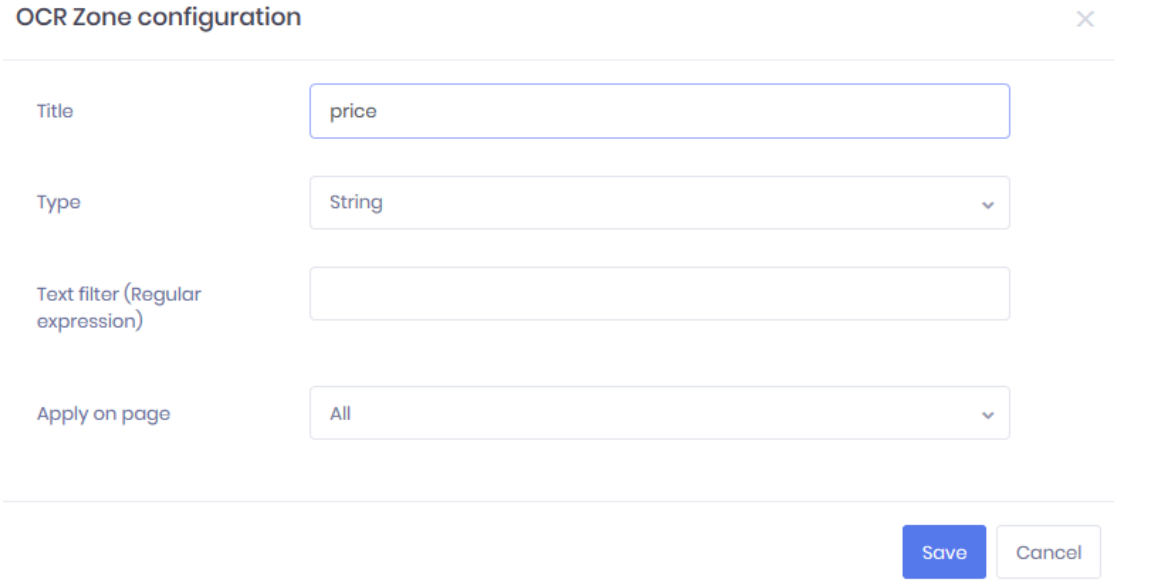

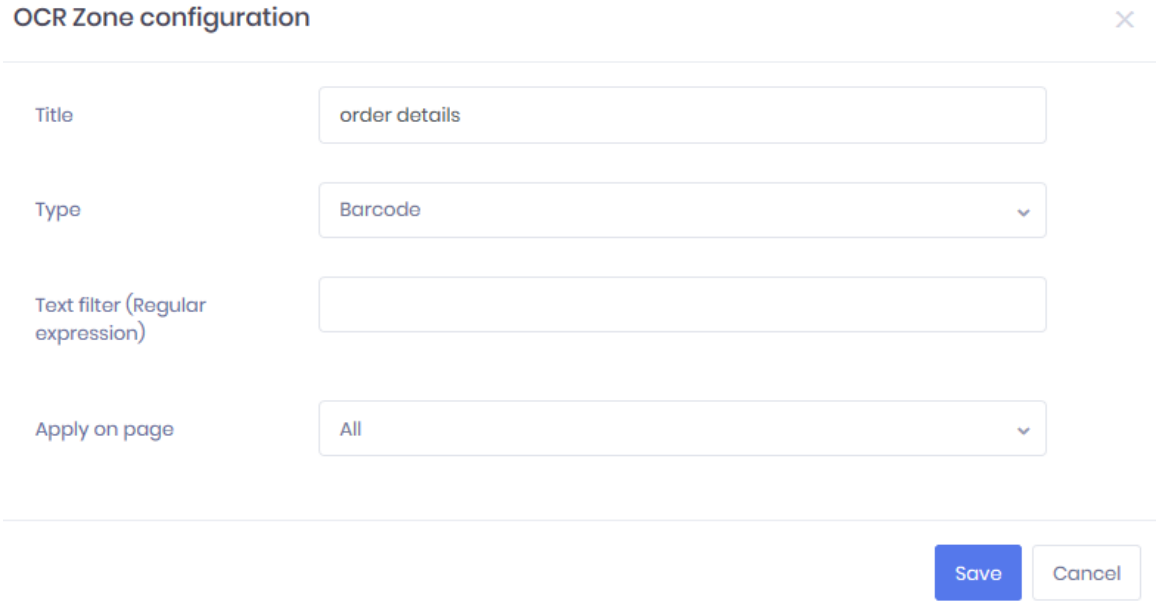

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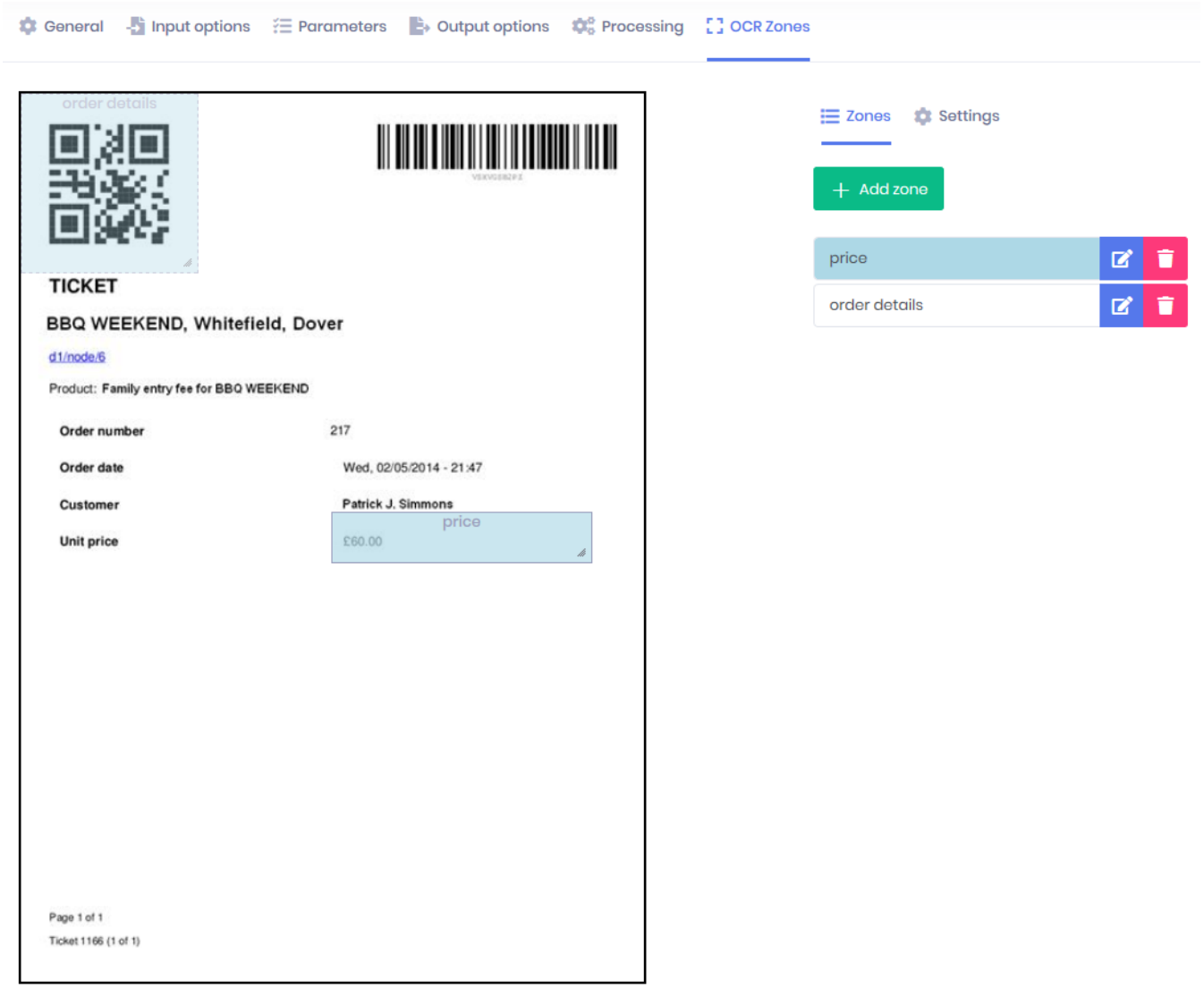

5. Save the parameters

After the definition of all zones, **save** the parameters by clicking on the Save button at the bottom.

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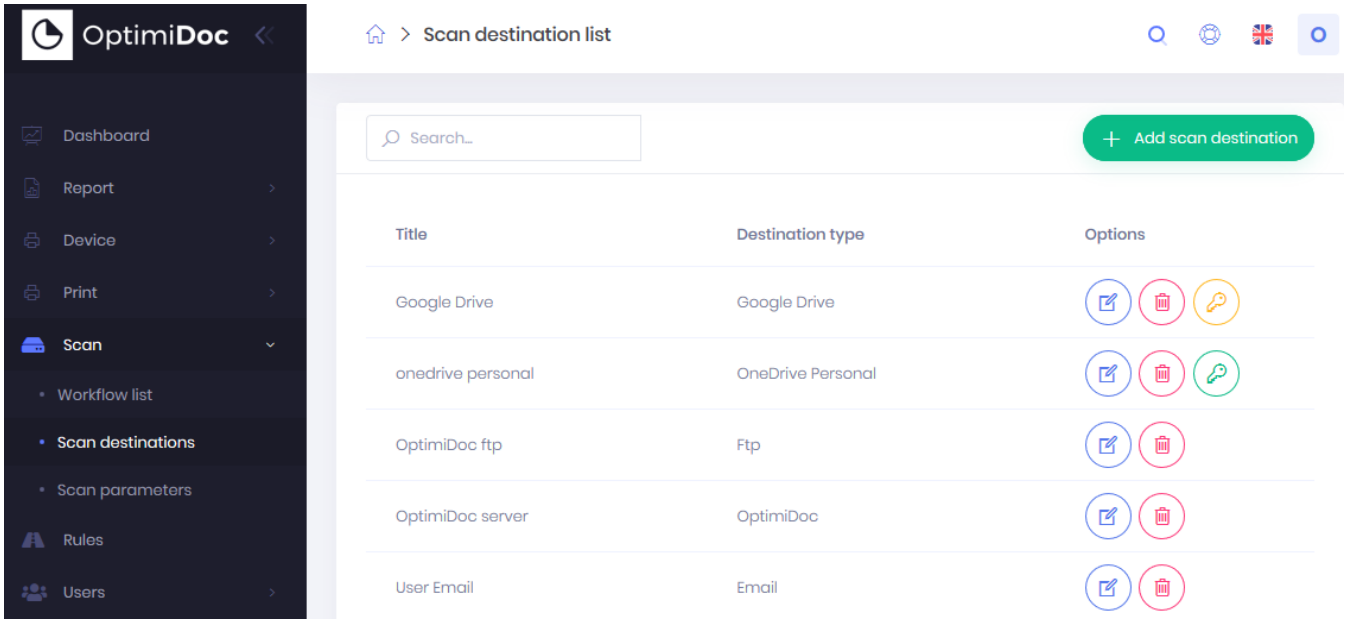
5.5.2 Scan destinations

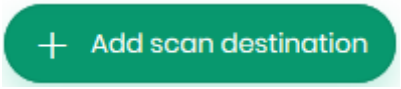
Scan destinations describes the location where the final documents shall be stored. OptimiDoc supports multiple scanning destinations and each destination requires different settings. To see the setting follow the description below. Each scanning workflow may have one scan destination defined.

Scan destination - list

List of scan destinations provides a basic overview of all defined scan destinations. From this page you can add a new destination, edit current destinations or delete them.



Scan destination - add destination

To **add** a scan destination to OptimiDoc, click on the 

button and enter the required information. OptimiDoc offers the following destination types:

- Email
- Folder
- FTP
- SharePoint
- Google Drive
- Script
- OptimiDoc
- DropBox
- One Drive
- Sharepoint Online
- WebDAV

In definition of destination you can also use the scan workflow parameters.

Scan destination - edit destination

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To **edit** a destination, click on the button and change the settings based on preselected type.

Scan destination - delete destination

To **delete** a destination, click on the button. The destination cannot be deleted if it is still assigned to a scan workflow.

5.5.2.1 Email

Email type delivers the scan to defined SMTP server.

- **Title** - destination title
- **Type** - type of scan destination
- **SMTP server** - IP address or domain name of SMTP server
- **Port** - SMTP server port number
- **Secure communication** - enable/disable secure communication
- **Sender** - email of sender. Scan workflow parameters can be used.
- **Recipient** - recipient email address. More email addresses shall be separated by comma.
- **Login** - login name for SMTP server.
- **Password** - password for SMTP server.
- **Email subject** - subject of email. Scan workflow parameters can be used.
- **Email body** - body of email message. Scan workflow parameters can be used.
- **Limit attachment size** - enables the functionality of maximal size limit of email. In case of exceeded limit, the attachments are stored in OptimiDoc and the email contains only the link.
- **Attachment size** - maximum size of email attachments
- **email subject** - subject of email in case of email exceed. Scan workflow parameters can be used.
- **email body** - body of email message in case of email exceed. Scan workflow parameters can be used.

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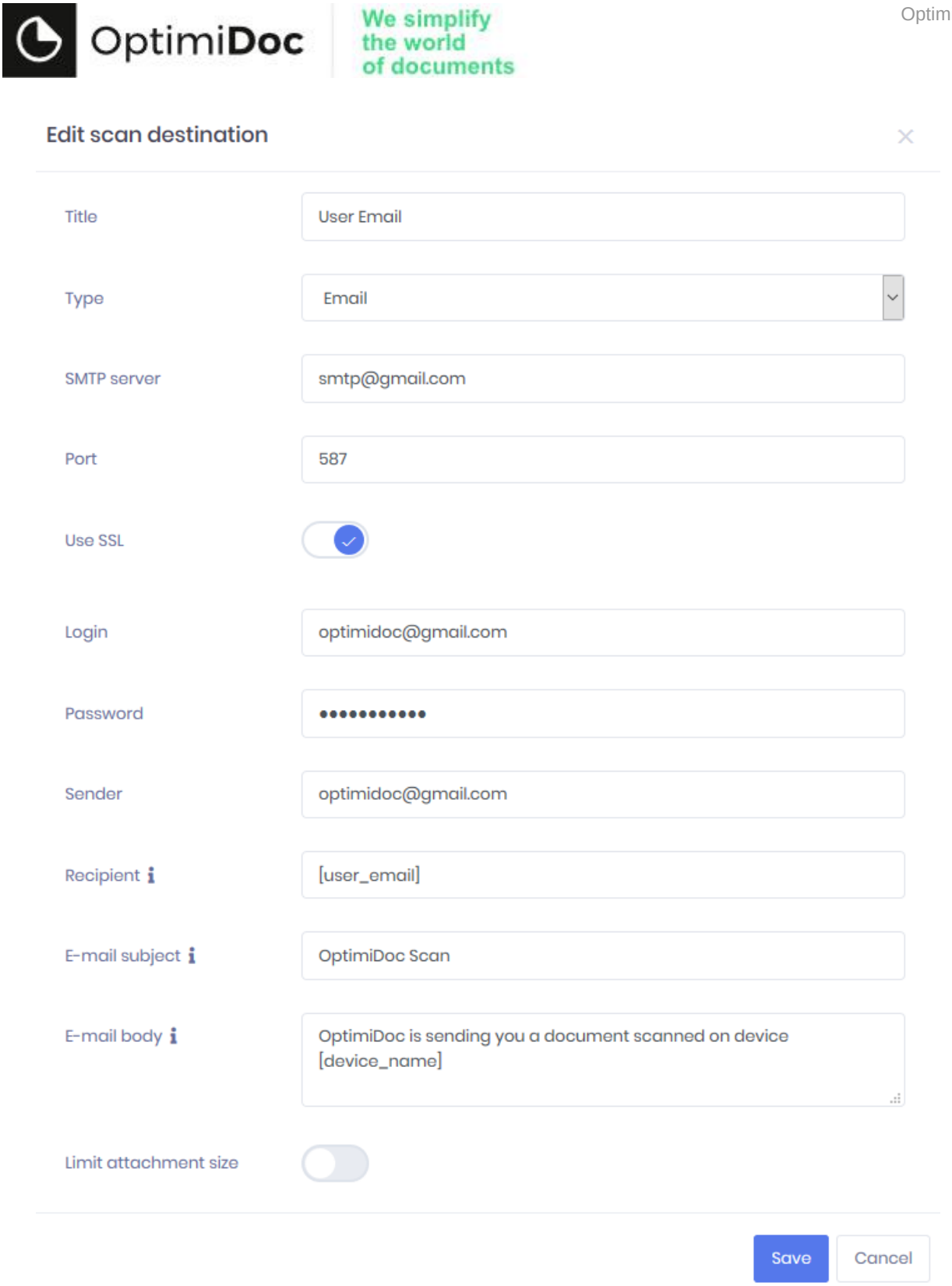

5.5.2.2 Folder

Folder type delivers the scan to a defined folder.

- **Title** - destination title
- **Type** - type of scan destination
- **Path** - path to required folder where the document will be stored
- **DFS** - check this if the destination is Distributed File System

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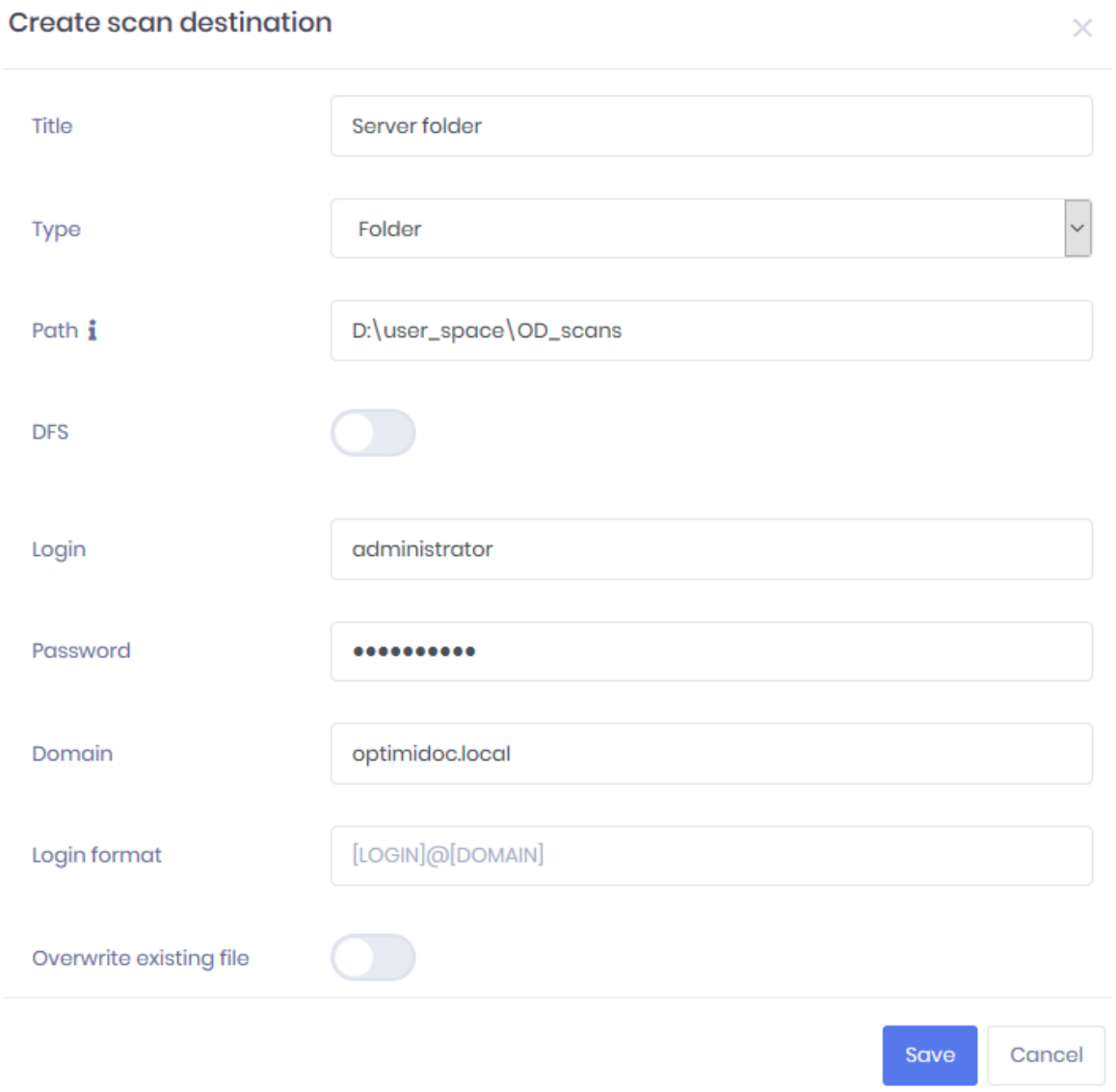
- **Login** - user login name
- **Password** - user password
- **Domain** - computer domain in case of a local computer without connection to domain use the name of computer
- **Login format** - format of the domain login (e.g. [LOGIN]@[DOMAIN] for Windows, [DOMAIN]\[LOGIN] for Samba, etc.)
- **Overwrite existing file** - if you check this option then files with the same names in destination will be overwritten. Otherwise OptimiDoc leaves the existing file and saves new with a suffix.



Tip You can also use system parameters for creating a new folder

5.5.2.3 FTP

FTP type delivers the scan to a defined FTP server.

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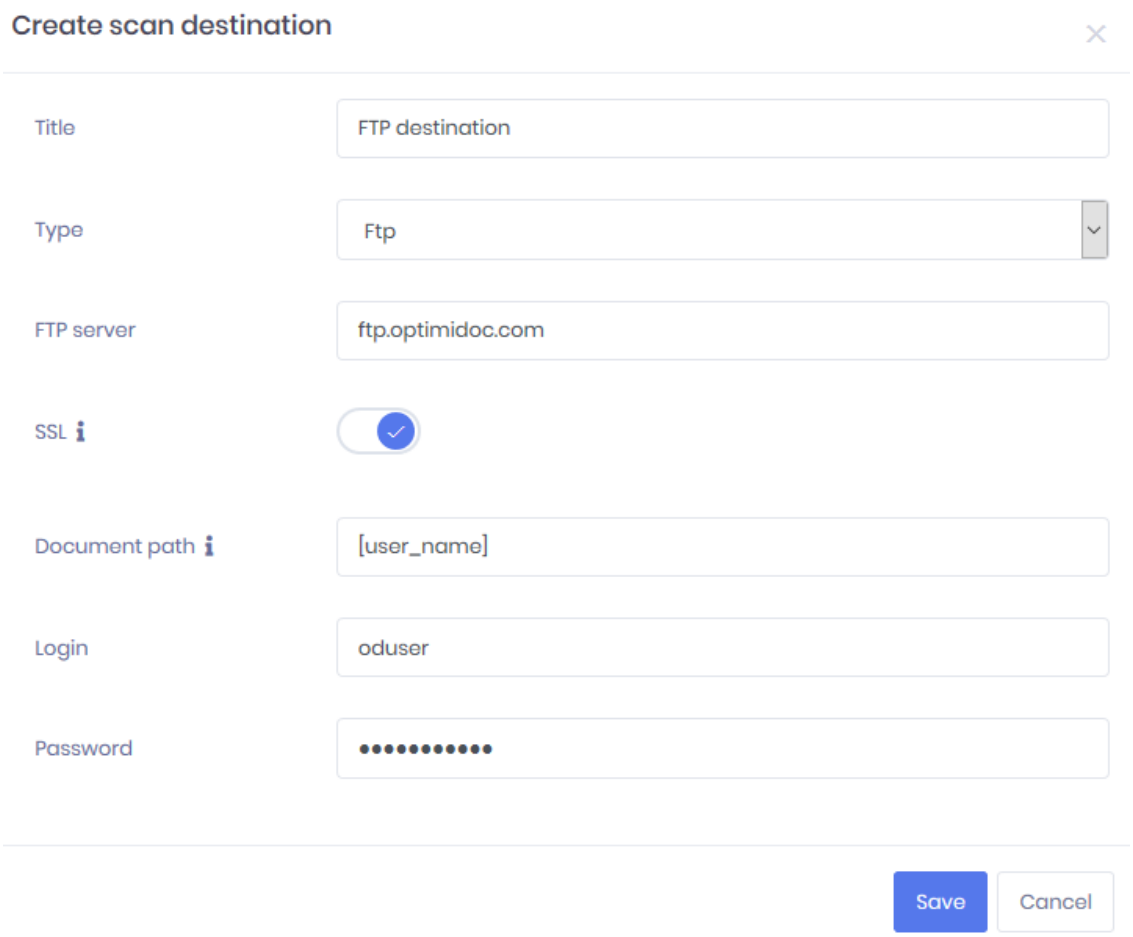
- **Title** - destination title
- **Type** - type of scan destination
- **FTP server** - can be written by domain name or IP address and port, <ip_address>:<port>
- **Path** - user can choose, where the document will be stored. If the path is empty, it will go to home directory.
- **Login & password** - credentials to FTP server



5.5.2.4 Microsoft SharePoint

SharePoint type delivers the scan to defined document library of Microsoft SharePoint. SharePoint does not support automatic sub folder creation.

- **Title** - destination title
- **Type** - type of scan destination
- **SharePoint server -** URL to SharePoint server (ex. http://sharepoint)
- **SharePoint web -** SharePoint Website (ex. /Sales or /HR)
- **Document path -** path to document list (ex. /Documents/)
- **Login -** login name of user account
- **Password -** password of user account
- **Domain -** domain of user account

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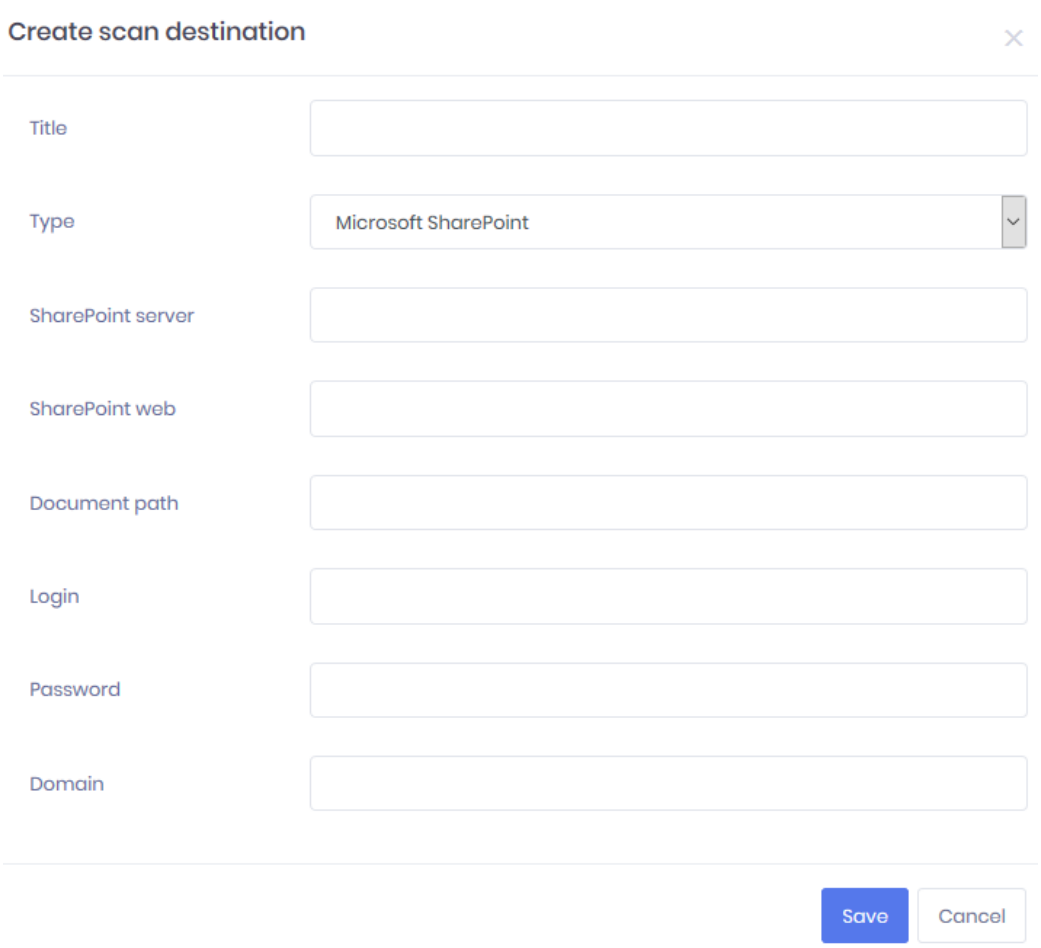

5.5.2.5 Google Drive

Google Drive type delivers the scan to Google Drive. Google Drive does not support the automatic subfolder creation.

- **Title** - destination title
- **Type** - type of scan destination
- **Folder** - folder in selected Google Drive.Scan workflow parameters can be used.

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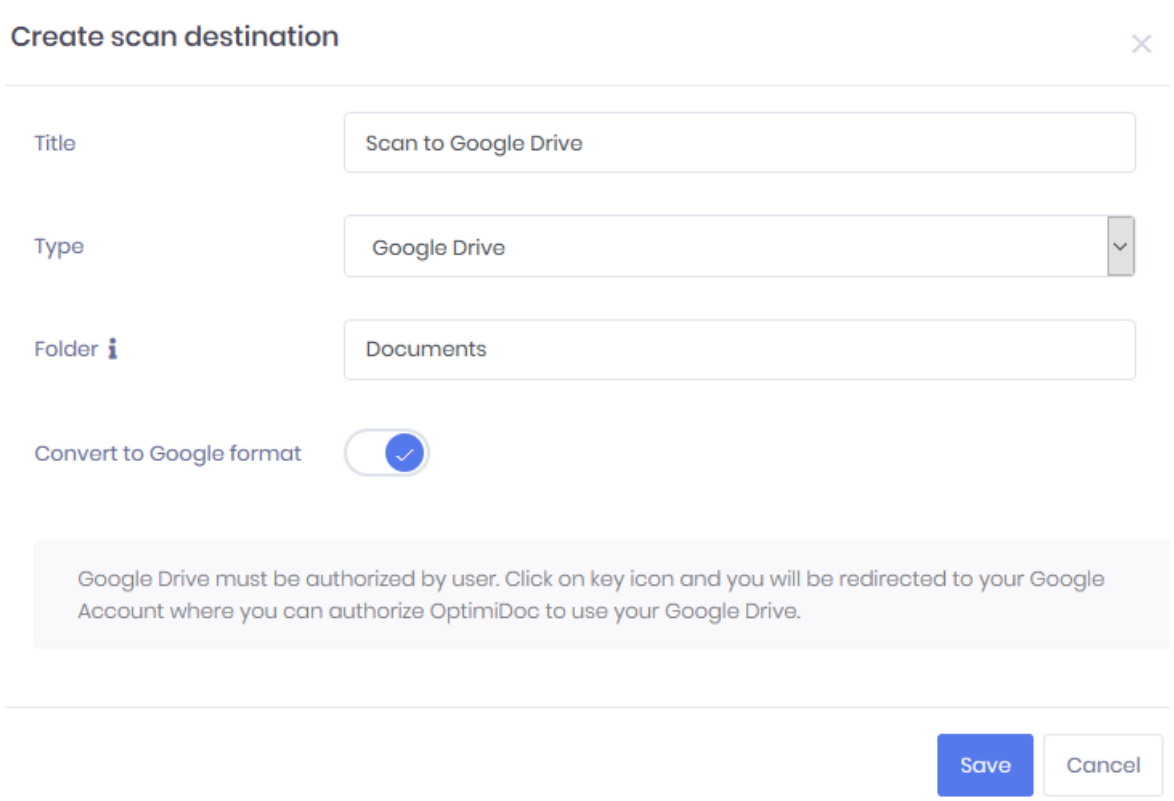

Note

The Google Drive destination requires authorization with the Google account.

To authorize the destination, click on the button. You will be redirected to the Google webpage where you can allow access to the Google Drive, by clicking on the Allow access button.

5.5.2.6 Script

Script type instead of saving the document starts the script which can proceed any following operation like storage to ERP system.

- **Title** - destination title
- **Type** - type of scan destination
- **Script** - file name of script including the path
- **Arguments** - script argument. Scan workflow parameters and file parameters can be used:
  - **[filename]** - absolute path to scanned document
  - **[metadata]** - absolute path to metadata of scanned document

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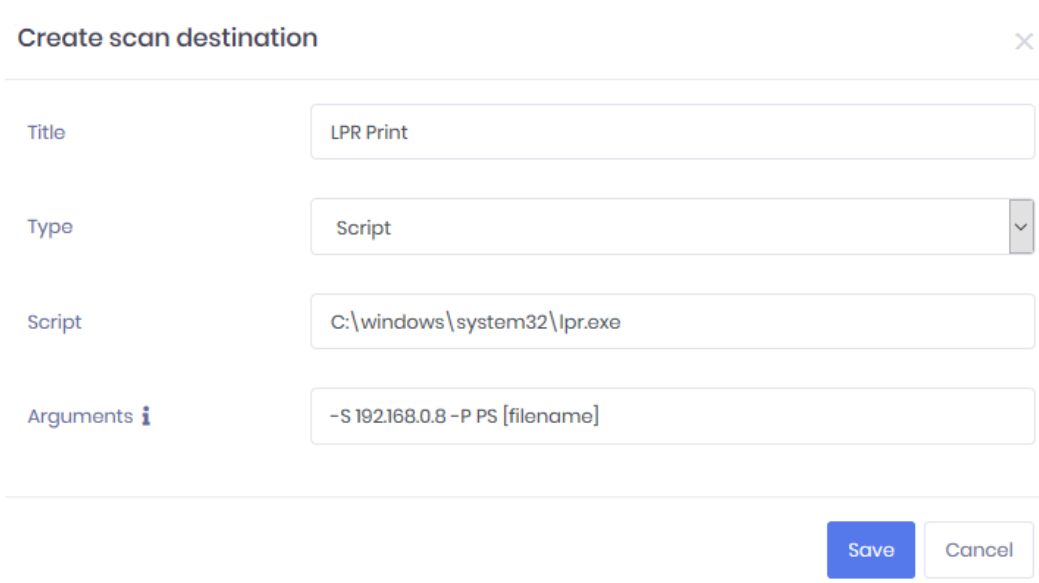
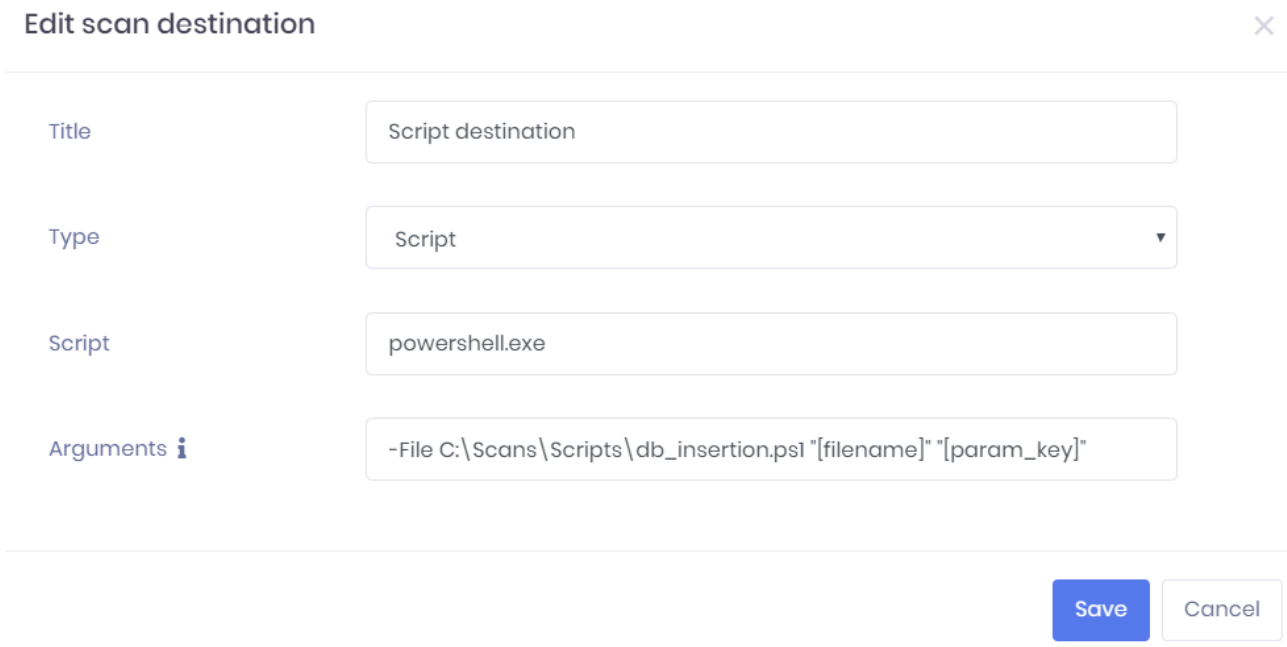


Example

Title: LRP print
Type: Script
Script: C:\windows\system32\lpr.exe
Arguments: -S <printer_IP_address> -P PS [filename]

Note: LPR needs to enabled in Windows features.

You can also run Powershell Script as well:



5.5.2.7 OptimiDoc

OptimiDoc type delivers the scan to the OptimiDoc server. The user can then download/delete

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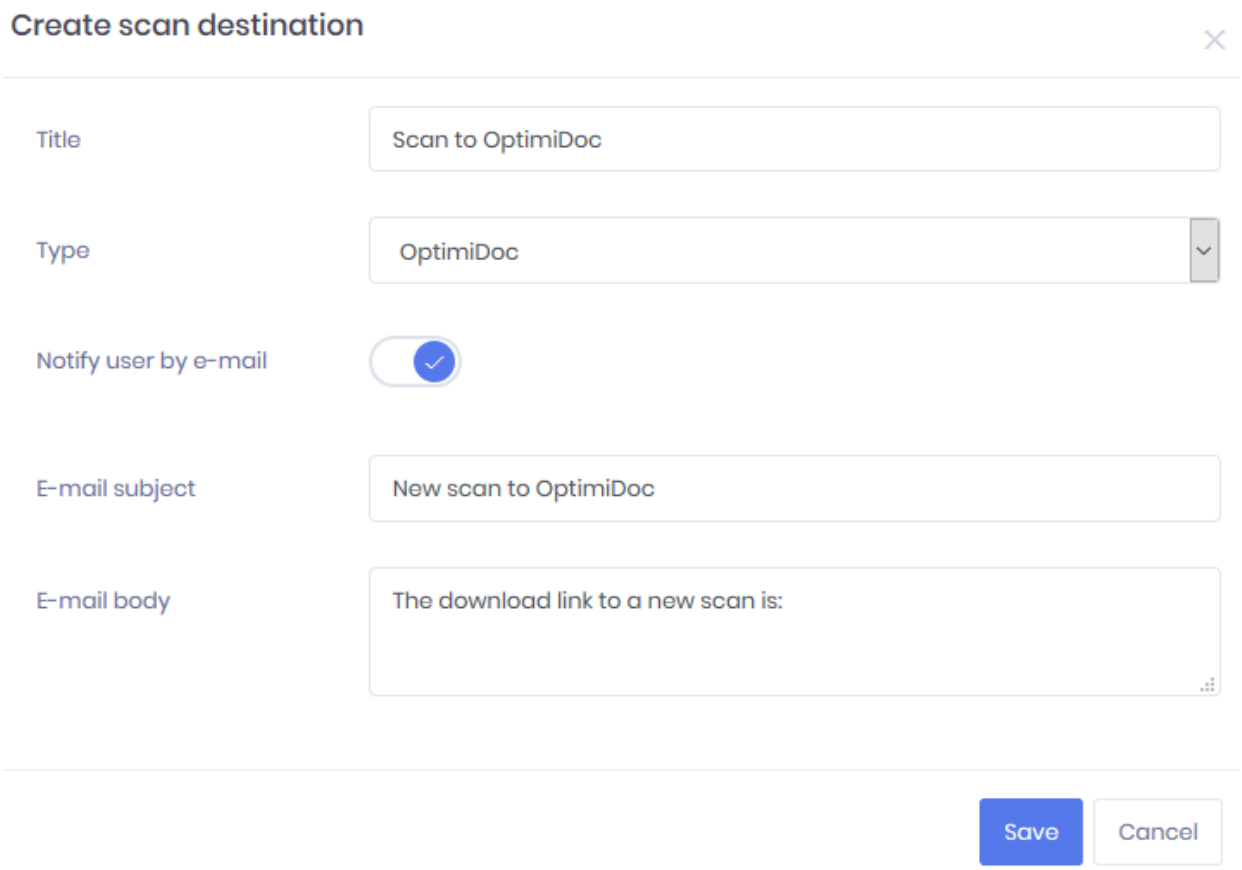
the document from the OptimiDoc's Dashboard.

- **Title** - destination title
- **Type** - type of scan destination
- **Notify user by email** - User will be notified by OptimiDoc that the document is ready
    - **email subject** - Subject of notification email
    - **email body** - Body of notification email. You can use the parameter [link] to add direct URL to the document



5.5.2.8 DropBox

DropBox type delivers the scan to DropBox.

- **Title** - destination title
- **Type** - type of scan destination
- **Folder** - folder in selected DropBox account. Scan workflow parameters can be used.

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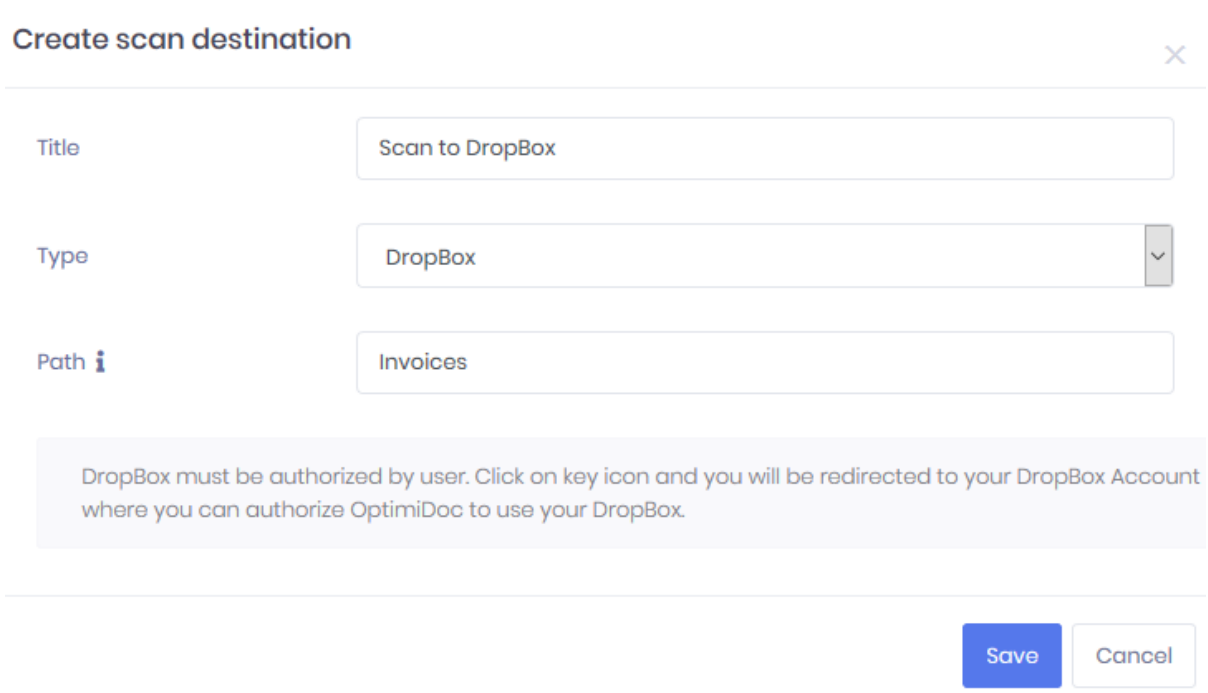
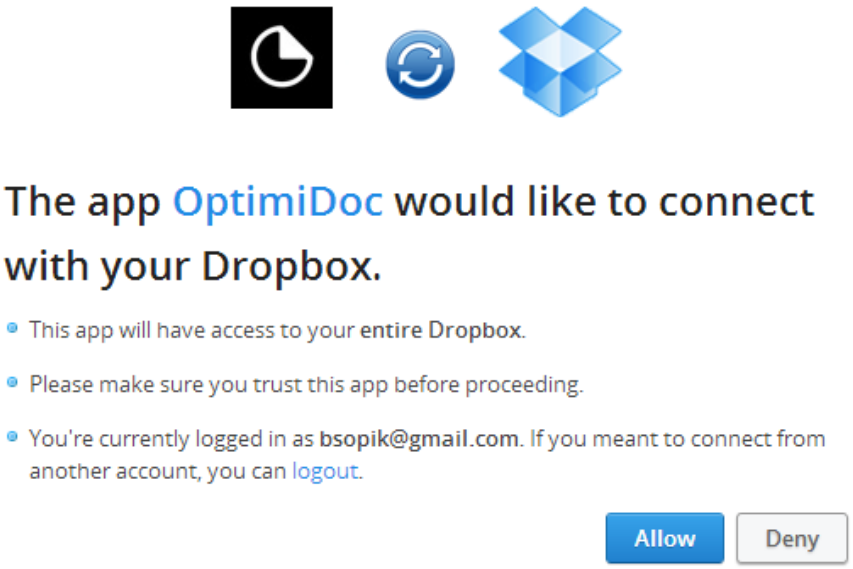


Note The DropBox destination requires authorization via a DropBox account. To authorize the destination, click on the button. You will be redirected to the DropBox page where you can allow access to the DropBox. To allow access click on the Allow access button.



5.5.2.9 OneDrive

OneDrive type delivers the scan to OneDrive. OneDrive does not support automatic subfolders

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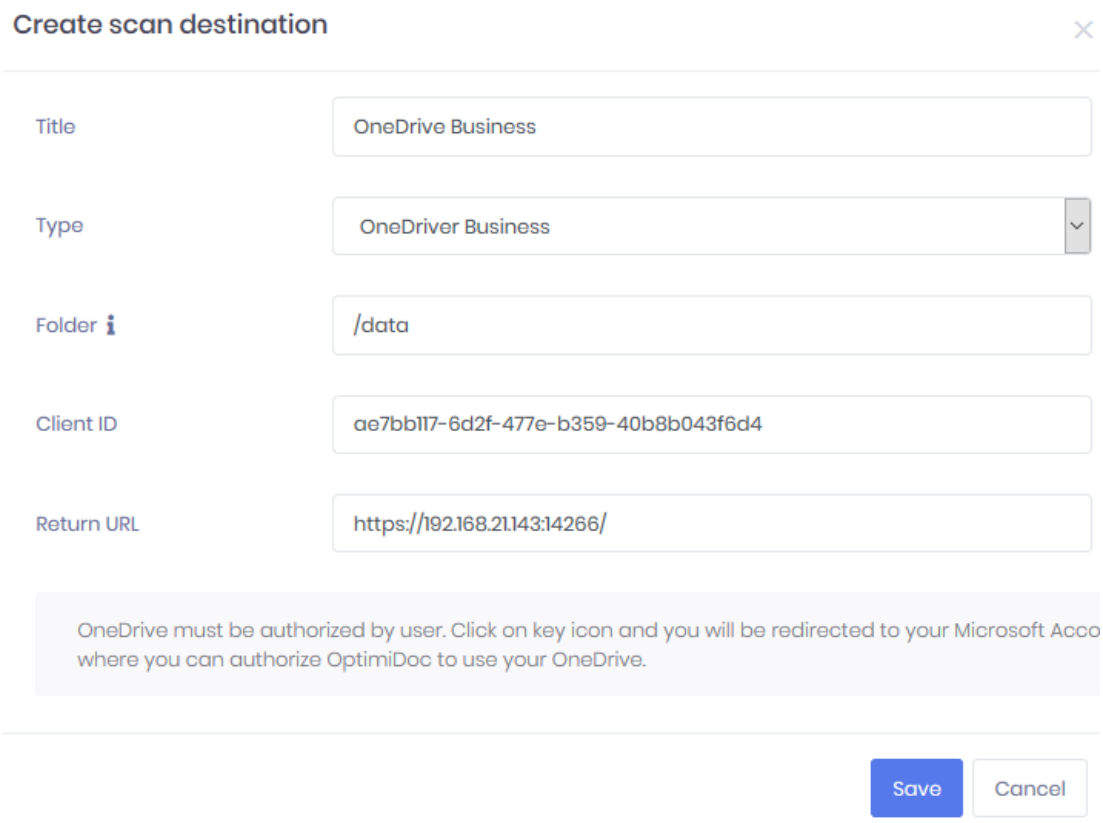
creation.

- **Title** - destination title
- **Type** - type of scan destination
- **Folder** - folder in selected OneDrive. Scan workflow parameters can be used.
- **Business** - type of OneDrive. Business or Personal OneDrive type.



Note The OneDrive destination requires authorization via Microsoft account. To authorize the destination click on the button. You will be redirected to the OneDrive page where you can allow access by clicking on the **Yes** button.

5.5.2.9.1 OneDrive Personal

Note The OneDrive destination requires authorization via a Microsoft account. To **authorize** the destination click on the button. You will be redirected to the OneDrive page where you can **allow access** to the OneDrive.

- To allow access click **Yes.**

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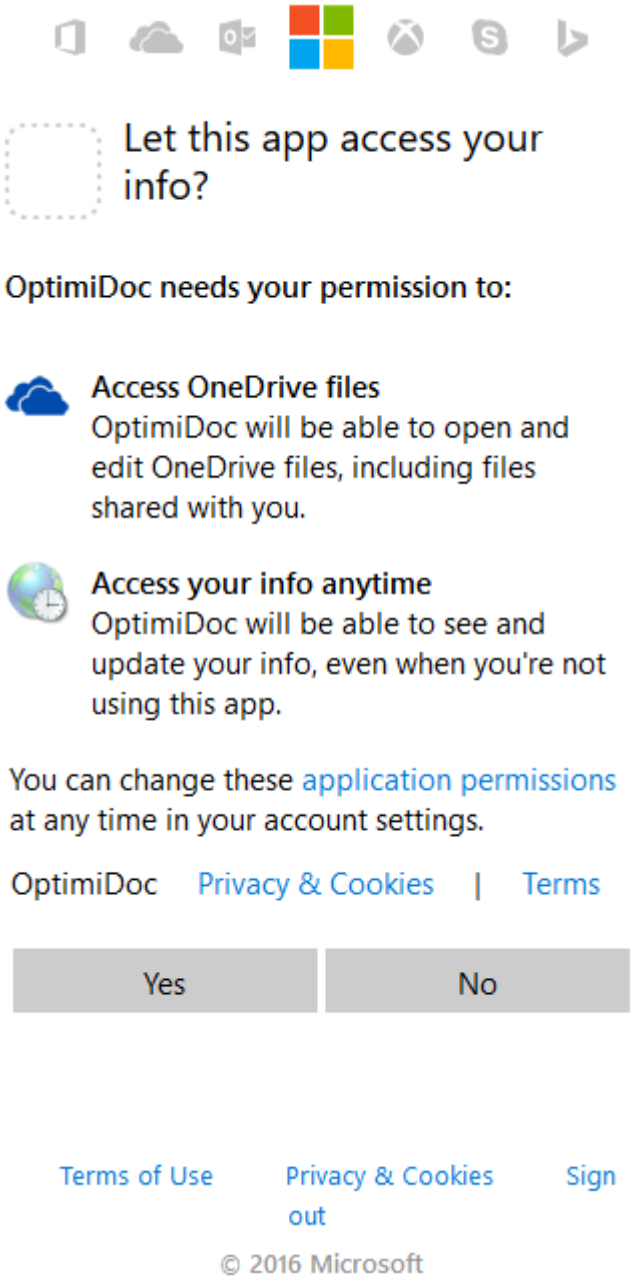

- **Copy URL** address from browser input and insert to OneDrive Authentication code dialog
- Click on the **Save** button.

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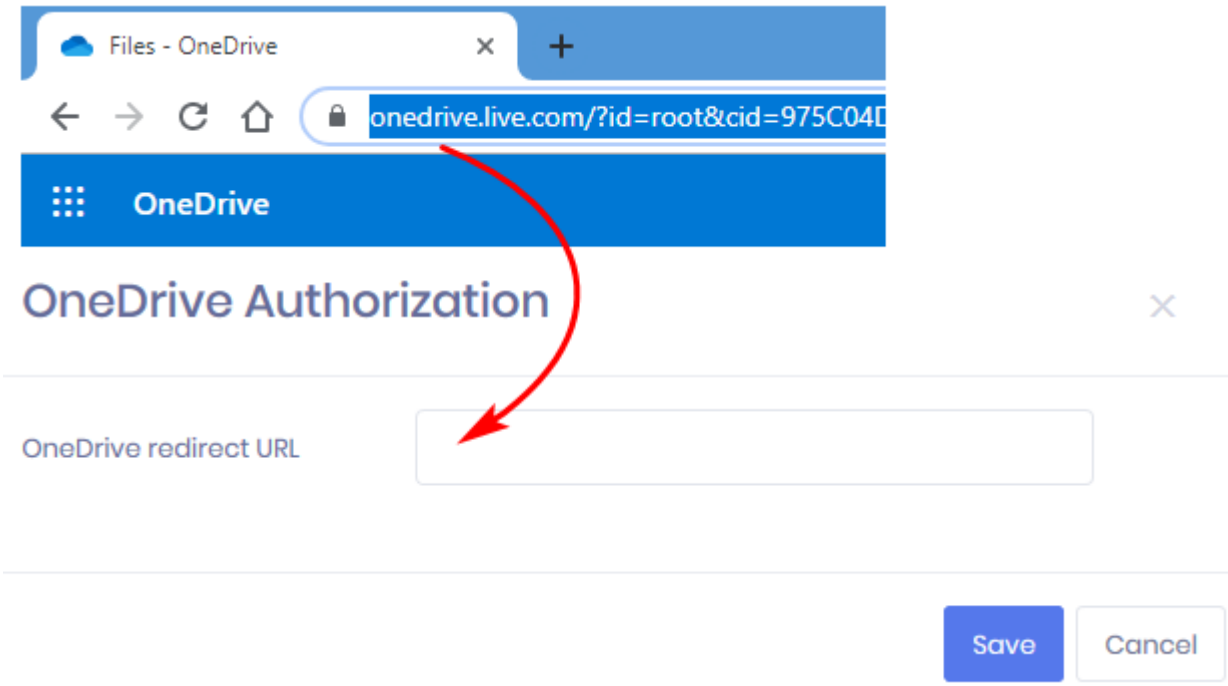
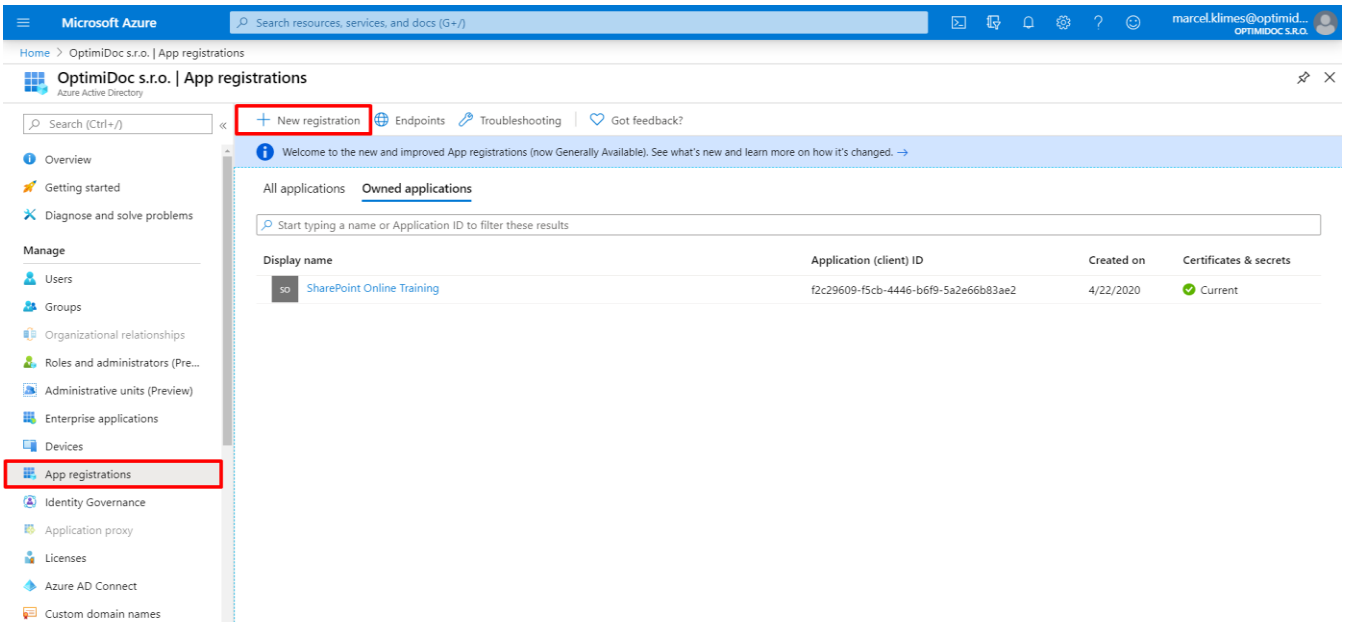


5.5.2.9.2 OneDrive Business

Before you start using OneDrive Business there are manual steps required. Follow the steps below.

1. Login to the Azure Management Portal - https://portal.azure.com/

2. Go to the Azure Active Directory section > App Registrations and click on New registration.



3. Enter the application name, select native application type and Redirect URI.

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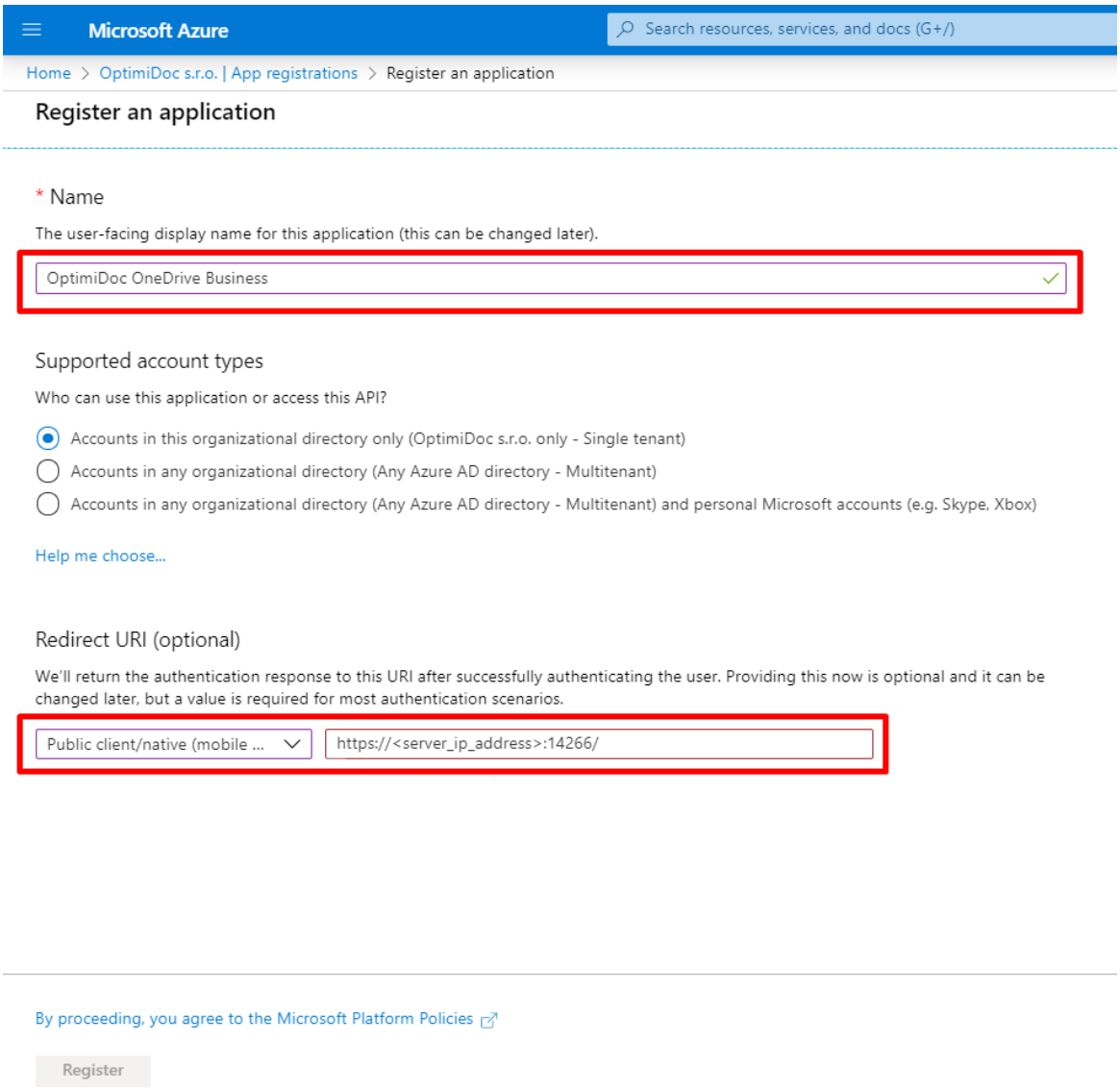

4. After creating the application, go to API permissions > Add a permission and search for SharePoint.

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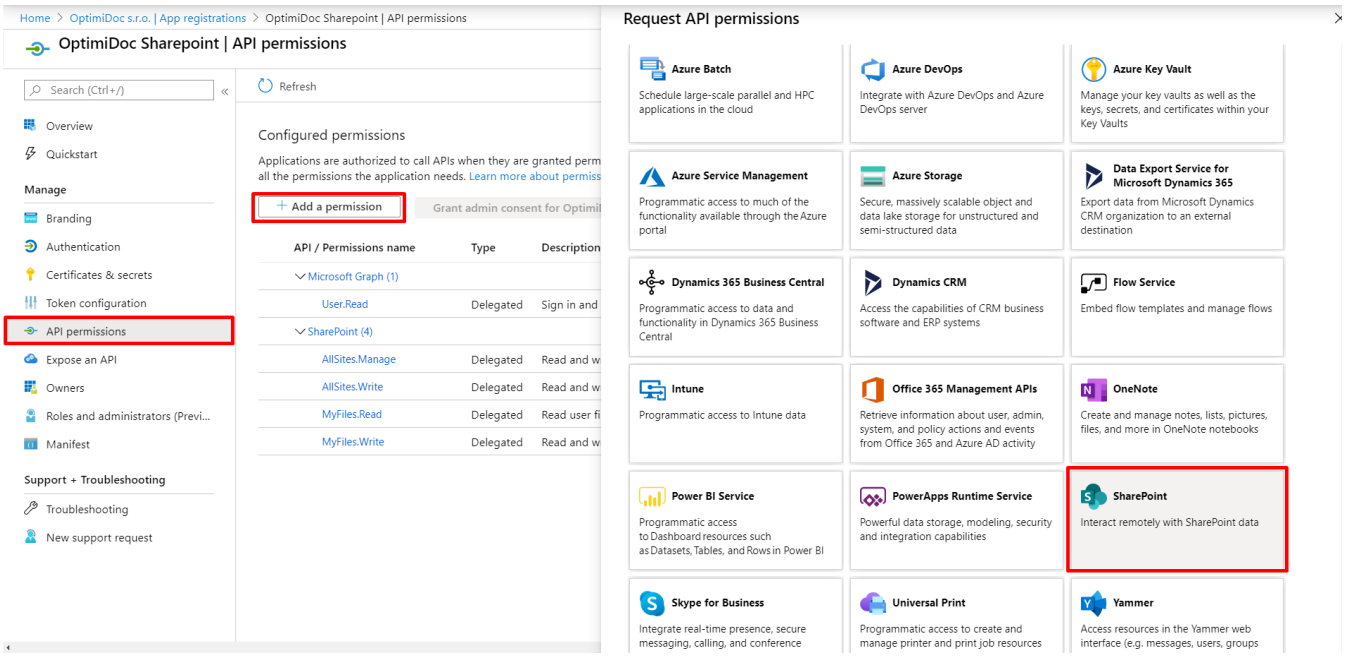

5. Select the Microsoft.SharePoint API and in permissions select rights based on the image below and click on Select. Add permissions for SharePoint Online and save.

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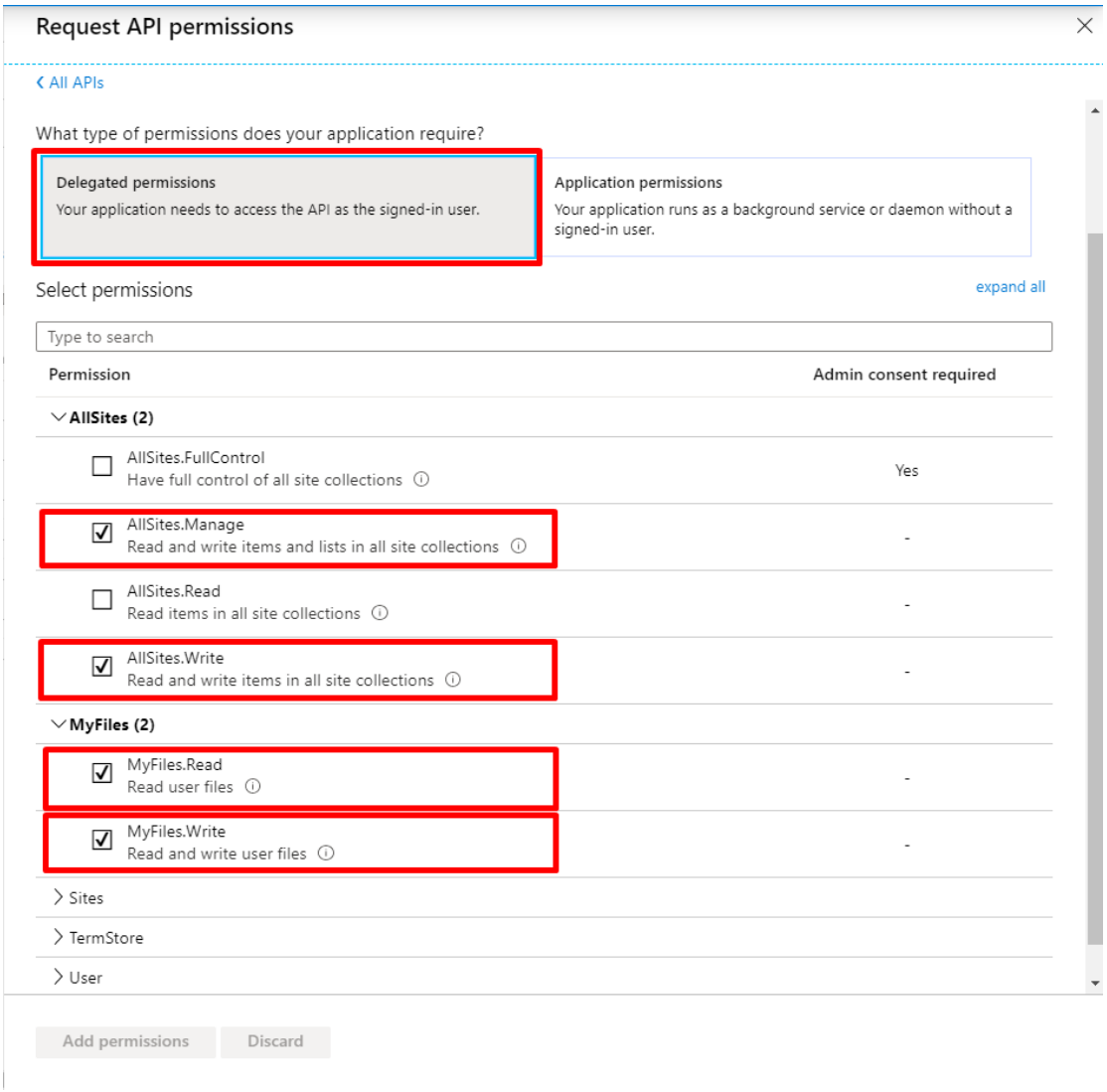

6. Configure the redirect URIs in Authentication section. Add the following two redirect URIs https://<server_IP>:14266/Dashboard/OneDriveConfirm/, https://<server_IP>:14266/Destination/OneDriveConfirm/

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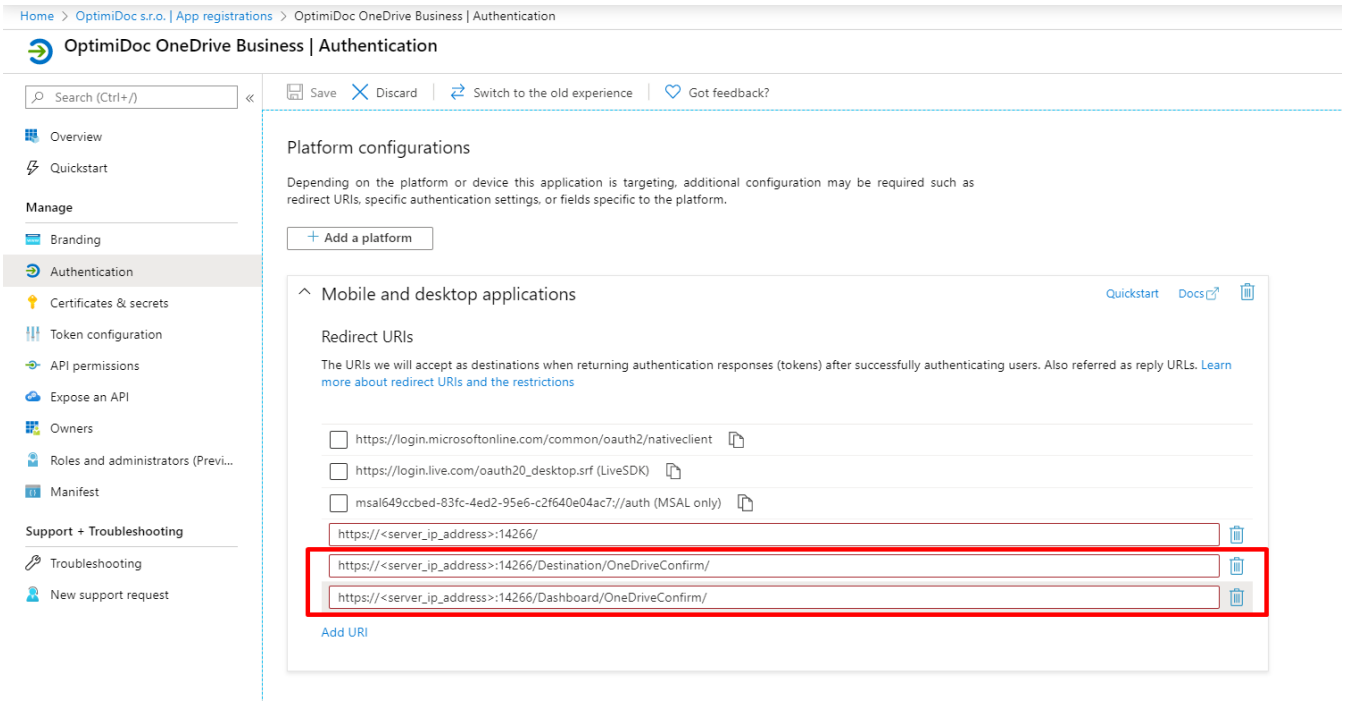
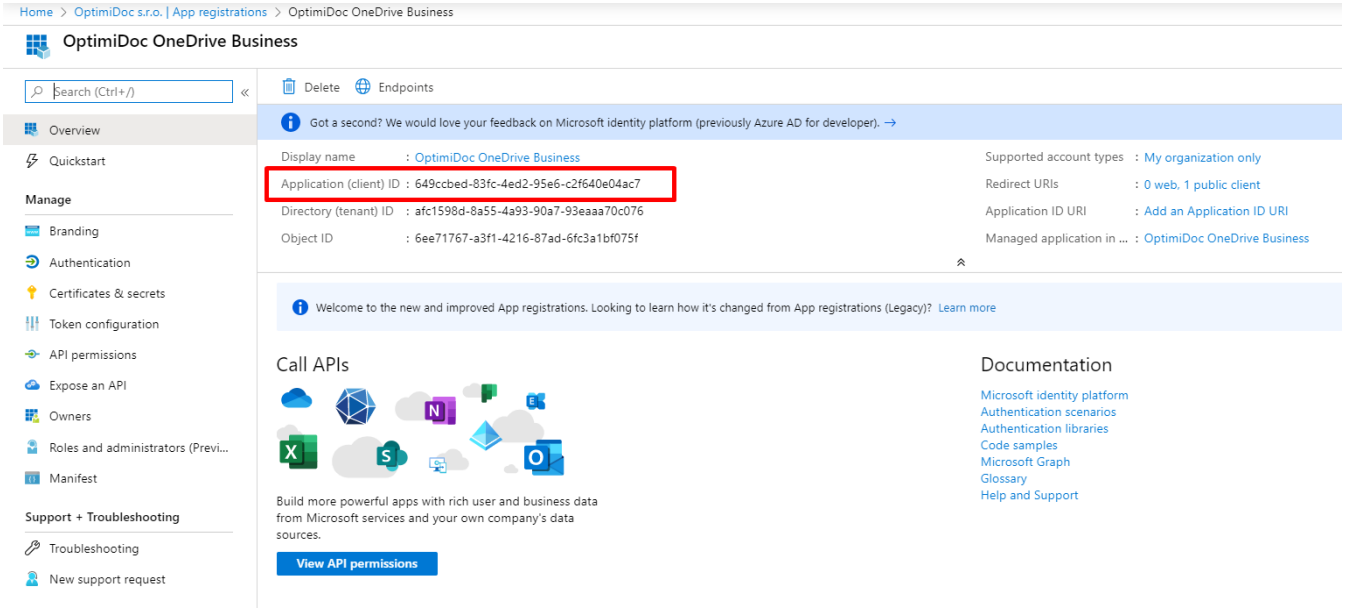


7. Now you have completed configuration in Azure.

8. To start the configuration of OptimiDoc you will need the Application ID.



9. In OptimiDoc setup the destination.

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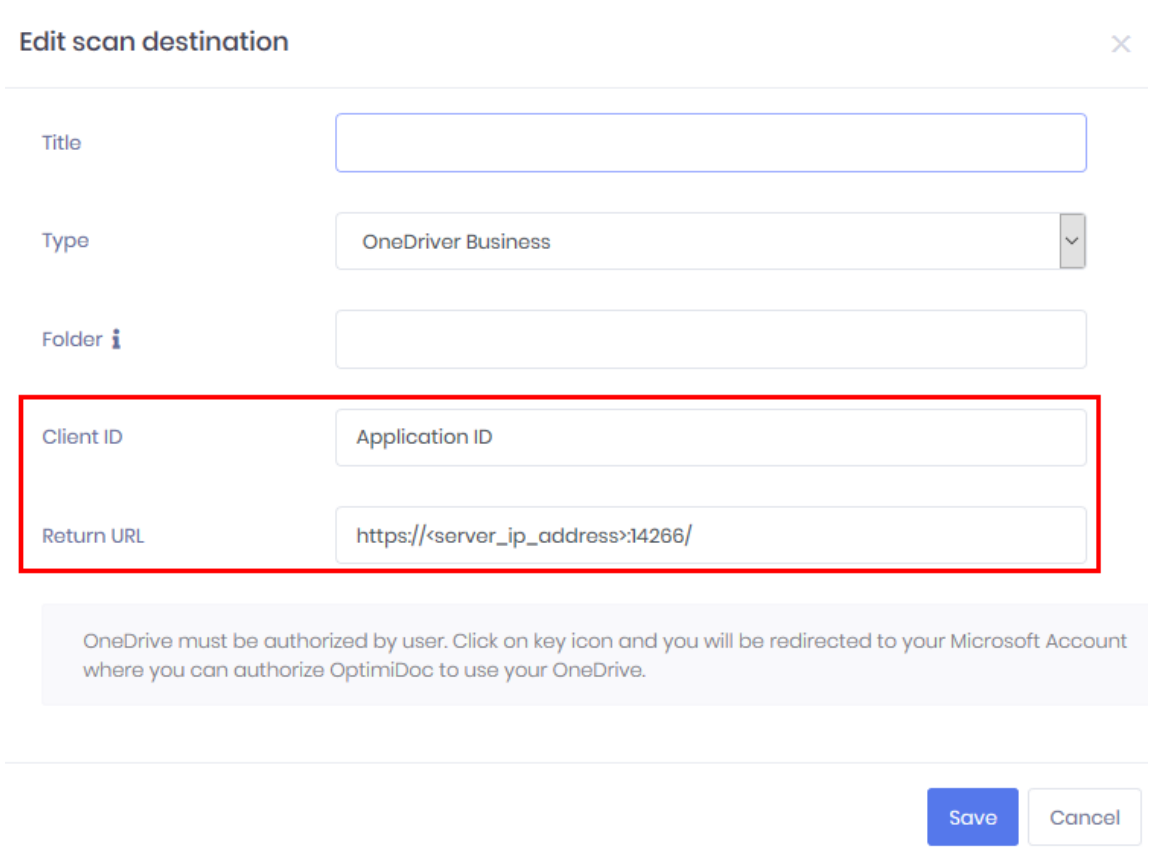
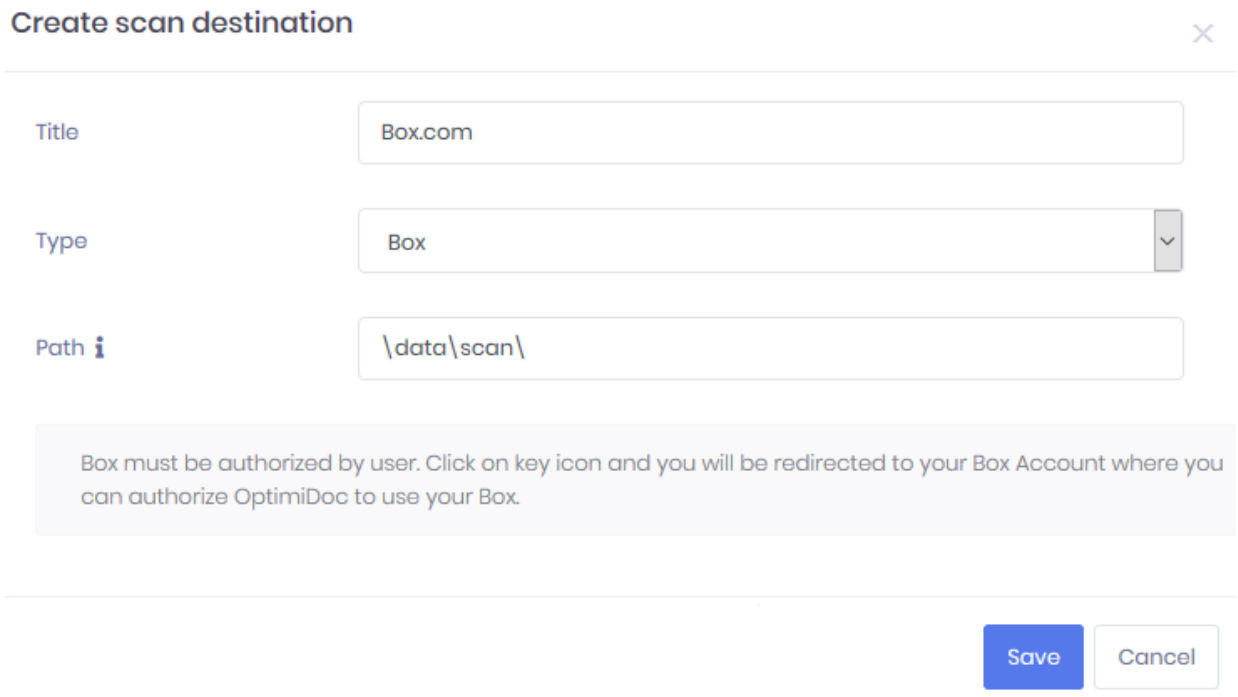


10. Authorize access by clicking on the button. For general account use the button in Scan Destinations. For personal OneDrive the user needs to authorize the access in Dashboard.

5.5.2.10 Box.com



Authorize newly created destination globally or let users authorize Box by themselves.

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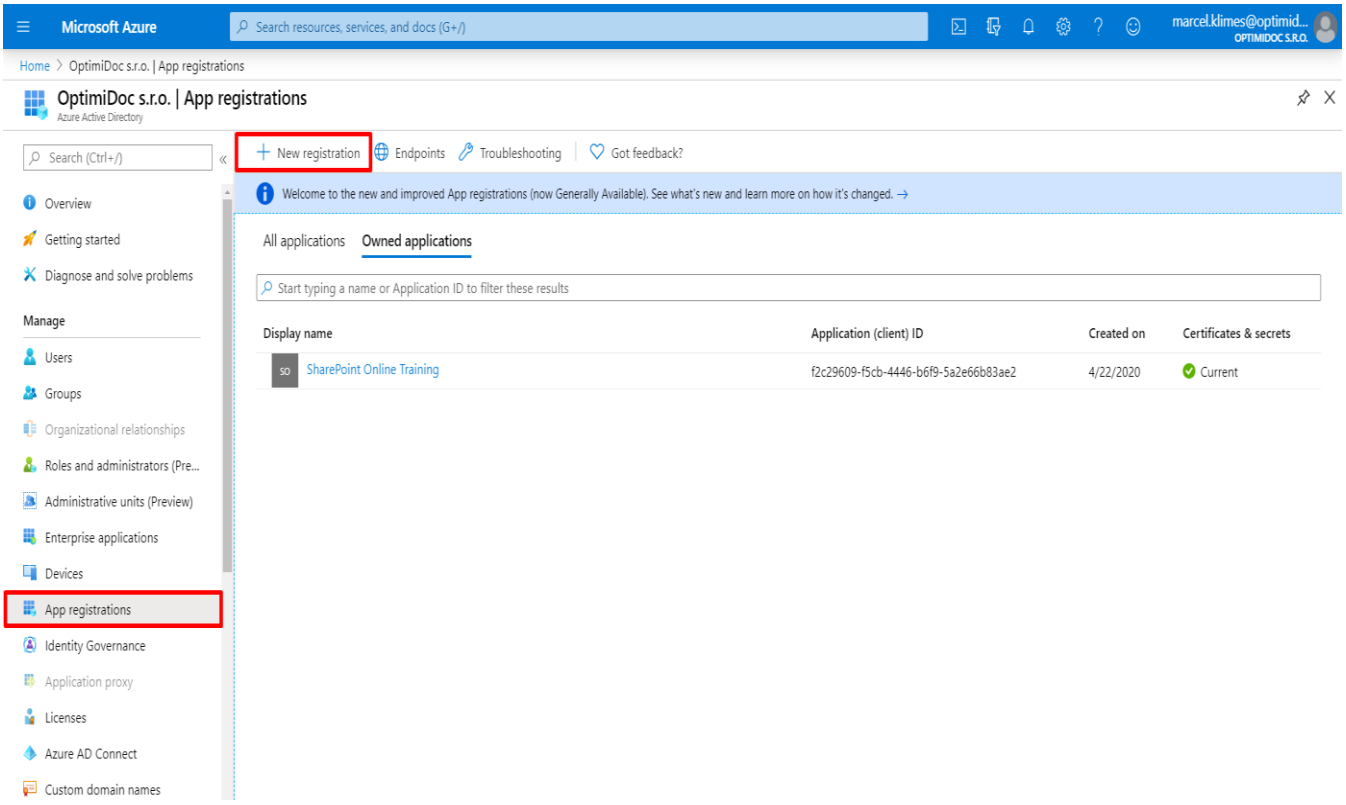
Use it within any workflow output settings as a destination.

Note Folder structure "scan\folder1\subfolder" - !no lead and trailing slash '\'!

5.5.2.11 SharePoint Online

1. Login to the Azure Management Portal - https://portal.azure.com/#
2. Go to the Azure Active Directory section > App Registrations and click on New registration.



3. Enter the application name and Redirect URI: https://oauth.optimidoc.com/MicrosoftOnline/

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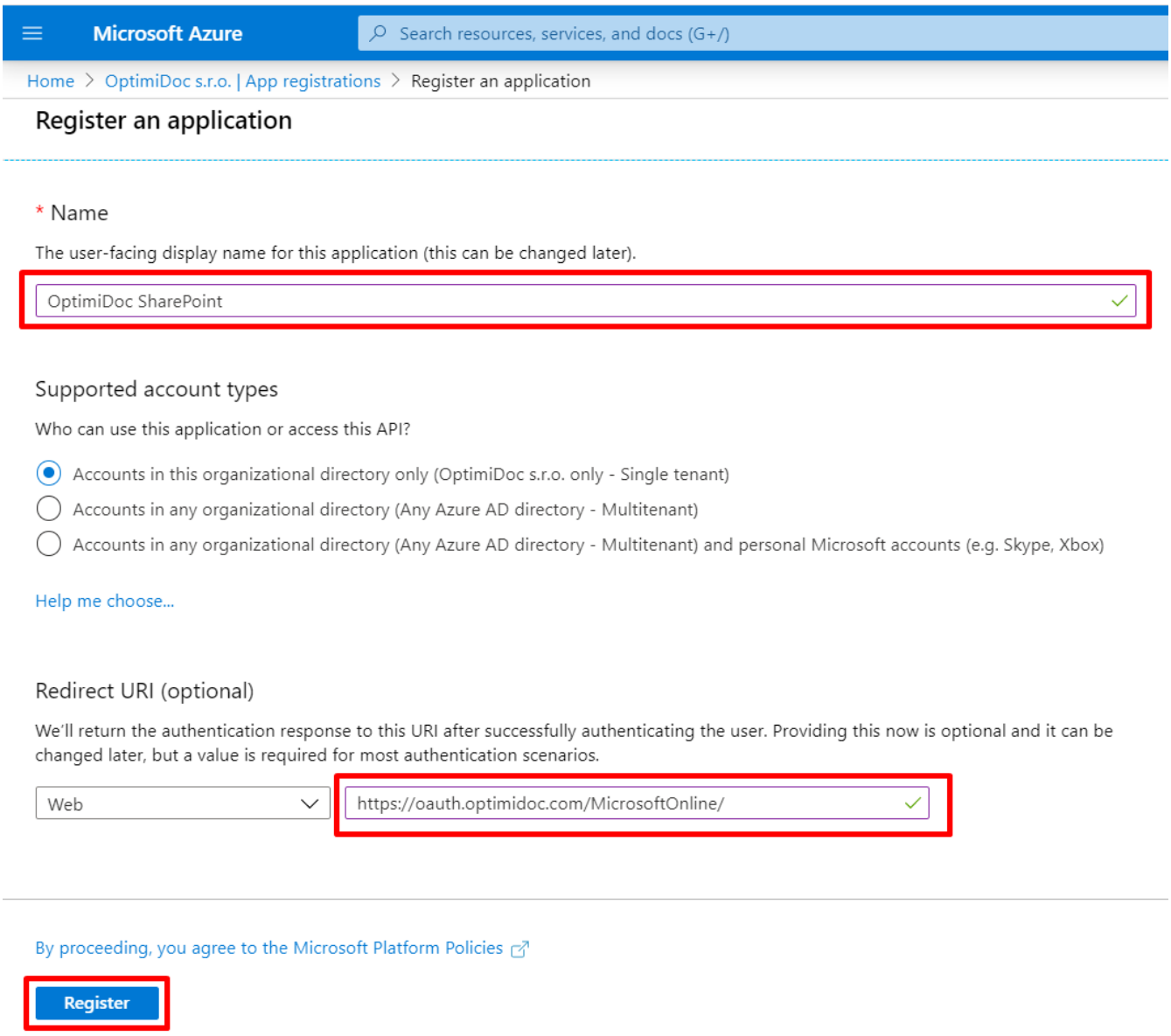

4. After creating the application, go to API permissions > Add a permission and search for SharePoint.

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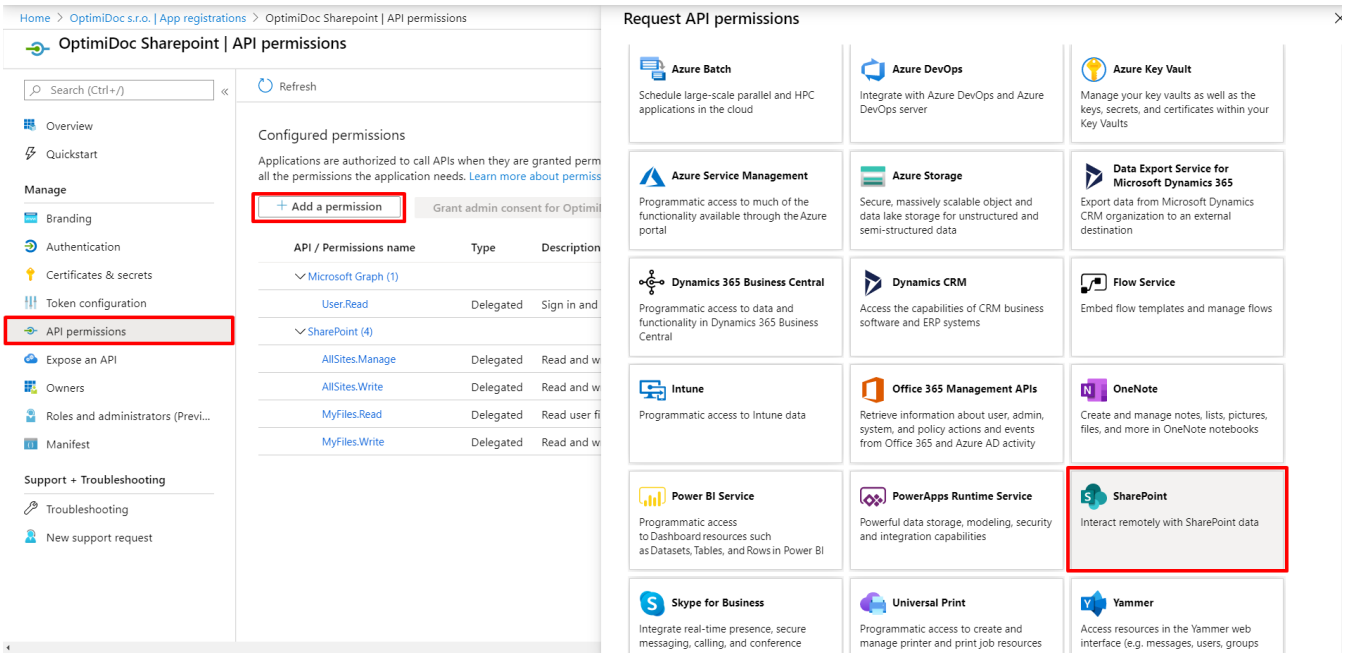

5. Select the Microsoft.SharePoint API and in permissions select rights based on the image below and click on Select. Add permissions for SharePoint Online and save.

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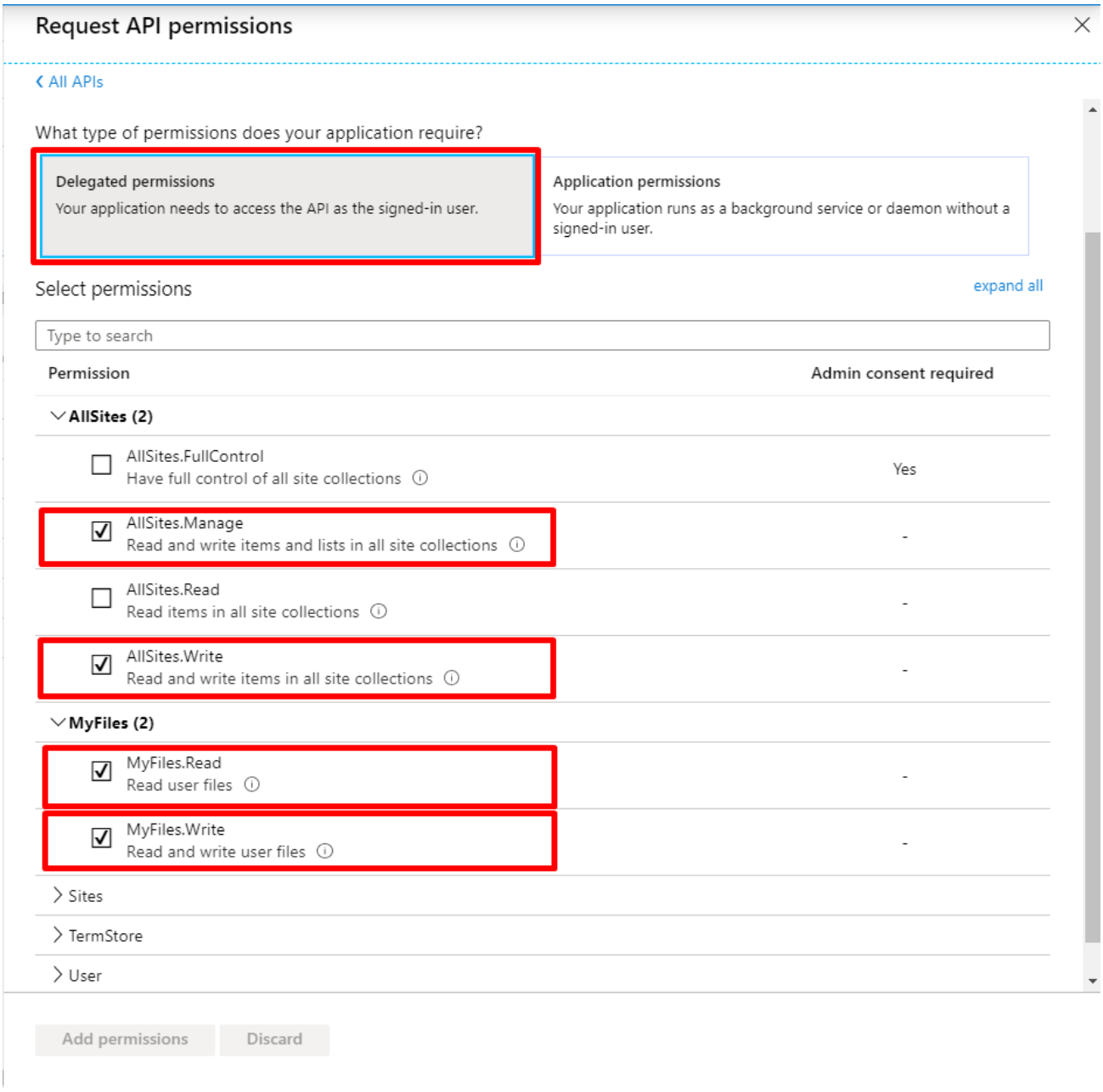

6. Now, when you have finished with application registration create the scan destination in OptimiDoc.

Title - name of scan destination
Type - type of scan destination
SharePoint server - add your SharePoint online URL
SharePoint web - leave empty if you want to upload scans in SharePoint root folder or use the site parameter
SharePoint path - name of the folders on SharePoint

- **See below points on how to add Client ID and Client Secret**

In case you are using sites in SharePoint, you need to set and split URL address like e.g.

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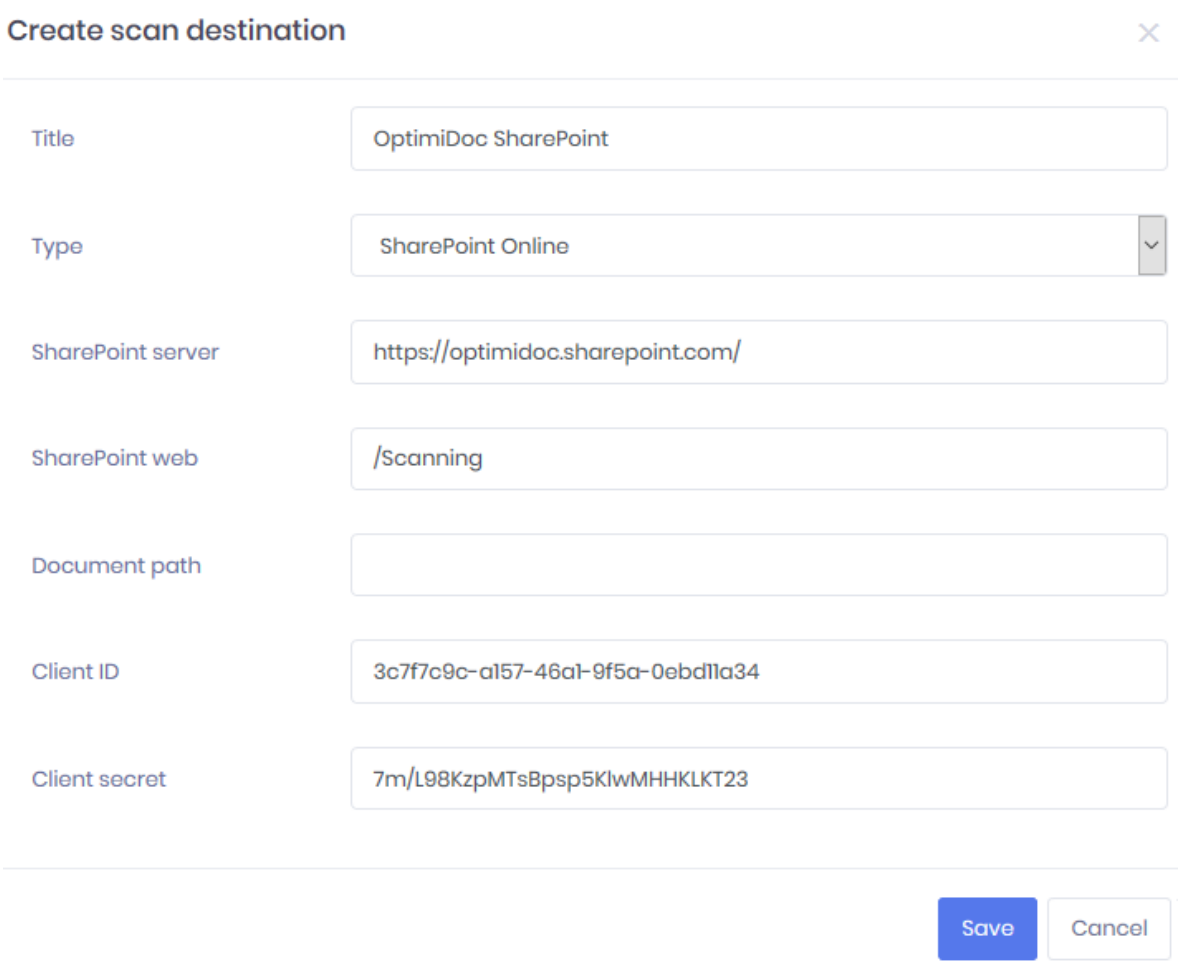
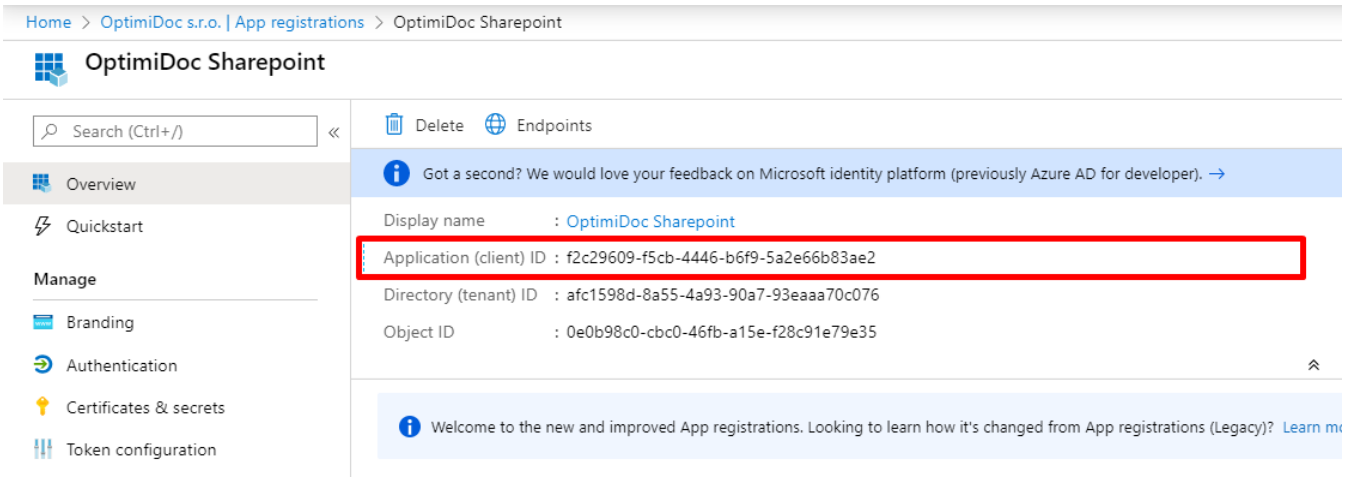
URL "https://optimidoc.sharepoint.com"
Web = "/sites/OptimiDocNorthAmerica"
Path = "/Shared%20Documents/test"



7. Add a Client ID -> Copy your Application ID and paste into scan destination "Client ID".



8. Add a Client Secret -> Certificates & secrets -> New client secret -> fill in description -> click Add and copy key value -> paste key value in scan destination "Client Secret" -> then click

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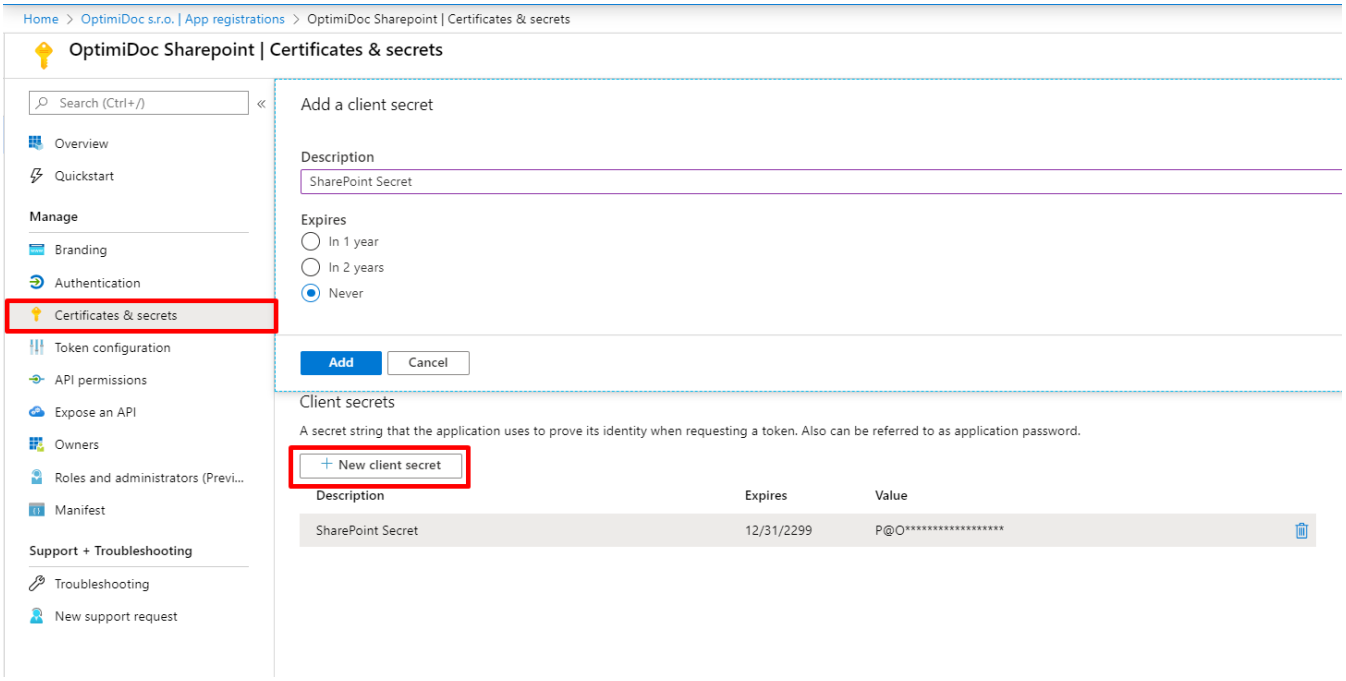
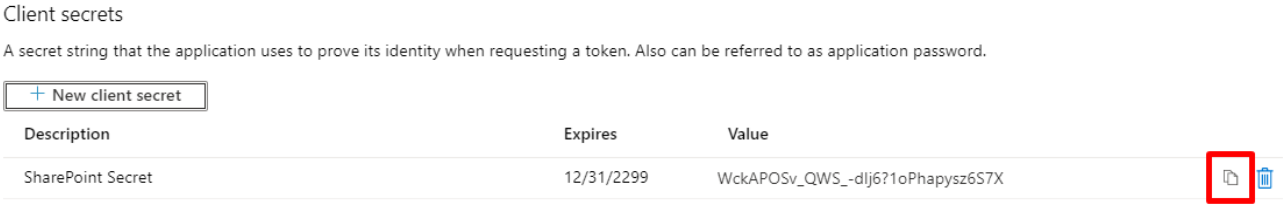
Save





9. Then authorize access by clicking on the button on the user's dashboard. For general account use the button in Scan Destinations.

5.5.2.12 WebDAV

To create a **WebDAV** scan destination click on the button *Add scan destination* and select the destination type **WebDAV.**

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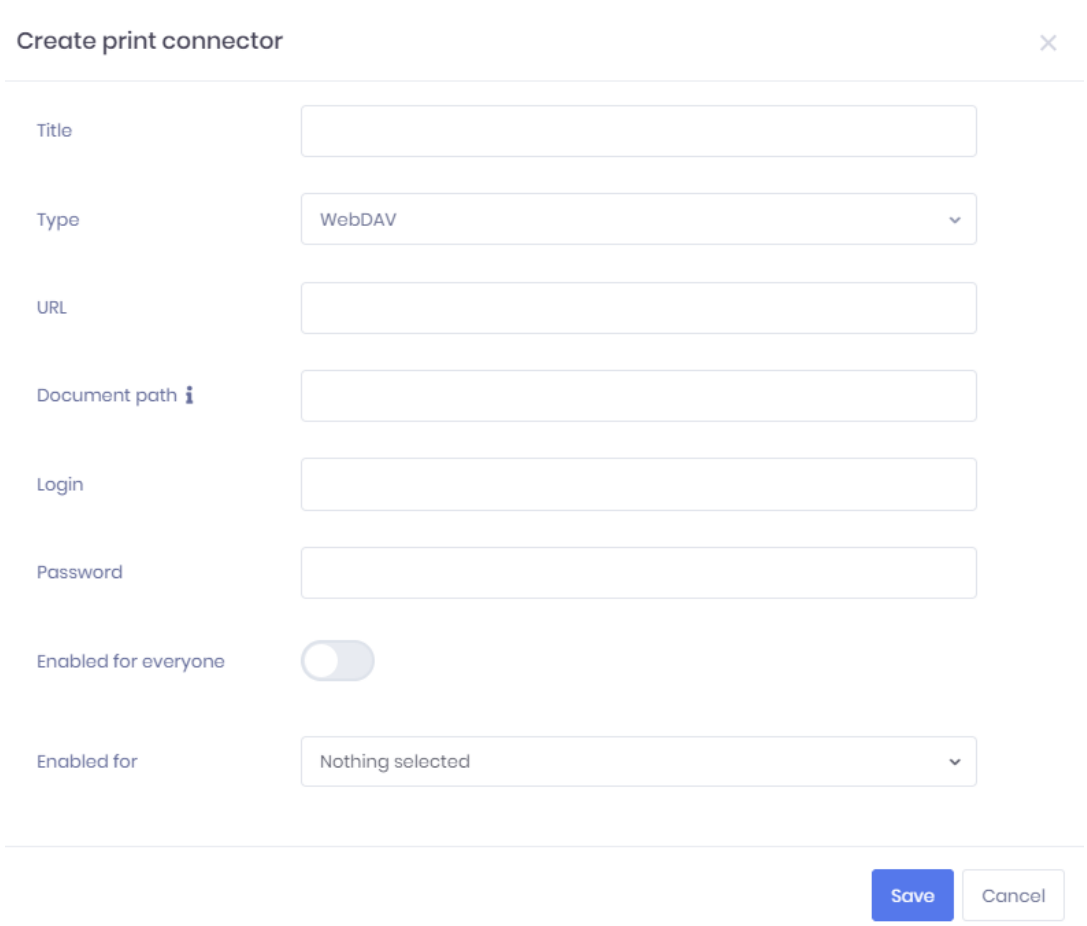

Fill in the Title and URL Address of the scan destination and you can also choose document path.

Don't forget to Enable it for everyone or for a specific group. After that Save the scan destination.

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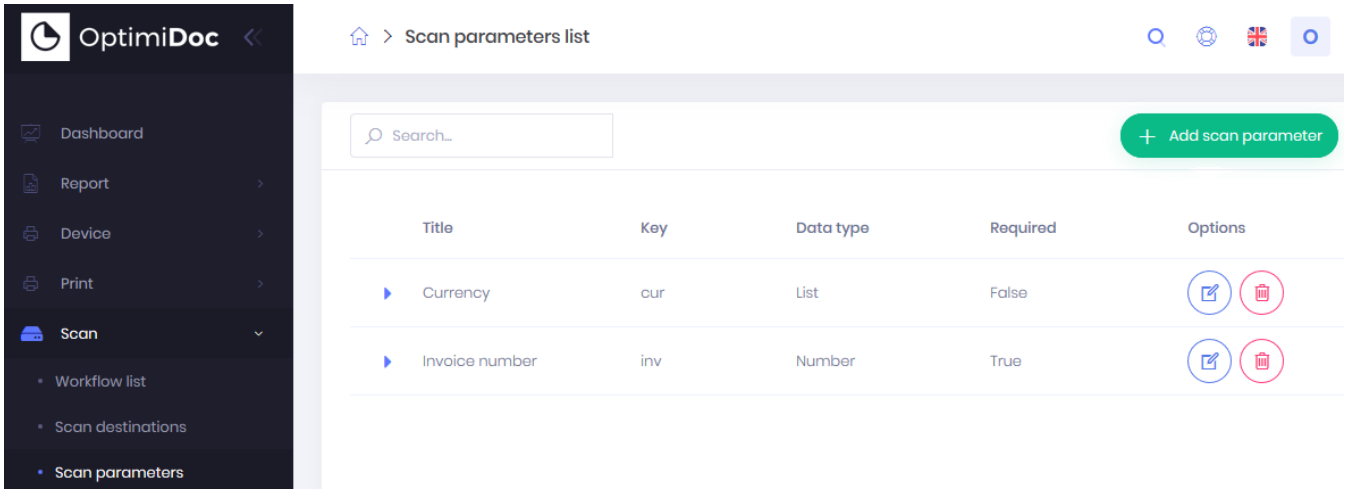
5.5.3 Scan parameters

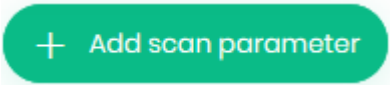
Each **scan workflow** can have assigned none, one or multiple scan parameters. Such assigned parameters can be used in the document name, destination or saved as metadata. Workflow can only have parameters created in the scan parameters section assigned. Such scan parameters can be used by multiple scanning workflows.

Scan parameters - List

List of **scan parameters** provides the basic overview of defined parameters. From the list you can add a new scan parameter, edit the current parameters or delete them.



Scan parameters - add parameter

To **add** a parameter to OptimiDoc, click on the 

button and enter the required information based on the selected type. OptimiDoc offers the following parameter types:

- Boolean
- String
- Date
- Number
- List
- CSV external list
- XML external list
- JSON external list
- User list
- Microsoft SharePoint List
- Folder

Scan parameters - edit parameter

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To **edit** a parameter, click on and change the settings.

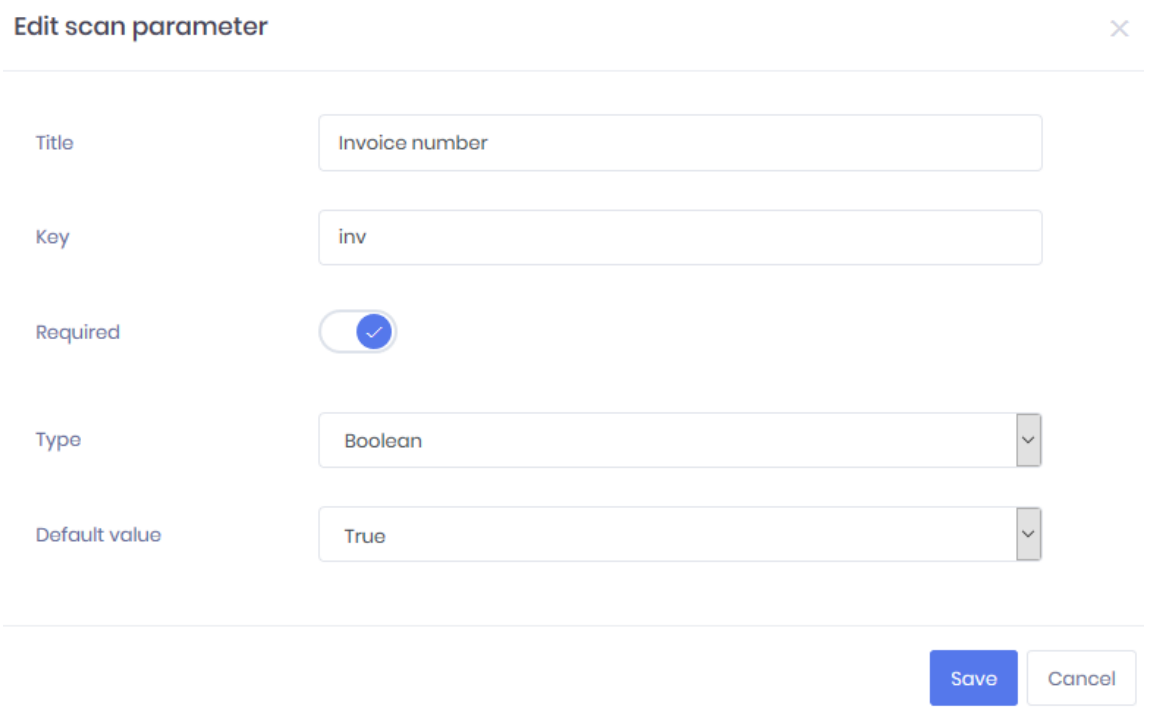
Scan parameters - delete parameter

To **delete** a parameter, click on . The parameter cannot be deleted if it is assigned to any scan workflow.

5.5.3.1 Boolean

Boolean type allows to select the value between yes and no.

- **Title** - title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required
- **Type** - type of parameter
- **Default value** - predefined value (Yes/No/Empty)



5.5.3.2 String

String type allows users to enter the text information.

- **Title** - title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required

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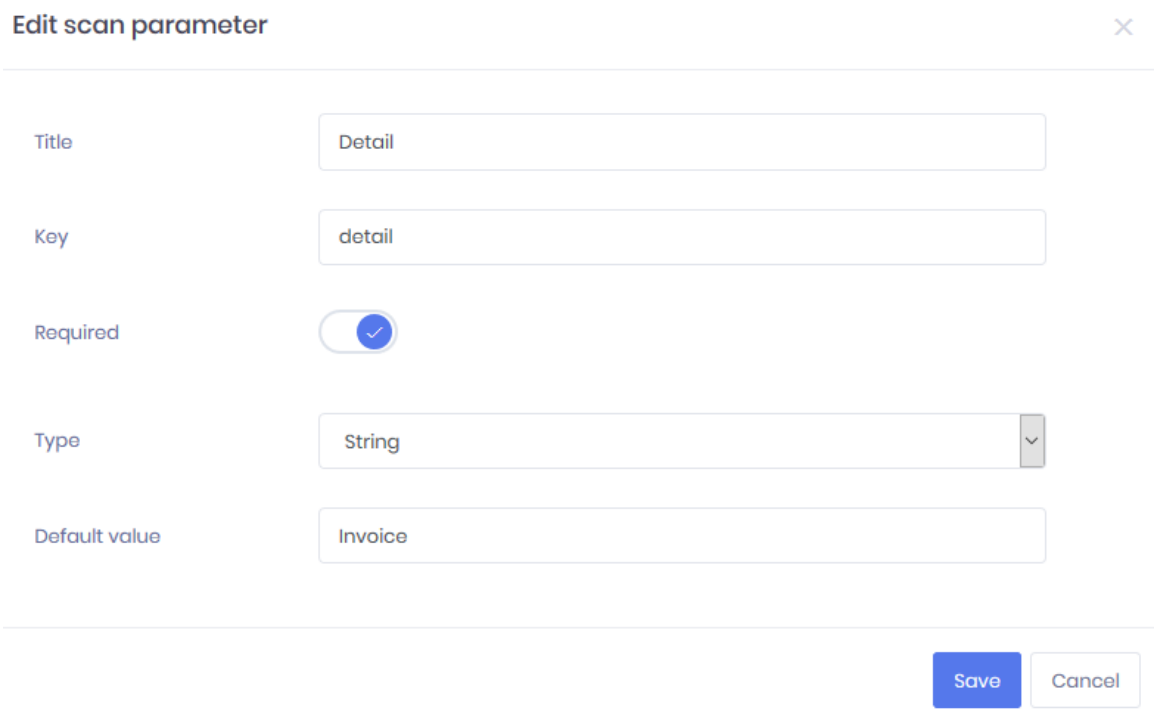
- **Type** - type of parameter
- **Default value** - predefined value which will be used on embedded user terminal



5.5.3.3 Date

Date parameters enables users to enter date information.

- **Title** - title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required
- **Type** - type of parameter
- **Default value** - predefined value which can be preselected date, current date or empty
    - **to select the current day,** click on the button
    - **to clear the date** and leave the field empty, click on the button

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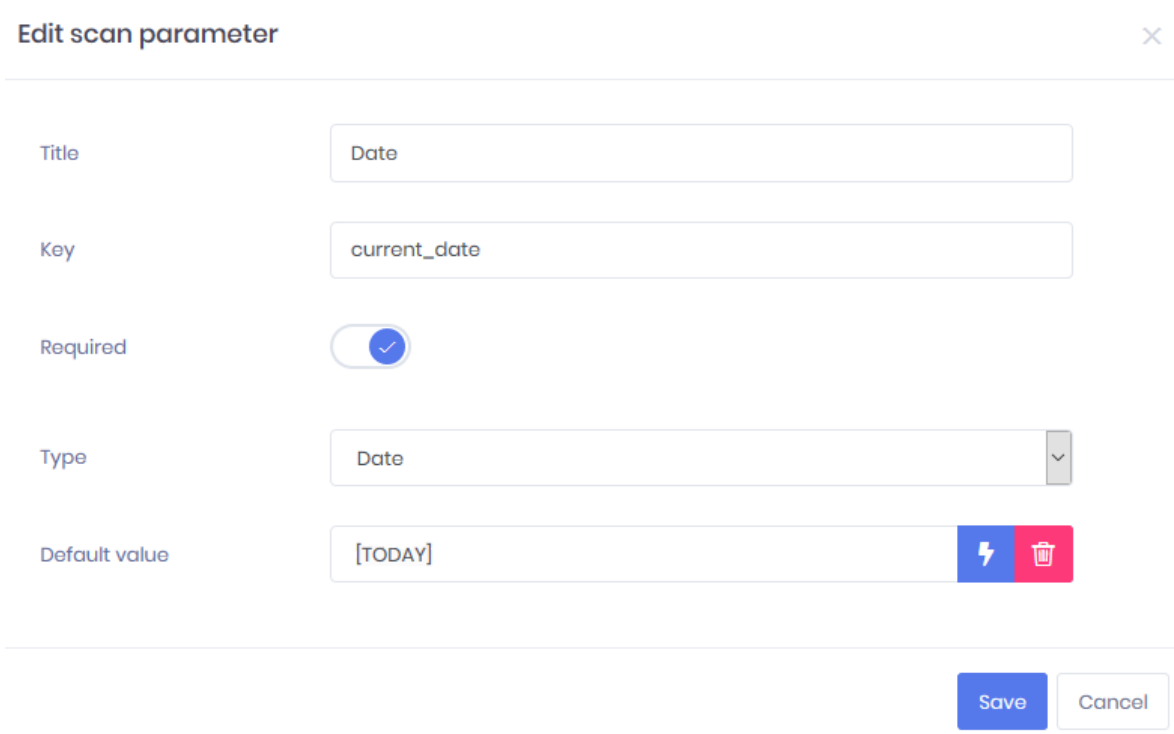

5.5.3.4 Number

Number parameters allows users to enter a number.

- **Title** - title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required
- **Type** - type of parameter
- **Default value** - predefined value which can be predefined number or empty

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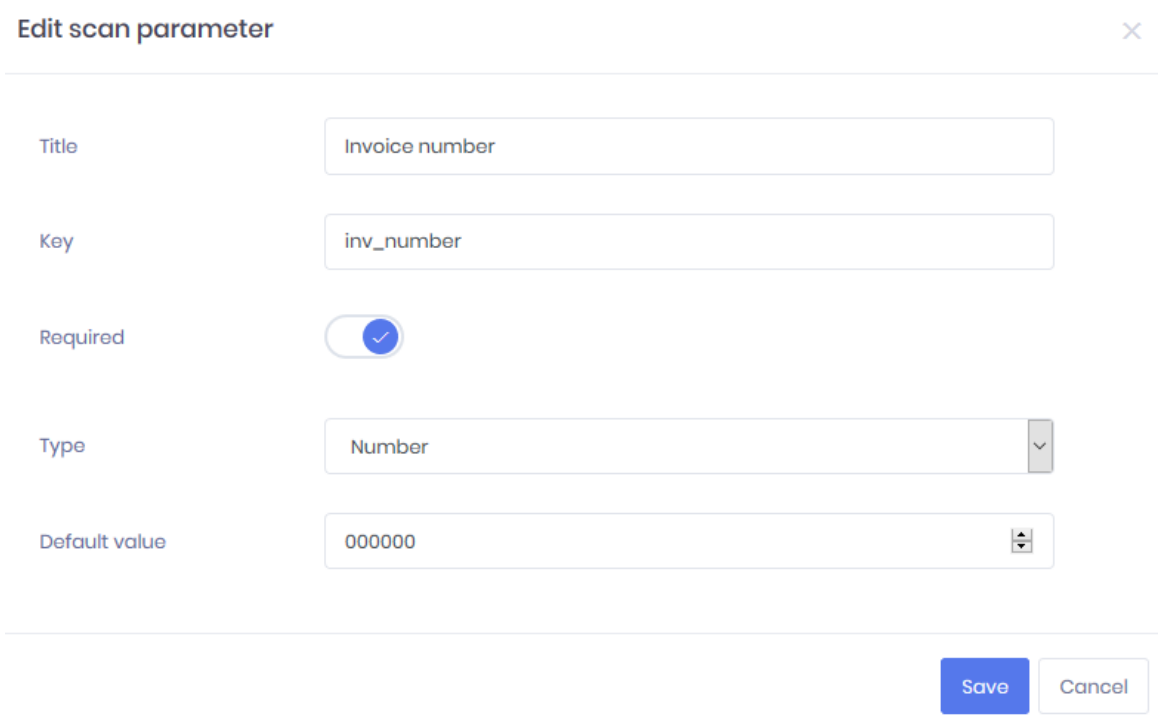

5.5.3.5 List

List parameters allows users to select the value from a predefined list.

- **Title** - a title of the scan parameter
- **Key** - a key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required
- **Type** - a type of parameter
- **Default value** - a predefined value which can be preselected from list or empty

To **add** new items to list, click on and follow the instructions below.

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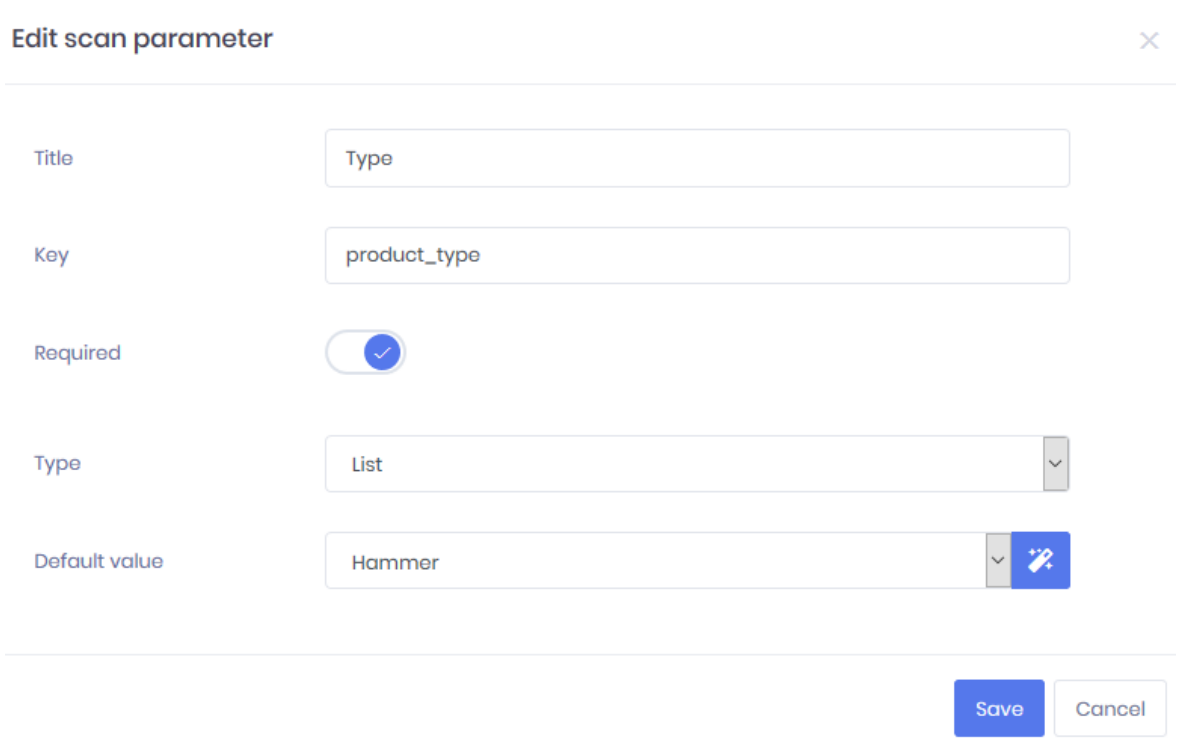

List items

List parameters can have predefined set of items including the predefined order.

To **add** a new item, click on the button and a new row will be added to enter a new key and a value. Title is user in embedded user interface for selection. Value is used in parameter value request.

- To **delete** an item, click on the button .
- To **change** the row order, click on the button and move the item to a desired position.

All changes need to be confirmed by clicking on the Save button. Or the changes can be discarded by clicking on the Cancel button.

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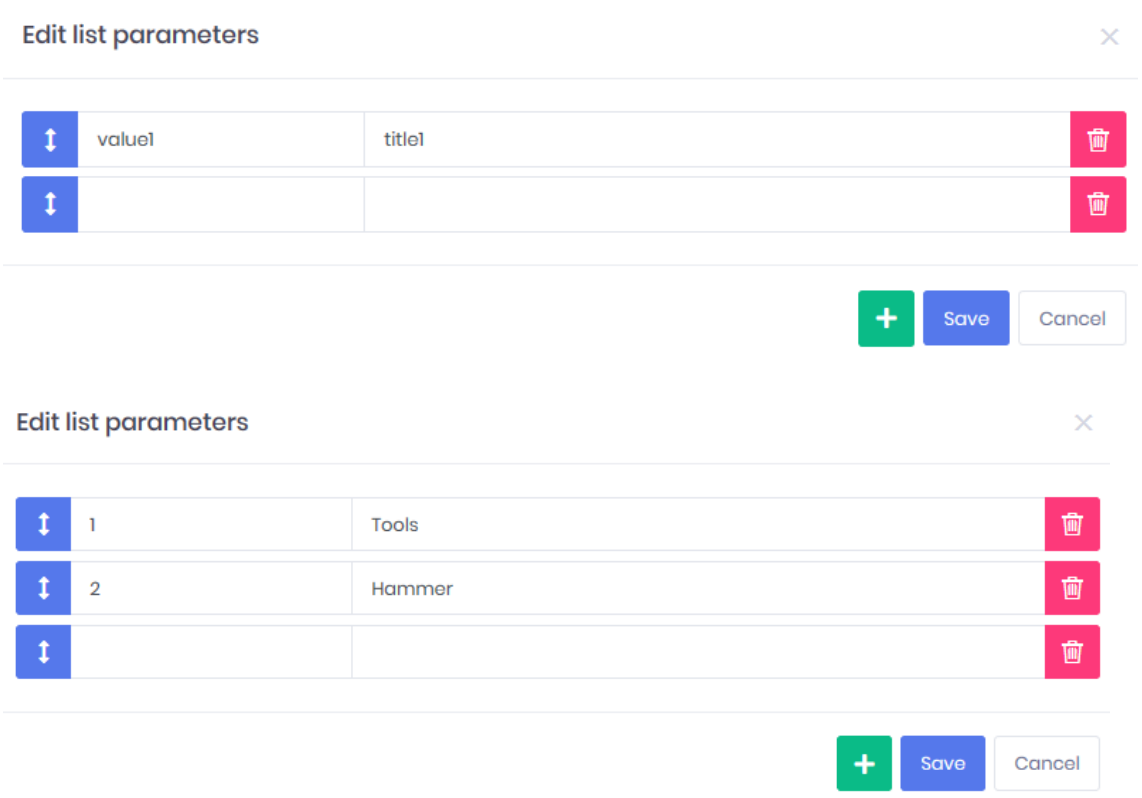

5.5.3.6 CSV external list

CSV external list takes the items value from **CSV** file. The values in CSV need to be separated by a comma. OptimiDoc updates the changes in CSV files **automatically**.

- **Title** - title of the scan parameter
- **Key** - a key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]. If you want to assign the parameter to document stored to SharePoint it is necessary to put the Key name as the same as is name of column in SharePoint (ex. Surname).
- **Required** - if the parameter input is required
- **Type** - a type of parameter
- **Default value** - a predefined value which can be preselected from list or empty
- **Path** - a path to CSV file with list items

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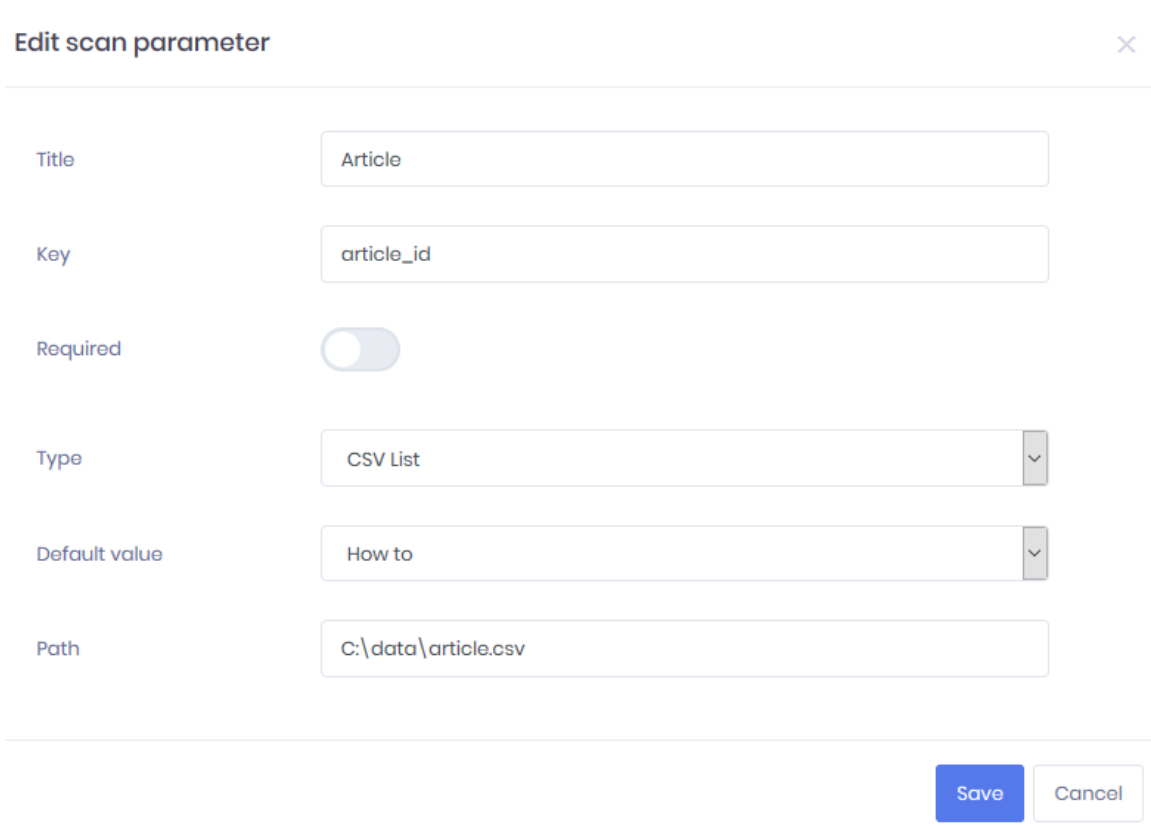

Note: the format of CVS file is the following:

value1,title1
value2,title2
value3,title3
...

5.5.3.7 XML external list

XML external list takes the items value from an XML file. OptimiDoc updates the changes in XML files automatically.

- **Title** - title of the scan parameter
- **Key** - a key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required
- **Type** - a type of parameter
- **Default value** - a predefined value which can be preselected from list or empty
- **Path** - a path to CSV file with list items
- **Item element** - an element name which represents item
- **Key** - a name of list item key
- **Value** - a name of list item value
- **Key/Value** in attributes - check in case the key and the value are stored in XML as an attribute of the item. In other cases we search key and value as an element of XML file.

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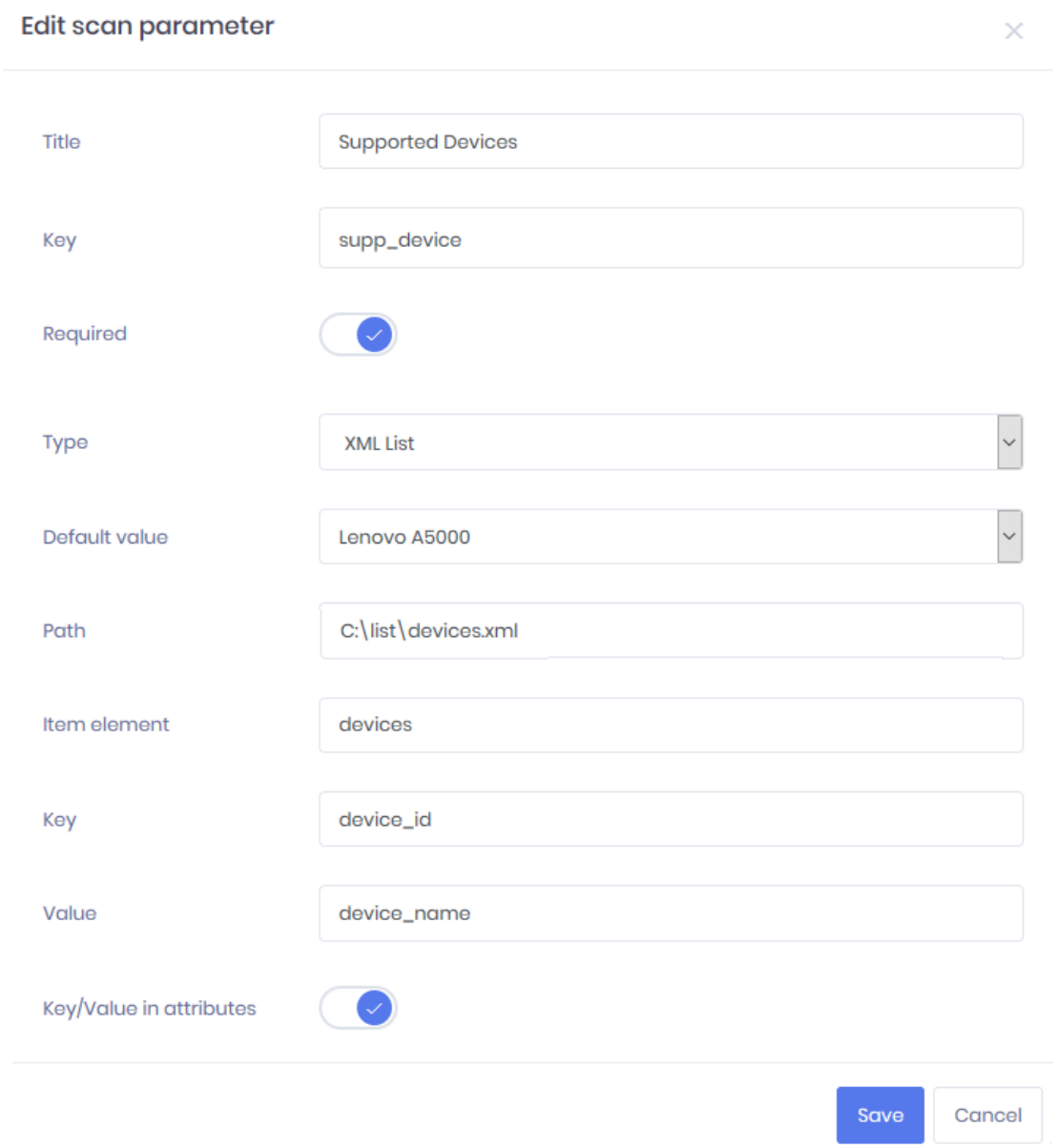

XML files examples:

Example

Example 1 (key and value as an element):

```
<list>
  <item>
    <key>key1</key>
    <value>value1</value>
  </item>
  <item>
    <key>key2</key>
    <value>value2</value>
  </item>
  <item>
    <key>...</key>
    <value>...</value>
  </item>
```

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```
</list>
```

Example

Example 2 (key and value as attributes):

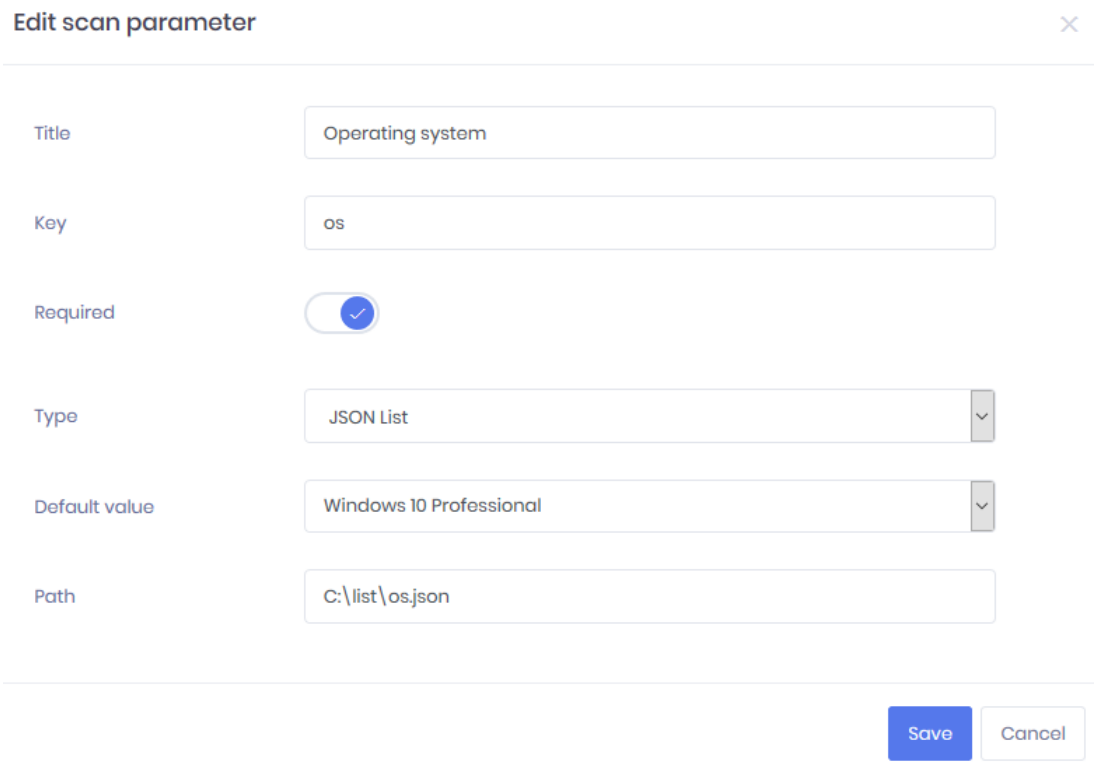
```
<list>
  <item key="key1" value="value1" />
  <item key="key2" value="value2" />
  <item key="..." value="..." />
</list>
```

OptimiDoc can handle any XML structure if the list items are defined in item and its attributes or elements.

5.5.3.8 JSON external list

JSON external list takes the items value from JSON file. The values in CSV needs to be separated by comma. OptimiDoc updates the changes in CSV files automatically.

- **Title** - title of the scan parameter
- **Key** - a key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required
- **Type** - a type of parameter
- Default value - a predefined value which can be preselected from list or empty
- **Path** - a path to JSON file with list items



JSON file structure*:*

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Example

```
{
   "key1": "value1",
   "key2": "value2",
   "...": "...",
}
```

5.5.3.9 User list

User list parameter will let you select user that is defined in OptimiDoc - more specifically it's email, home folder or login.

- **Title** - title of the scan parameter
- **Key** - a key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required
- **Type** - a type of the parameter
- **Default value** - predefined value of the parameter can be empty or currently logged user.

  To select currently logged user, click on the button

- To **Remove** a logged user, click on the button
- User Attribute - defines the value which will be used in next processing of scanned document. The value can be the following:
  - Email
  - User Home folder
  - User login

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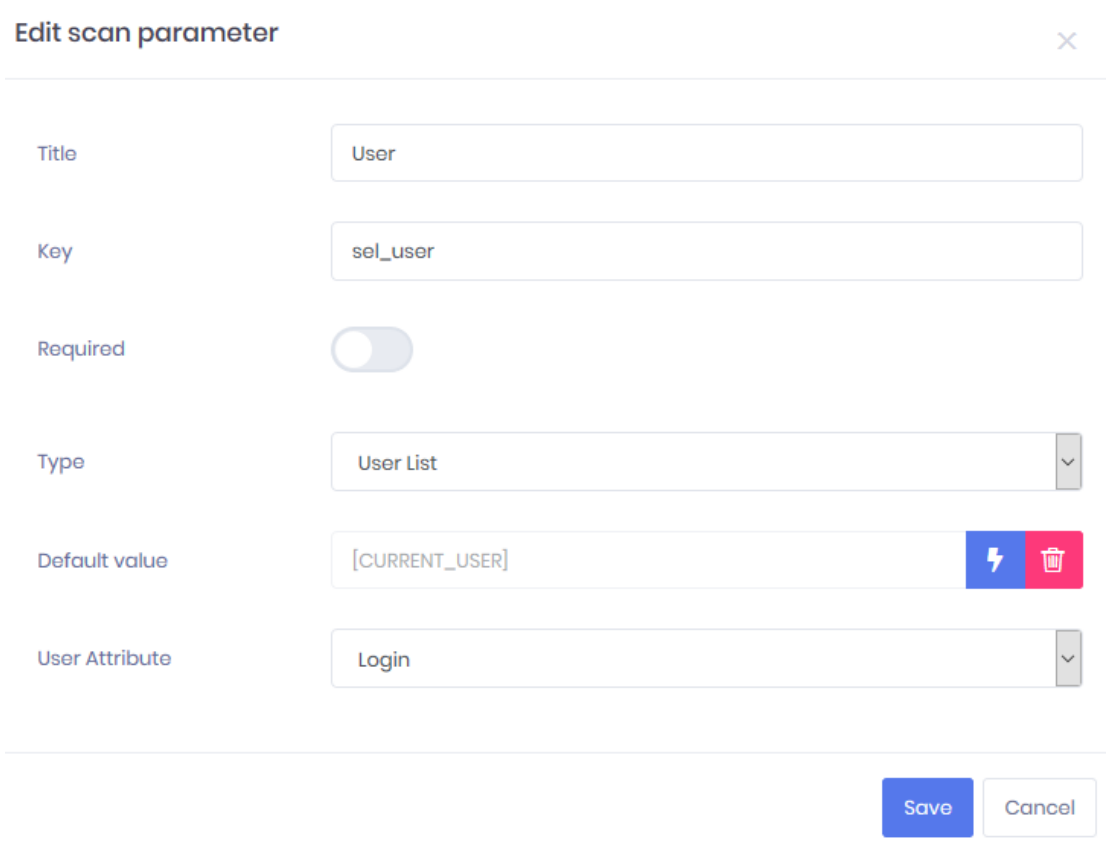

5.5.3.10 Microsoft SharePoint List

SharePoint List type enables to read a list from Microsoft SharePoint lists.

- **Title** - title of the scan parameter
- **Key** - a key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]. If you want to use the value as the column value in SharePoint Document library it is necessary to give the key value same as is the name of column.
- **Required** - if the parameter input is required
- **Type** - a type of the parameter
- **Default value** - the predefined value (Yes/No/Empty)
- **SharePoint server** - URL to SharePoint server (ex. http://sharepoint)
- **SharePoint Web** - SharePoint Website (ex. /Sales or /HR)
- **Login** - a username from an account
- **Password** - a password of user account
- **Domain** - a domain of the user account
- **List title** -the name of list (ex. Partners)
- **Value filed** - column which will be used as a value. If you want to use the selected value as a reference to the list it is necessary to use ID.
- **Display field** - column which will be used for presentation on panel
- **Refresh period** - the data are stored inside OptimiDoc. This value represents the refresh period how offten it will be read from SharePoint Server.

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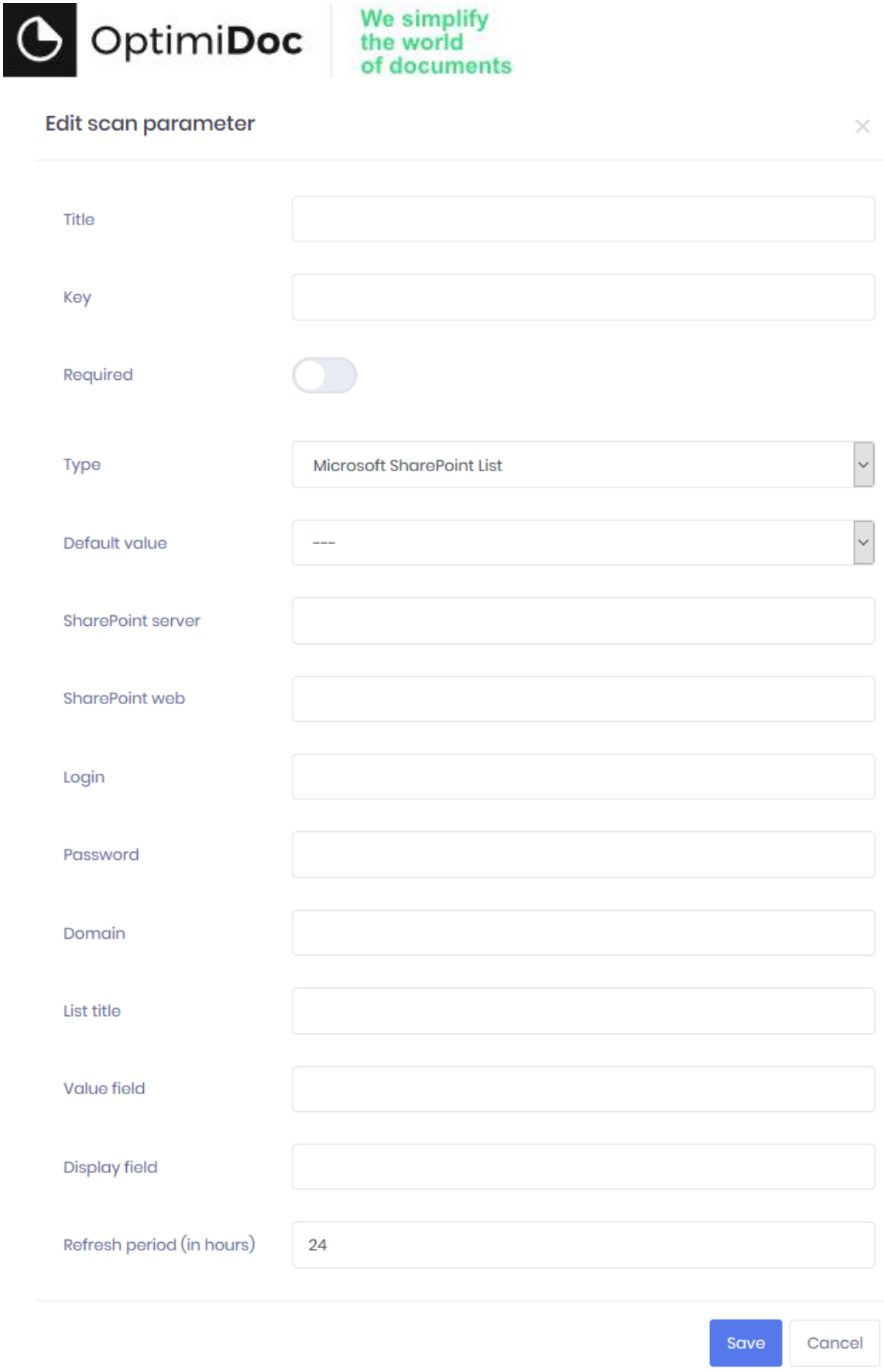

5.5.3.11 Folder

Folder allows users to select where to save scanned documents. On MFP, users can browse through the structure of the Scan destination.

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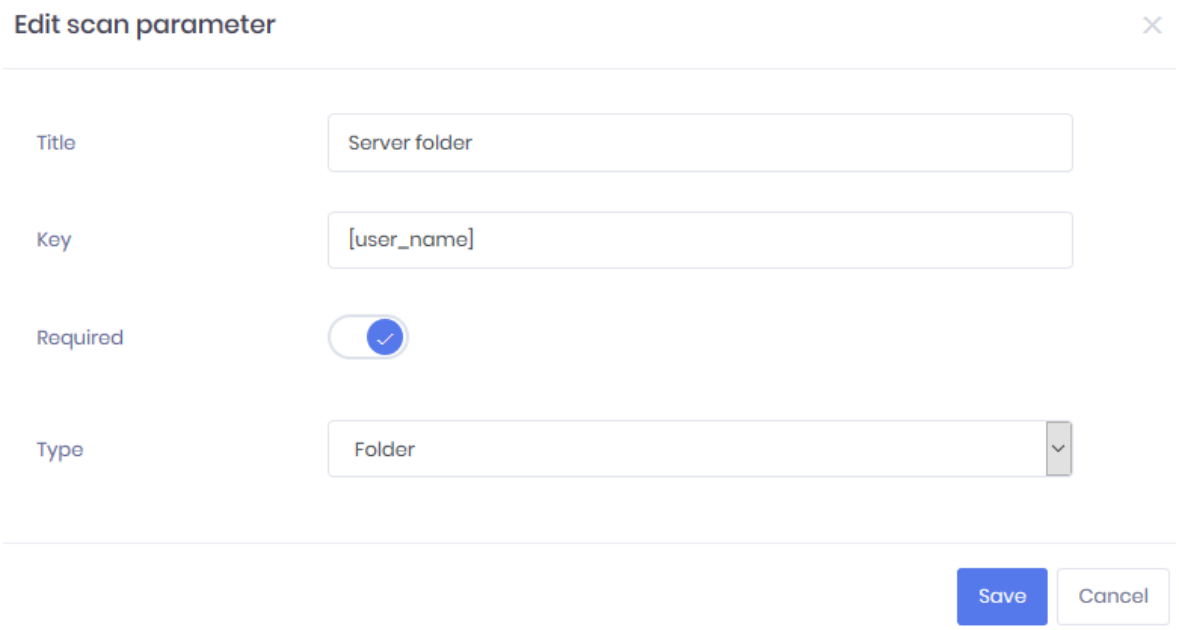
- **Title** - a title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required

To enable folder browsing on MFP:

1. Create scan parameter with type Folder (with some key e.g. "subfolder") and assign it to scanning workflow
2. Specify whole path to folder e.g. C:\scans or \\server\scans
3. Modify path from previous step to contains [key] .. e.g: C:\scan\[subfolder]

After that, you will be able to browse folders on terminal.



5.5.3.12 Site

Site parameter allows users to select which SharePoint site scanned documents will be saved to. On MFP, users can browse through the structure of the Scan destination.

- **Title** - a title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter_key]
- **Required** - if the parameter input is required

To enable site browsing on MFP:

1. Create scan parameter with type Site (with some key e.g. "sharepoint_site") and assign it to scanning workflow

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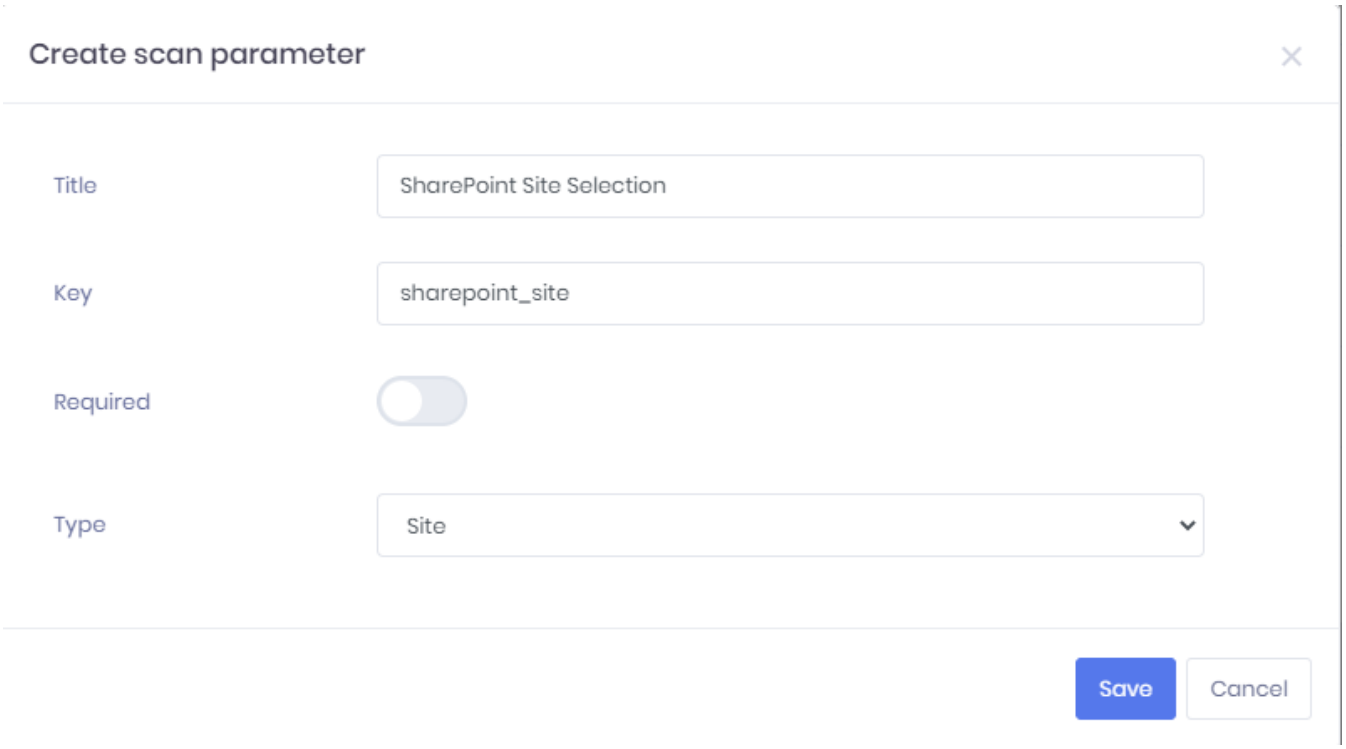

2. Modify path in order to contain [key] .. e.g: [sharepoint_site]

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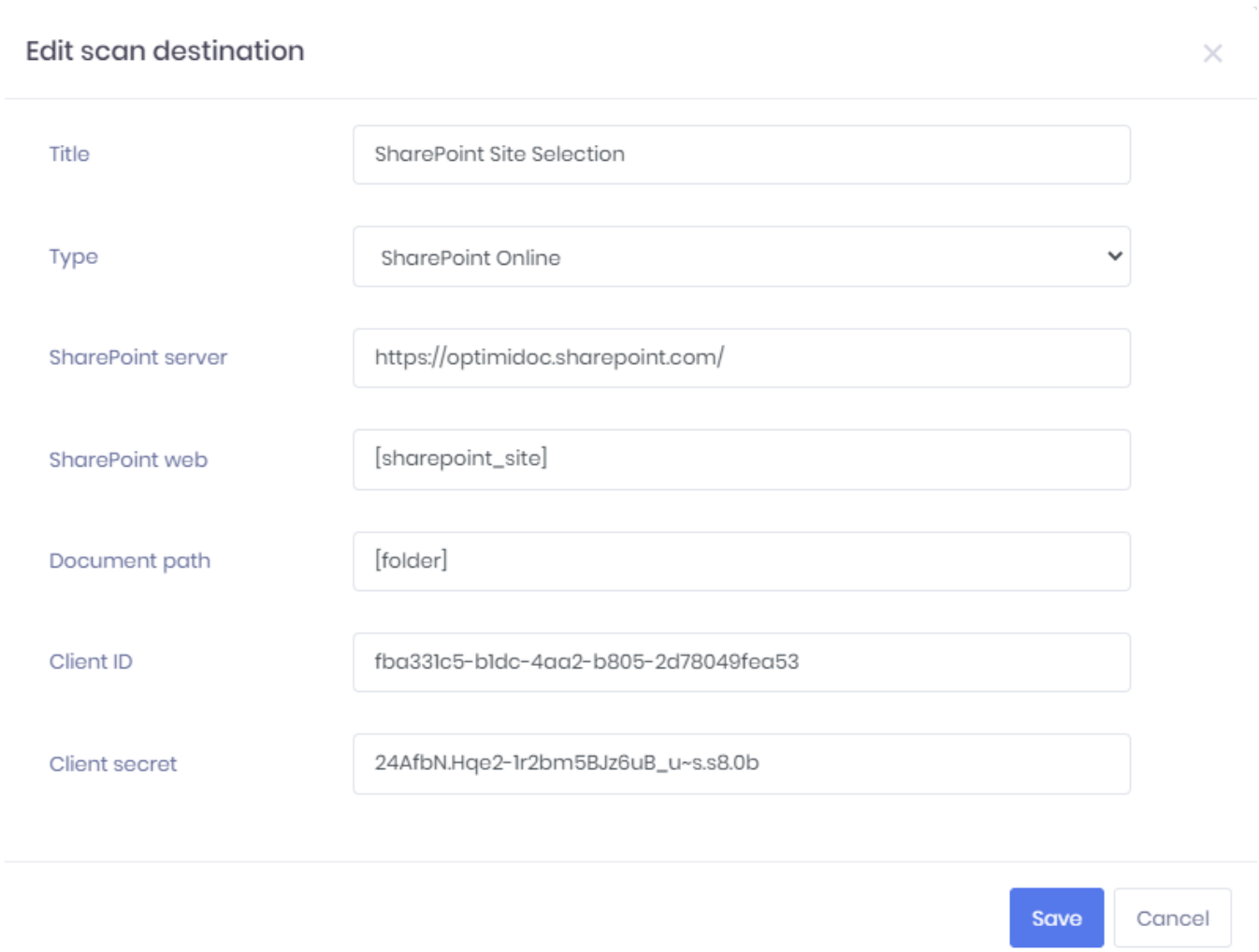

After that, you will be able to browse sites on the terminal.

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5.6 Rules

Rules allows the OptimiDoc **administrator** to define **conditions** and **actions** for defined operations. With such rules you can force BW printing for selected department or jobs.

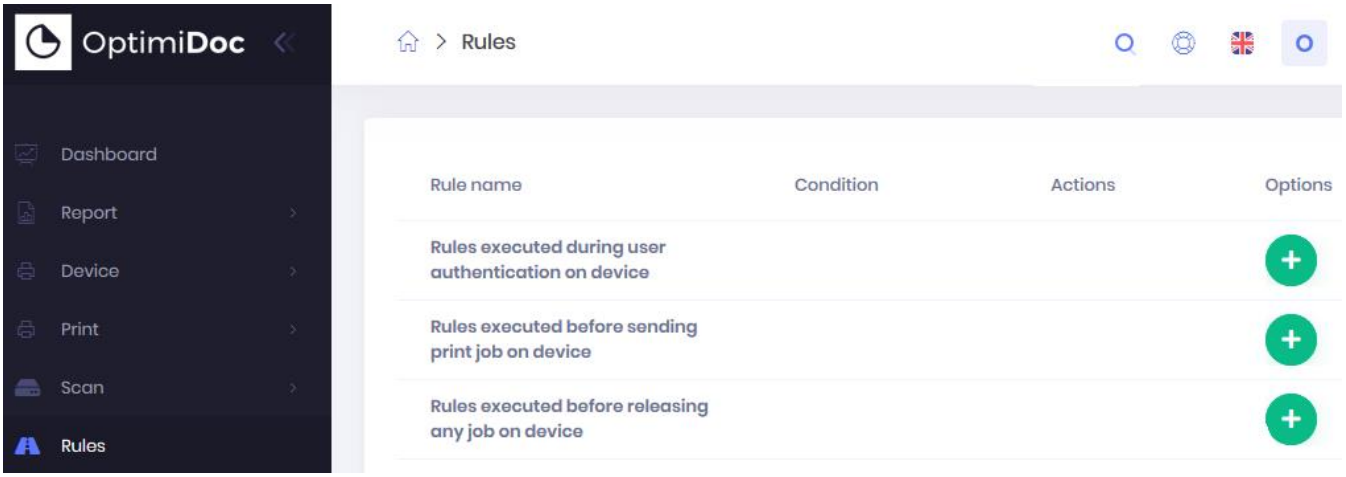
Important There are certain limitations in case of usage on Network Devices. For example, forcing duplex does not work in case of network device due to limitation in editting PJL/PDL of print job.

Available conditions and actions

Triggers	Conditions	Actions
• Authentication on terminal • Print job delivery to device • Releasing any job	• Login • Group • User • Department • Device • Job title • Current consumption • Number of pages • Job type • Job consumption estimate	• Reject operation • Force Black & white • Force Duplex • PrintAll • Redirect to device • Save job preview • Send email notification

Rules list

The Administrator can see the list of created rules in the Rules section of the administrative web interface.



New rule

To create a **new rule,** click on the + button in the corresponding category regarding to

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rule type. Then define a rule name, conditions and actions. Each rule can contain multiple conditions and actions.

Edit rule

To **edit** selected rule, click on the button.

Remove rule

To **remove** selected rule, click on the button.

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5.6.1 Rules executed during user authentication on device

Available conditions and actions in this ruleset:

Available conditions:

Login - will check the login of the user currently logged-in
User's group - will check the group to which current user belongs
User - will check the defined specific user
Department - will check the user's department
Device - this means that the rule will only be applied on the selected devices
Current consumption - means the current calendar month's consumption

Possible actions:

Reject operation - this action will reject the operation which is being performed if conditions are met
Print all jobs - this action will print all unprinted jobs in the user's queue if conditions are met
Send email notification - this action will send an email notification with subject and body defined to the user logged in
Send email notification to - this action will send an email with subject and body to user specified in the action definition

Examples

Example no. 1 - reject/deny user login on the device

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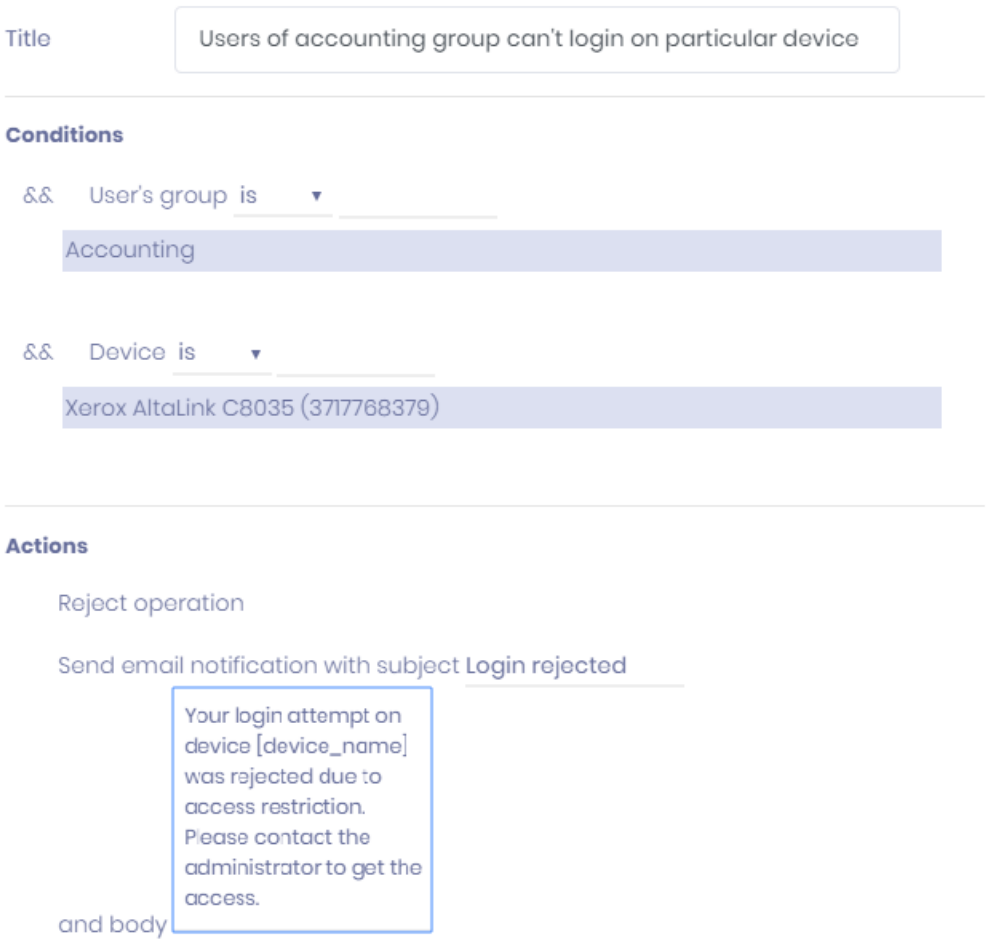

Example no. 2 - admin notification about login attempt

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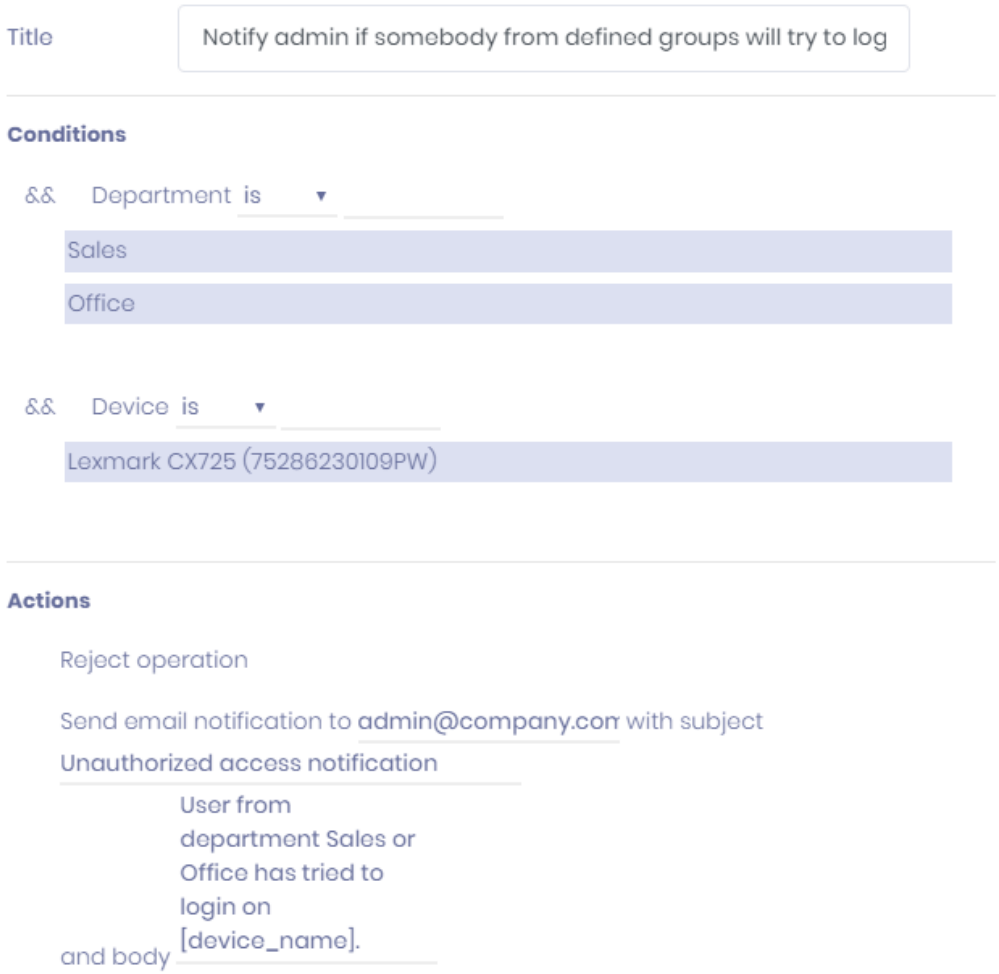
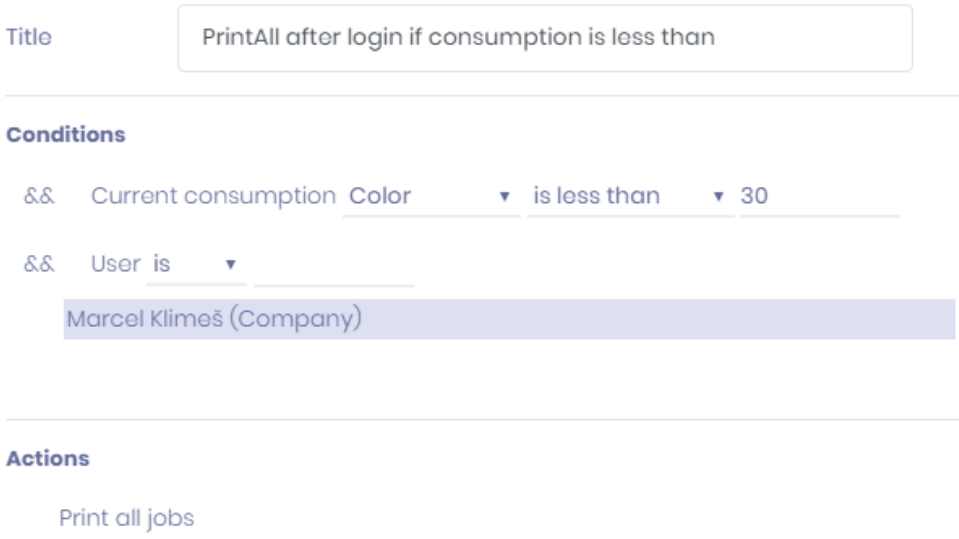


Example no. 3 - print all jobs in queue upon login, with consumption restriction



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5.6.2 Rules executed before sending print job on device

Available conditions and actions in this ruleset:

Available conditions:

Login - this condition will check the login of the user currently logged-in
User's group - this condition will check the group to which the current user belongs
User - this condition will check specific user defined
Department - this condition will check the user's department
Device - this means that the rule will be applied only on the selected devices
Current consumption - means current calendar month's consumption
Job title - this condition will analyze job title (name)
Job consumption estimate - this condition will analyze how many pages there are in current print job and of what type (Color, Black & White)

Possible actions:

Force Black & White - this action will force the print job to be printed in Black & White
Force duplex - this action will force the print job to be printed using duplex mode
Reject operation - this action rejects the operation that is being performed if conditions are met
Redirect to device - this action will redirect the print job to the selected printer
Save job preview to - this action will save the print job preview to the destination (created under Scan destination section) in PDF format
Send email notification - this action will send an email notification with subject and body defined to the logged-in user
Send email notification to - this action will send an email with subject and body to user specified in the action definition

> **Note**
>
> There are some availability exceptions:
>
> In case of **Save job preview to** - **it is not possible** to deliver preview to OptimiDoc destination type

Examples

Example no. 1 - job redirection

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OptimiDoc We simplify the world of documents

Title: Redirect to B&W device

Conditions

&& Job consumption estimate Color ▾ is greater than ▾ 10

&& Department is ▾

Office

Actions

Redirect to device Xerox VersaLink B405 (3714677690)

Send email notification with subject Job redirection

and body Your job was redirected to B&W device due to job consumption estimate.

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5.6.3 Rules executed before releasing any job on device

Important These rules are available only on Xerox devices with pre-authorization enabled.

Available conditions and actions in this ruleset:

Available conditions:

Login - this condition will check the login of the user currently logged-in
User's group - this condition will check the group to which the current user belongs
User - this condition will check specific user defined
Department - this condition will check the user's department
Device - this means that the rule will be applied only on the selected devices
Number of pages - you can define color here as well as paper size
Job type - print, scan or copy job
Current consumption - means current calendar month's consumption

Possible actions:

Reject operation - this action rejects the operation that is being performed if conditions are met
Send email notification - this action will send an email notification with subject and body defined to logged-in user
Send email notification to - this action will send an email with subject and body to user specified in the action definition

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5.7 Users

The Users Section is dedicated to **user management**. In the user section you can create or manage users, **import** them from CSV or the Active Directory or manage the departments.

Users section contains the following parts:

User list	Overview and management page of **all users in Optin**
Department list	Management of **departments**.
Group list	Management of **groups**. Groups are used for definition
User import	Page for **importing** of **users** from **CSV file** or **Active D** (To setup the automatic synchronization of users from follow the guide here.)
Mass operation	Automatic PIN generation and PIN/Card Number impor
Automatic synchronization	Page for **automatic import** settings.
GDPR	The GDPR function is intended to **anonymize** user-rela

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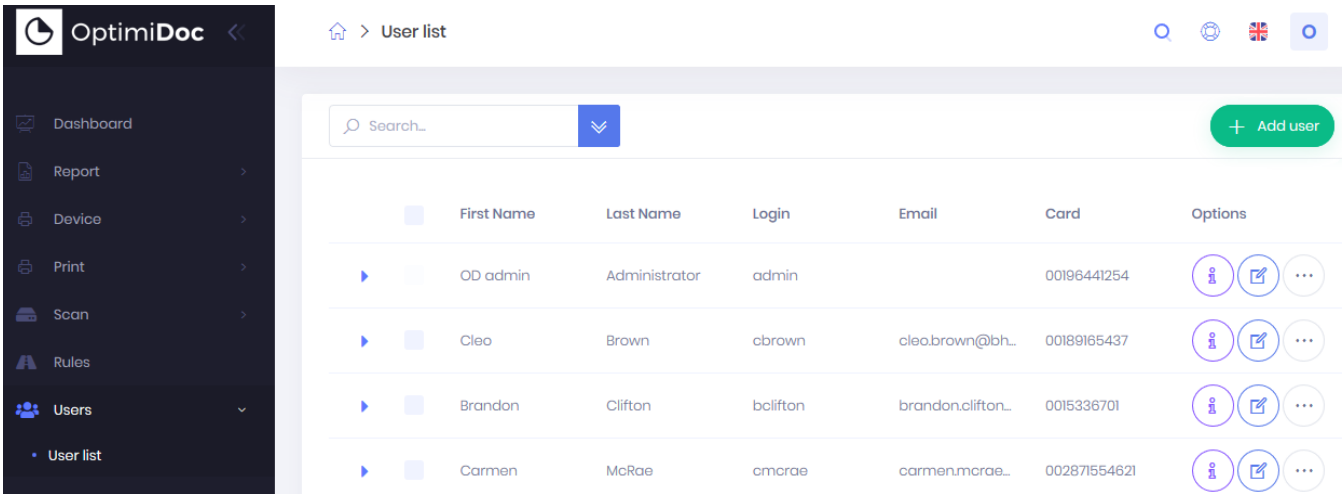
5.7.1 User list

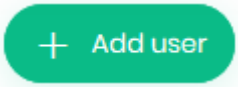
The User list provides a **basic overview** of **users in the OptimiDoc** user database. Through the User list you can **view, search, add, edit or delete users**.



User list search

- **By name** - enter the name into the text field in the First Name or Last Name column
- **By login or card number** - enter the desired login or card number into the text field in the Login column
- **By department** - select a department from the list in the Department column
- **Email** - enter user's email
- **Type** - select either Active, Deleted or All

Add a user

To **add** a user to OptimiDoc, click on the 

button and fill in the following:

- **First name** - User's first name
- **Last name** - User's last name
- **Department** - User's department. Each user can has assigned only one department
- **Login** - login is a unique user identifier in OptimiDoc, and each user can have more than one login (different login in 3rd party applications)
- **Password** - User's password to the web interface and the embedded user interface in case of Login and Password authentication method
- **Email** - User's email which will be used for sending documents and notifications.
- **PIN** - PIN is used as a user's identifier in the case of PIN authentication method
- **Home folder** - User's home folder which will be used for document storage
- **Card number** - number of user's card used for authentication
- **Expiration** - user account expiration date

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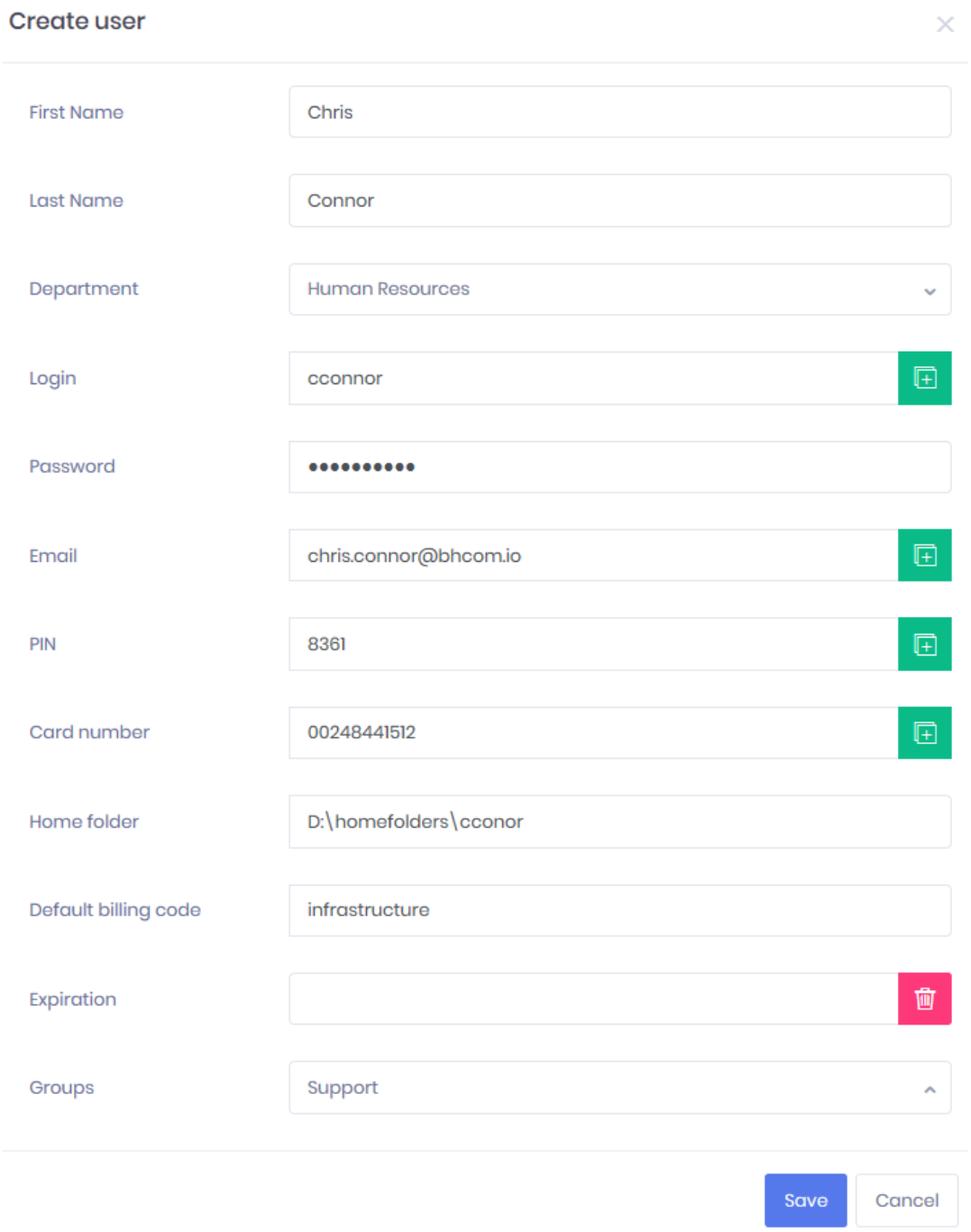
- **Default billing code** - user's default project
- **Groups** - groups to which the user belongs to



Users - Edit user

The registered user's details can be viewed and edited.

To **view** user details such as:
- access rights
-allowed/denied operations

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-assigned groups, scan flows, print connectors and billing codes,

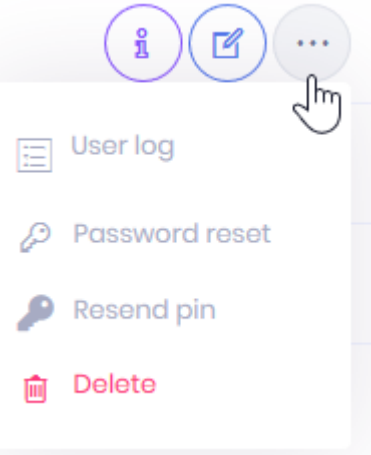
click on the button.

To show user's card number and department click the small button next to user's name.

To **edit** existing user, click on the button.

Users - Delete user/Reset Password and more

To bring up a menu that allows you to **view user log, reset password, resend PIN** and to **delete a user,** click on the button to show a context menu. In the menu you can select a desired operation:



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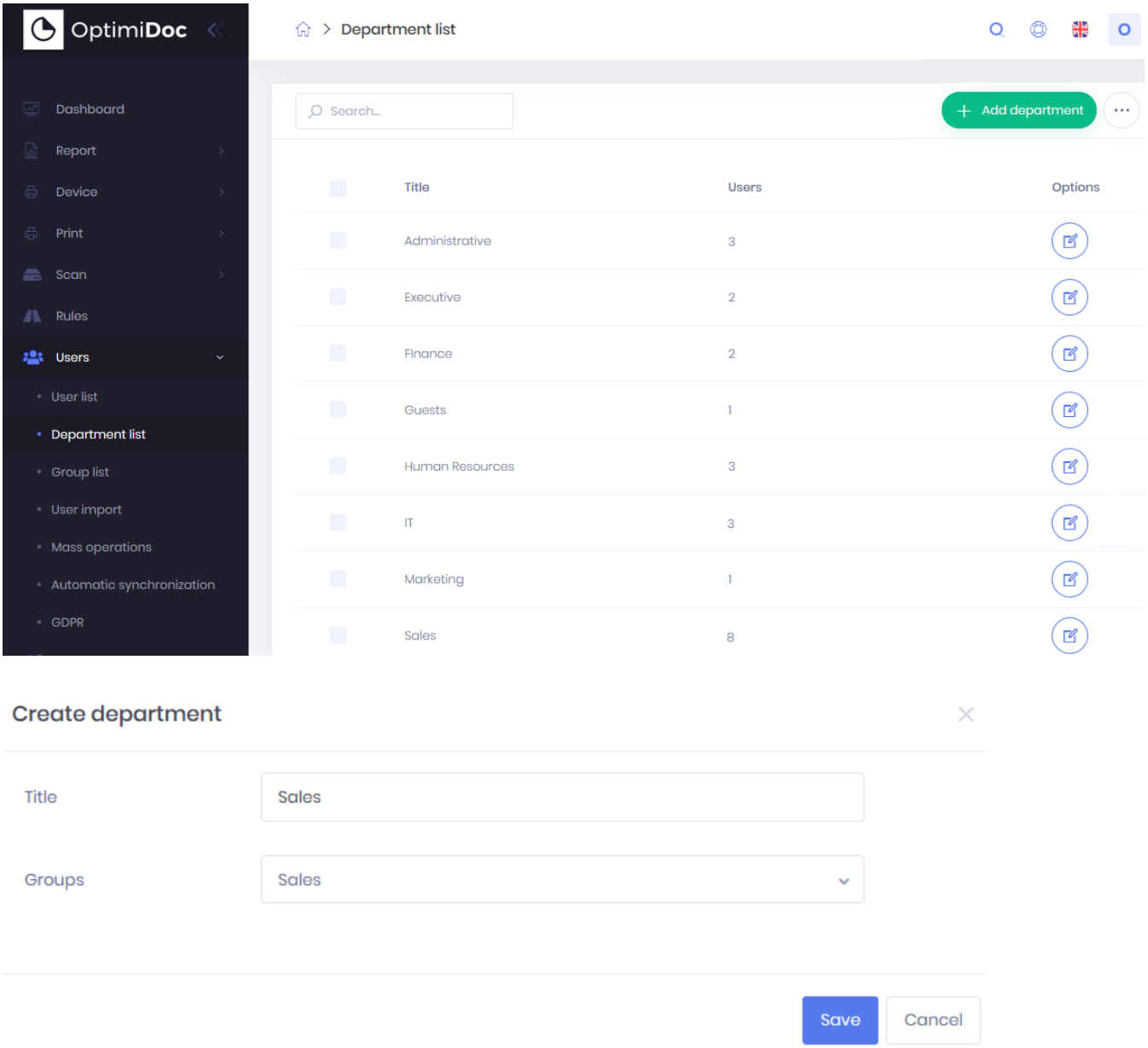
5.7.2 Department list

Department list page offers the administrator to **manage departments in OptimiDoc**. Departments are used during the definition of scanning workflows and during the creation of user accounts.

Department list - Add department

To **add a** department to OptimiDoc click on the

button, enter the department title and select its Group.



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Department list - Delete department

To **delete** a department, click on the button. The department cannot be deleted if any user is assigned to the department.

Department list - Edit department

To **edit** a department, click on the button, change the department title and/or change its Group.

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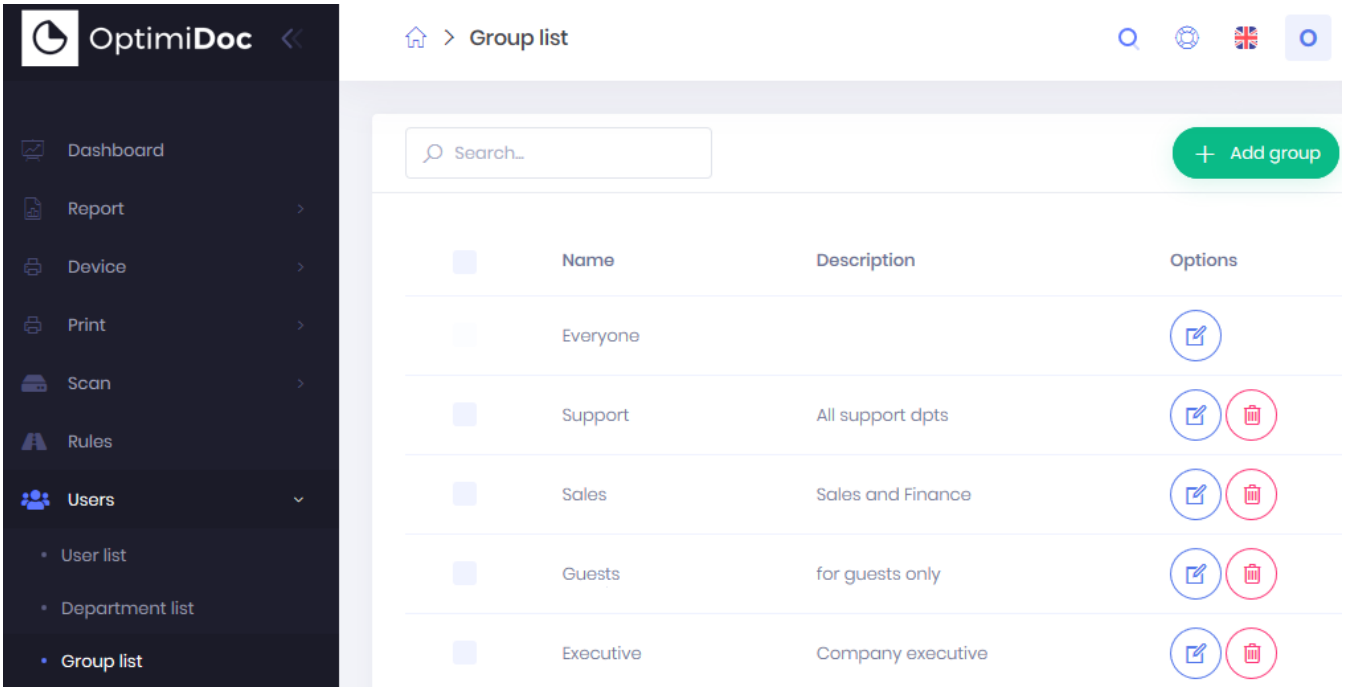
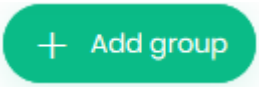
5.7.3 Group list

Groups are used for **definition of access rights** to a particular functionality of OptimiDoc and multifunction. Basic Everyone group is used for general definition of access rights for all users. Other groups can switch the settings from Everyone group. So, for example, when the Everyone group allows usage of color printing and copying then the administrator can deny the Color group in other groups. Each group has an assigned list of users or departments.



Group list - Add group

To **add** a group to OptimiDoc, click on the 

button.

Group list - Delete group

To **delete** a group click, on the button. A group cannot be deleted if any user is assigned to it.

Group list - Edit group

To **edit** a group click, on the button.

Basic settings

- **Name** – Enter the name of the group

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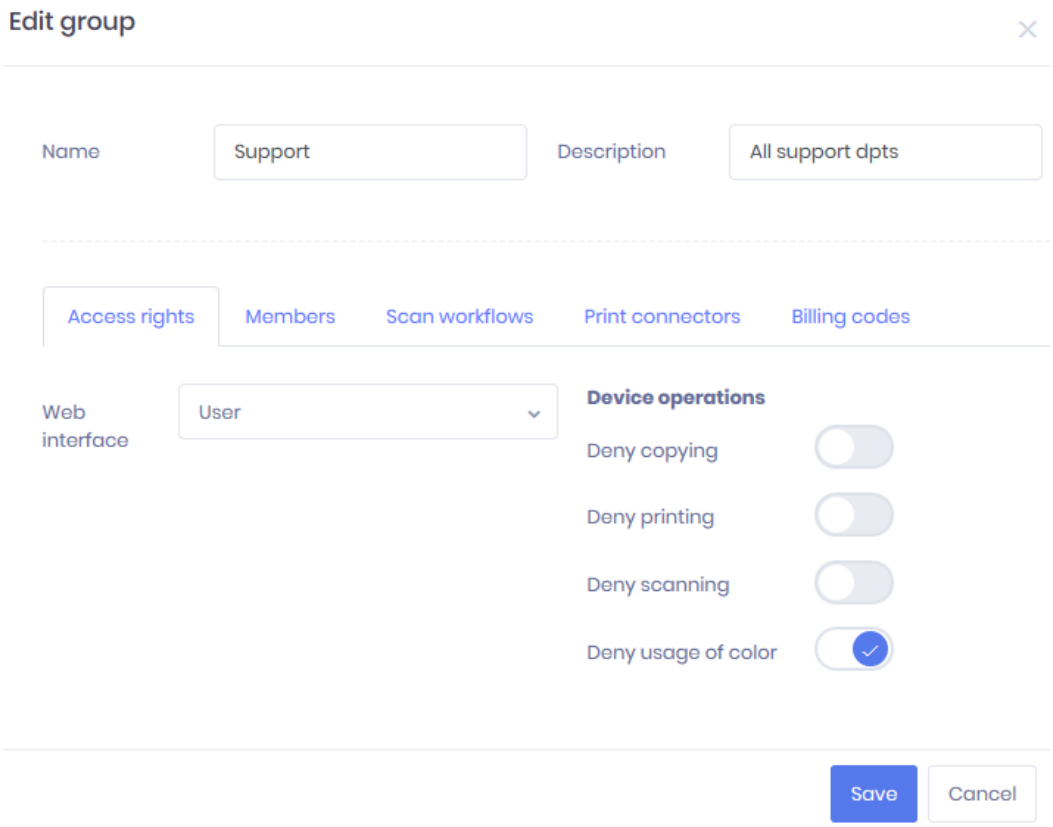
- **Description** – Enter the description of the group.
- **Access rights** - General settings of access to the web interface and device functions
- **Web interface** with the following options:
    - User - basic access to dashboard, user reports
    - Department Manager - access to user level + user department reports
    - Manager - access to user + complete reports
    - Administrator - access to the complete the OptimiDoc web interface
    - Local Administrator – access to the reports and device management for specific location. Location name is to be specified in the Description field of the group - if blank local admin will see all printers. (if your printers have location filled out, such as "3rd floor" or "Building A", you can enter the same location name into the description field)
- **Device operations** - Here you can deny any operation – Copying, Print, Scanning, Usage of color. If you want to use this functionality on **Xerox** devices, you need to turn on **pre-authorization**.



Members - tab to add and remove group members. Rights will be applied to users added to the group. To add a user or department, write input to the field. To remove a user or group, select user or department and click on the trash bin that will appear when you move your mouse pointer over one of assigned departments or users.

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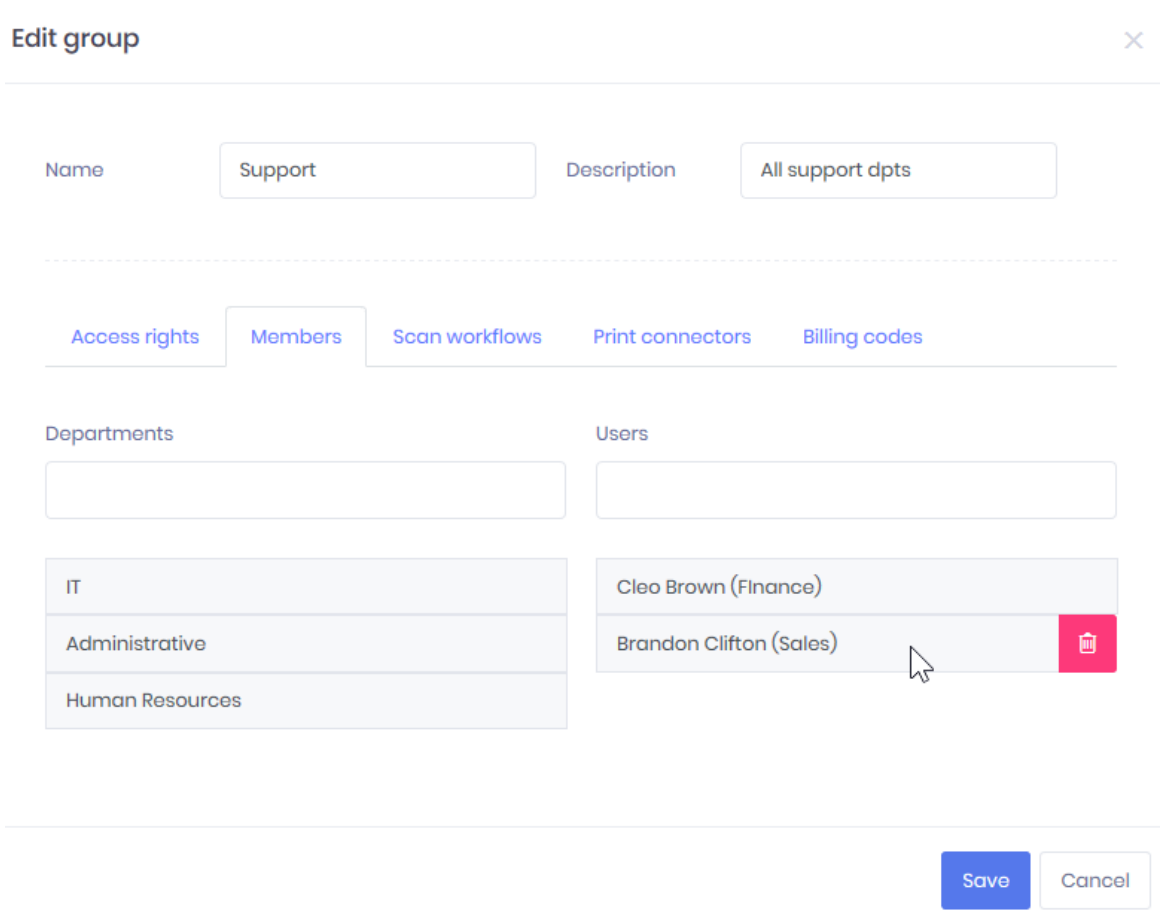

Scan workflows - definition of scan workflows access rights. In the list of Enabled workflows, you can see the list of enabled workflows in the Everyone group. In the list of disabled workflows, you see the list of disabled workflows in the Everyone group. To change the settings, move the workflow from disabled to enabled or opposite using the arrow buttons. There is also the possibility to enable or disable more scan workflows at once by holding down CTRL and selecting the desired flows**.**

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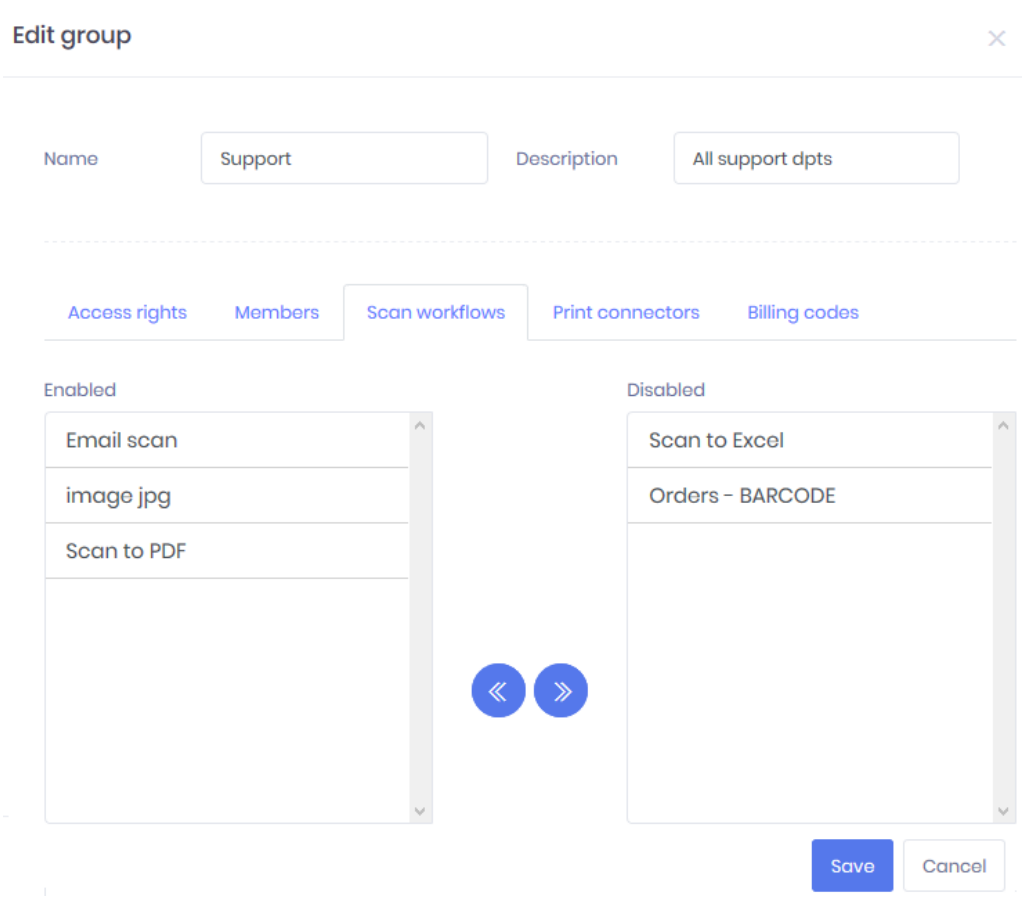

Print connectors - definition of access rights to print connectors. Behavior is the same as for scan workflows. To change the settings, move the workflow from disabled to enabled or opposite using the arrow button. There is also the possibility to enable or disable more print connectors at once by holding down CTRL and selecting the desired connectors.

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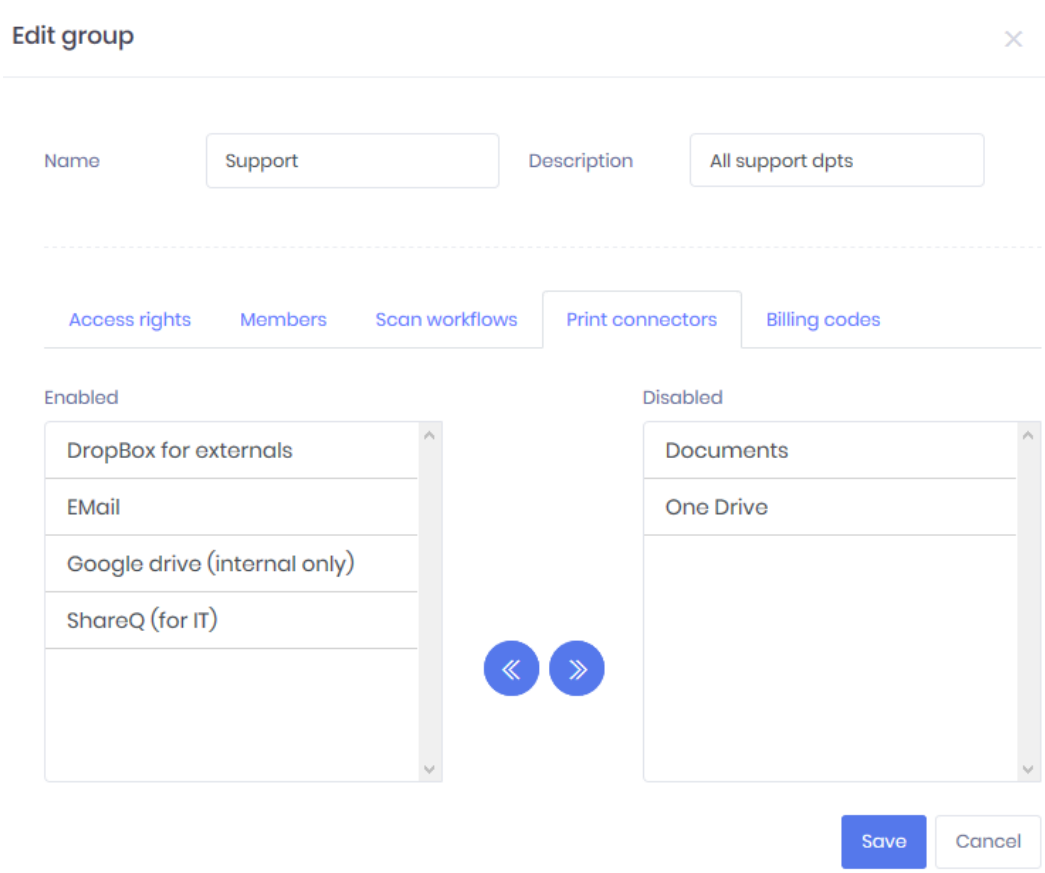

Billing codes - definition of access rights to projects. Behavior is the same as for workflows. To change the settings, move the workflow from disabled to enabled or opposite using the arrow button. There is also the possibility to enable or disable more projects at once by holding down CTRL and selecting the desired billing codes.

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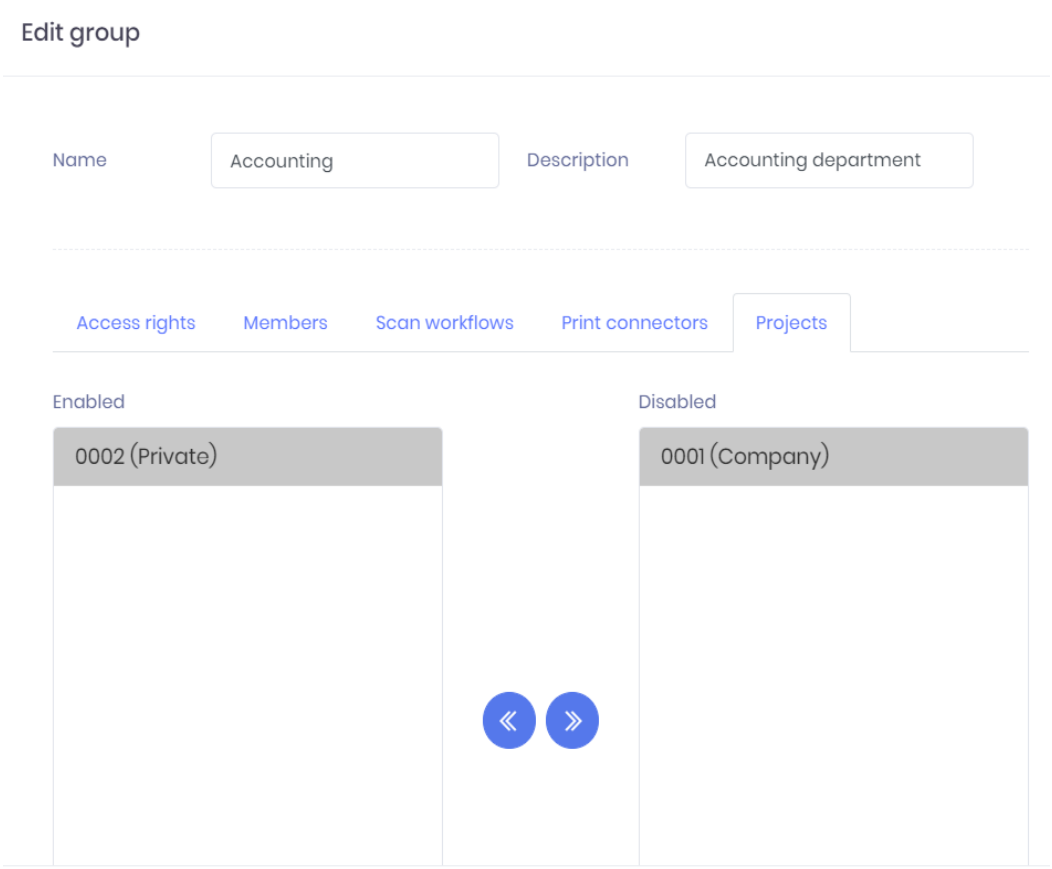

After you have finished creating the new group, click on the **Save button**.
We have the possibility to multiselect groups and delete more groups at once.

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5.7.4 User import

OptimiDoc offers the automatic synchronization of users from the Active Directory (AD), OpenLDAP, Lotus Domino or CSV file. To import the user it is necessary to define AD or OpenLDAP configuration or CSV file and start the synchronization.

AD and OpenLDAP import

AD and **OpenLDAP** configuration are accessible from the Main menu in the Users menu or Configuration.

AD configuration parameters necessary for successful import:

- Type - Type of connection - Active directory or OpenLDAP
- Login - login name of the user with access to AD or OpenLDAP
- Password - login password
- Directory - directory of AD or OpenLDAP for user import
- Domain - name of the domain from which the users shall be imported
- Card attribute- attribute from which the card shall be imported
- PIN attribute - attribute with user PIN
- Groups for replication - definition of active directory group names for replication including the user assignment
- External ID attribute
- Default billing code
- User filter - means LDAP query e.g. (&(objectClass=user)(memberOf=cn=Workers,ou=Test,dc=optimidoc,dc=local)) - which will import only users who are members of Group Workers in AD

Tip List of attributes' names in AD - WEB.

Note AD synchronization imports only the users who have the First name and Last name fields set.

If you want to establish secure connection between OD and AD, you have to fill in domain input: ldaps://<IP> or <domainname>:636

Your AD must support LDAPS (636 or 3269)

To start the import, click the **Synchronize** button.

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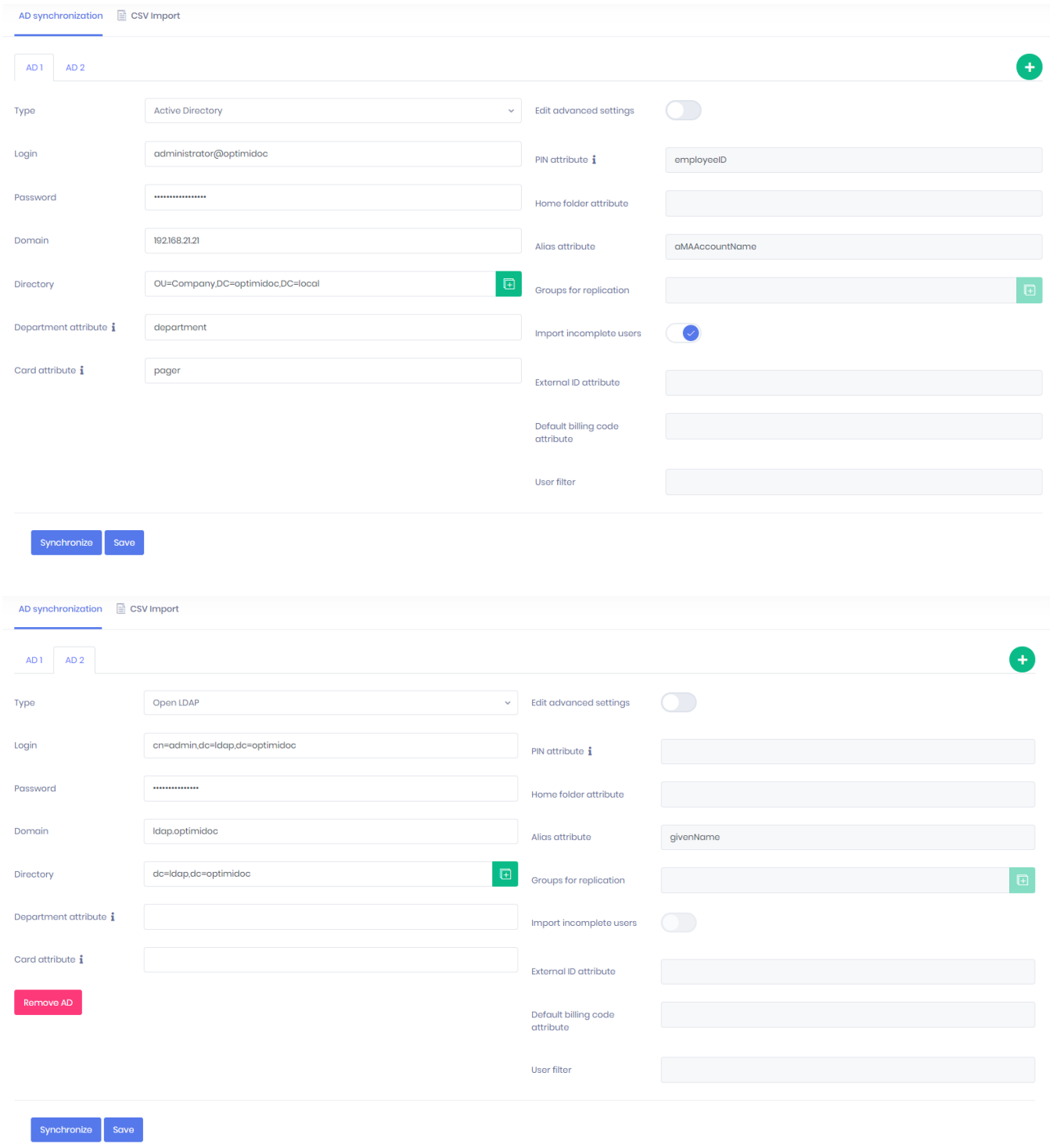

Google Directory import

For more information on how to set up GSuite Directory synchronization go to this section.

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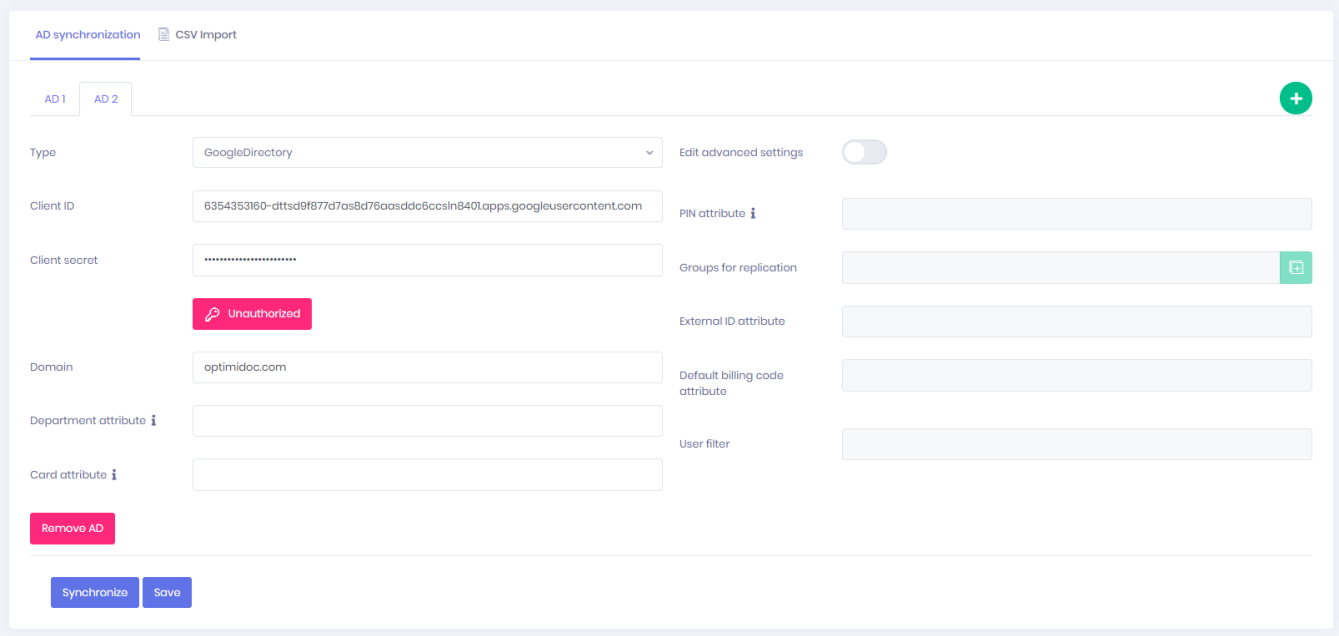

Note

A problem description:
The customer noticed, that some accounts from AD are not replicated to OptimiDoc. Non-replicated account is not disabled. In AD cannot successfully find the duplicate values of attributes (e. g. email). Sub-question – which duplicates are checked?

The solution:
In AD it is necessary to set the attribute givenName. OptimiDoc requirement is: The name and surname of users must be filled, it is the reason for unexecuted replication.
The duplicates are normally written to log as follows: ERROR: Cannot create user Name Surname with Login: 'name.surname'.

CSV import

To import the users from a CSV file it is necessary to specify the Path to the file or select it by clicking the Browse button.

CSV file structure:
Login,GivenName,Surname,Department,Password,Email,Pin,HomeFolder,Card
login1,Name1,Surname1,Department1,Password1,Email1,PIN1,Folder1,Card1
login2,Name2,Surname2,Department2,Password2,Email2,PIN2,Folder2,Card2

the header is always required.

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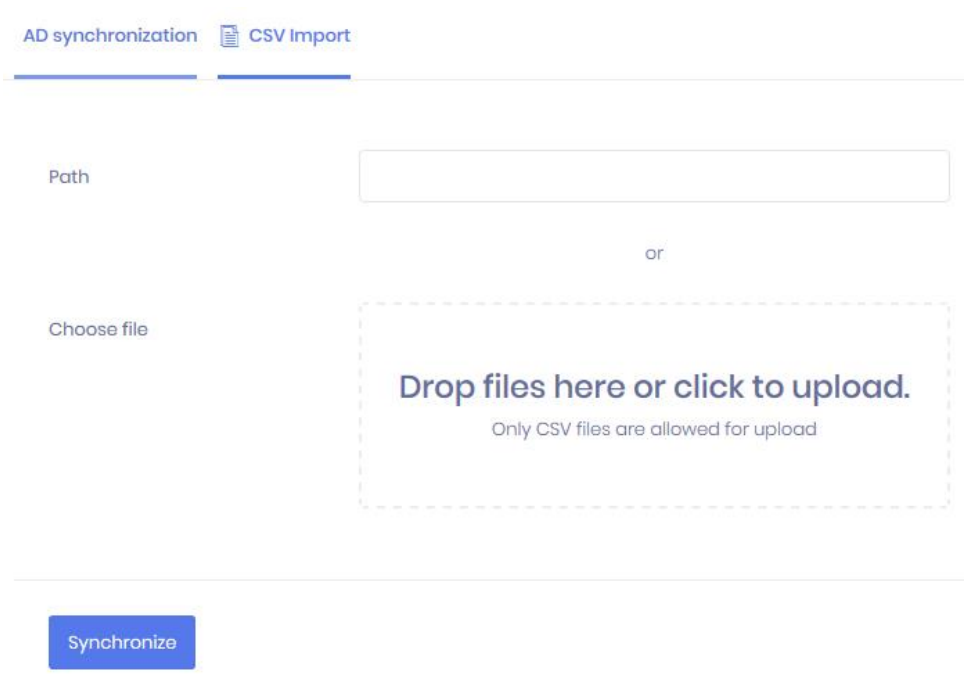
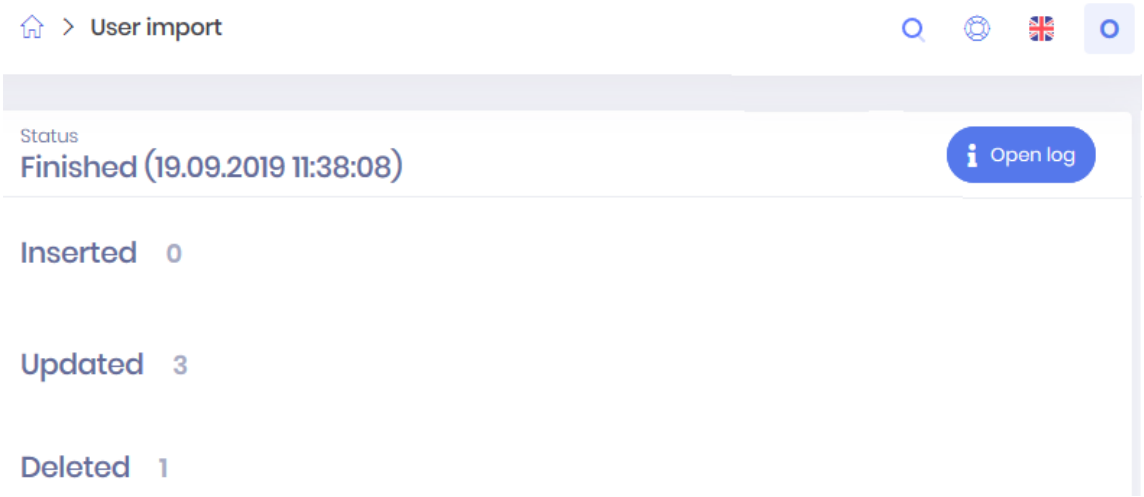


User import - Import status

AD/OpenLDAP/CSV import result is listed below the configuration.



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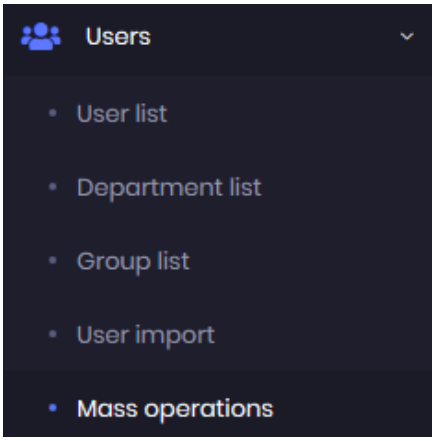
5.7.5 Mass operations

Mass operations are accessible under the menu item:



Mass operations can be used for an email distribution of automatically created PINs to users. This helps in case the customer does not know the user card numbers or wants to create access **PINs** for employees.

PIN generator

OptimiDoc generates the email with new PIN and sends it to each user in the system.

To generare PINs the following options are available:

- **Only for users without card** - PIN will be generated only to users without assigned card
- **Only for users without PIN** - PIN will be generated only to users without assigned PIN
- **PIN length** - length of generated PIN
- **email subject** - Subject of email which will be sent to users.
- **E-mail body** - Body of email which will be sent to users. Parameter {0} will be replaced with the value of the generated PIN.

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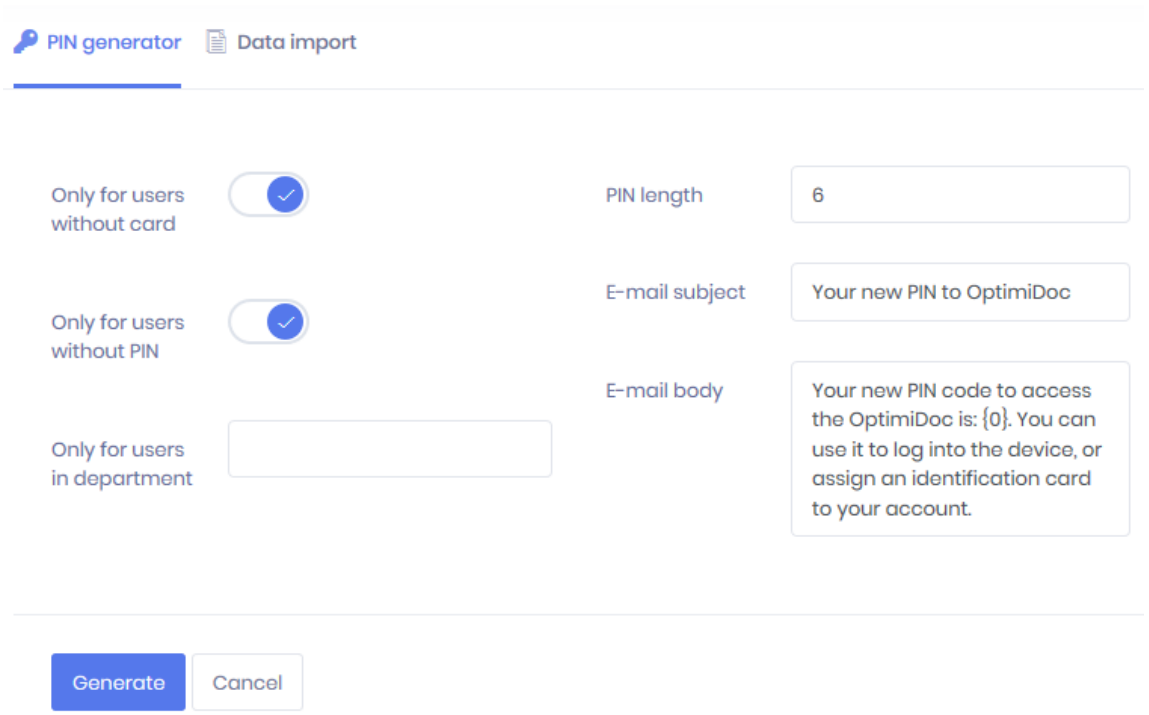
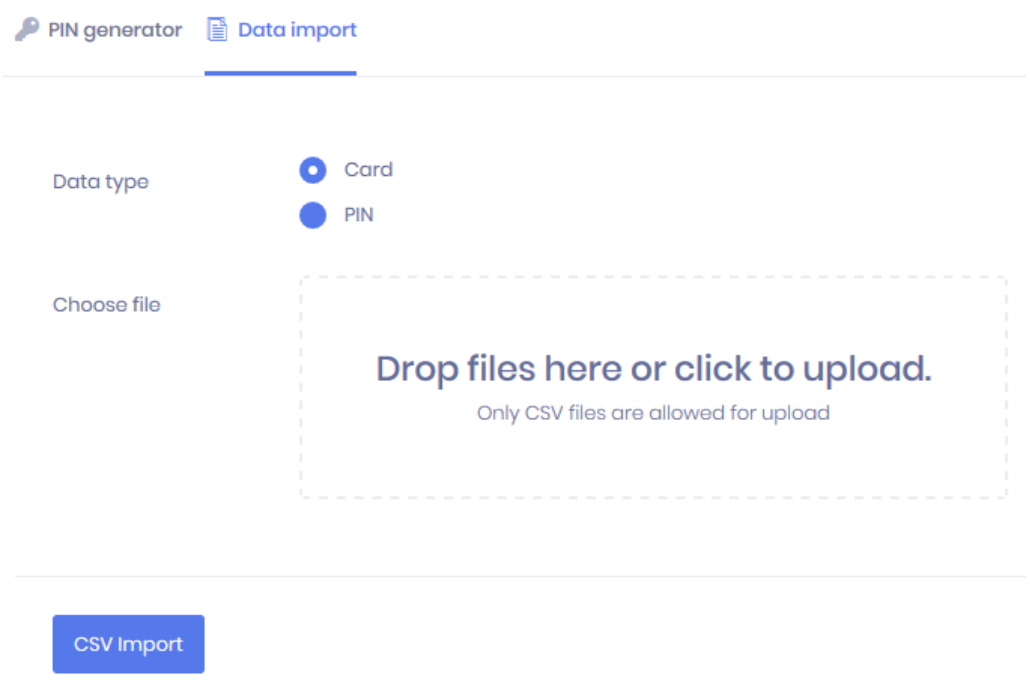


CSV PIN and Card Number Import

OptimiDoc can now import users' PINs and Card numbers.



CSV format is as follows:

Note login1,PIN or Card_number
login2,PIN or Card_number

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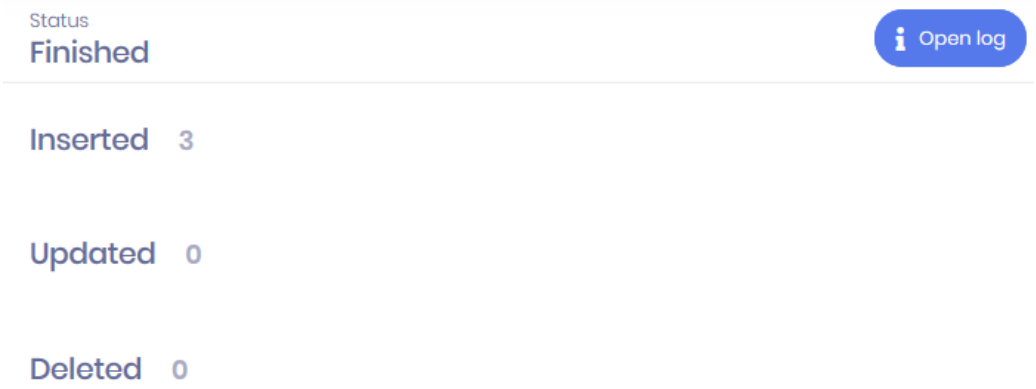
```
login3,PIN or Card_number
.
.
.
loginx,PIN or Card_number
```

After import, you can check the results directly on screen:



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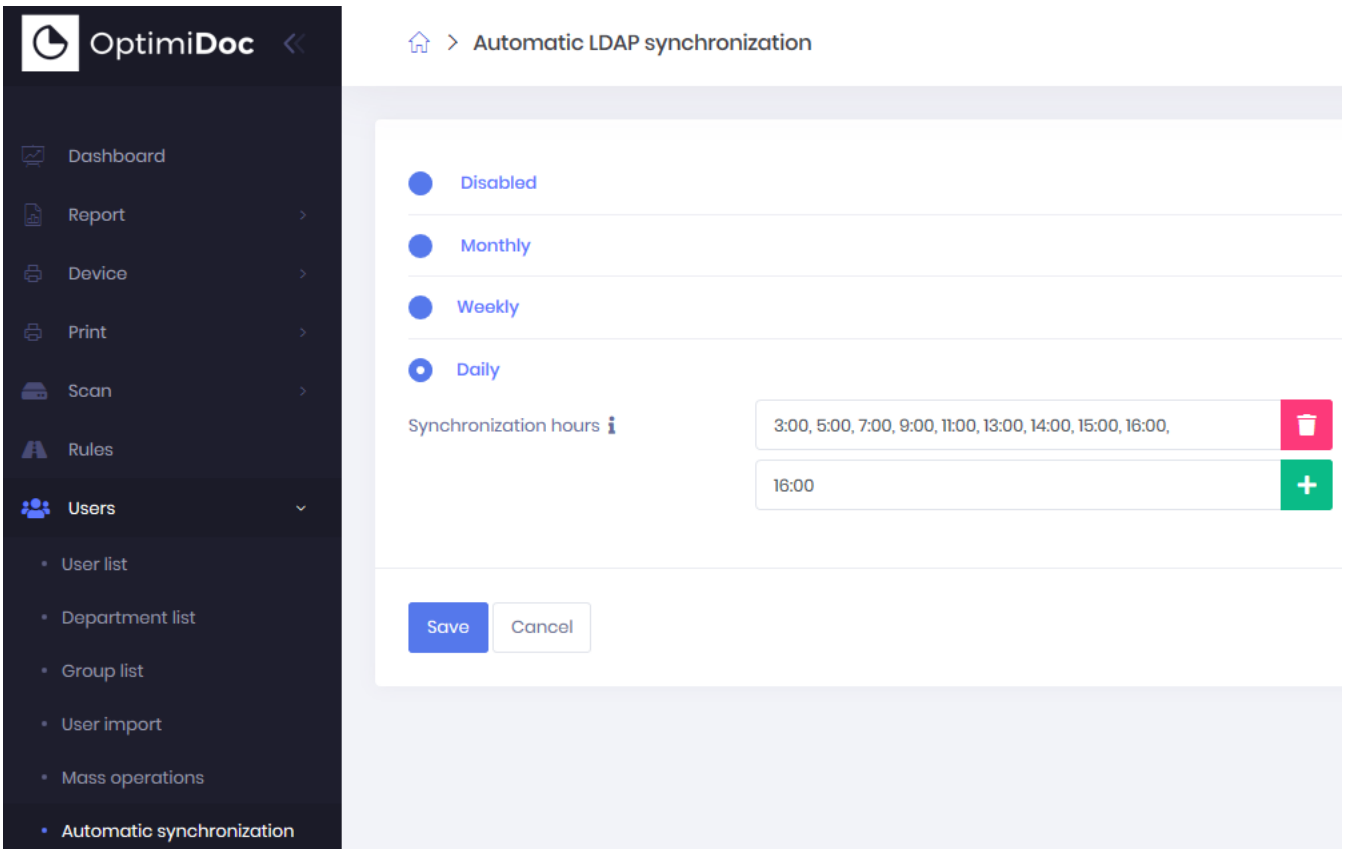
5.7.6 Automatic Synchronization

There are two options for user synchronization from the Active Directory or LDAP. You can use:

Automatic synchronization via **OptimiDoc**
Automatic synchronization via **Task Scheduler**

5.7.6.1 Automatic LDAP synchronization via OptimiDoc



To **start automatic** user synchronization from the Active Directory or LDAP with OptimiDoc it is necessary to set the **Automatic Synchronization**:

Disabled - Automatic synchronization is disabled.
Monthly - You can specify more days separated by a comma. e.g. 1,10,25 for synchronization on 1st, 10th and 25th day of the month.
Weekly - You can specify more days in a week and select time for synchronization.
Daily - You can specify more hours separated by a comma. e.g. 4, 19 for synchronization at 4AM and 7PM.

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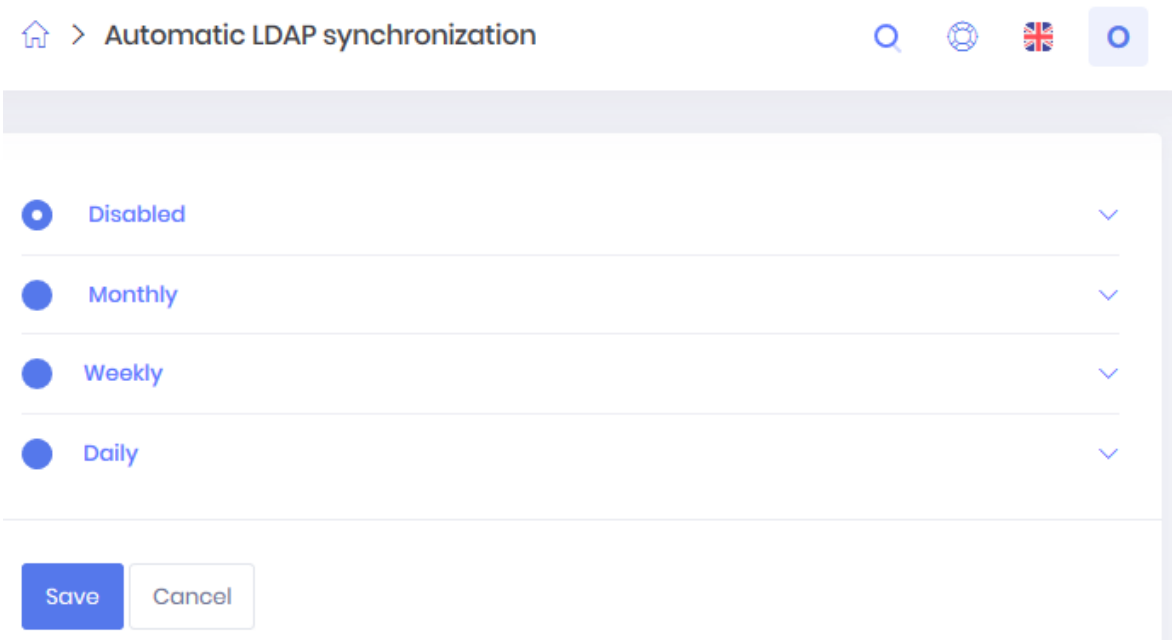
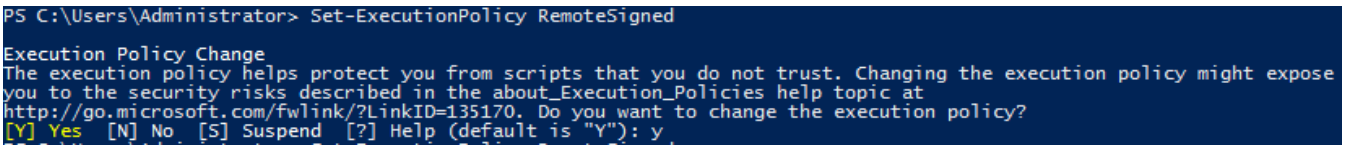


5.7.6.2 Automatic Active Directory Synchronization via Task Scheduler

To **start automatic synchronization** of **Active Directory** with OptimiDoc it is necessary to proceed with the following steps:

1. Start the PowerShell as an administrator.

2. Run the "**Set-ExecutionPolicy RemoteSigned**" command and confirm



3. Start the Windows Task scheduler from the Start menu or by running the command **control schedtasks**

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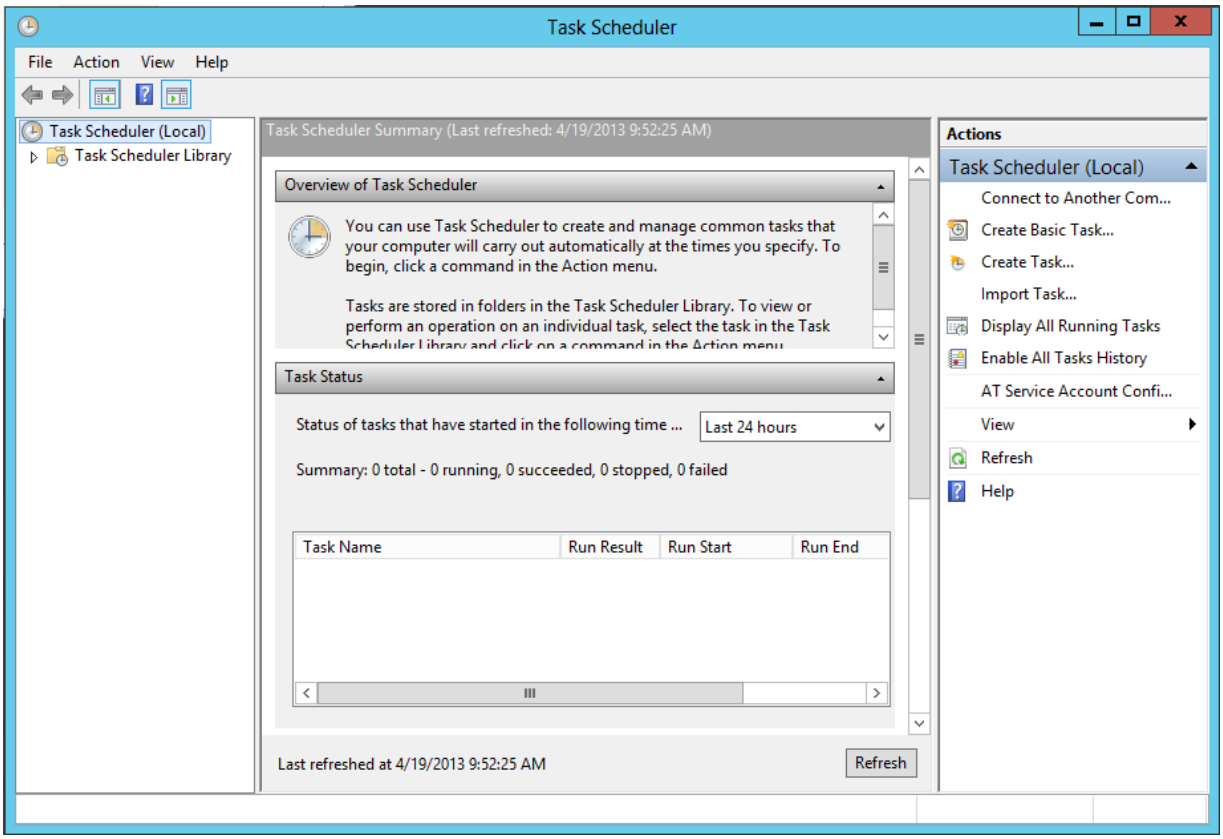
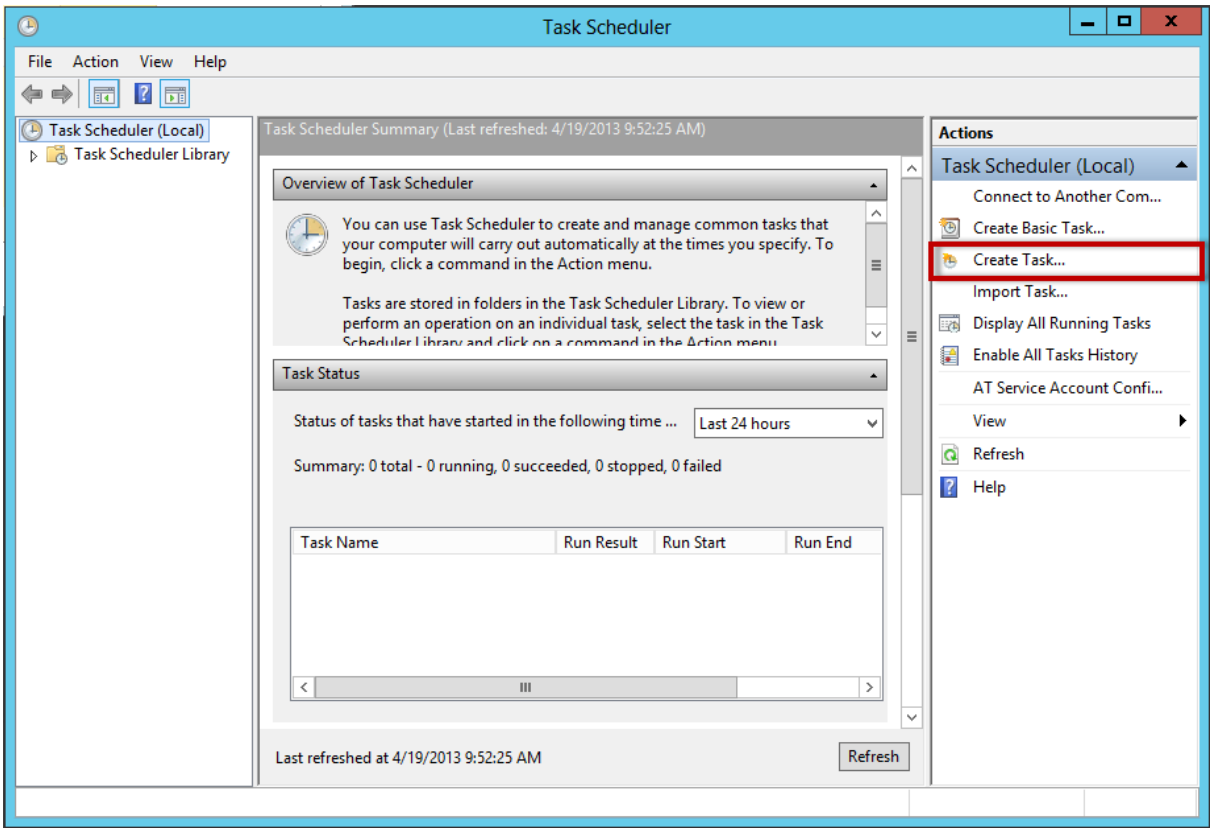


4. Select **Create task...** in Actions



5. Enter the **Name**, select the option **Run whether user is logged on or not** and check the

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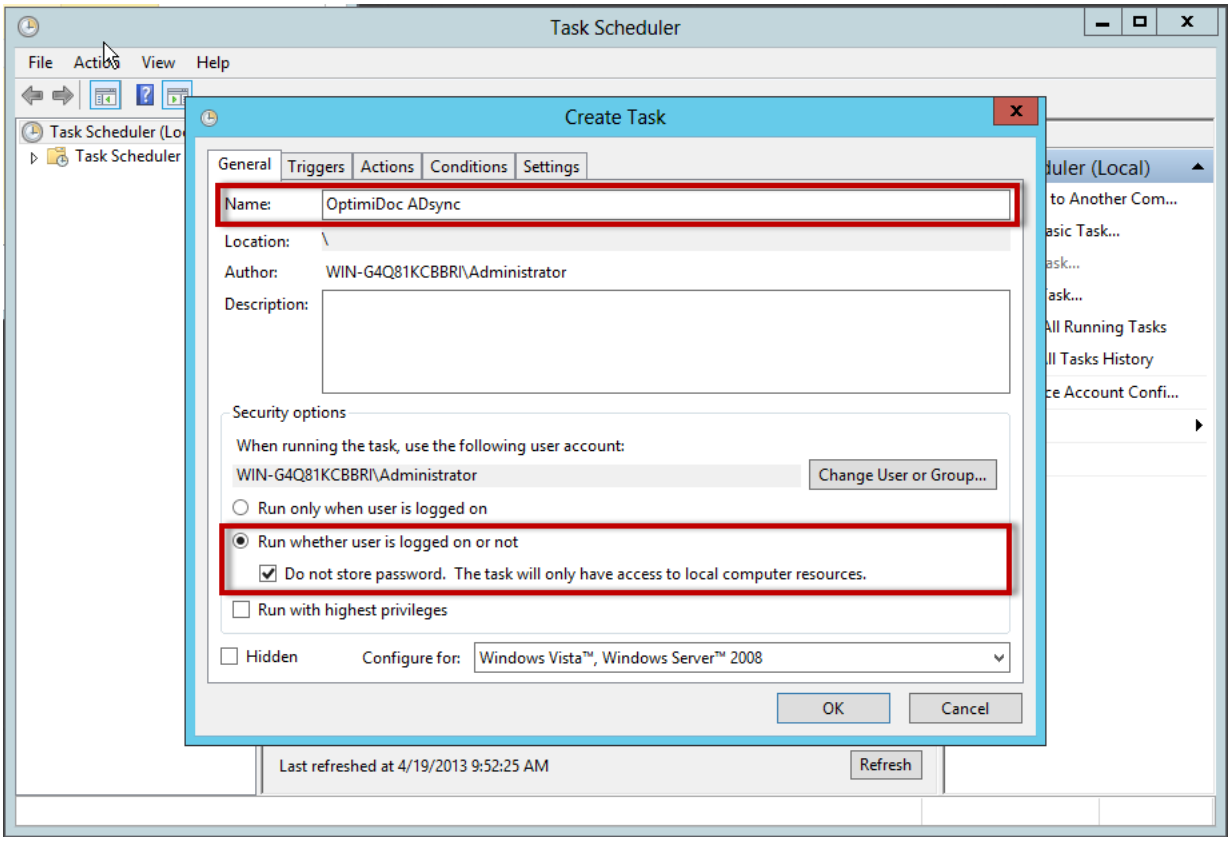
Do not store password option.



6. Select the Triggers tab and click on the **New...** button and define the schedule of synchronization, Confirm by clicking on **Ok**.

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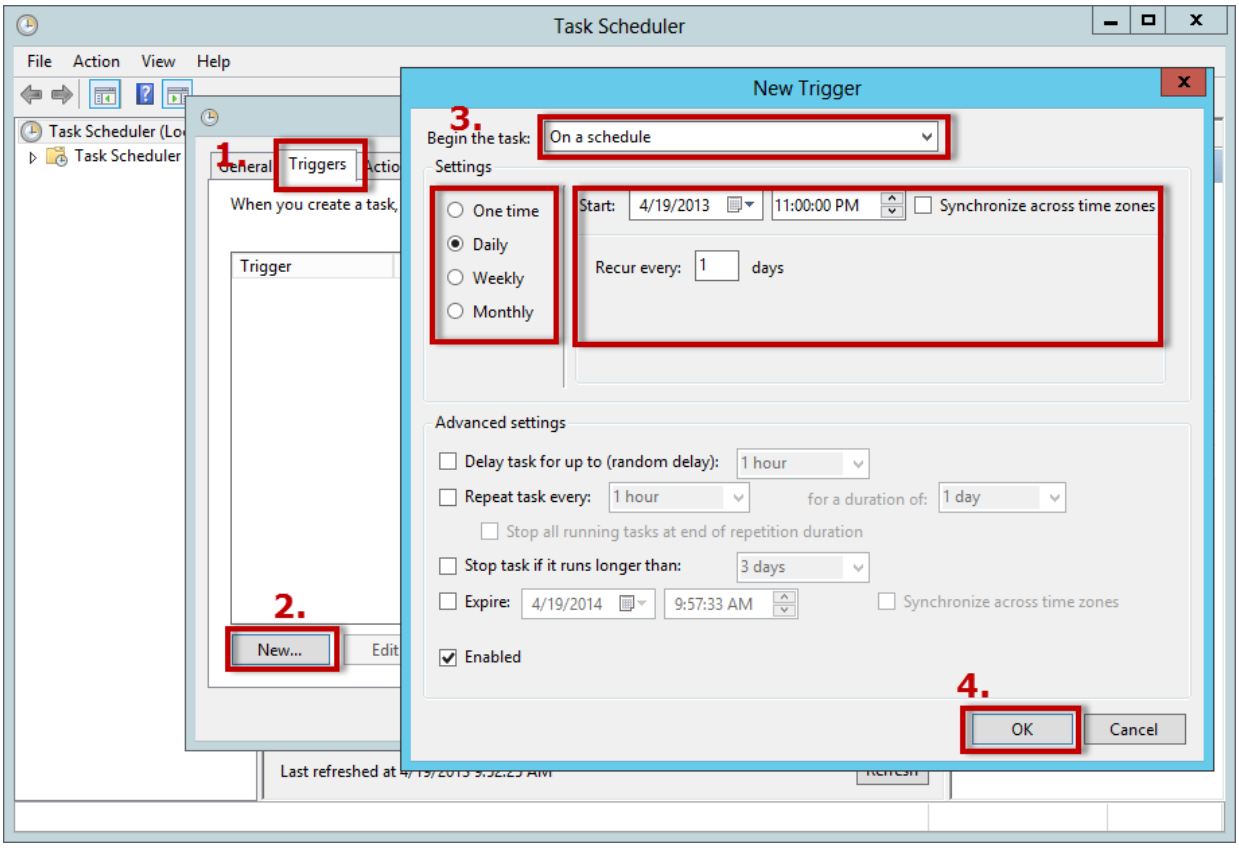

7. Select the Actions tab and click on the **New..**. button. Select the action **Start a program**, enter the program "**powershell**" and put the arguments **-c ". '<optimidoc_install_path>\Support\ad_sync.ps1'"**. Afterwards confirm the settings by clicking on the **Ok** button.

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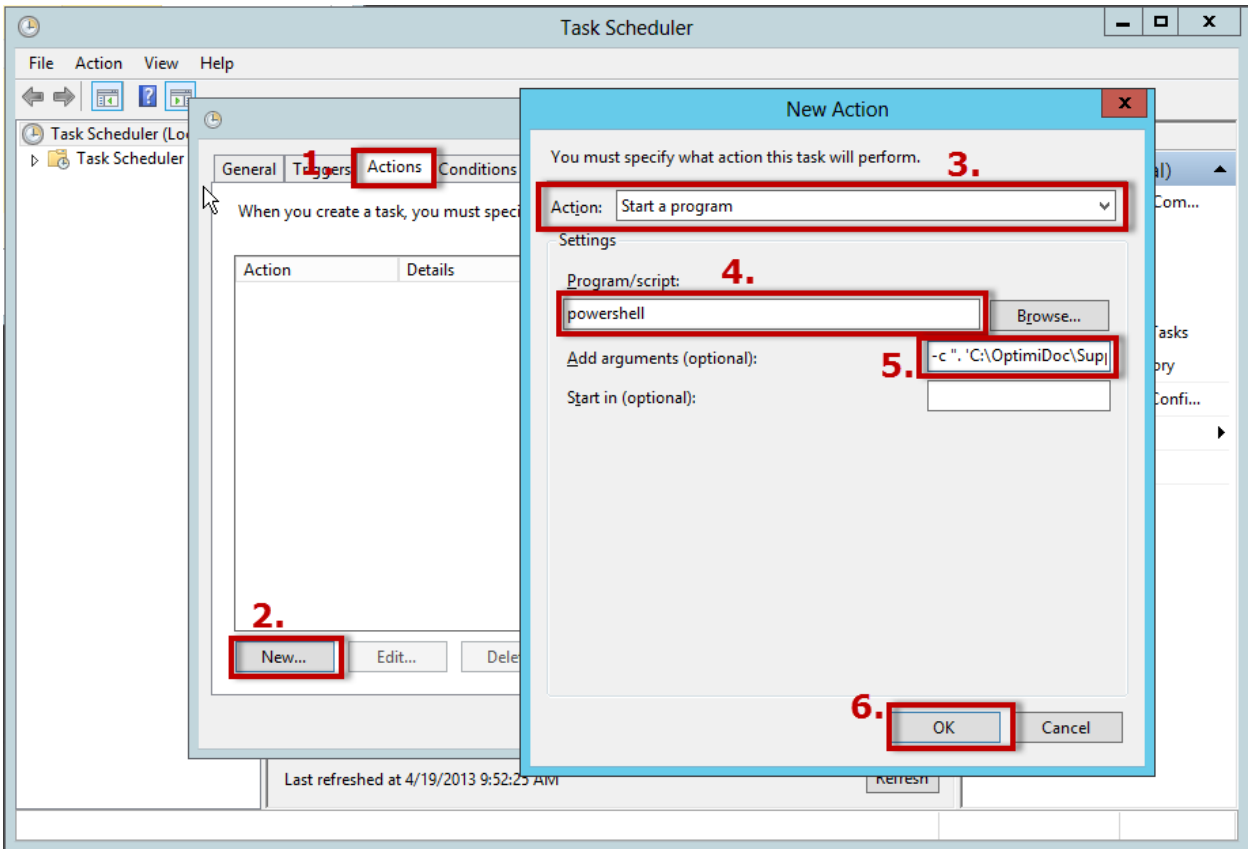
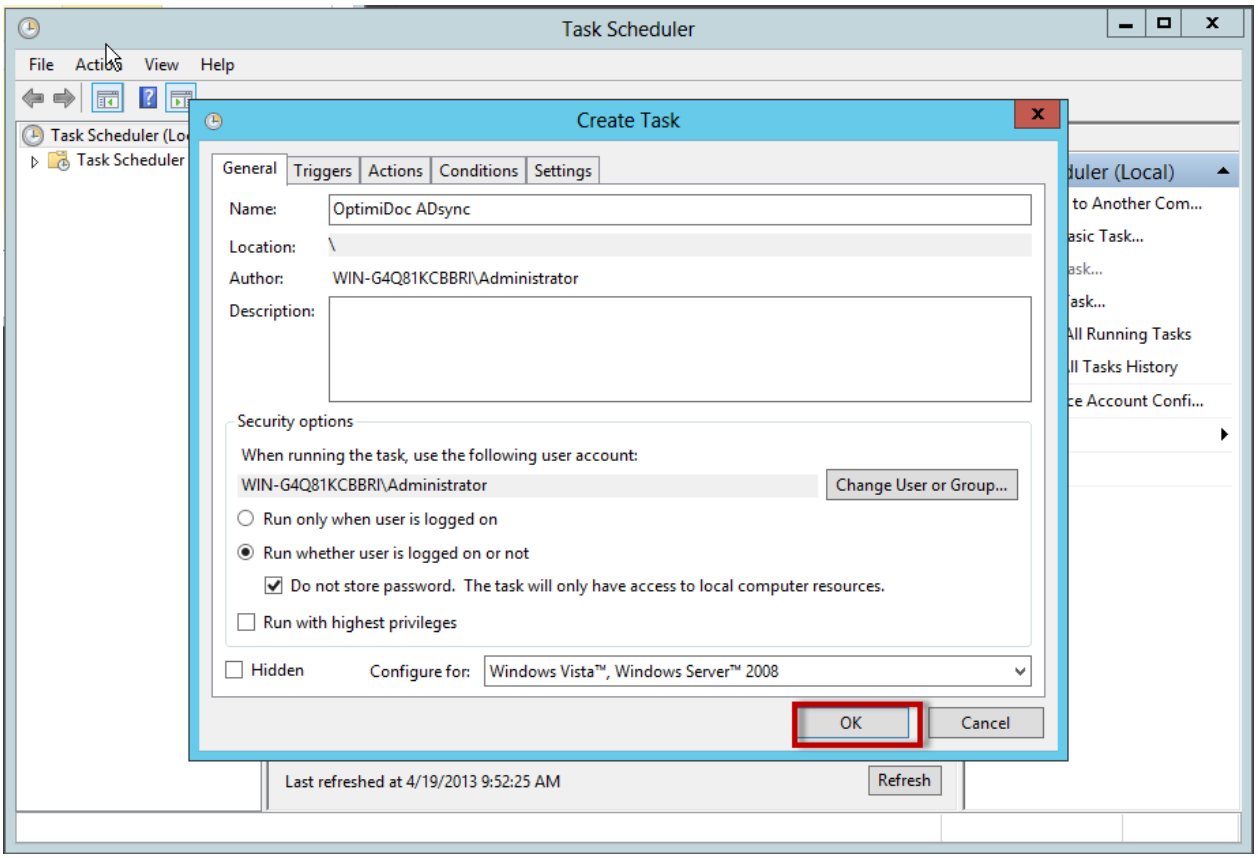


8. Save the task by clicking on the **Ok** button.



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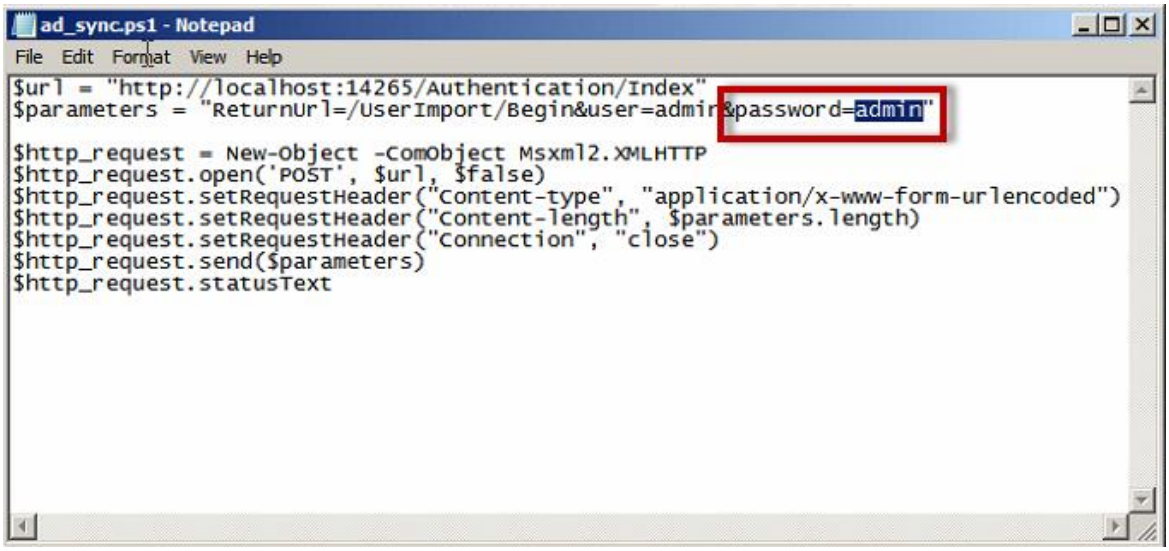
9. (Optional) In the case of changed password of administration please change it also at **<optimidoc_install_folder>\Support\ad_sync.ps1** file.



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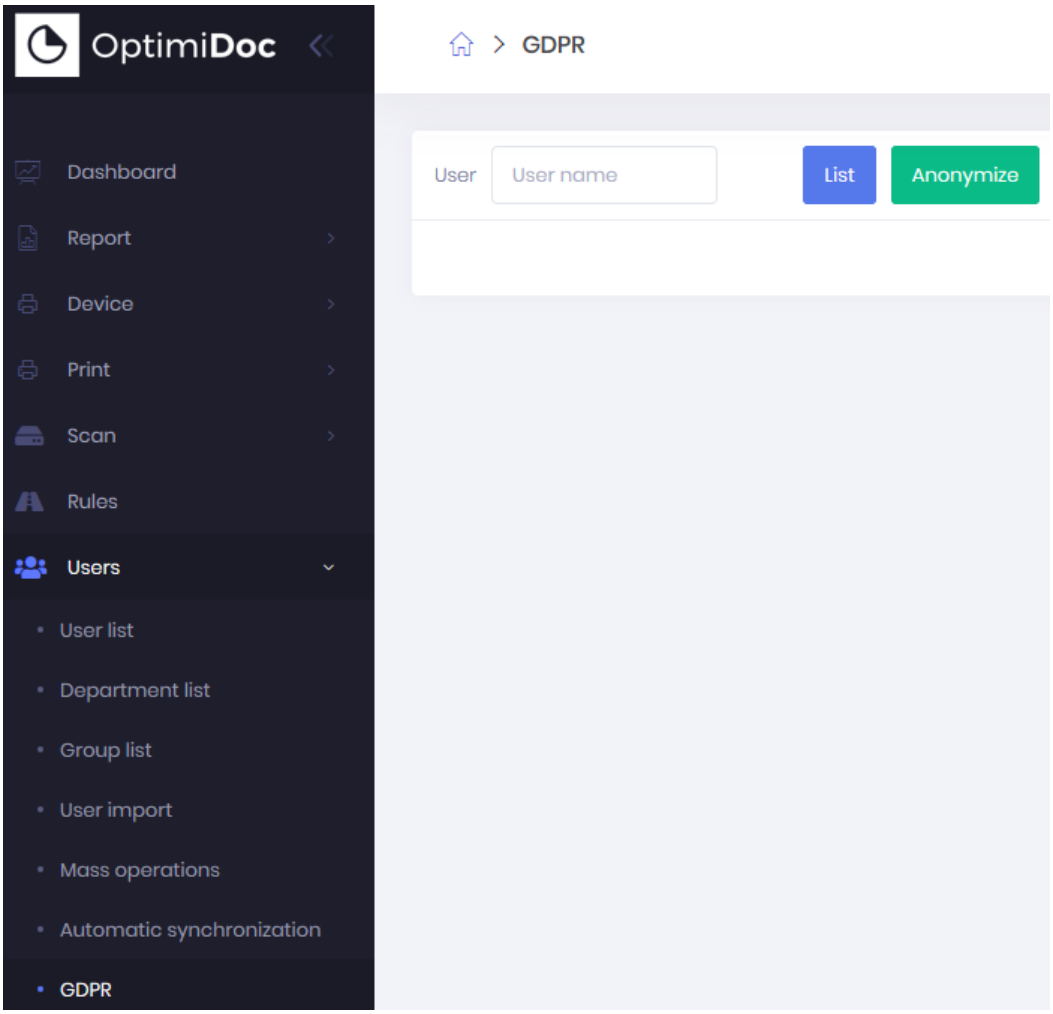
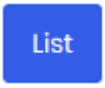
5.7.7 GDPR

The GDPR section can **anonymize** user-related data.



You can view user data by clicking the button 

.

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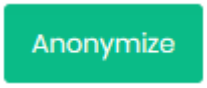
If you click the button 

, all the gathered user information will be deleted.

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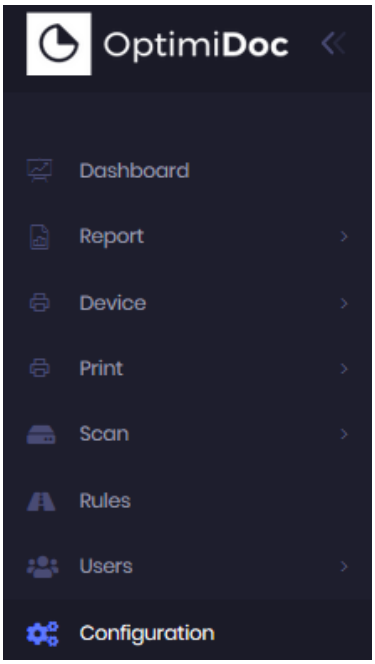
5.8 Configuration

The OptimiDoc configuration page is divided into 3 tabs:
- **Basic** configuration, which kind of functionalities the user can use, and what the user needs to set.
- **Advanced** configuration of OptimiDoc,
- **Vendor Specific** configurations compatible with specific vendors.



Basic configuration

SMTP Server

Server - SMTP server IP address or host name
- Port - SMTP server port number
- Secure communication - Enable or disable secure communication
- Sender - email address from which the email will be sent
- Administrator's email - administrator's notification email for alerts or other information
- User name - SMTP account login
- Password - SMTP account password

When you have finished editing, you can test the new settings with the Test connection button.

SMTP server configuration and Admin email are also used, for example in case when you want to be notified about how many OCR pages are remaining. There are two thresholds when we send such notification - when there are 10% and 1% remaining.

Print job removal

User can choose how long print jobs should stay in the OptimiDoc spooler folder.

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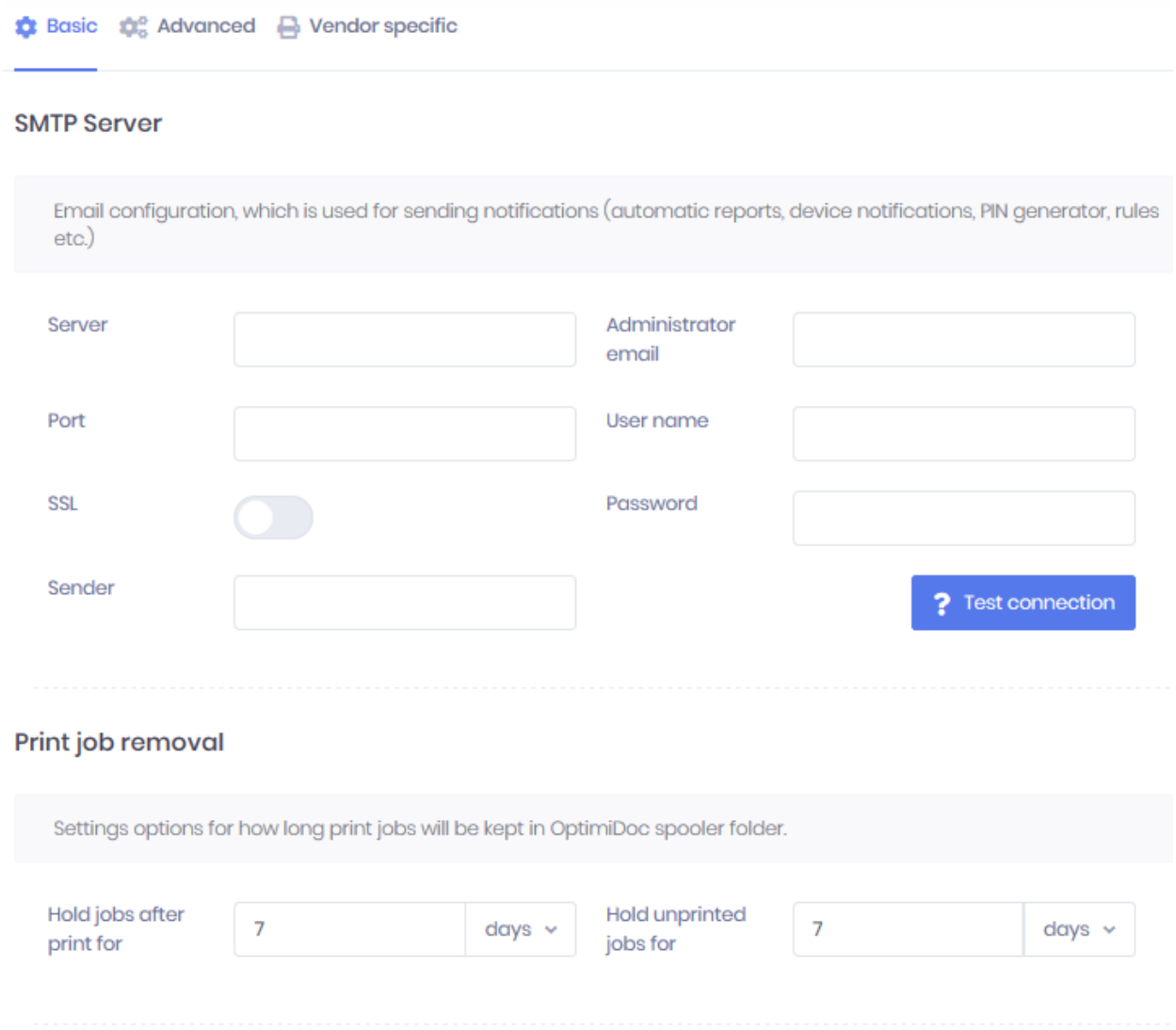
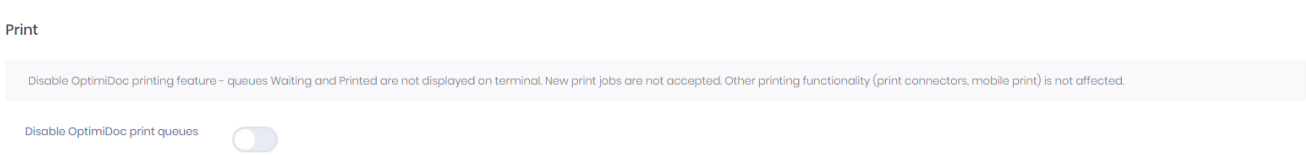
- Hold jobs after print - users can keep jobs in the spooler, which they would like to reprint
- Hold unprinted jobs - keep the jobs in the spooler which were not printed yet

User has option to choose between hours or days.



Print
Disabling Waiting and Printed queues - comes handy when you want to show only Print connectors such as cloud storages.



Personalization
User can select the font colors, menu, and can even upload their own company logo, which will appear in the embedded user interface and also in the OptimiDoc web interface.

There is also the option to reset all personalization settings to default colors and logo.

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Reporting and accounting

- Billing codes - Users can enable their billing codes which will sort all jobs into the specific projects.
- Decimal places - user can set the number of decimal places; it is possible to choose from 0 till 8.

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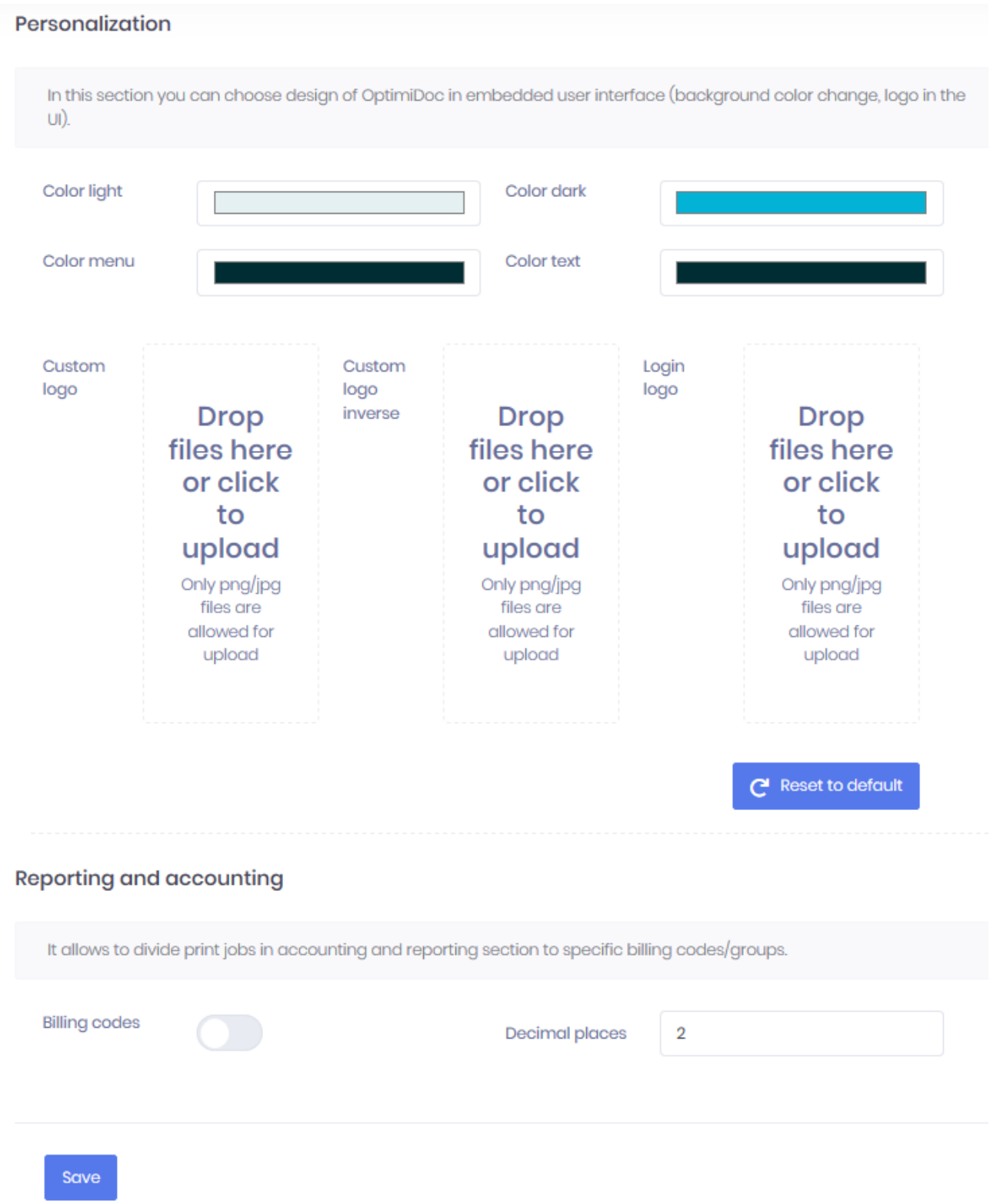

Advanced configuration

OCR Processing
- Maximal count of parallel tasks - amount of parallel process of OCR Engine.

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FTP server is used for document delivery from devices to the OptimiDoc server.

- FTP configuration (is used only in case of disabled HTTP delivery):
- User name - account login
- Password - account password
- Server - IP address or domain name
- Port - port number
- Path - path on FTP server
- Local path - local path to selected folder on the FTP server. It is required to add full control right to this folder for IIS_IUSRS.

Network accounting
Allows double-checking of the accounting of print jobs from network devices by the information from the preview generator. This option will slow down processing.

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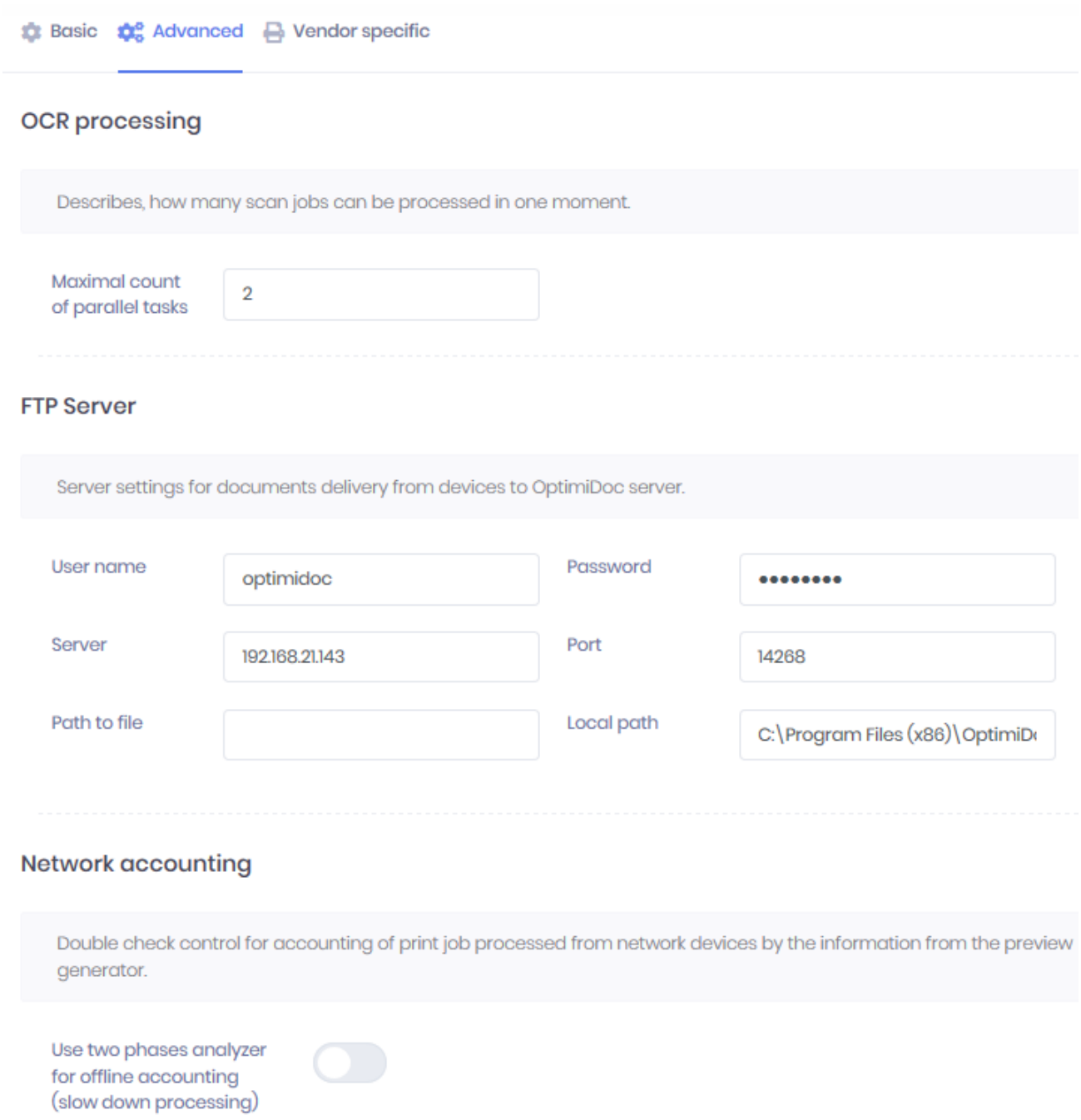

Print job spooler directory

- Spooler path is used for a giving a location, where print jobs should be stored.

  If the Spooler path is empty, it will automatically store jobs to a default folder (OptimiDoc\WebApp\App_Data\Spooler)

- Use shared spooler - shared spooler is used during Cluster, where print jobs from more servers will be stored in one place.

Conversion of card number

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- Conversion of card number will allow a user to extract specific part of card number, which is used in OptmiDoc and another solution.

Example

Substring(-8);Reverse2;Hex2Dec

Input	output
R006F01202537EBBC	3169531685
R006F01208547ECBC	3169601413
R006F0120C531F1BC	3169923525

or

First card reader read card with number: 001cfbbf32
Second card reader read card with number: 001CFBBF32

ASCII2Hex(14);LowerCase

Cluster configuration

- Shared IP address - Virtual address which is used only for NLB
- Local Server DNS record used for Cluster

User name extraction
is used for reporting. Allows the extraction of the User name of the user who sent a print job to the server via regular expression.
e.g. domain-name\user is regular expression
[\w\W]+\\(\w+)

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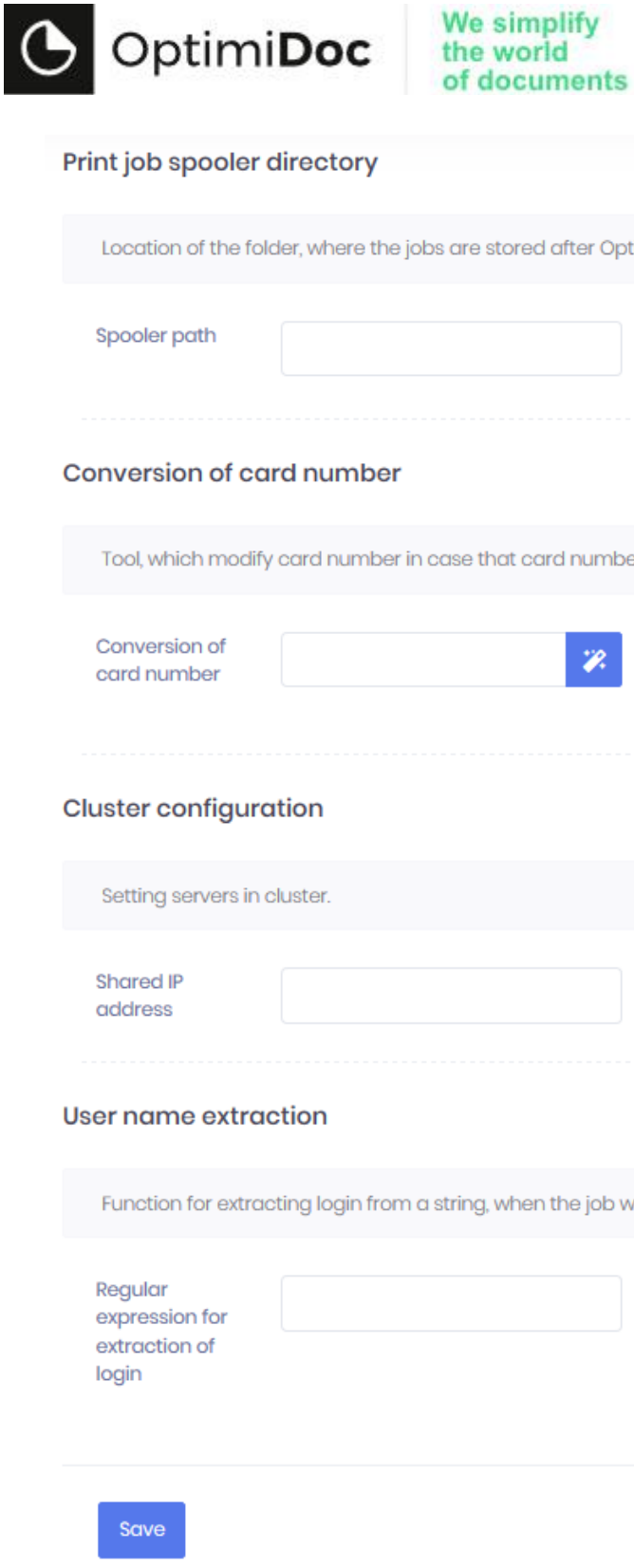

Vendor Specific configuration

- **Xerox vendor** - possibility to hide jobs in case of Print all functionality
- **HewlettPackard** - possibility to select exact card reader and cards, which are used on the device

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Xerox

Additional specific of Xerox. Possibility to hide job titles in embedded user interface.

Hide job titles in Print All

HewlettPackard

Additional specific of HP. Selecting cards readers, which are used on devices with specific card types.

Card reader type: Other

Save

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5.9 Diagnostic

The Report section provides detailed information about user activities in the print environment and definitions of price lists which are used for the cost calculation of each operation.

Report contains four section:

Active users	List of currently authenticated users on devices.
Log Center	Opens the log of OptimiDoc web. Opens the log of service user for acceptance of print jobs via LPR and scans via HotFolder. Tools for downloading log files
Unauthorized accesses	List of unauthorized prints and access to device by card.
Nodes list	Overview and management of connected OptimiDoc servers and OptimiDoc Print Node.

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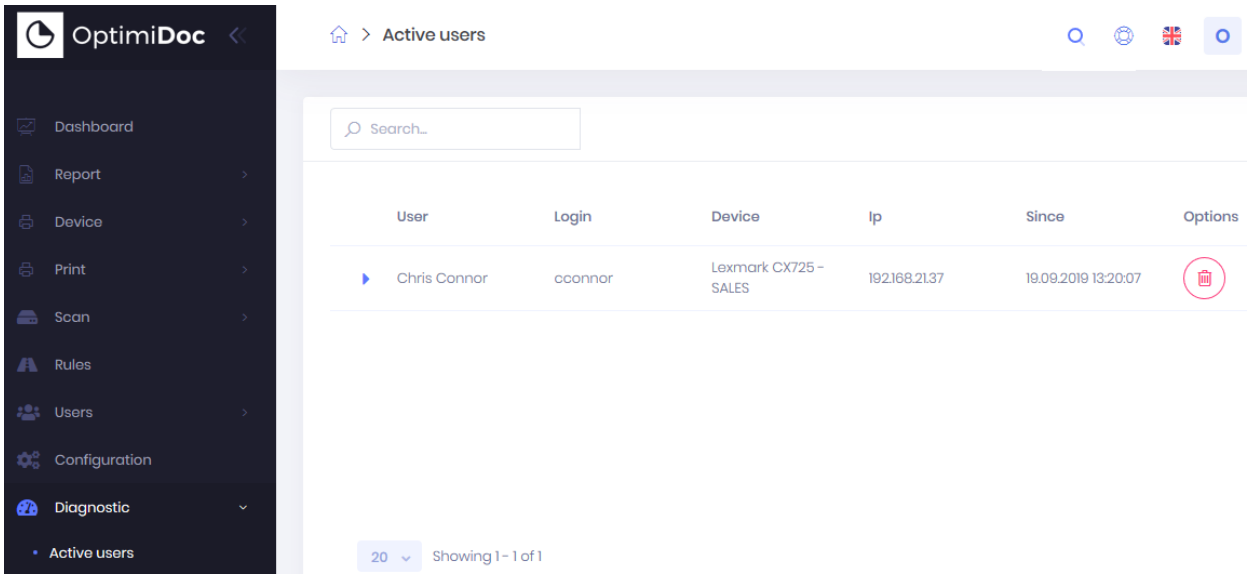
5.9.1 Active users

Active user list provides an overview of currently authenticated users on devices. The list shows only authenticated users on devices with authentication to device.

There is also option to **delete** active user from session on device.

STATE Options

- **Init** - initial screen (e.g. PIN prompt) is displayed, card swipe was done
- **InProgress** - on devices that can handle only one field (xerox) during Login & password or some Card & something authentication
- **CardAssignment** - card is unknown, user will be prompted for card assignment
- **Authenticated** - user is authenticated
- **PrintAllPrompt** - prompt for print all (in case that it is a standalone screen)
- **Failed** - unspecified error
- **BeforeAuthorization** - only for HP devices, login process is divided into two: authentication (user recognition) & authorization (access rights)



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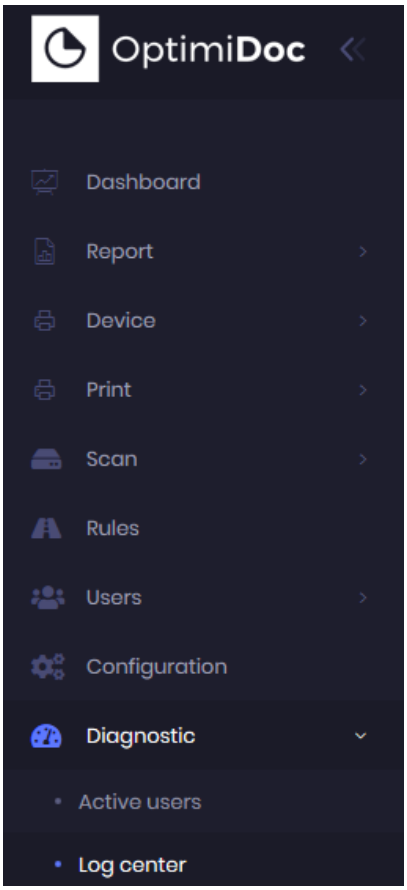
5.9.2 Log center

You will get to the Log Centre by clicking the link in the menu on the left.



5.9.2.1 Event log

The Event log under Diagnostic topic shows operations which OptimiDoc users and applications have done.

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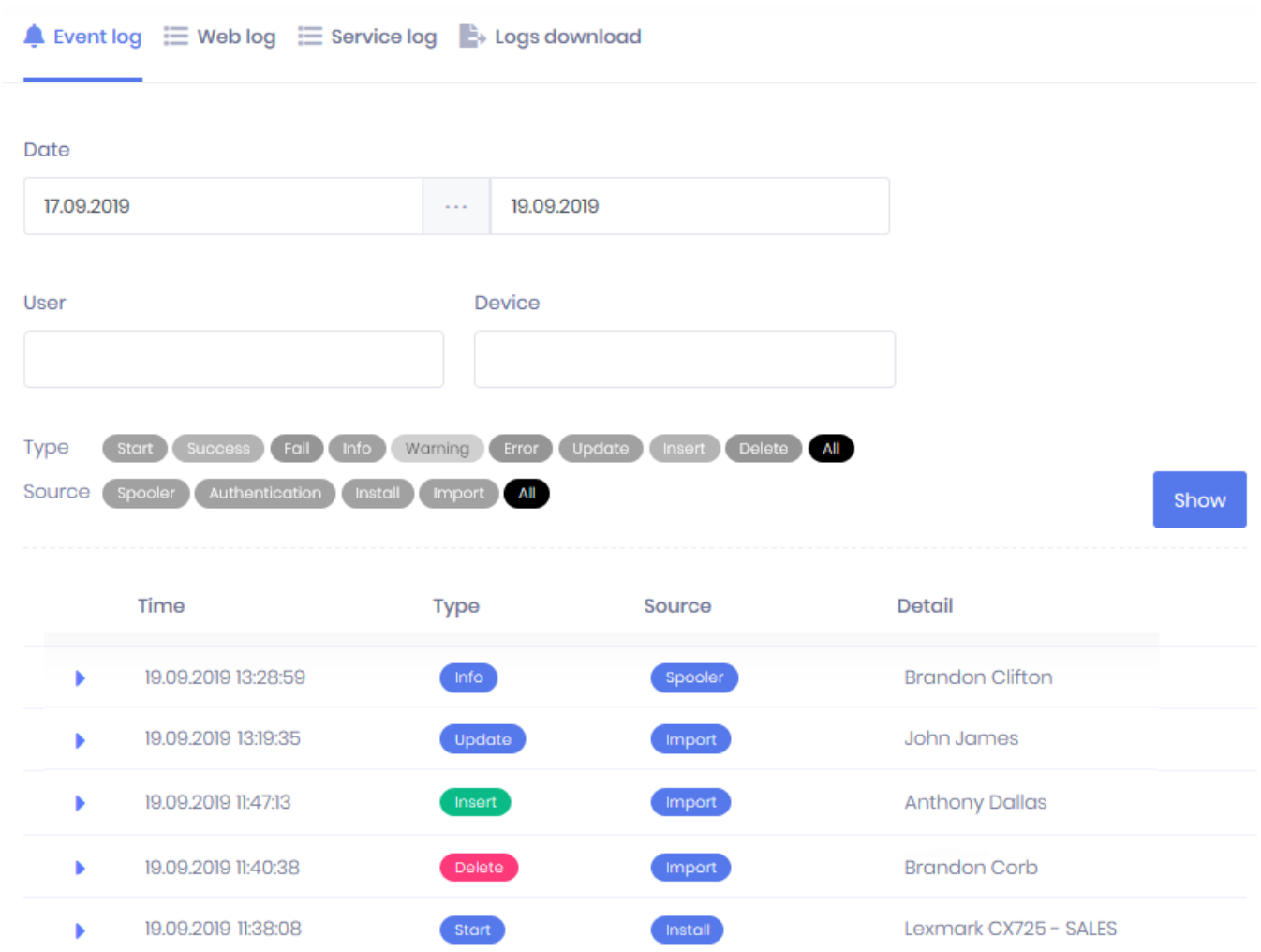

5.9.2.2 Web log

If you click on **Web log** in the Diagnostic topic, the Internet browser opens a new tab with list of operations which OptimiDoc applications have done. At every step of the application you can see what time the operation was completed and a description of the operation.

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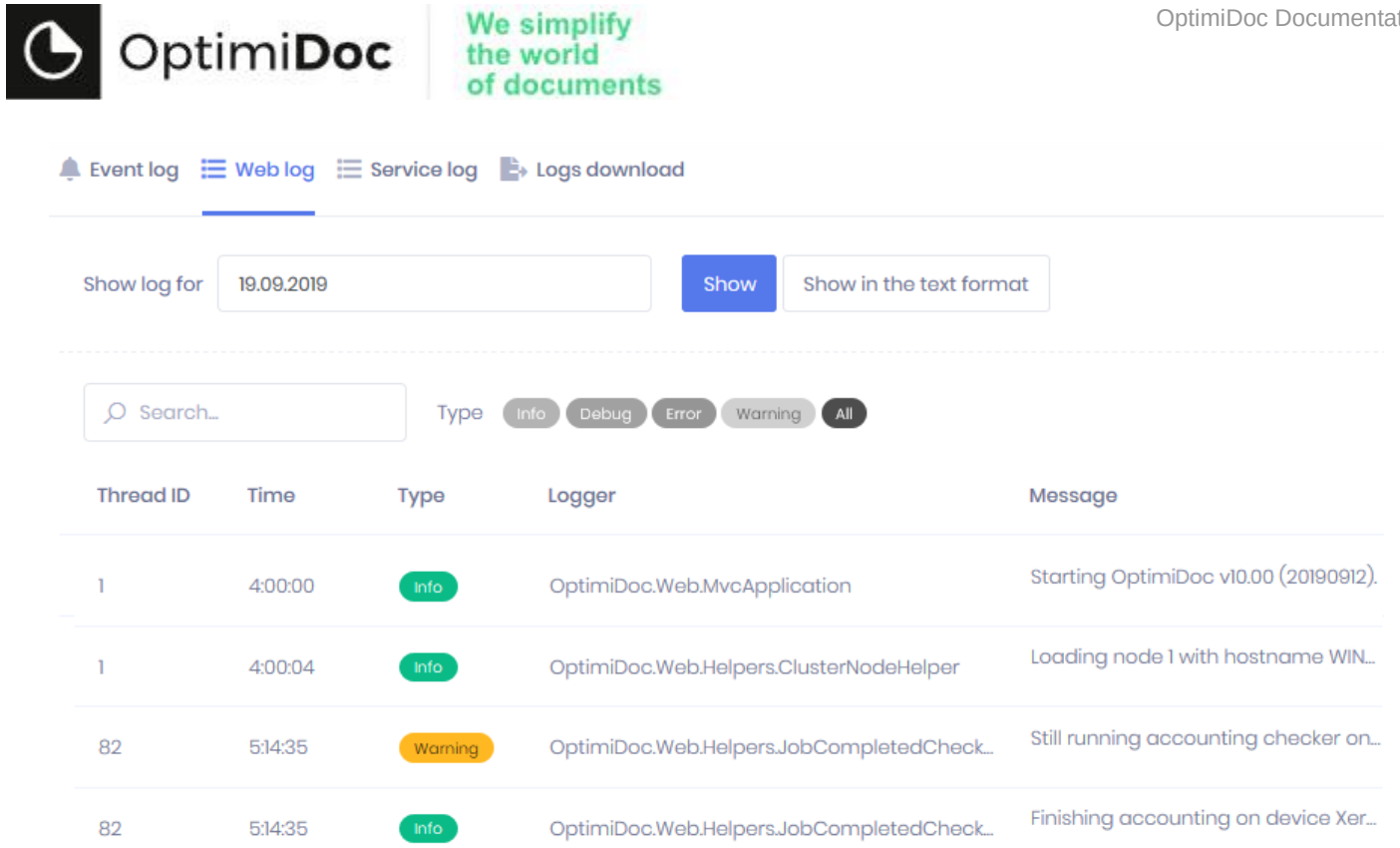

Screen of application steps with times and descriptions of operations:

```
3024|1|2017-07-26 09:47:23.1701|INFO|||OptimiDoc.Web.MvcApplication|Starting OptimiDoc v6.14 (20170714).
3024|1|2017-07-26 09:47:39.5221|DEBUG|||OptimiDoc.Web.Helpers.IISHelper|Found binding: http 192.168.0.174 14265
3024|1|2017-07-26 09:47:39.5802|DEBUG|||OptimiDoc.Web.Helpers.IISHelper|Found binding: https 192.168.0.174 14266
3024|1|2017-07-26 09:47:40.1990|INFO|||OptimiDoc.Web.Helpers.ClusterNodeHelper|Loading node 7 with hostname DESKTOP-B1QG19I or binding
https://192.168.0.174:14266 (master: True)!
3024|1|2017-07-26 09:47:40.5915|DEBUG|||OptimiDoc.Web.Helpers.LicenseInfo|Loading license C:\OptimiDoc\WebApp\App_Data\License\SWXE-1101-0006-2739-4496-
1190.lic.
3024|1|2017-07-26 09:47:45.7416|DEBUG|||OptimiDoc.Web.Helpers.LicenseInfo|Creating license for Demo customer with S/N SWXE-1101-0006-2739-4496-1190
3024|5|2017-07-26 09:47:53.8253|DEBUG|||OptimiDoc.Web.Controllers.BaseController|User OptimiDoc Administrator (role: Admin) has been authenticated.
3024|32|2017-07-26 10:19:31.3963|DEBUG|||OptimiDoc.Web.Controllers.BaseController|User OptimiDoc Administrator (role: Admin) has been authenticated.
3024|29|2017-07-26 10:19:31.4795|DEBUG|||OptimiDoc.Web.Controllers.BaseController|User OptimiDoc Administrator (role: Admin) has been authenticated.
3024|20|2017-07-26 10:23:38.7058|INFO|OptimiDoc Administrator||OptimiDoc.Web.DeviceLayer.LexmarkLayer|Installing FLS file on Lexmark device Lexmark CX725
(7, 192.168.0.37)
3024|20|2017-07-26 10:23:39.2059|INFO|OptimiDoc Administrator||OptimiDoc.Web.DeviceLayer.LexmarkLayer|Final status:    <div class="warning"> The install
completed successfully, but the install file did not contain any new solutions. </div>

3024|29|2017-07-26 10:42:02.7115|DEBUG|OptimiDoc Administrator||OptimiDoc.Web.Helpers.Xerox.XsaInstaller|Installing XSA on device VersaLink (192.168.0.32)
3024|29|2017-07-26 10:42:03.8775|DEBUG|OptimiDoc Administrator||OptimiDoc.Web.Helpers.Xerox.XsaInstaller|Installation has finished (False).
3024|39|2017-07-26 10:45:15.1051|INFO|Testovaci User||OptimiDoc.Dao.AuthenticationService|Card 011011CD6E was assigned to user Testovaci User
3024|33|2017-07-26 11:02:45.3162|INFO|||OptimiDoc.Web.Api.CopyController|Accounting operation outside of OptimiDoc with device id .
3024|33|2017-07-26 11:02:47.0437|INFO|||OptimiDoc.Web.Api.CopyController|Unknown user  (0). Using Administrator as default accounting.
2588|1|2017-07-26 11:14:39.2442|INFO|||OptimiDoc.Web.MvcApplication|Starting OptimiDoc v6.14 (20170714).
2588|1|2017-07-26 11:15:09.1497|DEBUG|||OptimiDoc.Web.Helpers.IISHelper|Found binding: http 192.168.0.174 14265
2588|1|2017-07-26 11:15:09.2122|DEBUG|||OptimiDoc.Web.Helpers.IISHelper|Found binding: https 192.168.0.174 14266
2588|1|2017-07-26 11:15:10.0716|INFO|||OptimiDoc.Web.Helpers.ClusterNodeHelper|Loading node 7 with hostname DESKTOP-B1QG19I or binding
https://192.168.0.174:14266 (master: True)!
2588|1|2017-07-26 11:15:10.5092|DEBUG|||OptimiDoc.Web.Helpers.LicenseInfo|Loading license C:\OptimiDoc\WebApp\App_Data\License\SWXE-1101-0006-2739-4496-
1190.lic.
2588|1|2017-07-26 11:15:20.3781|DEBUG|||OptimiDoc.Web.Helpers.LicenseInfo|Creating license for Demo customer with S/N SWXE-1101-0006-2739-4496-1190
2588|7|2017-07-26 11:15:25.4702|INFO|Testovaci User||OptimiDoc.Web.Api.CopyController|Accounting operation outside of OptimiDoc with device id DESKTOP-
B1QG19I.
2588|9|2017-07-26 11:16:26.0877|DEBUG|||OptimiDoc.Web.Controllers.BaseController|User OptimiDoc Administrator (role: Admin) has been authenticated.
2588|8|2017-07-26 11:20:55.9689|INFO|OptimiDoc Administrator||OptimiDoc.Web.Api.CopyController|Accounting operation outside of OptimiDoc with device id
DESKTOP-B1QG19I.
2588|10|2017-07-26 11:30:09.5233|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|InitAuth: elapsed time: 0.212s
2588|32|2017-07-26 11:30:09.5749|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|Starting init
2588|26|2017-07-26 11:30:10.0255|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|ValidateAndContinue: elapsed time: 00.055
2588|26|2017-07-26 11:30:15.2426|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|Neplatne prihlaseni.
2588|8|2017-07-26 11:30:20.2476|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|InitAuth: elapsed time: 0.3s
2588|22|2017-07-26 11:30:20.2987|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|Starting init
2588|32|2017-07-26 11:30:20.6594|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|ValidateAndContinue: elapsed time: 00.000
2588|10|2017-07-26 11:30:26.0219|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|Neplatne prihlaseni.
2588|36|2017-07-26 11:31:21.3621|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|InitAuth: elapsed time: 0.3s
2588|22|2017-07-26 11:31:21.4178|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|Starting init
2588|37|2017-07-26 11:31:21.7839|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|ValidateAndContinue: elapsed time: 00.000
2588|36|2017-07-26 11:31:27.6341|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|Neplatne prihlaseni.
2588|39|2017-07-26 11:32:31.5711|DEBUG|||OptimiDoc.Web.Helpers.XeroxAuthentication|InitAuth: elapsed time: 0.15s
```

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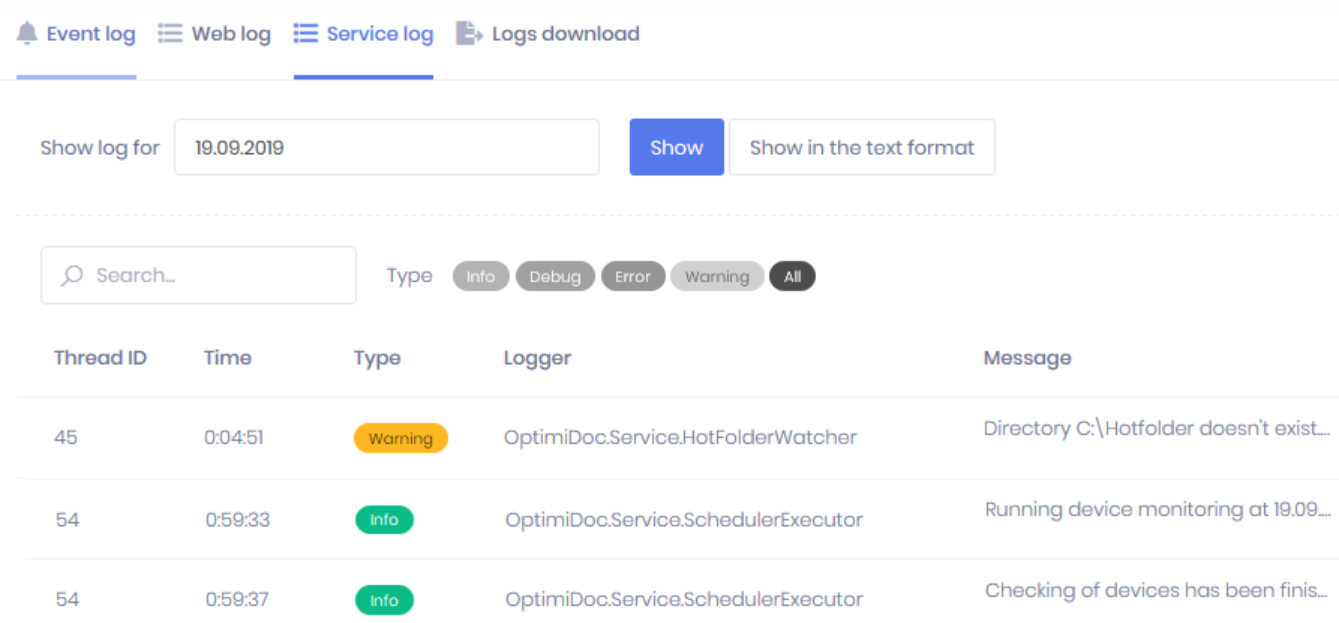
5.9.2.3 Service log

If you click on **Service log** in the Diagnostic topic, the Internet browser opens a new tab with a list of operations which OptimiDoc windows service has completed. Every step of service you can see the time the operation was done and with a description of the operation.



Screen of service steps with times and descriptions of operations:

```
8620|5|2017-07-26 11:55:26.9045|INFO||OptimiDoc.Service.OptimiDocService|Starting OptimiDoc Service v6.13 (20170411) ... connecting to: http://localhost:14265
8620|5|2017-07-26 11:55:26.9670|INFO||OptimiDoc.Service.HotFolderWatcher|Starting HotFolder service...
8620|5|2017-07-26 11:55:27.1858|INFO||OptimiDoc.Service.LpdServer|Starting LPD server...
8620|5|2017-07-26 11:55:27.2014|INFO||OptimiDoc.Service.LpdServer|Started...
8620|9|2017-07-26 11:55:27.2169|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|Started.
8620|10|2017-07-26 11:55:27.2325|INFO||OptimiDoc.Lpd.Lpd|Lpd Server started on port 515.
8620|5|2017-07-26 11:55:27.3108|INFO||OptimiDoc.Service.EmailWatcher|Starting Mobile print service...
8620|5|2017-07-26 11:55:27.3888|INFO||OptimiDoc.Service.AutomaticReportExecutor|First interval 272611,1773
8620|5|2017-07-26 11:55:27.4044|INFO||OptimiDoc.Service.SchedulerExecutor|First interval 272595,5517
8620|11|2017-07-26 11:55:27.9044|WARN||OptimiDoc.Lpd.Command.CommandReceiveJob|Pro typ Int32 byla hodnota buď příliš velká, nebo příliš malá.
8620|11|2017-07-26 11:55:27.9826|INFO||OptimiDoc.Service.LpdServer|Queue: Optmidoc, id: 0, name: Microsoft Word - Nov? Dokument Microsoft Wordu, owner: Denis
8620|11|2017-07-26 11:55:27.9826|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 0 was added to queue Optmidoc
8620|9|2017-07-26 11:55:27.9982|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|About to processing print job: OptimiDoc.Lpd.Queue.QueuedPrintJob
8620|5|2017-07-26 11:55:28.0138|INFO||OptimiDoc.Service.OptimiDocService|Certificate path: C:\OptimiDoc\Services\optimidoc.p12
8620|10|2017-07-26 11:55:28.0138|INFO||WebDAVSharp.Server.WebDavServer|WebDAVServer background thread has started
8620|5|2017-07-26 11:55:28.2169|INFO||OptimiDoc.KonicaMinolta.PrintService|Starting Print service...
8620|9|2017-07-26 11:55:29.3794|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|Finished processing print job: 0
8620|9|2017-07-26 11:55:29.3951|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 0 was removed from the queue default
8620|13|2017-07-26 11:55:30.0367|WARN||OptimiDoc.Lpd.Command.CommandReceiveJob|Pro typ Int32 byla hodnota buď příliš velká, nebo příliš malá.
8620|13|2017-07-26 11:55:30.0367|INFO||OptimiDoc.Service.LpdServer|Queue: Optmidoc, id: 1, name: Zku?ebn? str?nka, owner: Denis
8620|13|2017-07-26 11:55:30.0367|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 1 was added to queue Optmidoc
8620|9|2017-07-26 11:55:30.0467|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|About to processing print job: OptimiDoc.Lpd.Queue.QueuedPrintJob
8620|12|2017-07-26 11:55:30.0638|WARN||OptimiDoc.Lpd.Command.CommandReceiveJob|Pro typ Int32 byla hodnota buď příliš velká, nebo příliš malá.
8620|12|2017-07-26 11:55:30.0638|INFO||OptimiDoc.Service.LpdServer|Queue: Optmidoc, id: 2, name: Microsoft Word - Nov? Dokument Microsoft Wordu, owner: Denis
8620|12|2017-07-26 11:55:30.0638|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 2 was added to queue Optmidoc
8620|9|2017-07-26 11:55:31.1043|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|Finished processing print job: 1
8620|9|2017-07-26 11:55:31.1043|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 1 was removed from the queue default
8620|9|2017-07-26 11:55:31.1043|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|About to processing print job: OptimiDoc.Lpd.Queue.QueuedPrintJob
8620|9|2017-07-26 11:55:32.1729|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|Finished processing print job: 2
8620|9|2017-07-26 11:55:32.1729|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 2 was removed from the queue default
8620|5|2017-07-26 11:55:34.1772|INFO||OptimiDoc.KonicaMinolta.ScanService|Starting Scan service...
8620|14|2017-07-26 11:57:01.7138|WARN||OptimiDoc.Lpd.Command.CommandReceiveJob|Pro typ Int32 byla hodnota buď příliš velká, nebo příliš malá.
8620|14|2017-07-26 11:57:01.7294|INFO||OptimiDoc.Service.LpdServer|Queue: Optimidoc, id: 3, name: Microsoft Word - Test, owner: Denis
8620|14|2017-07-26 11:57:01.7294|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 3 was added to queue Optimidoc
8620|9|2017-07-26 11:57:01.7294|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|About to processing print job: OptimiDoc.Lpd.Queue.QueuedPrintJob
8620|9|2017-07-26 11:57:02.8413|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|Finished processing print job: 3
8620|9|2017-07-26 11:57:02.8413|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 3 was removed from the queue default
8620|27|2017-07-26 12:00:00.0191|INFO||OptimiDoc.Service.AutomaticReportExecutor|Running automatic reports at 26.07.2017 12:00:00
8620|26|2017-07-26 12:00:00.0361|INFO||OptimiDoc.Service.SchedulerExecutor|Running device monitoring at 26.07.2017 12:00:00
8620|27|2017-07-26 12:00:00.1947|INFO||OptimiDoc.Service.AutomaticReportExecutor|Generating of automatic reports has been finished at 26.07.2017 12:00:00
8620|26|2017-07-26 12:00:07.1433|INFO||OptimiDoc.Service.SchedulerExecutor|Checking of devices has been finished at 26.07.2017 12:00:07
8620|15|2017-07-26 12:04:29.8726|WARN||OptimiDoc.Lpd.Command.CommandReceiveJob|Pro typ Int32 byla hodnota buď příliš velká, nebo příliš malá.
8620|15|2017-07-26 12:04:29.8726|INFO||OptimiDoc.Service.LpdServer|Queue: Optimidoc, id: 4, name: Microsoft Word - Test, owner: Denis
8620|15|2017-07-26 12:04:29.8726|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 4 was added to queue Optimidoc
8620|9|2017-07-26 12:04:29.8882|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|About to processing print job: OptimiDoc.Lpd.Queue.QueuedPrintJob
8620|9|2017-07-26 12:04:31.0136|INFO||OptimiDoc.Lpd.Queue.QueueMonitor|Finished processing print job: 4
8620|9|2017-07-26 12:04:31.0136|INFO||OptimiDoc.Lpd.Queue.Queues|PrintJob 4 was removed from the queue default
8620|16|2017-07-26 12:06:40.1349|WARN||OptimiDoc.Lpd.Command.CommandReceiveJob|Pro typ Int32 byla hodnota buď příliš velká, nebo příliš malá.
```

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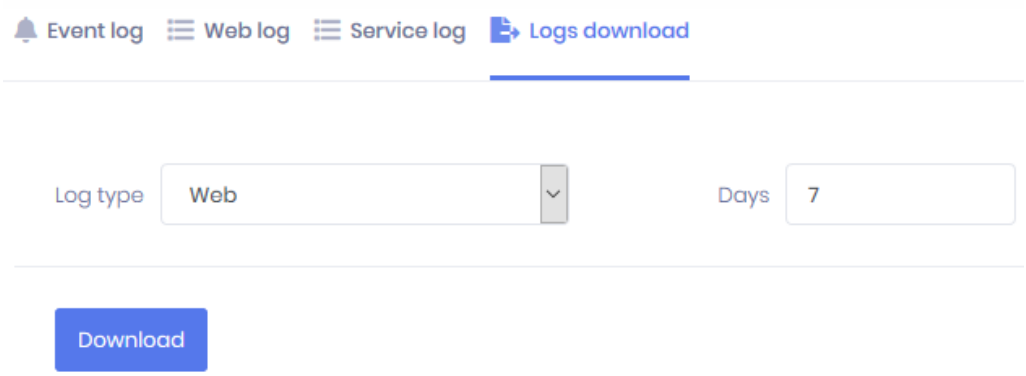
5.9.2.4 Logs download

Via the download logs page you can download logs for web site or service directly from the web interface.

To download logs please select:

- Log type - Web/Service
- Days - how long logs shall be kept in the download file



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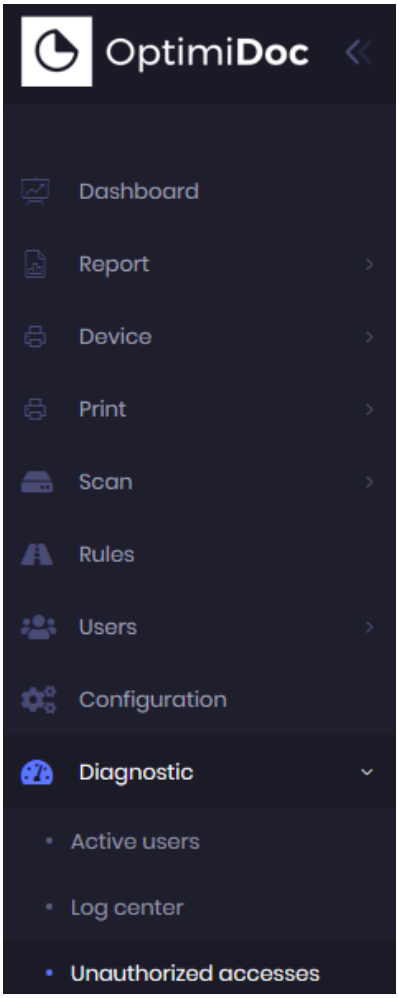
5.9.3 Unauthorized accesses

Unauthorized access list provides a basic overview of unaccepted print jobs due to unrecognized user or accesses to a device with an unrecognized card. The administrator can add unrecognized prints or card to selected user or create a new one.



The Unauthorized access list contains date, used device, card or user value, source and option items.

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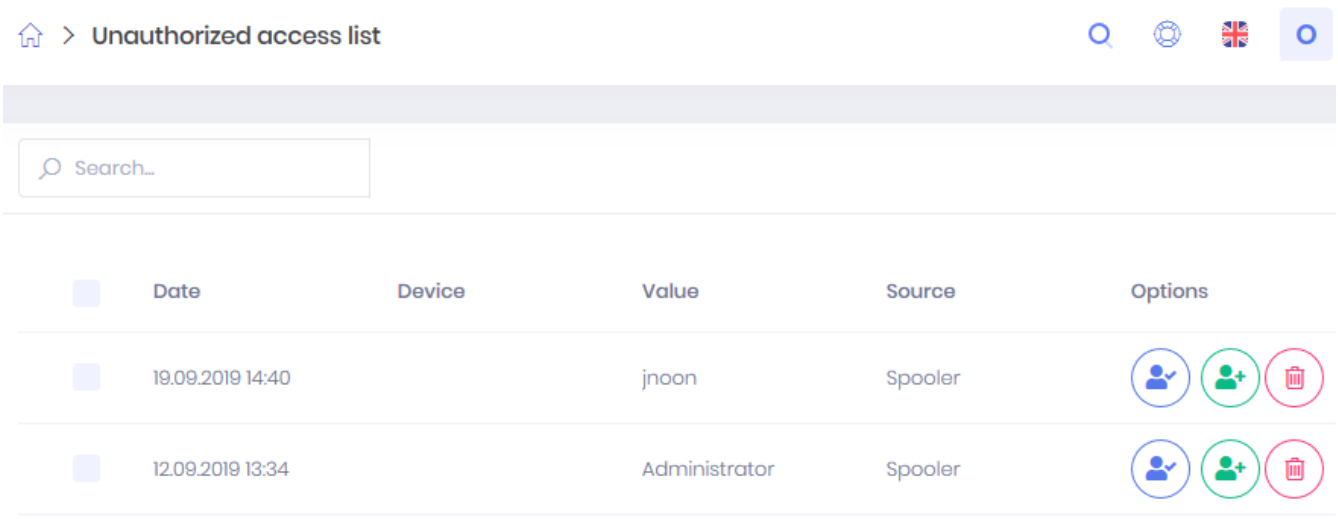
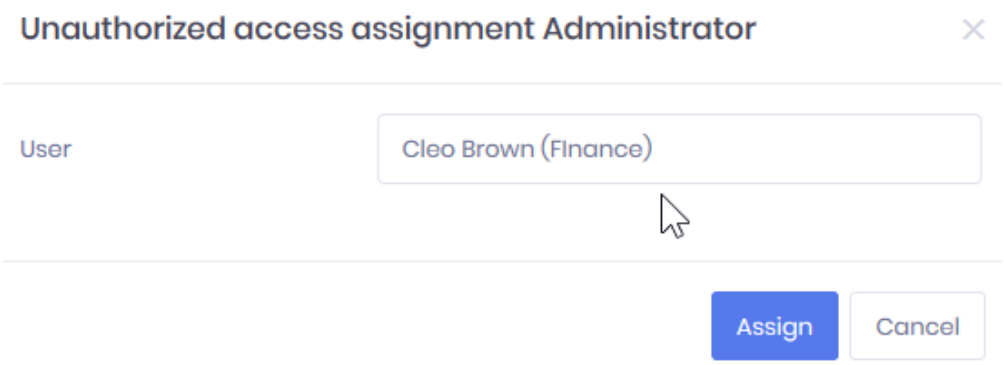


New user creation

To assign a job to a new user, click on the button and enter the user data.

Assign job to an existing user

To **assign the job** to a card or to an existing user, click on the button, enter the user name and click on the Assign button.



Delete an unauthorized access job

To **delete the job,** click on the button.

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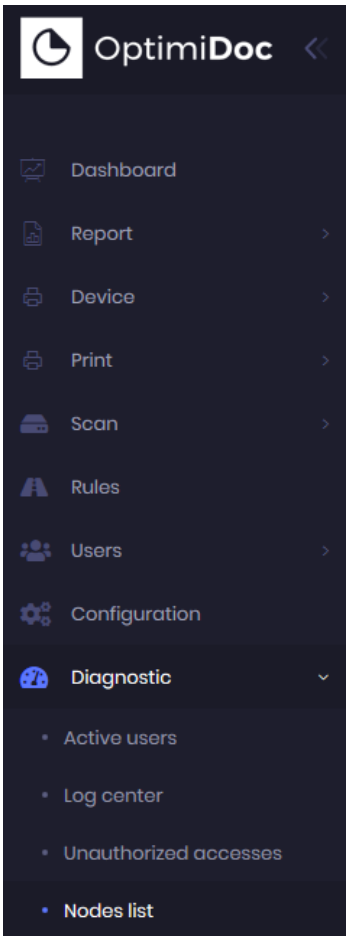
5.9.4 Nodes list

Nodes list contains all connected OptimiDoc Servers and Print Nodes.



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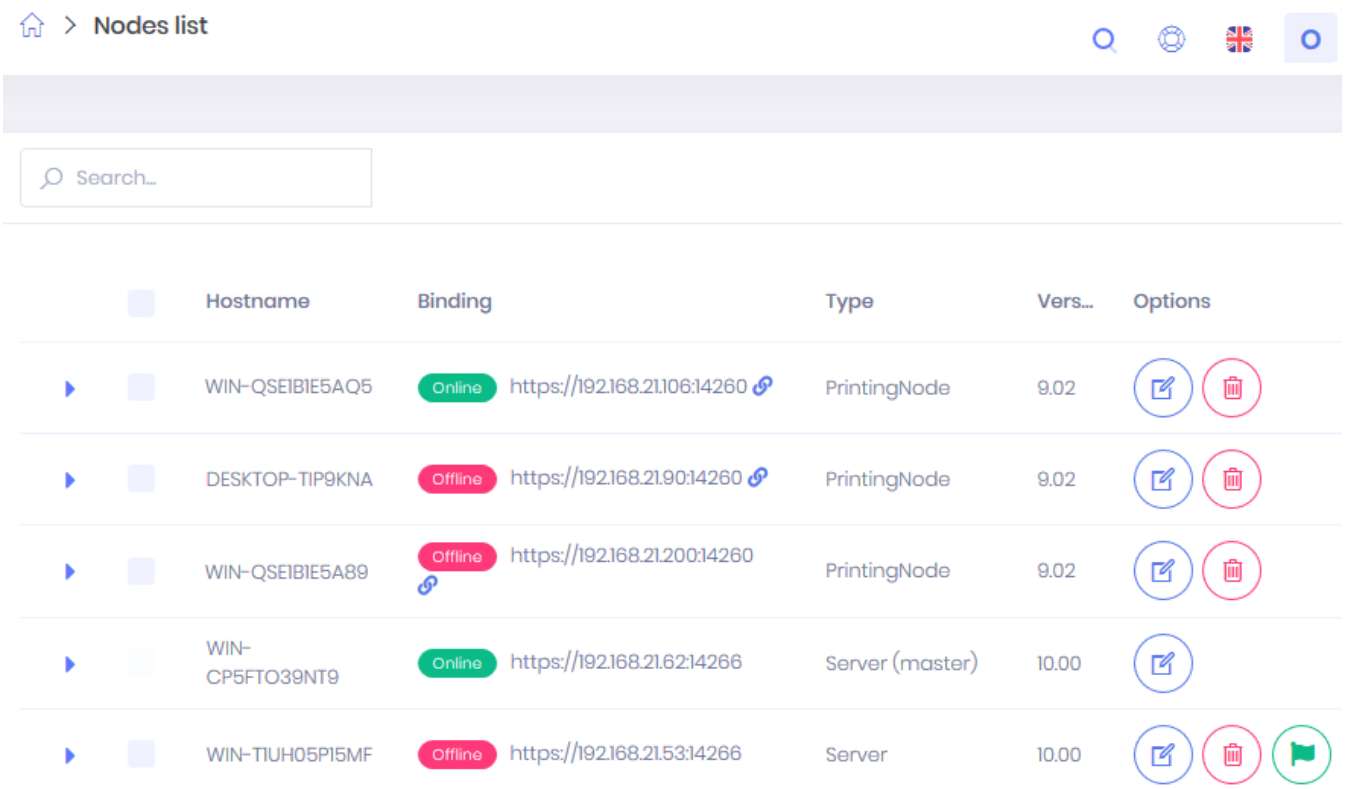
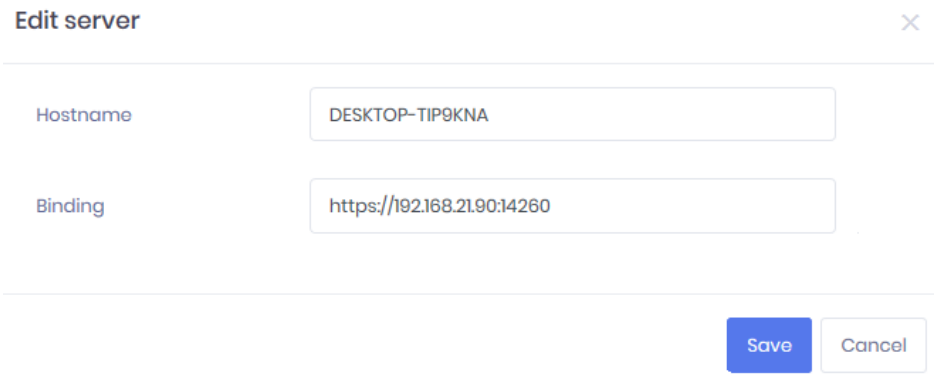


OptimiDoc Server - Switch to Master

One OptimiDoc Server in cluster needs to be a Master server. The Master server processes the automatic reports generation and processes the Mailbox print connectors. Click on the button to switch the server to master.

OptimiDoc Server/Print Node - Edit

Edit can be used for changing the name of Server/Node in case of a change in operating system or in case of not automatic update of binding. Click on the button to edit the Server/Node.



OptimiDoc Server/Print Node - Remove

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To remove a server or a node from the list, click on the button. During the removal process all print jobs are marked as deleted.

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6 OptimiDoc Mobile

This section describes the user interface of the OptimiDoc **mobile application** for **Android** and **iOS**.

The application lets you view and delete print jobs from OptimiDoc and also print them on any printer installed on the OptimiDoc server. You can also use your device's camera to take a photo of a document and send it to OptimiDoc using the scan workflows. If you have any Xerox multifunction printers, you can easily login on them from your smartphone with one tap of a button.

In the Android application you can add a widget to your home screen to quickly print all unprinted jobs on a certain printer or login on a Xerox device. Also exclusively on Android, OptimiDoc administrators can put the application into a "terminal mode." In this mode, the application supports authentication using a PIN in addition to the default username and password. You can even connect a card reader and authenticate users with a card number.

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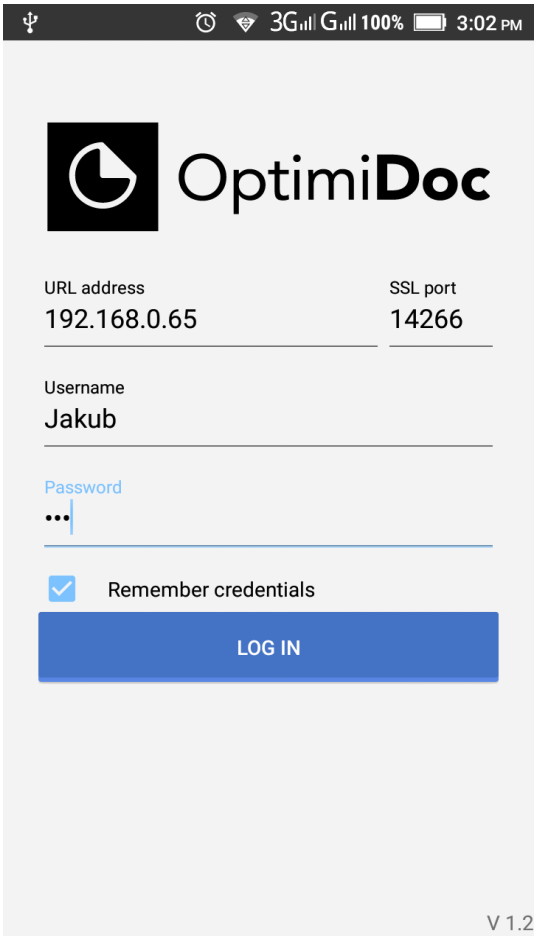
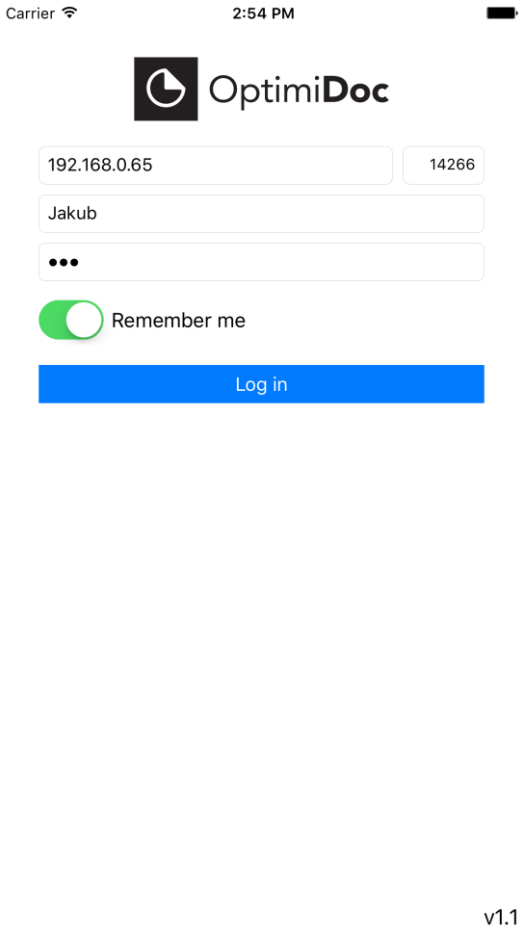
6.1 Login

- **URL address** - address of the optimidoc server you want to login on
- **SSL port** - the https port assigned to the OptimiDoc server in IIS
- **Username** - your username in OptimiDoc
- **Password** - your password in OptimiDoc
- **Remember credentials** - if the checkbox is selected, the application will remember your login information and log you in without asking for them





Important There is a possibility to use only secure port of the server and server must have a trusted certificate isuued.

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6.1.1 Terminal mode login

This section applies only to the Android application's Terminal mode. To turn this mode on, you will need administrator privileges in OptimiDoc. For Terminal mode settings refer to the Settings section.

Note: the login screen in the Terminal mode may vary from the screenshot below depending on the chosen authentication method. The following is a screenshot of the "card and PIN" authentication method. Possible authentication methods are:

- PIN
- Username & password
- Card
- Card or PIN
- Card and PIN
- Card or username & password
- Card and username & password

- - this icon means that you can use a card to log in.
- This authentication method requires a card reader to be connected to the Android device's USB port

- If you can't connect to the server using the chosen authentication method (e.g. you don't have a PIN assigned) or if the server address or port changes, an OptimiDoc administrator can still log in normally using the Administrator login dialog. To open this popup, tap the three dots in the top right and then tap "Administrator login"

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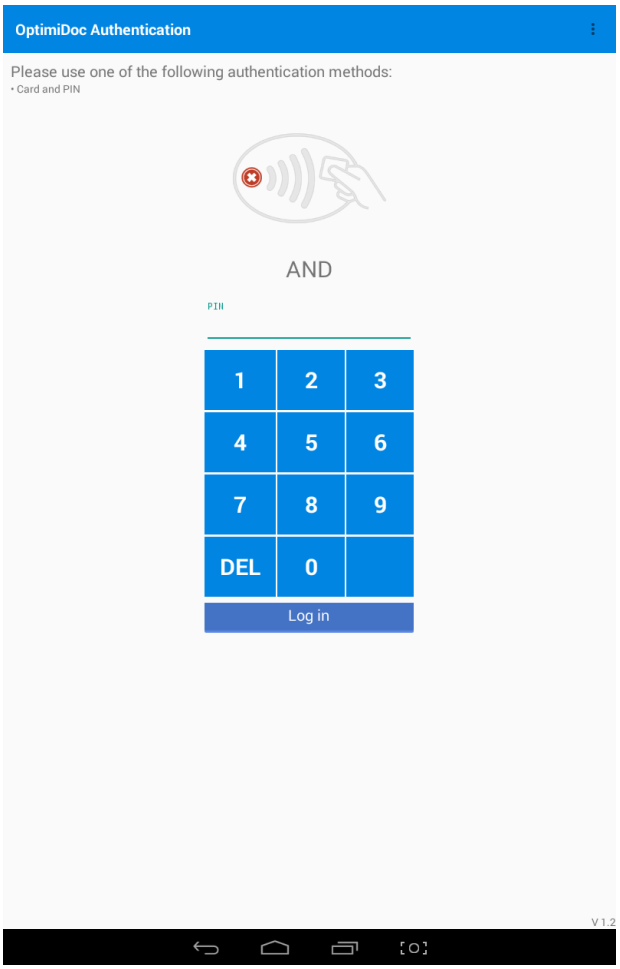

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6.2 Print jobs

This section is about unprinted and printed jobs of a certain user. For print connectors, including shared queues, see the Connectors section.

- To open the navigation menu, tap the icon in the top left corner
- On Android, you can also swipe right to open the drawer
- Tap the "Waiting" and "Printed" tabs on the top to switch between unprinted and printed jobs
- Tap the individual print jobs to select them
- On iOS devices, you can swipe a job to the left to delete it
- Tap to display detailed information about a print job (more info in the Job details)
- Buttons in the button bar at the bottom:
    - 1st button deletes selected jobs
    - 2nd button changes the color print option
        - Full color - documents will be printed in color
        - Monochrome - documents will be printed in black and white
    - 3rd button changes the plex print option
        - Not selected - the default settings will be used
        - simplex - one-sided print
        - Vertical duplex - two-sided print along the short edge of the paper
        - Horizontal duplex - two-sided print along the long edge of the paper
    - 4th button prints selected print jobs
    - 5th button prints all the print jobs in the current tab
- The 4th and 5th buttons redirect to the Printer selection

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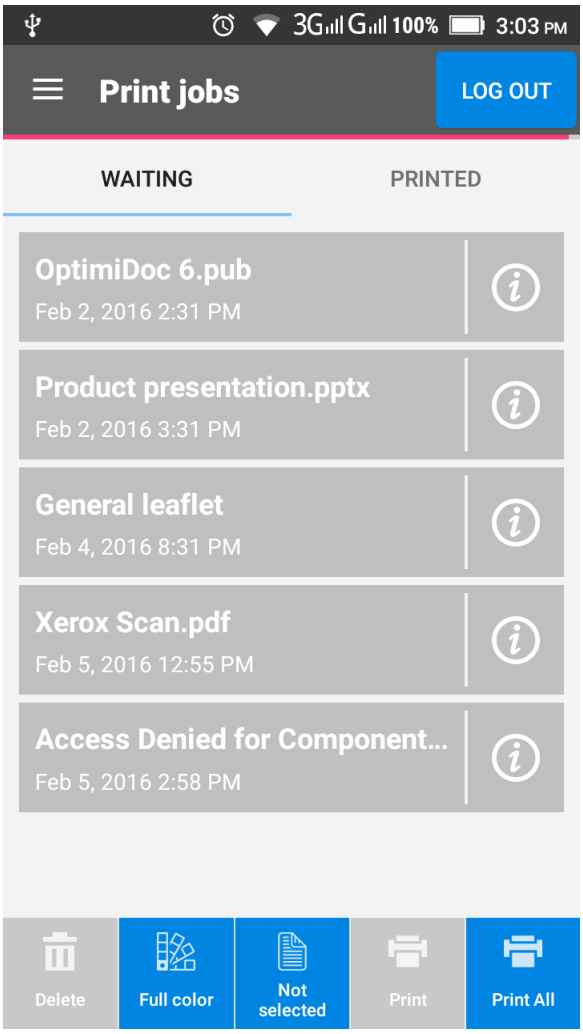

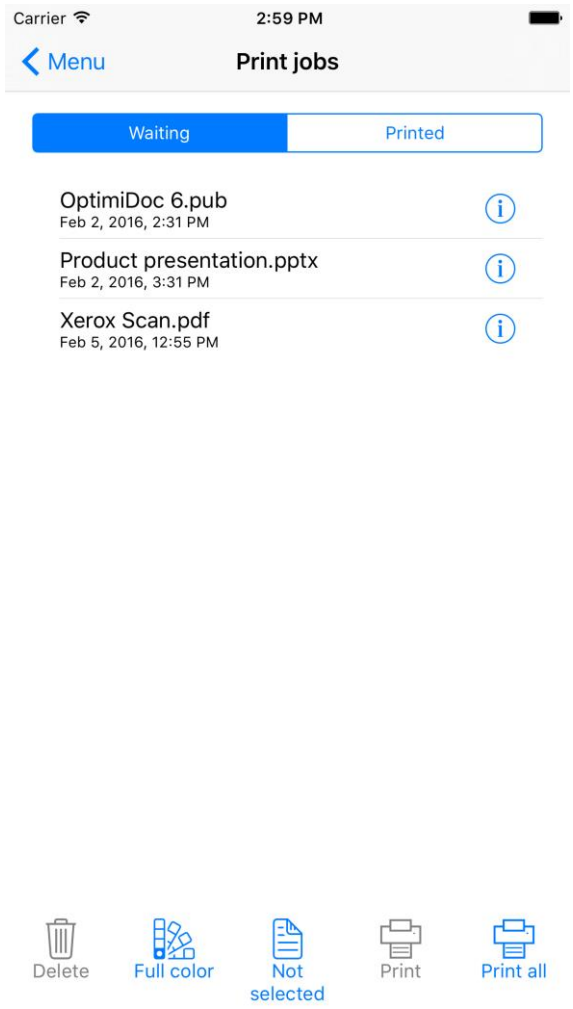

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6.3 Connectors

- To open the navigation menu, tap the icon in the top left corner
- On Android, you can also swipe right to open the drawer
- Tap the tabs at the top to switch between the print connectors from OptimiDoc.
- Note that there might not be any tabs if there are no print connectors added to the OptimiDoc server.
- Print connectors containing no print jobs are not displayed
- Tap the individual print jobs to select them.
- On iOS devices, you can swipe a job to the left to delete it
- Tap to display detailed information about a print job
- Buttons in the button bar at the bottom:
    - 1st button deletes selected jobs
    - 2nd button changes the color print option
        - Full color - documents will be printed in color
        - Monochrome - documents will be printed in black and white
    - 3rd button changes the plex print option
        - Not selected - the default settings will be used
        - simplex - one-sided print
        - Vertical duplex - two-sided print along the short edge of the paper
        - Horizontal duplex - two-sided print along the long edge of the paper
    - 4th button prints selected print jobs
    - 5th button prints all the print jobs in the current tab
- The 4th and 5th buttons redirect to the Printer selection

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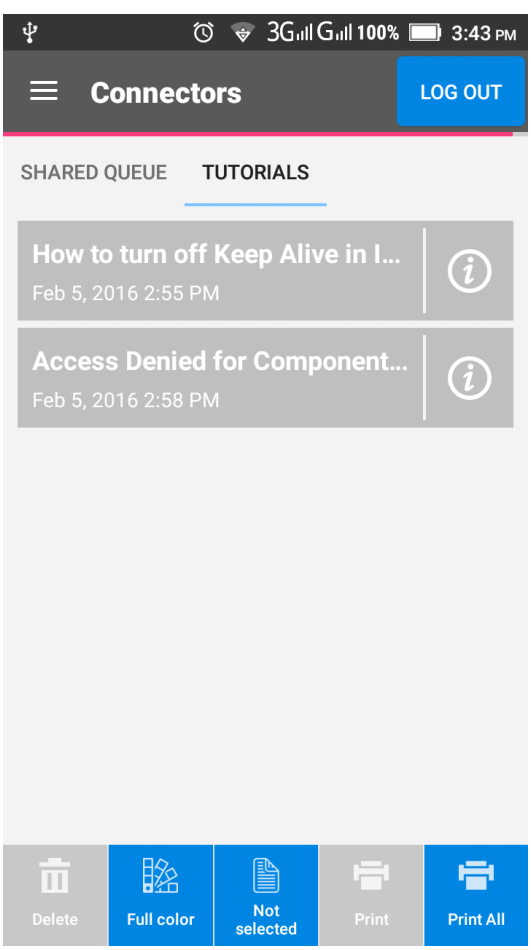

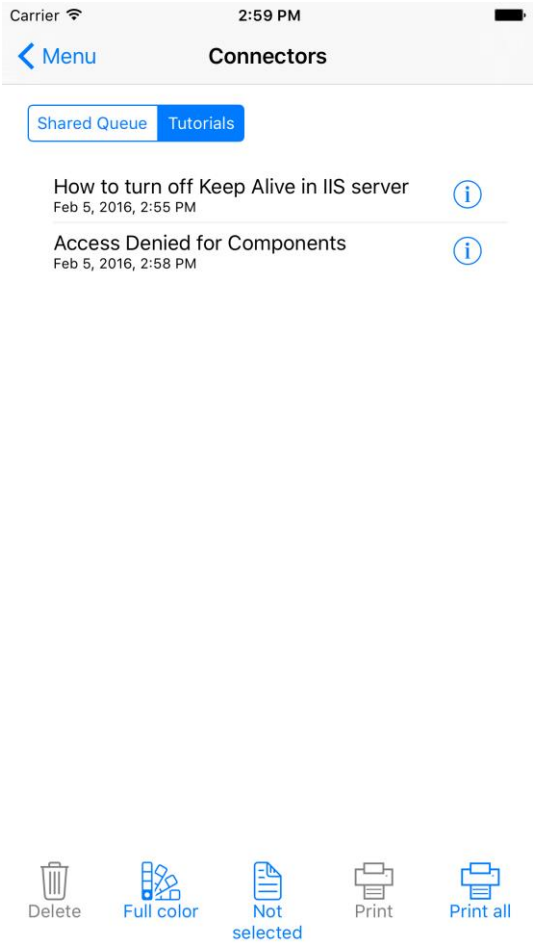

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6.4 Job details

- To close the job details, tap the icon in the top left corner
- The first line of text is the name of the job
- **Received** - date and time on which the print job was received on the OptimiDoc server
- **Project** - the project this print job belongs to. For more information about projects, see Projects
- The image at the bottom is the preview of the print job
- Tap or to switch pages
- You can also swipe the image to the left or right to switch pages
- The current page and the total amount of pages are displayed at the bottom of the preview
- Buttons in the button bar at the bottom:
    - 1st button deletes selected jobs
    - 2nd button changes the color print option
        - Full color - documents will be printed in color
        - Monochrome - documents will be printed in black and white
    - 3rd button changes the plex print option
        - Not selected - the default settings will be used
        - simplex - one-sided print
        - Vertical duplex - two-sided print along the short edge of the paper
        - Horizontal duplex - two-sided print along the long edge of the paper
    - 4th button changes the amount of copies that will be printed
    - 5th button sends the print job to a printer
        - see also: Printer selection

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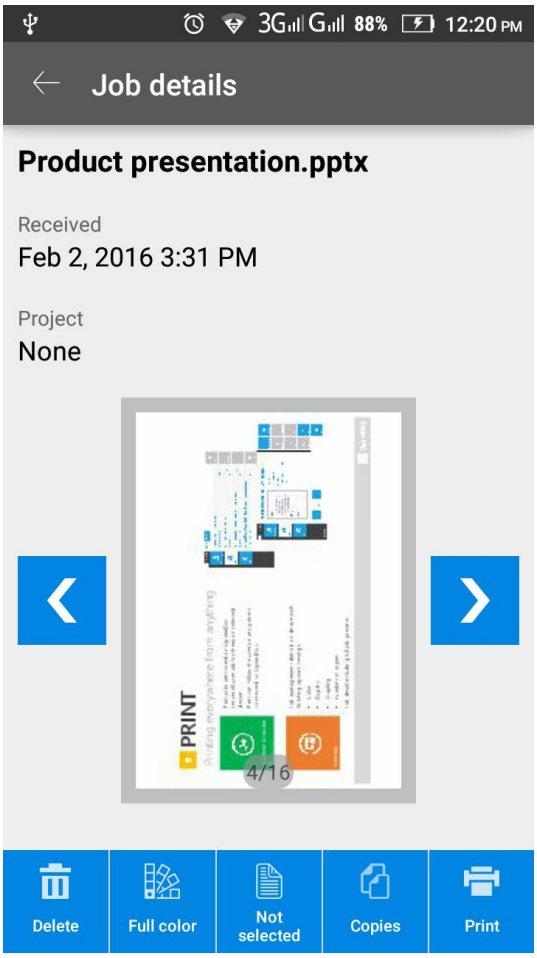

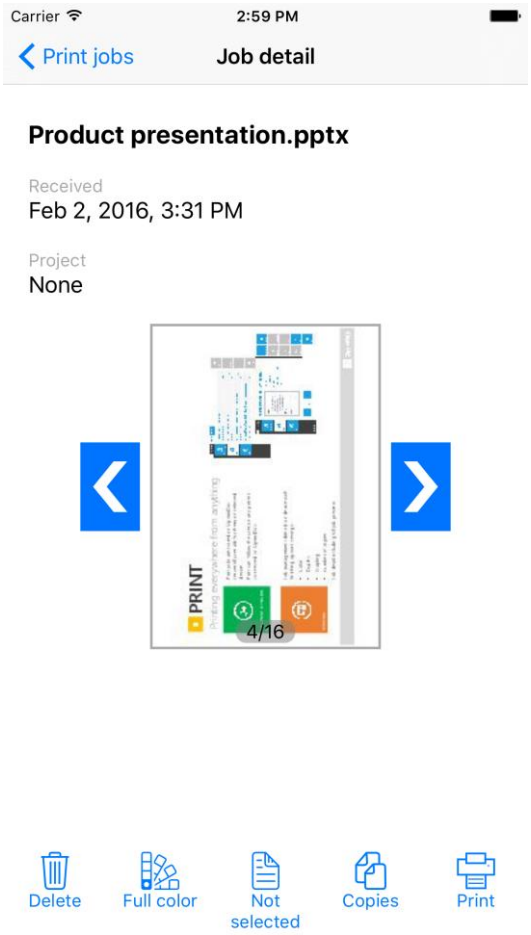

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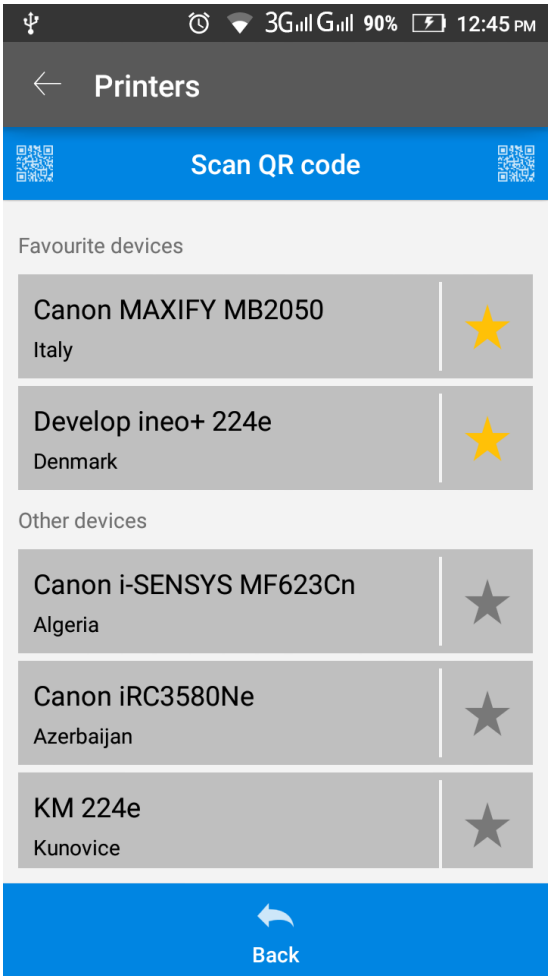
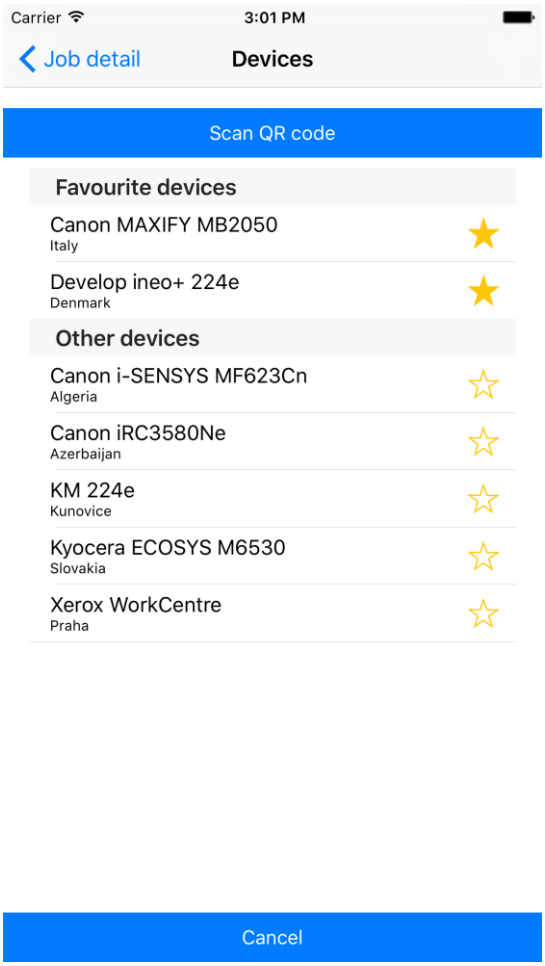
6.5 Printer selection

This section depicts the screen that is displayed when the user clicks a Print button. For the menu item "Devices" see Devices.

- To close the printer selection and cancel the print operation, tap the icon in the top left corner
- To select a printer using a QR code, tap the "Scan QR code" button
- The QR code can be generated by OptimiDoc in the web interface, for more information see Device list
- Note: if you create your own QR code, it should contain only the IP address of the printer
- For better visibility, you can add a printer to favourites
- To add or remove a printer from favourites, click the star icon next to it
- To send the selected jobs to a printer and initiate print, choose a printer from the list and tap it.





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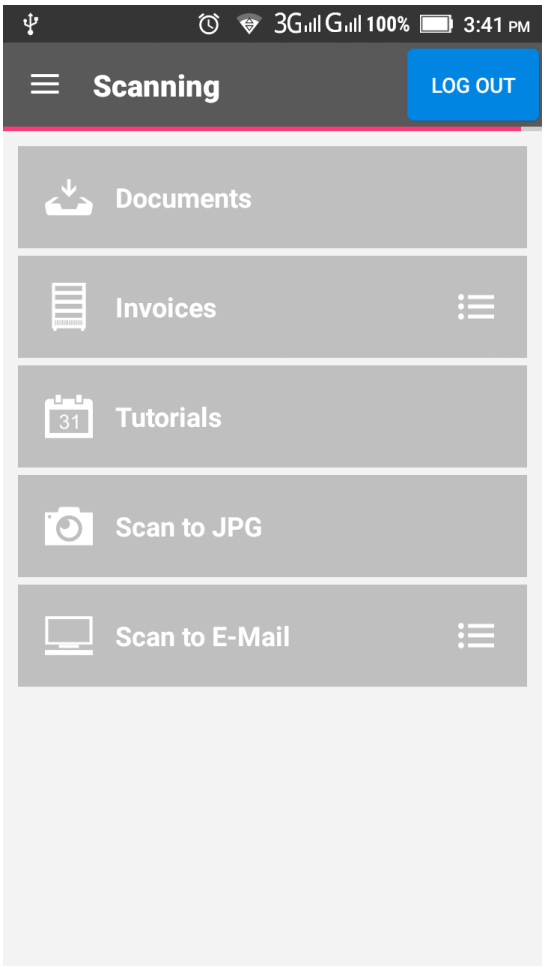
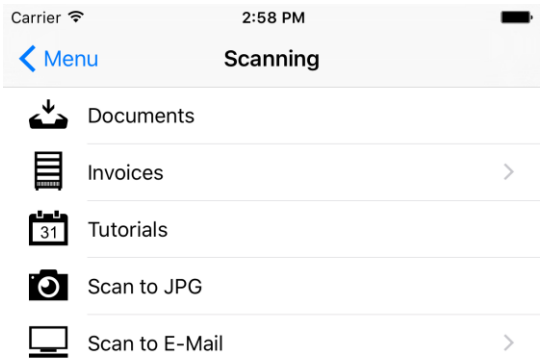
6.6 Scanning

This article is about the scanning functionality of the OptimiDoc mobile application. For information about Scan workflows in OptimiDoc, see Scan workflows.

- To open the navigation menu, tap the icon in the top left corner
- On Android, you can also swipe right to open the drawer
- The scanning workflows setup on the OptimiDoc server are listed here
- Workflows which have the (on iOS) icon next to them have some parameters defined in OptimiDoc. More information about scan parameters can be found in the Workflow list section
- If you tap a workflow without parameters, the application will let you take a photo
- If you tap a workflow with parameters, you will be redirected to the Scan parameters screen





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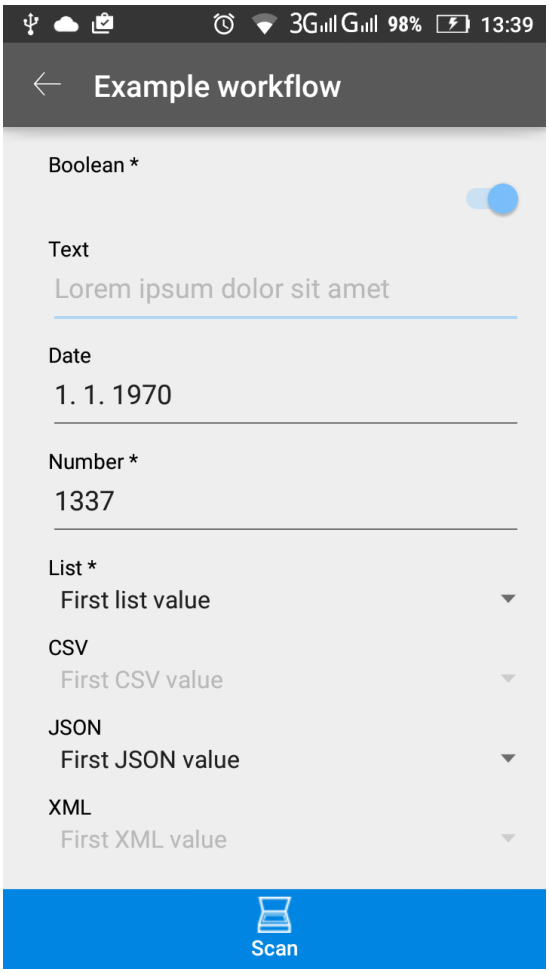
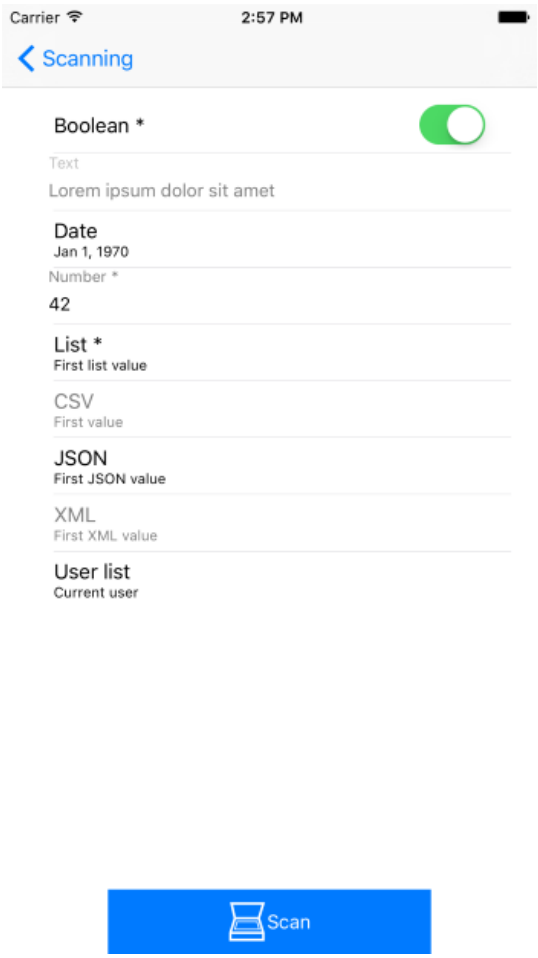
6.6.1 Scan parameters

This section is about editing scan parameters in the mobile app. For more information about these parameters see Scan parameters.

- To close the scan parameters, tap the icon in the top left corner
- This screen lists all the scan parameters added to the scan workflow
- The grayed-out parameters are not editable
- Parameters marked with an asterisk (*) are required and their value mumst be specified
- Editing the values:
  - Boolean scan parameters have a switch on the right
  - Text and number parameters are text fields
  - Date parameters open a dialog with a date picker
  - list parameters (e.g. CSV or JSON) open a dialog which displays possible values
- To take a photo and then send the scan job, tap the "Scan" button





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6.7 Settings

This section applies only to Android. Note that most of these settings are only visible to OptimiDoc administrators.

- To close the settings, tap the icon in the top left corner
- **About** - general information about the app
- **Terminal mode** - turns the Terminal mode[1] on or off
- **Default printer** - the printer to which print jobs will be sent in Terminal mode (the user cannot select a printer while the app is in the Terminal mode)
- **Default OptimiDoc URL** - the address of the OptimiDoc server you want the application to connect to while in Terminal mode
- **Default port** - the https port assigned to the OptimiDoc server in IIS
- **Authentication method** - the method used to authenticate users
- Authentication methods:
    - PIN
    - Username & password
    - Card
    - Card or PIN
    - Card and PIN
    - Card or username & password
    - Card and username & password

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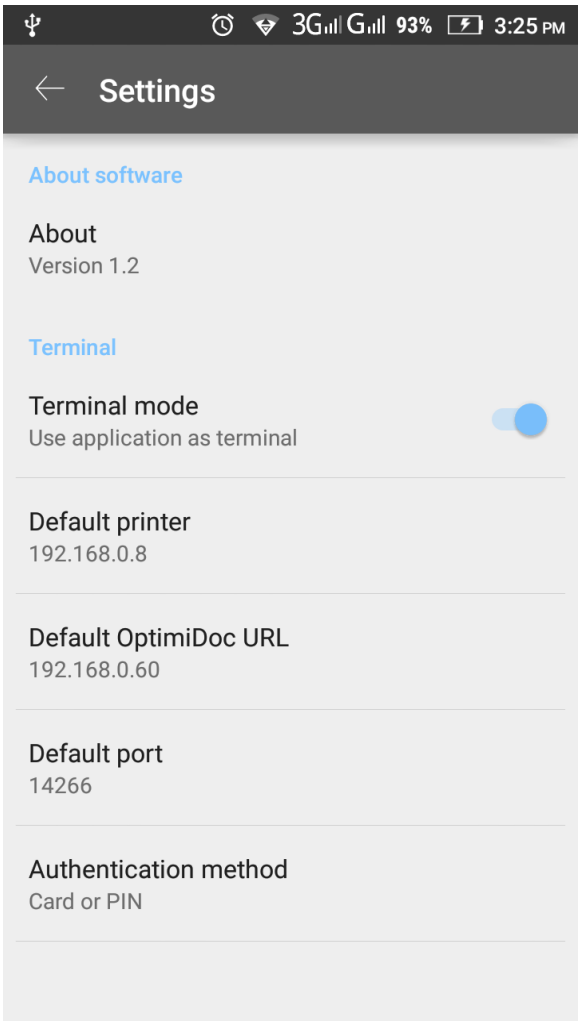

Note When users want to log in with Terminal mode on, they cannot change the OptimiDoc server address or port. For this reason, an OptimiDoc administrator can still specify these values using the "Administrator login" dialog on the login screen. For more information see Terminal mode login.

[1] Terminal mode - an Android-only mode of the mobile application. In this mode, users can't select the server they want to connect to and is instead restricted to connecting to a predefined server (configured in the settings). In addition to the usual login and password authentication, the application can be configured to require a PIN and/or card number. When printing, the user won't be able to select a printer to send the jobs to, the application will use the printer defined in the settings instead.

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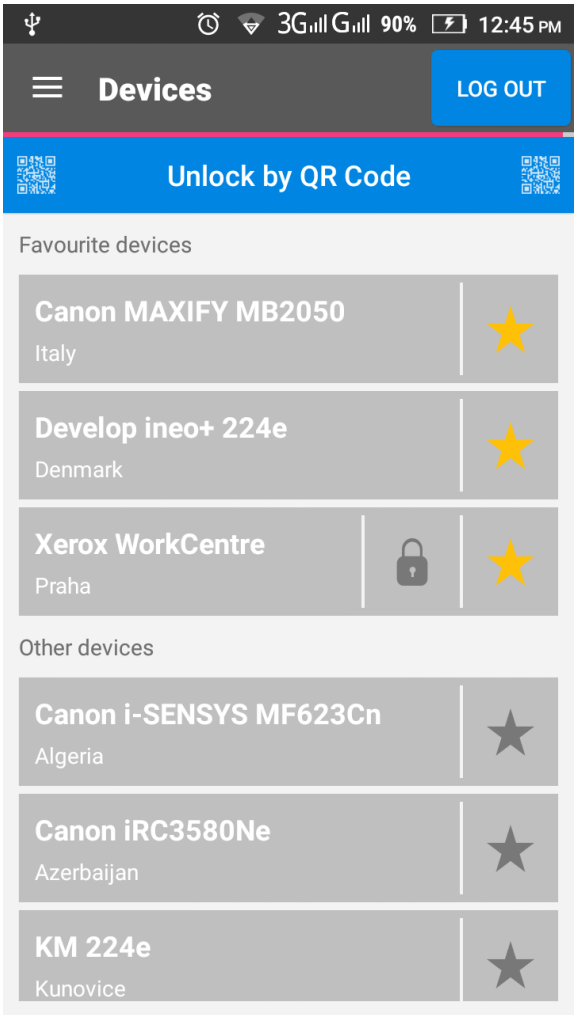
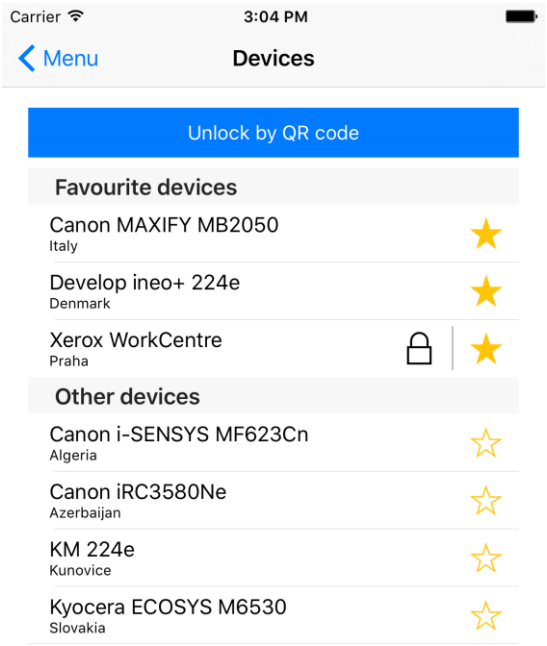
6.8 Devices

This section is about the menu item "Devices". For the screen displayed when you tap a Print button see Printer selection.

- To open the navigation menu, tap the icon in the top left corner
- On Android, you can also swipe right to open the drawer
- You can log in on a Xerox printer using your smartphone. To do so, tap (on iOS)
- Note: this button is hidden for devices from manufacturers other than Xerox
- To log in on a Xerox printer using a QR code, tap the "Unlock by QR code" button
- The QR code can be generated by OptimiDoc in the web interface, for more information see Device list
- Note that if you create your own QR code, it should contain only the IP address of the printer.
- For better visibility, you can add a printer to favourites
- To add or remove a printer from favourites, click the star icon next to it





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6.9 Android widget

The home screen widget is used for quick access to a printer. You can tap a button on the widget to print all unprinted print jobs from OptimiDoc. If you add a widget for a Xerox printer, you can tap a button on your smartphone and the application will log you in on the device.

- The first line of text is the printer's name
- The second line is the printer's location
- To print all unprinted print jobs, tap
- To log in on a Xerox device, tap
- Note: this button is hidden for devices from other manufacturers

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7 OLAP Cube Reporting

To **install** the **OptimiDoc** data cube, perform the following steps:

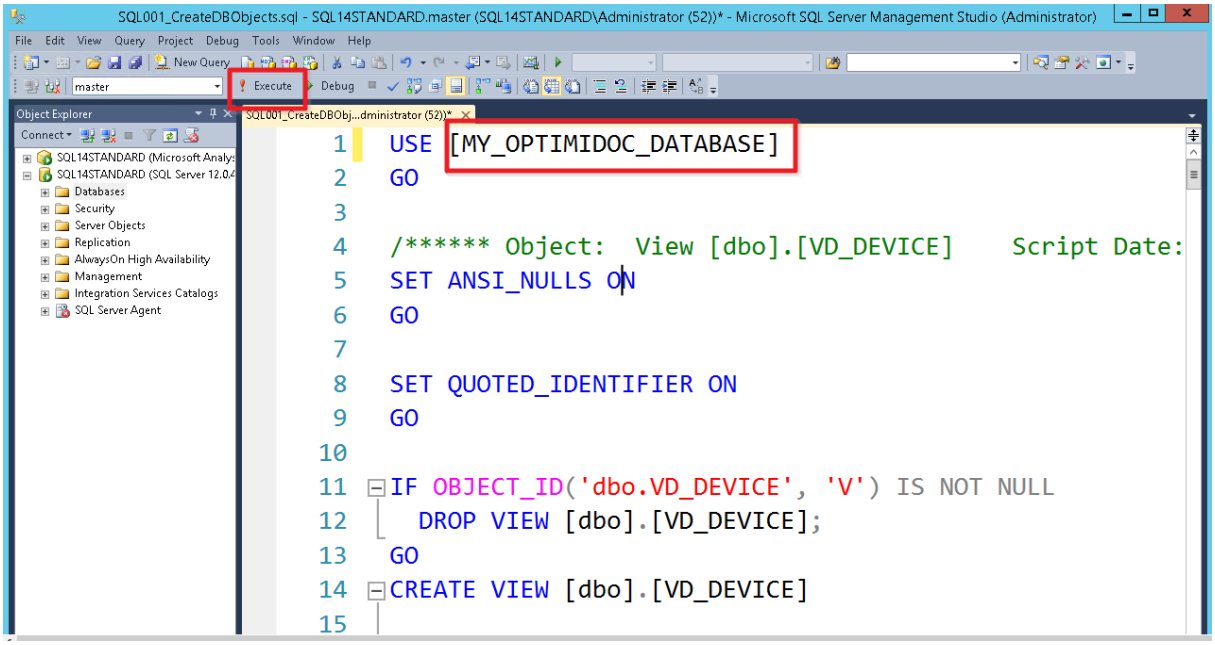
1. Open the **SQL Server Management Studio** (SSMS) to connect to the database server on which the OptimiDoc database is located.

All SQL scripts are stored to OptimiDoc\Support\OLAP.

2. Open **SQL001_CreateDBObjects.sql**

2.1. On the first line, replace **[OPTIMIDOC]** with the name of your OptimiDoc database instance.

2.2. Execute the script.



3.Open **SQL002_GenerateDates.sql**

3.1. On the first line, replace **[OPTIMIDOC]** with the name of your database instance

3.2. If necessary, change the values in the **@DateFrom** and **@DateTo** variables to the desired period. Note: Data outside this range will not be loaded into the data cube.

3.3. Execute script.

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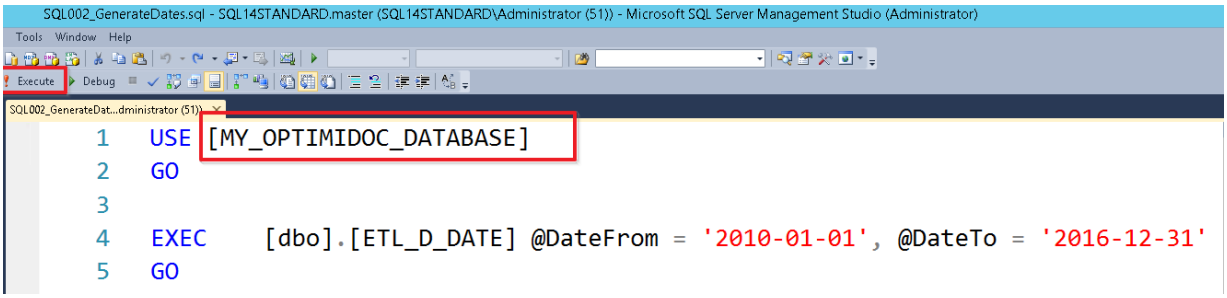
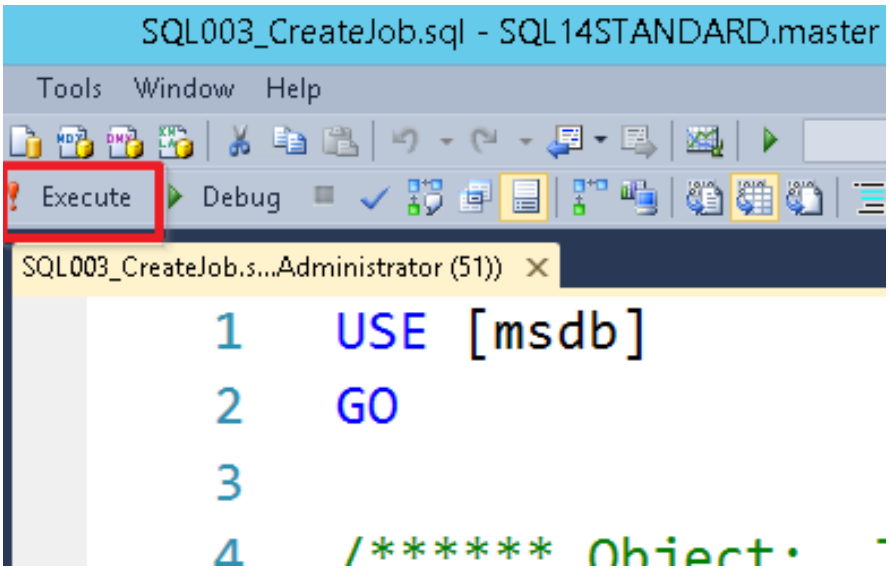
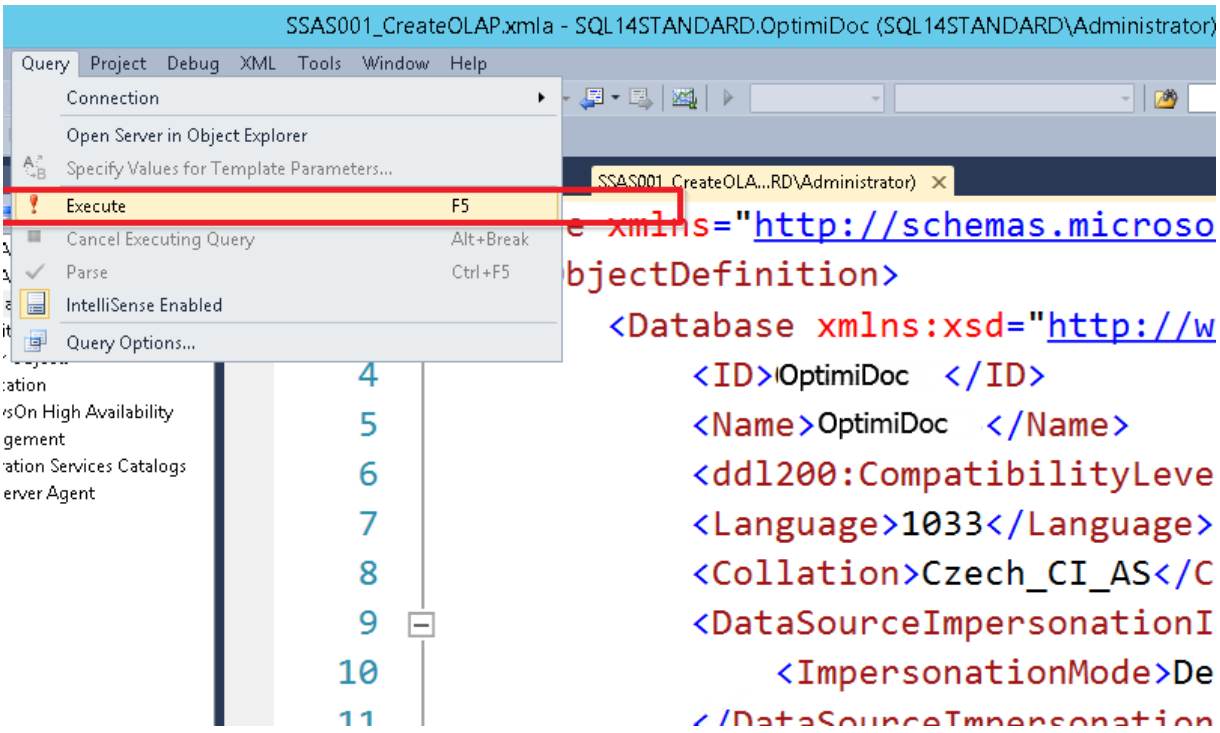


4.Open and execute **SQL003_CreateJob.sql**



5.Open **SSAS001_CreateOLAP.xmla**, connect to Analytics Server and execute the script.



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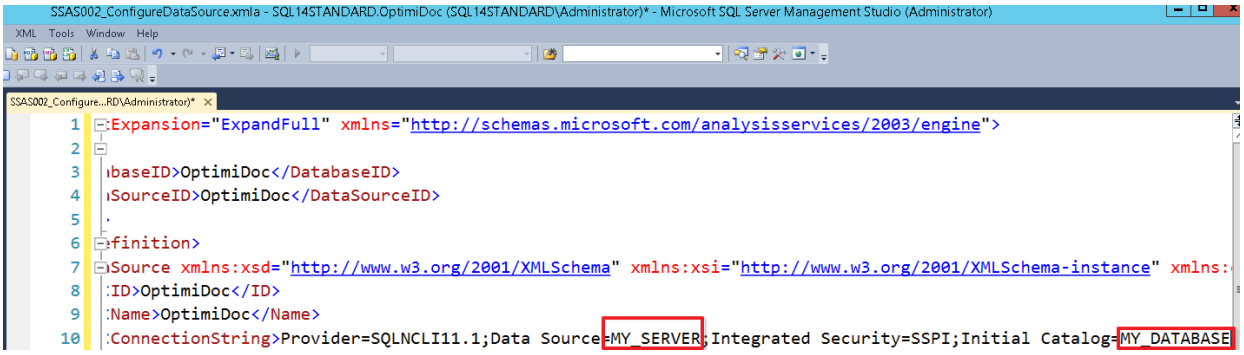
6.Open **SSAS002_ConfigureDataSource.xmla** and perform the following steps:

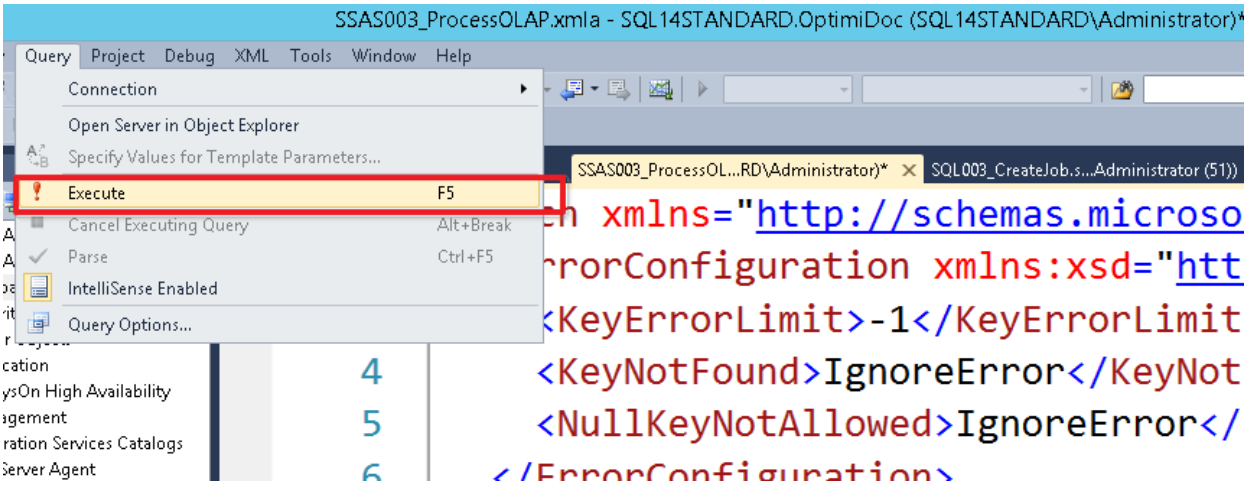
6.1. On the line **<ConnectionString>** replace **localhost** with the name of the server

6.2. On the line **<ConnectionString>** replace **OPTIMIDOC** with the name of your OptimiDoc database.

6.3. Execute script



7.Open and execute **SSAS003_ProcessOLAP.xmla**.



Common problems

The following is a list of common problems when installing or working with the OLAP cube:

1. **Script *SSAS003_ProcessOLAP.xmla* ends with an error message saying it cannot connect to the database**
   - The user under which the Analysis Services service is running (SSAS service log on account) is used to load data into the cube. It is necessary to add access rights for this user to read data from the OptimiDoc database (the db_datareader role is sufficient)
2. **The cube doesn't display current data**
   - The reason might be that the SQL job that keeps the data up-to-date is not running.
   - It is also possible that there is no entry for the current day in the table containing

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dates. You can fix this by generating the **SQL002_GenerateDates.sql** again and entering the current date. This problem typically occurs on January 1st.

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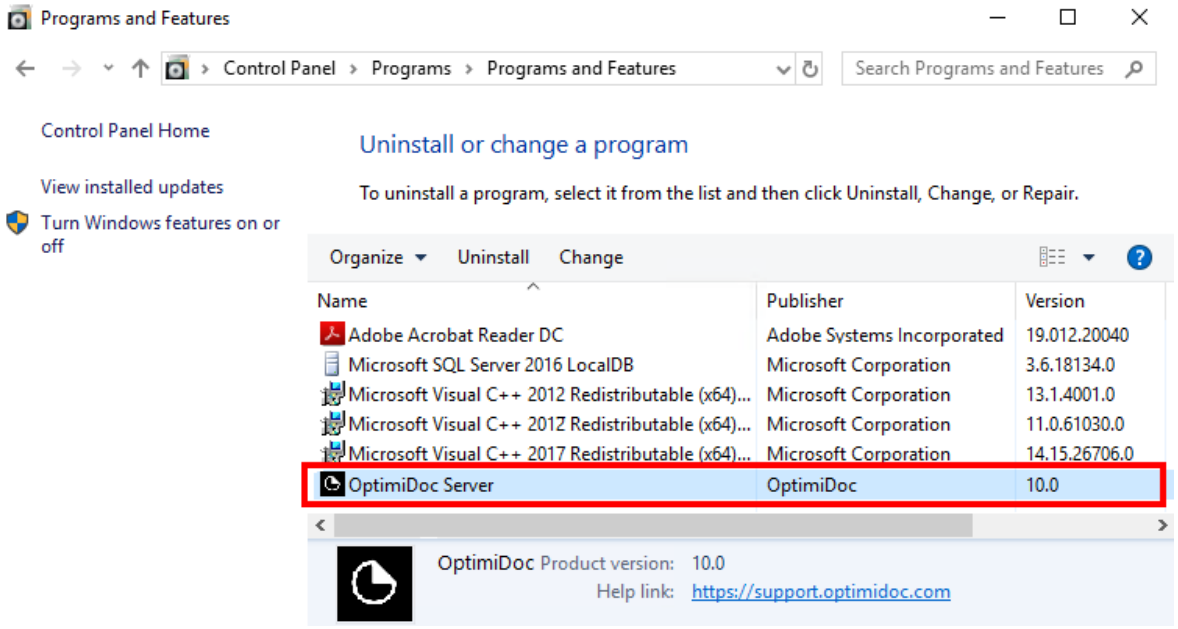
8 Uninstallation

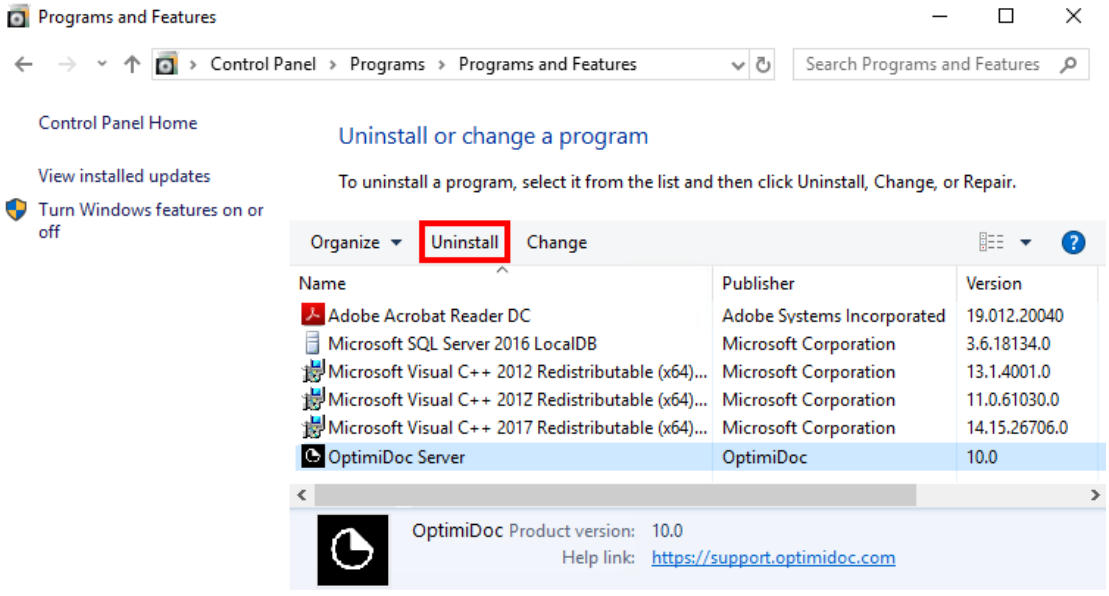
This chapter provides details about uninstalling OptimiDoc software components. Before you start the uninstallation, please deactivate OptimiDoc as described in "Old license removal".

To uninstall the OptimiDoc server follow the steps below:

1. Open Programs and Features in the Control Panel and select OptimiDoc.



2. Click on the Uninstall button.



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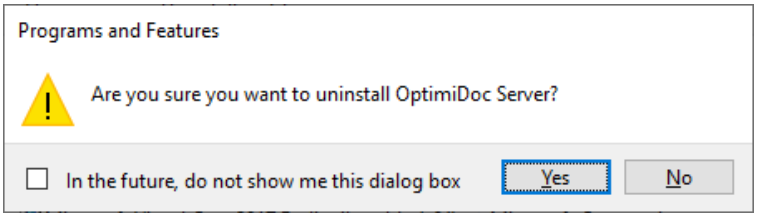
3. Confirm the uninstallation.



Important Before uninstalling, be sure to log on with Windows Administrator credentials.

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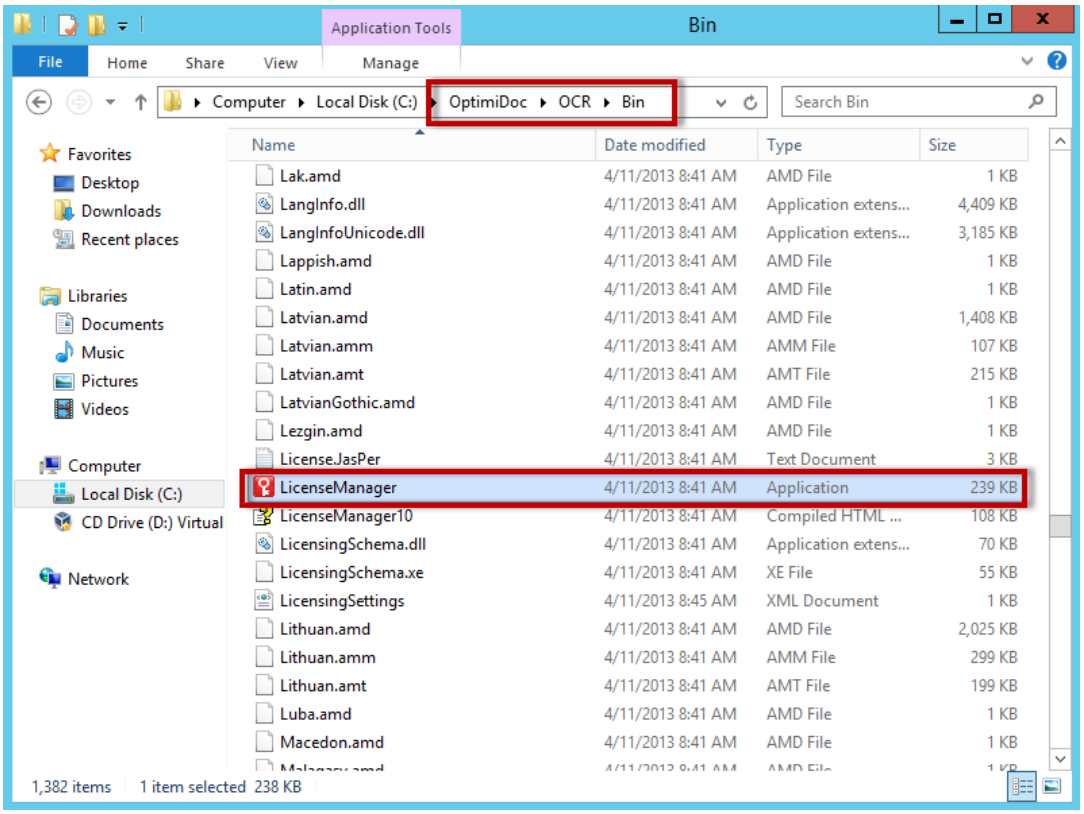
8.1 Old license removal

To remove the old license there are two steps necessary:
1. ABBYY FineReader Engine license removal
2. OptimiDoc license removal

ABBYY FineReader Engine license removal

Important **For ABBYY license deactivation, internet connection is necessary!**

1. Go to <optimidoc_folder>\OCR\Bin and start LicenseManage.exe



2. Select the license to deactivate

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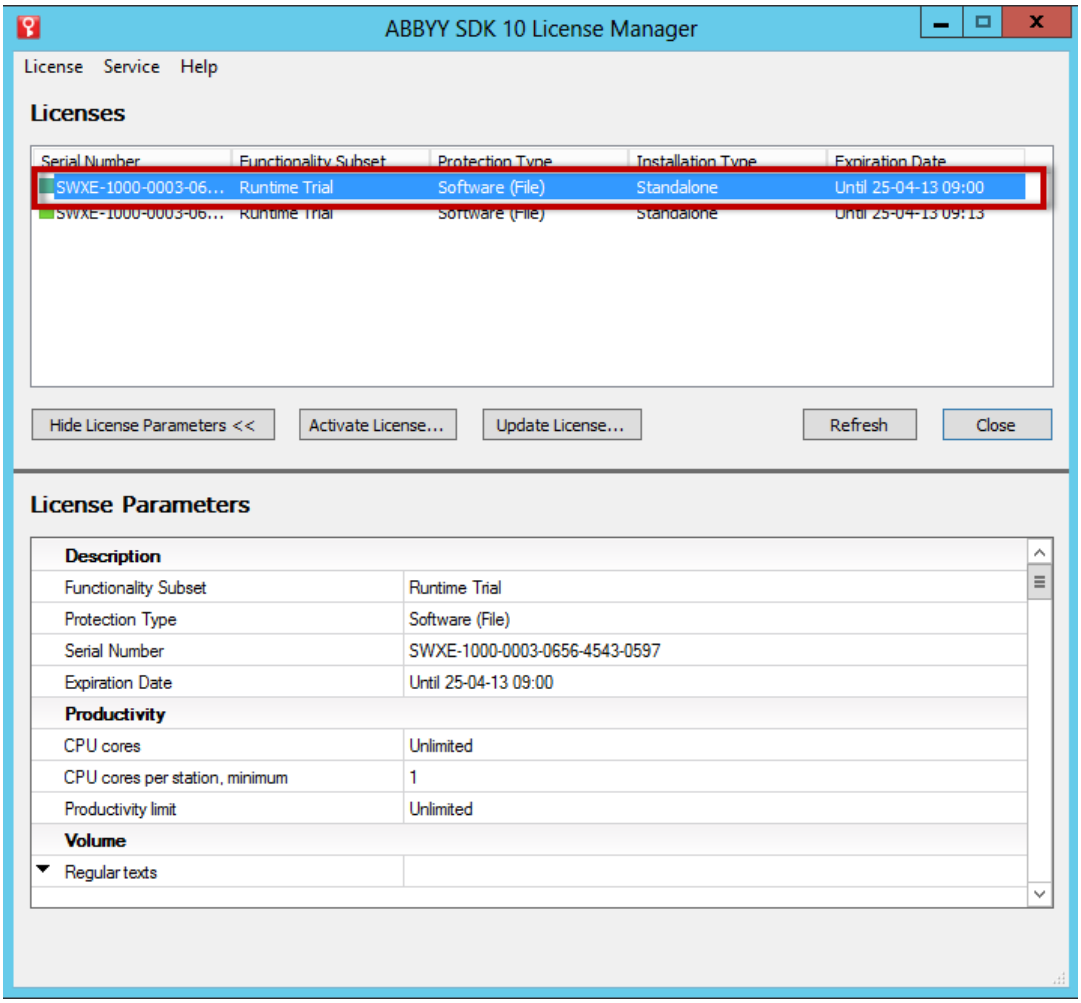

3. Right click on license and select Deactivate

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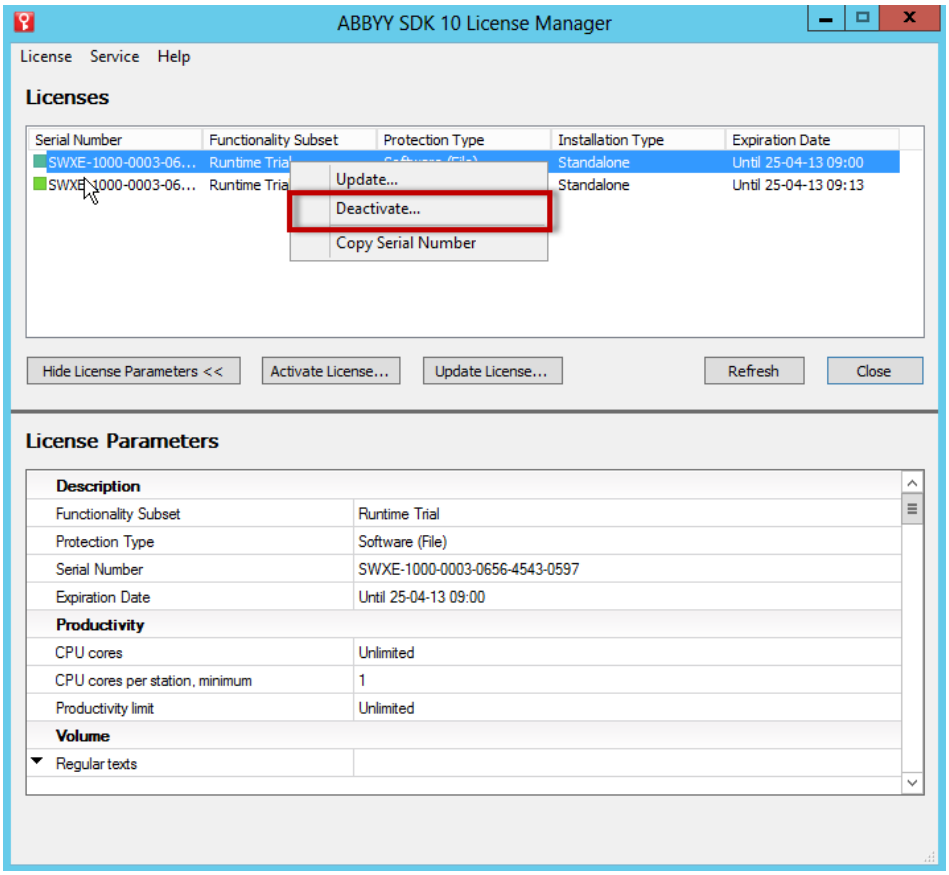
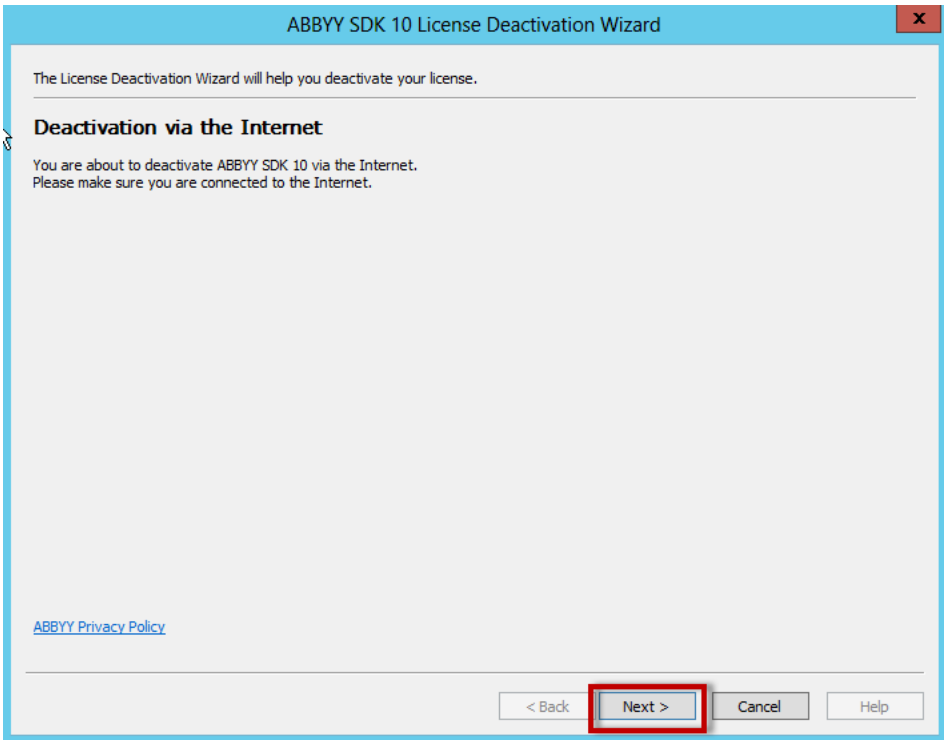


4. Confirm the deactivation by clicking on next



5. Deactivation succeeded.

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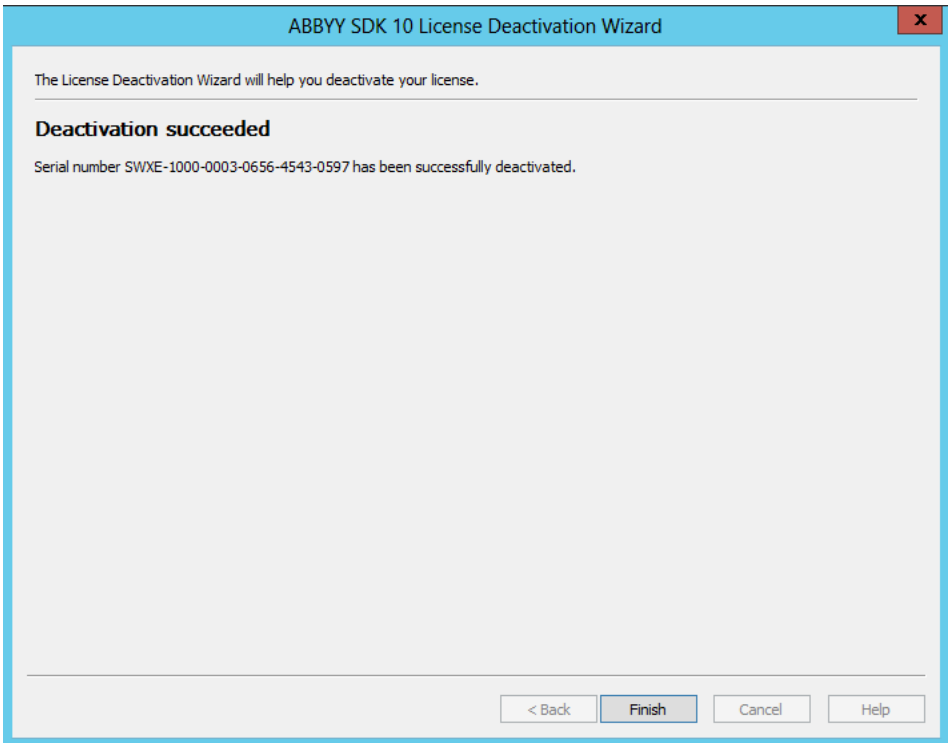
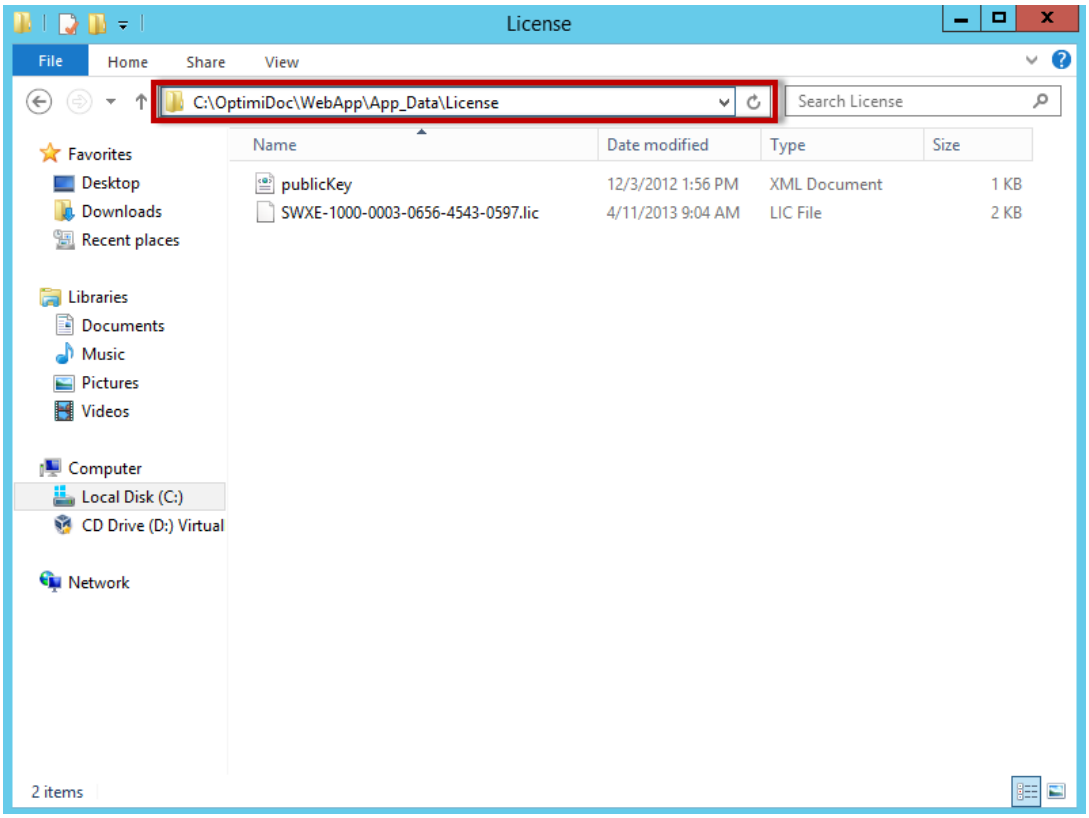


OptimiDoc license removal

1. Go to <optimidoc_install>\WebApp\App_Data\License



2. Delete *.lic files

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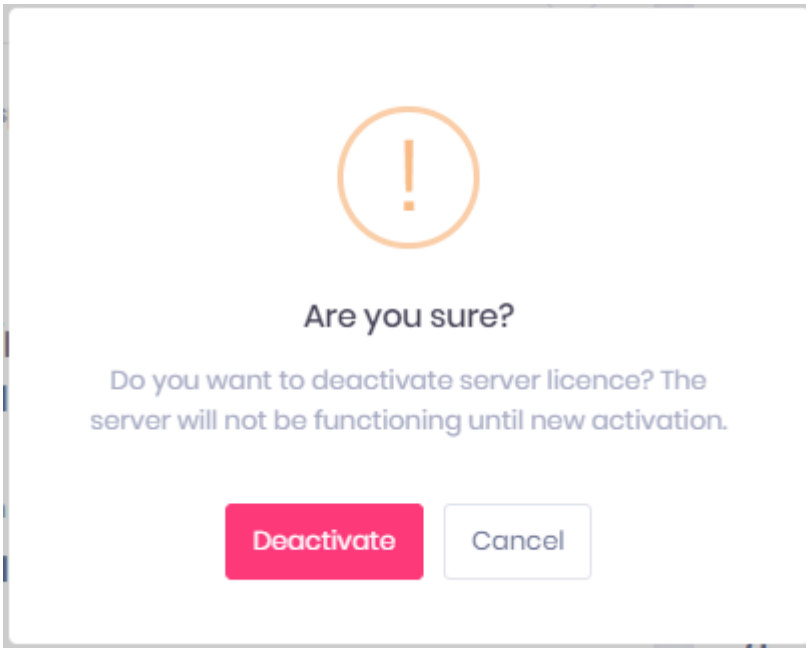
8.2 OptimiDoc license removal

To remove OptimiDoc license click the delete/trash button in the license widget

And confirm the deactivation



The license file will be deleted from the license folder and new slot for activation will be available.

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9 Supported devices

Full list of supported devices is accessible at https://partner.optimidoc.com/SupportedDevices

Other brands and models can be monitored as a network devices or by OptimiDoc Print Monitor.

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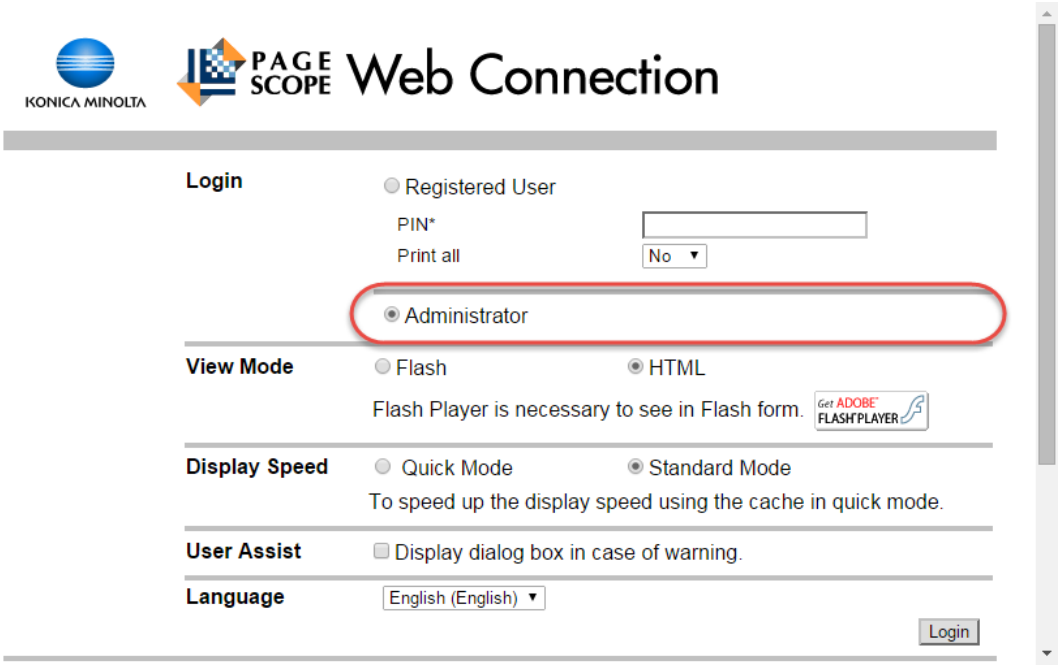
9.1 Konica Minolta device configuration

Konica Minolta requires additional configuration to work with OptimiDoc.

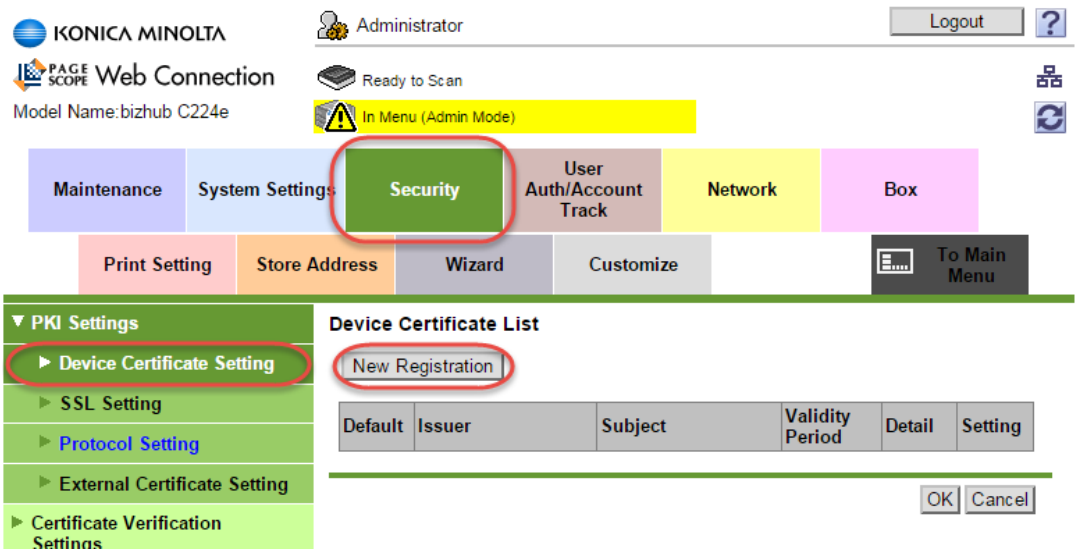
SSL configuration

1. Open the PageScope Web Connection of the device in web browser and login as an Administrator.

The Administrator default password is 12345678 or 1234567812345678.



2. Go to the Security tab and open Device Certificate settings, then click on **New Registration** button.



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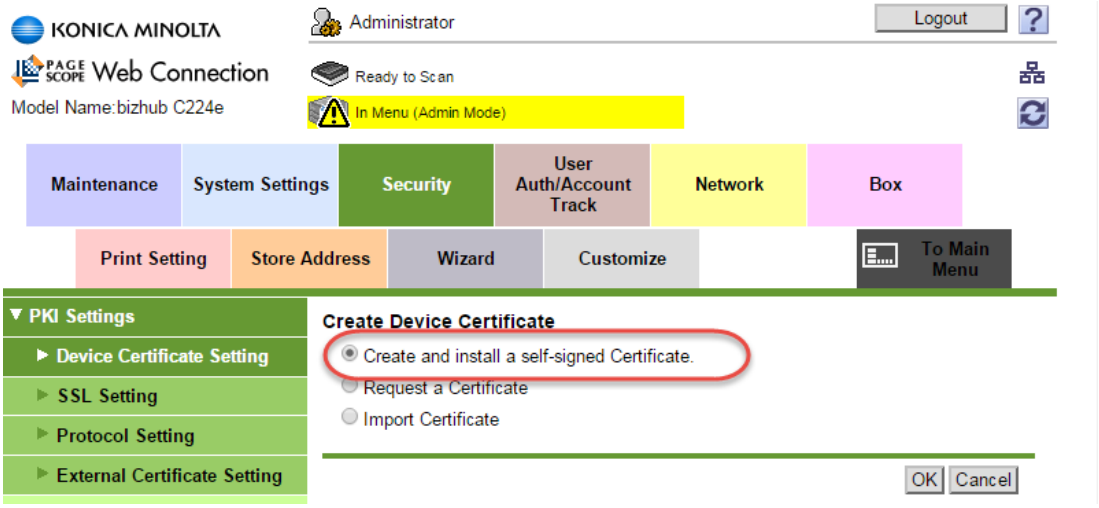
3. Select **Create and install a self-signed Certificate and click on Ok.**



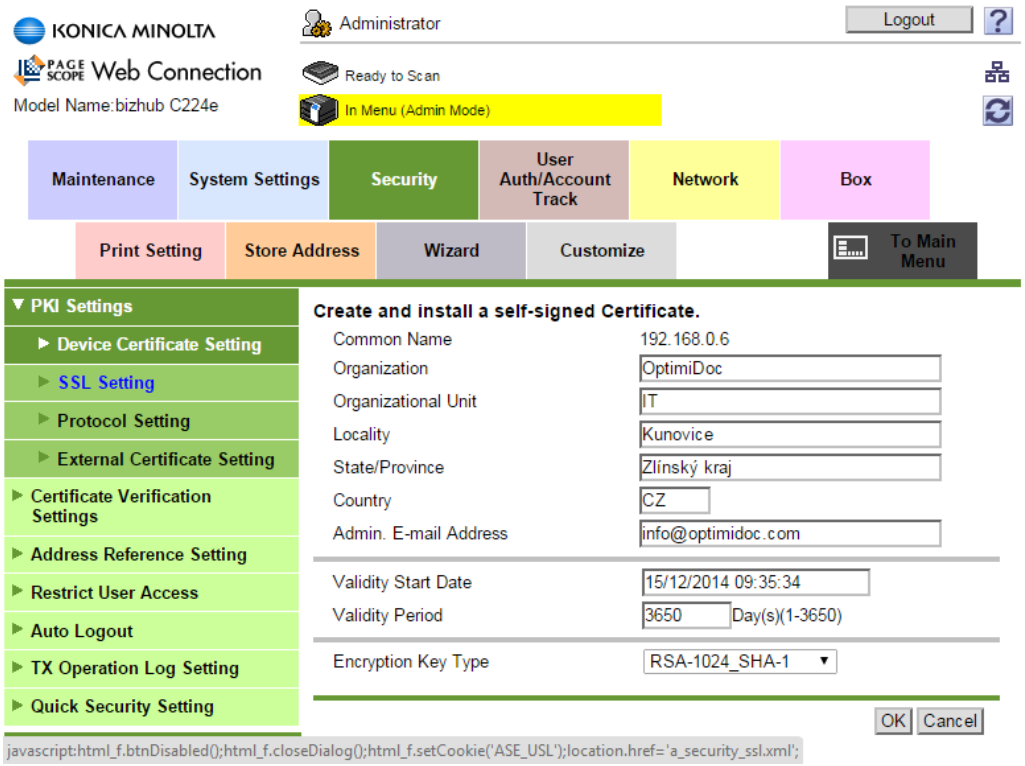
4. Enter certificate details such as company name, etc.

Enter following data:

Validity Period : **3650**

Encryption Key Type: **RSA-1024_SHA-1**

After entering data click on **Ok**.



5. As a final confirmation you will get following message.

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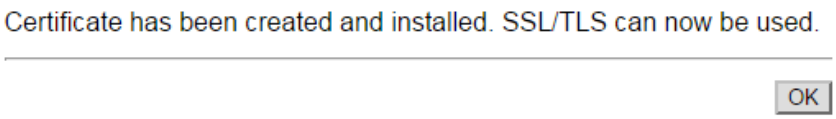
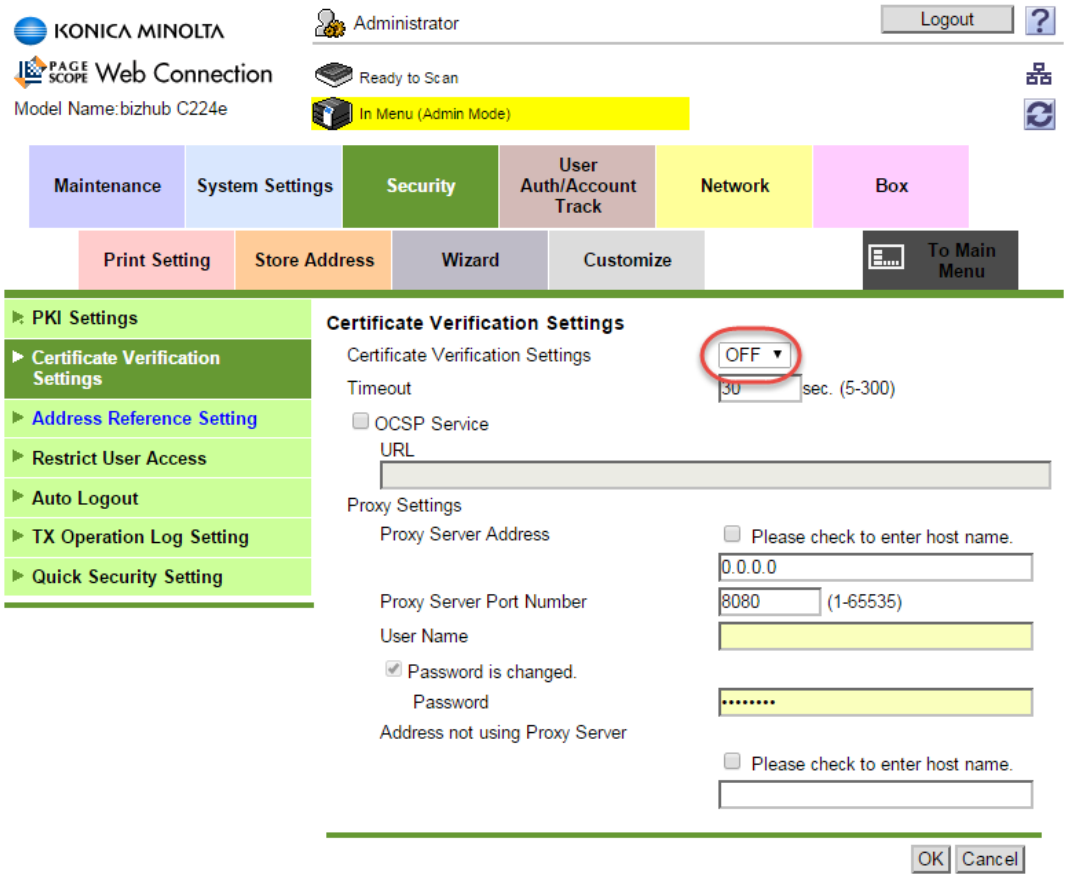


Certificate Verification Settings

1.In the Security section, open the Certificate Verification Settings and set Certificate Verification Settings to **OFF**. Confirm the settings by clicking on Ok.



OpenAPI settings

1. In the Network section open the OpenAPI and set Use SSL/TSL to **SSL only**. Confirm the settings by clicking on **Ok**.

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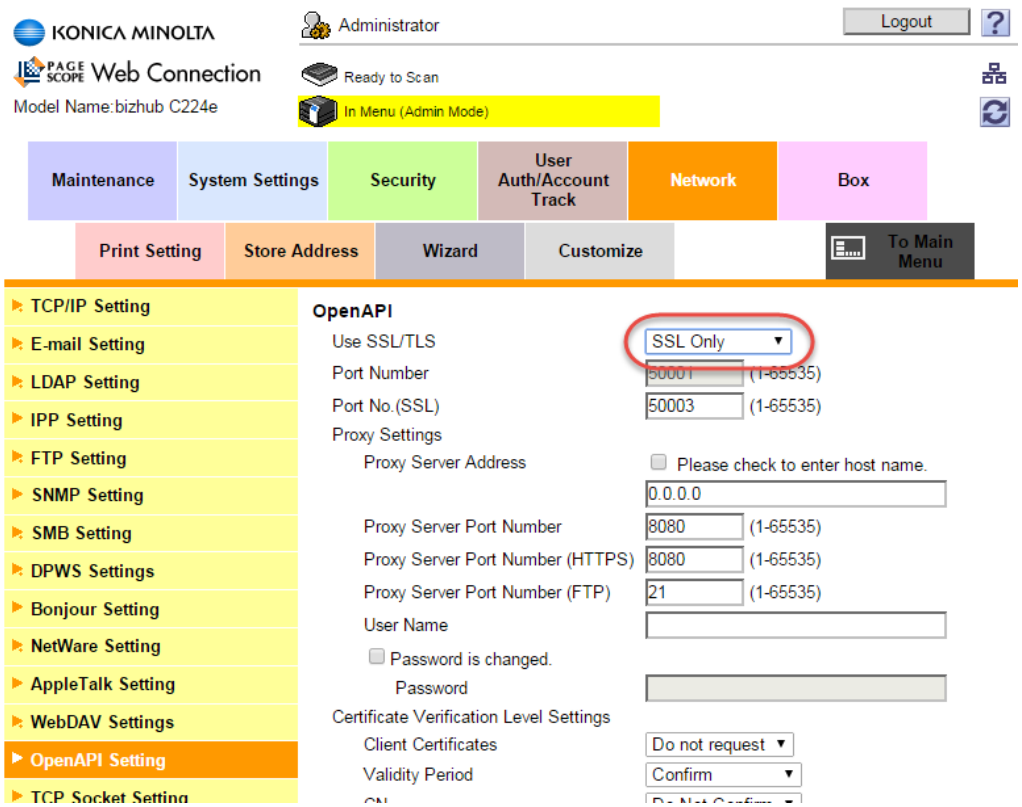

TCP Socket Setting

1. In the Network section open the TCP Socket Setting and check Use SSL/TSL. Confirm the settings by clicking on **Ok**.

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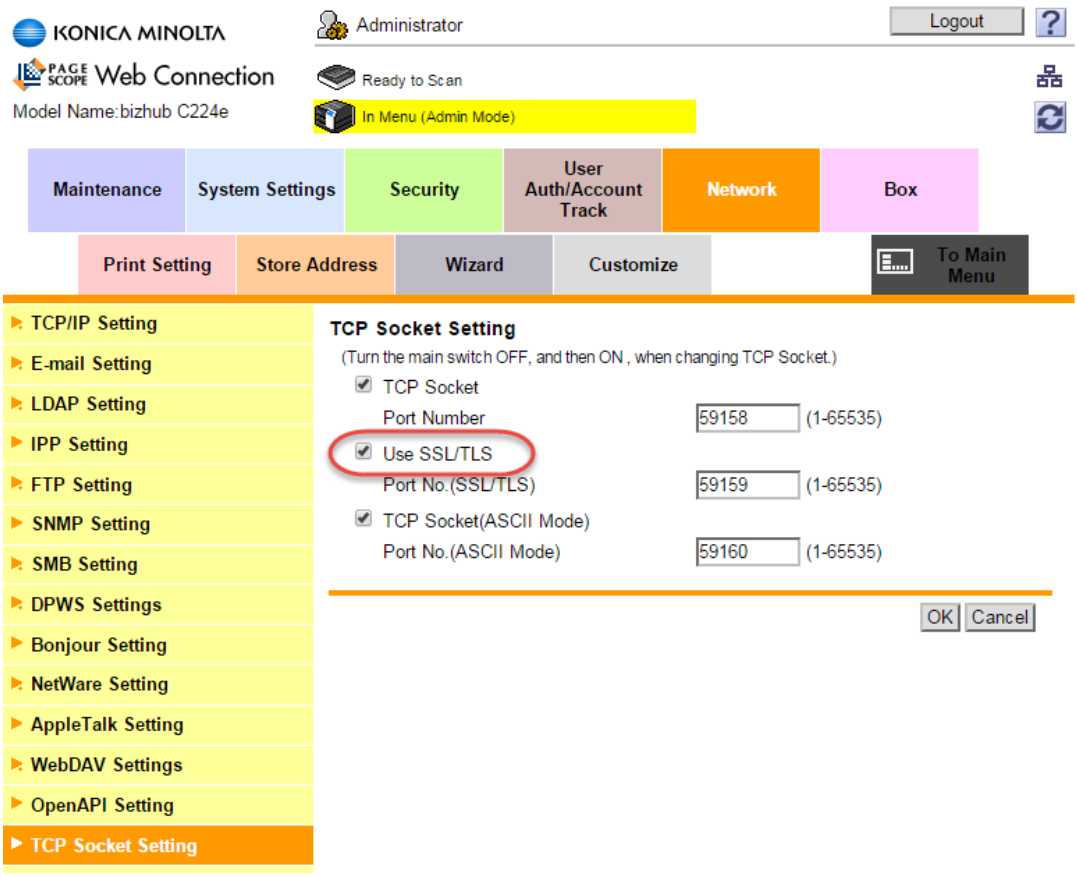
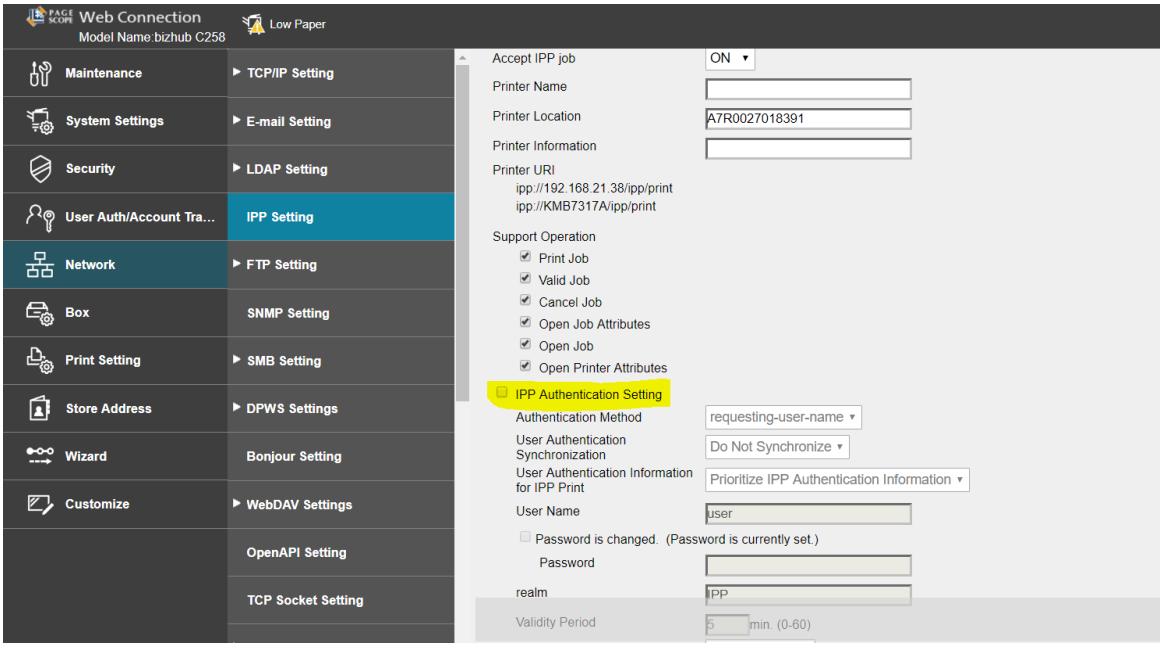


IPP Authentication Setting

1. In the Network section open the IPP Setting and uncheck the IPP Authentication Setting. Confirm the settings by clicking on **Ok**.



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9.2 Xerox device configuration

There are some specific models that require additional configuration:

- Xerox WorkCentre ConnectKey models
- Xerox VersaLink models

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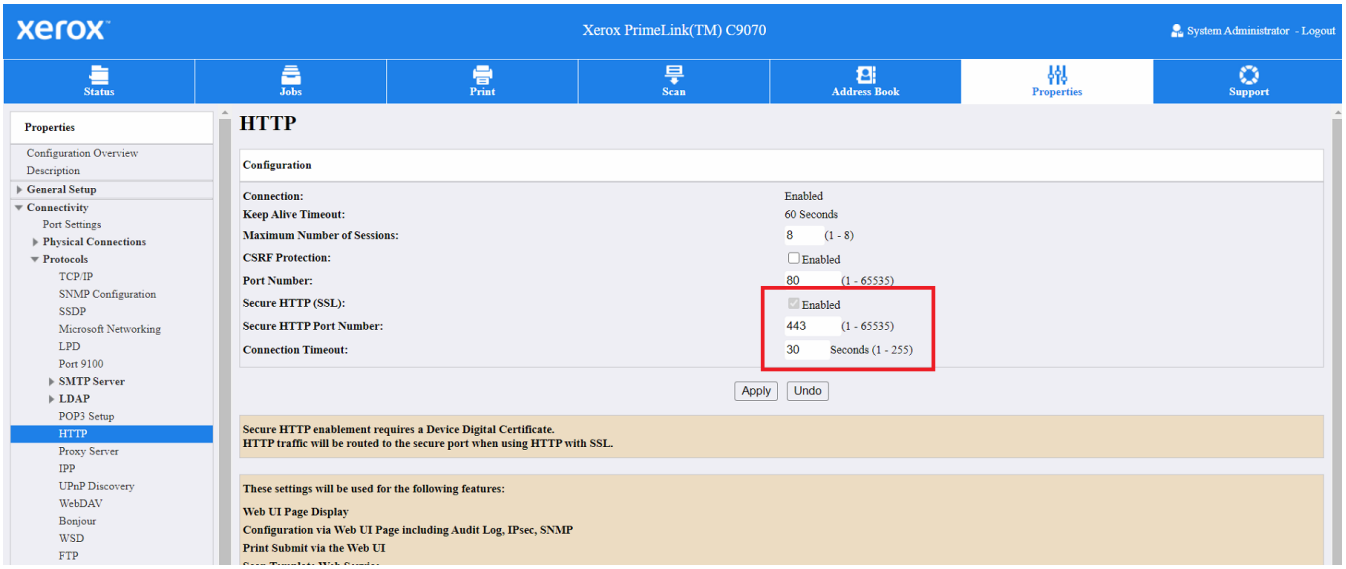
9.2.1 Xerox PrimeLink models

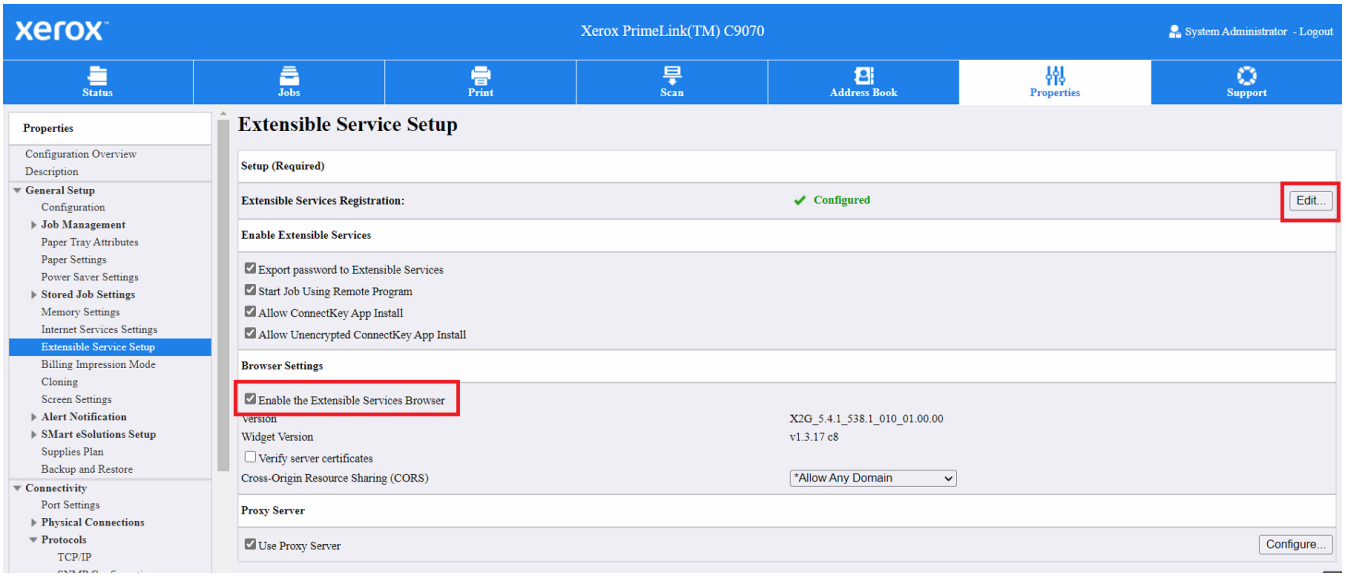
HTTP setup

Enable the Secure HTTP. The administrator may be asked to create the self-signed certificate on device.



Extensible Service Setup

Enable the Extensible Services Browser and Click on Extensible Service Registration **Edit button**



Click on **Enable All** and **Apply**

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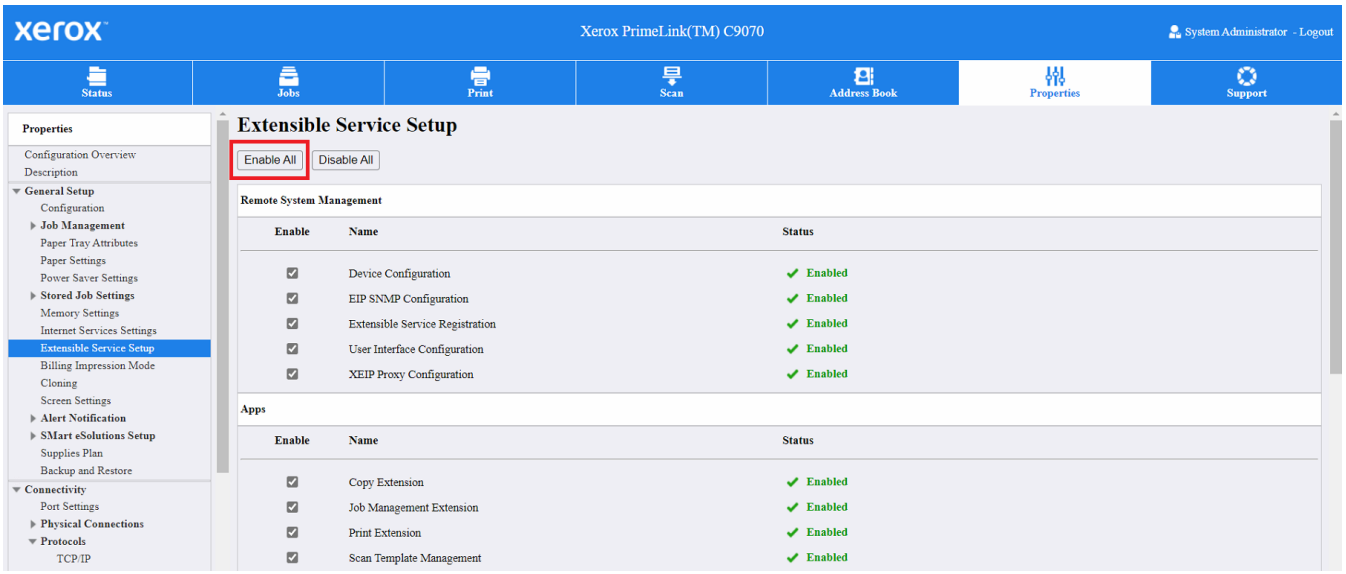

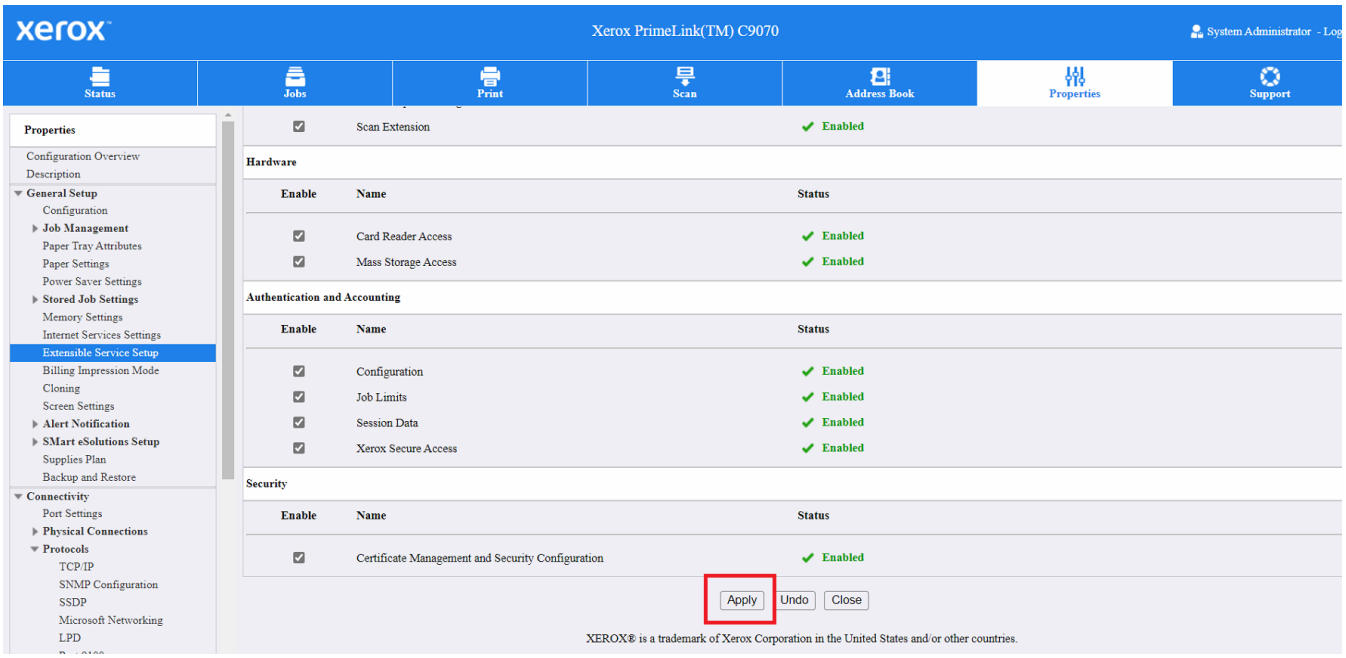

Validation Options

Check the Include User Name with validation request

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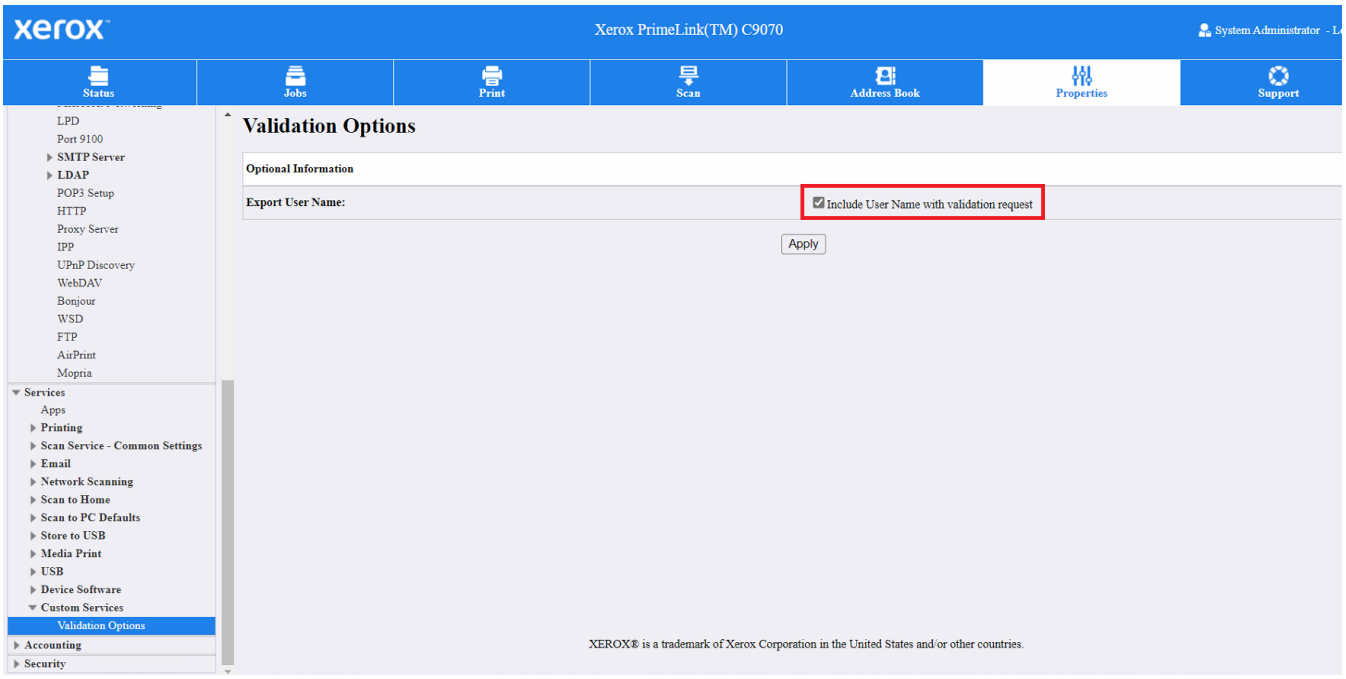
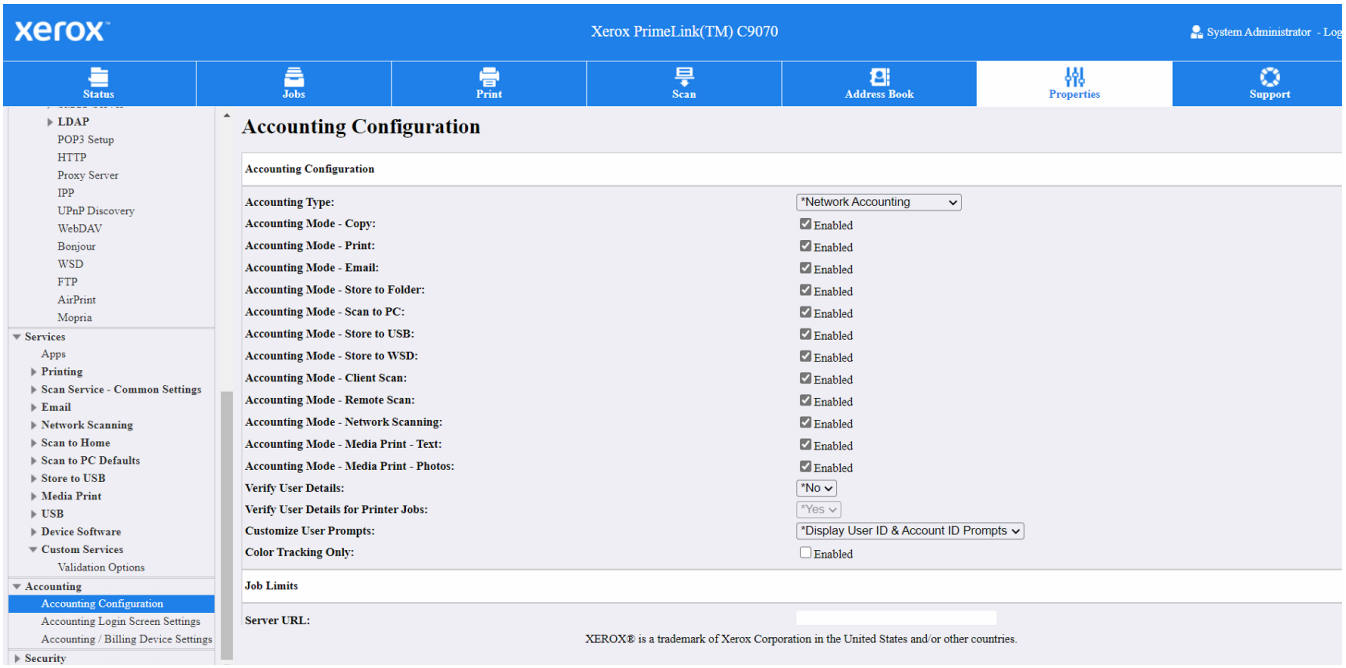


Accounting Configuration

Set the accounting settings based on images below and Click on Apply button.



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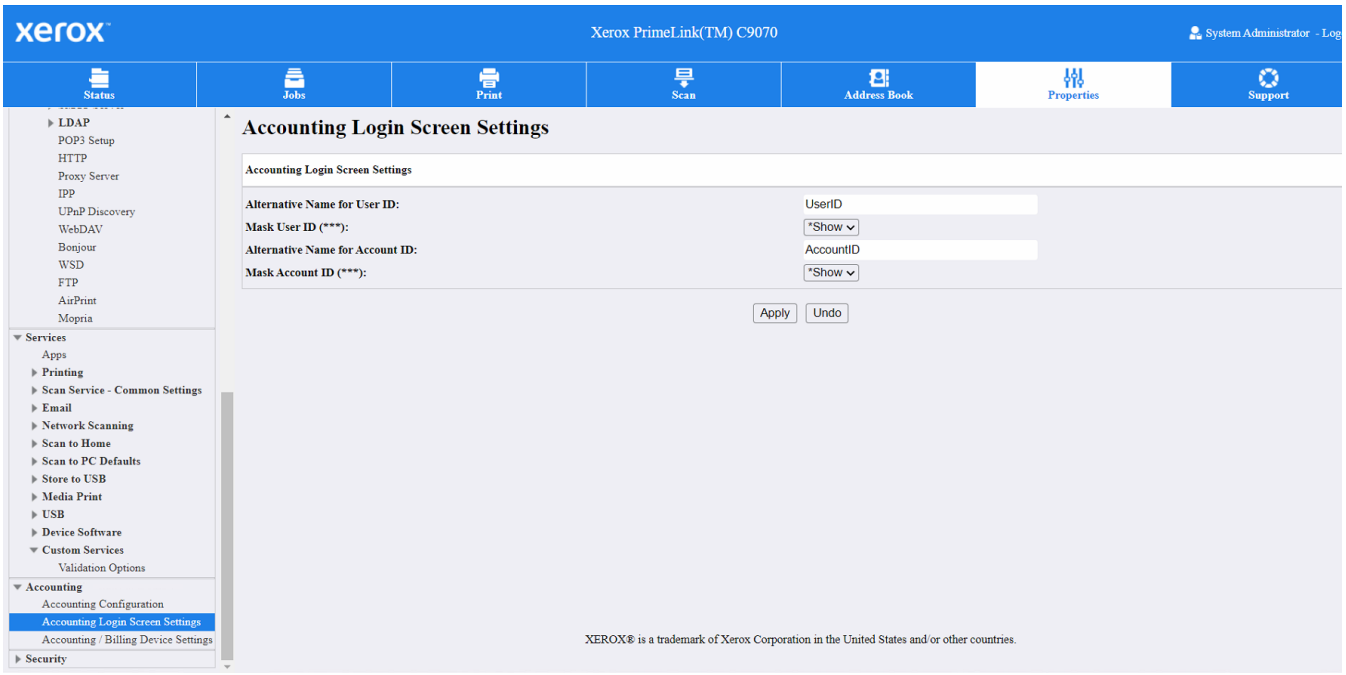
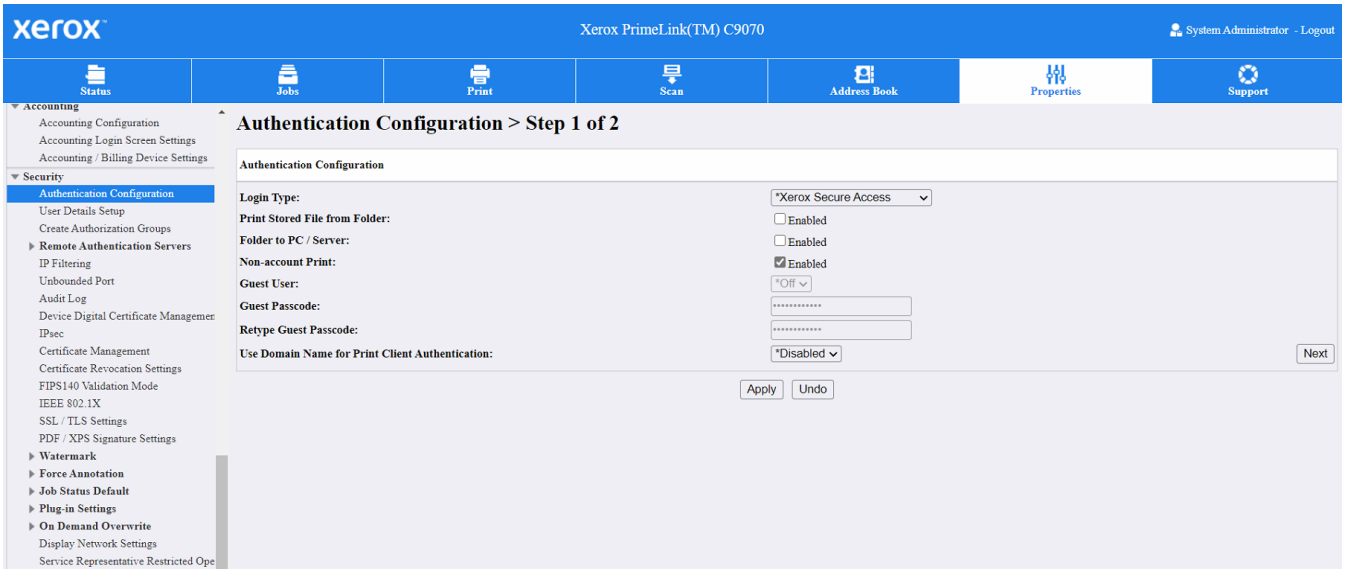


Authentication configuration

Select the Xerox Secure Access



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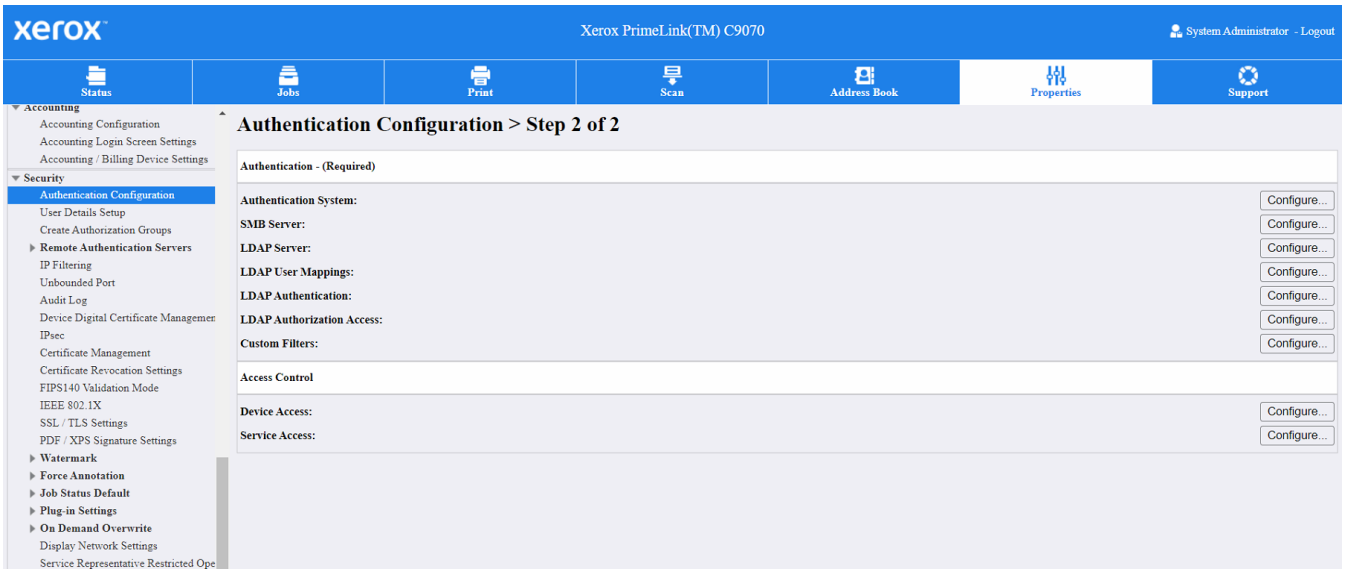
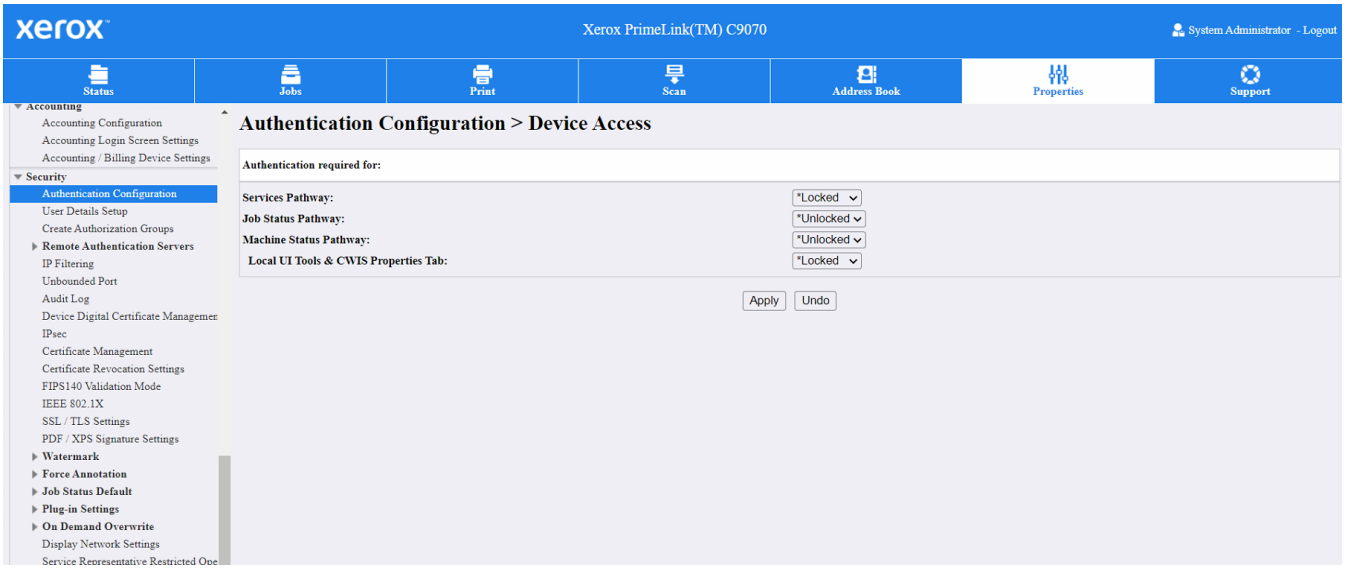


Set device access



Set service access

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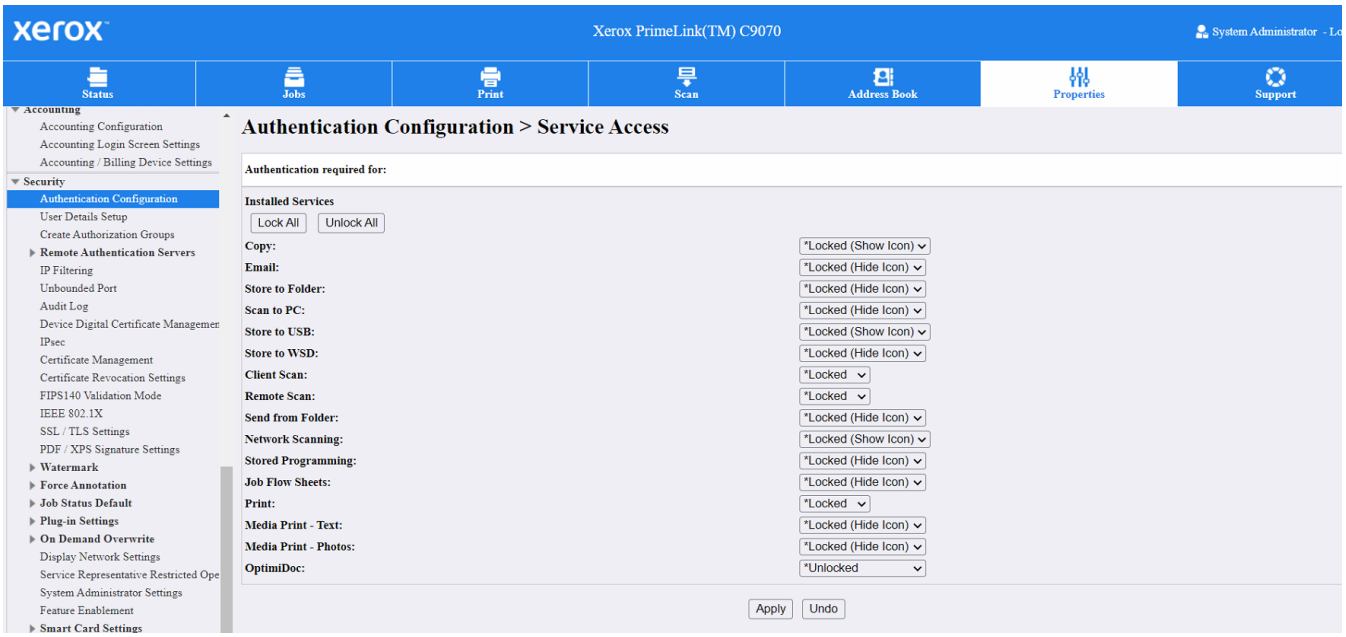
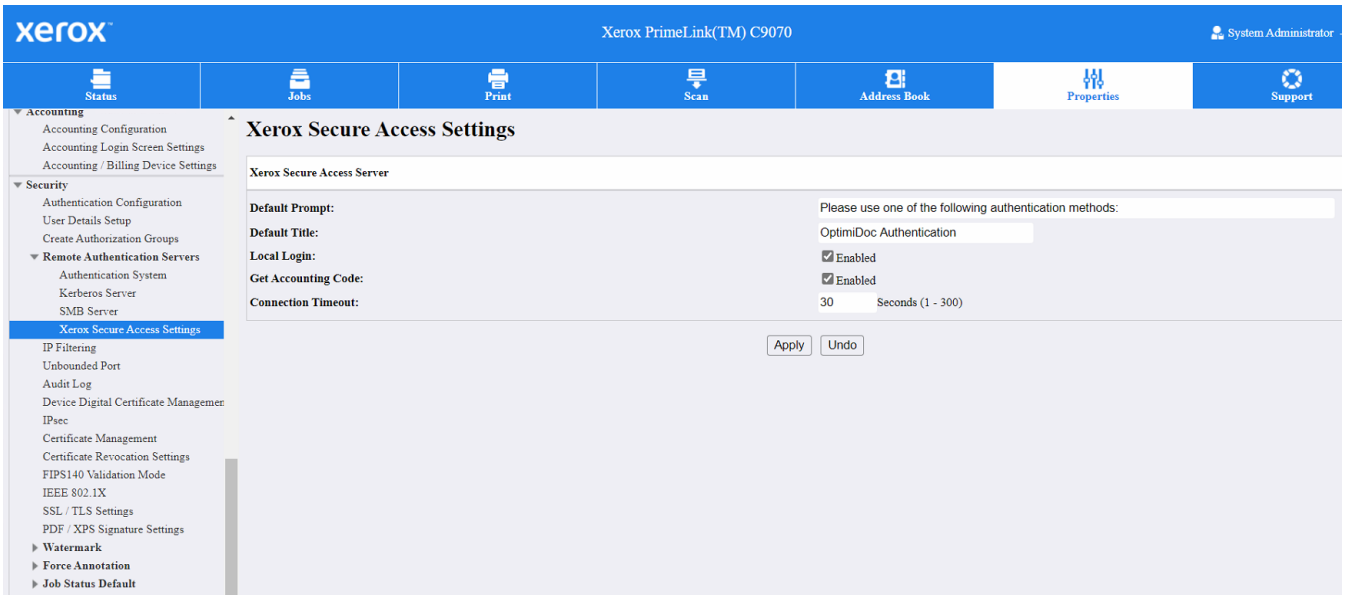


Set the Xerox Secure Access Settings



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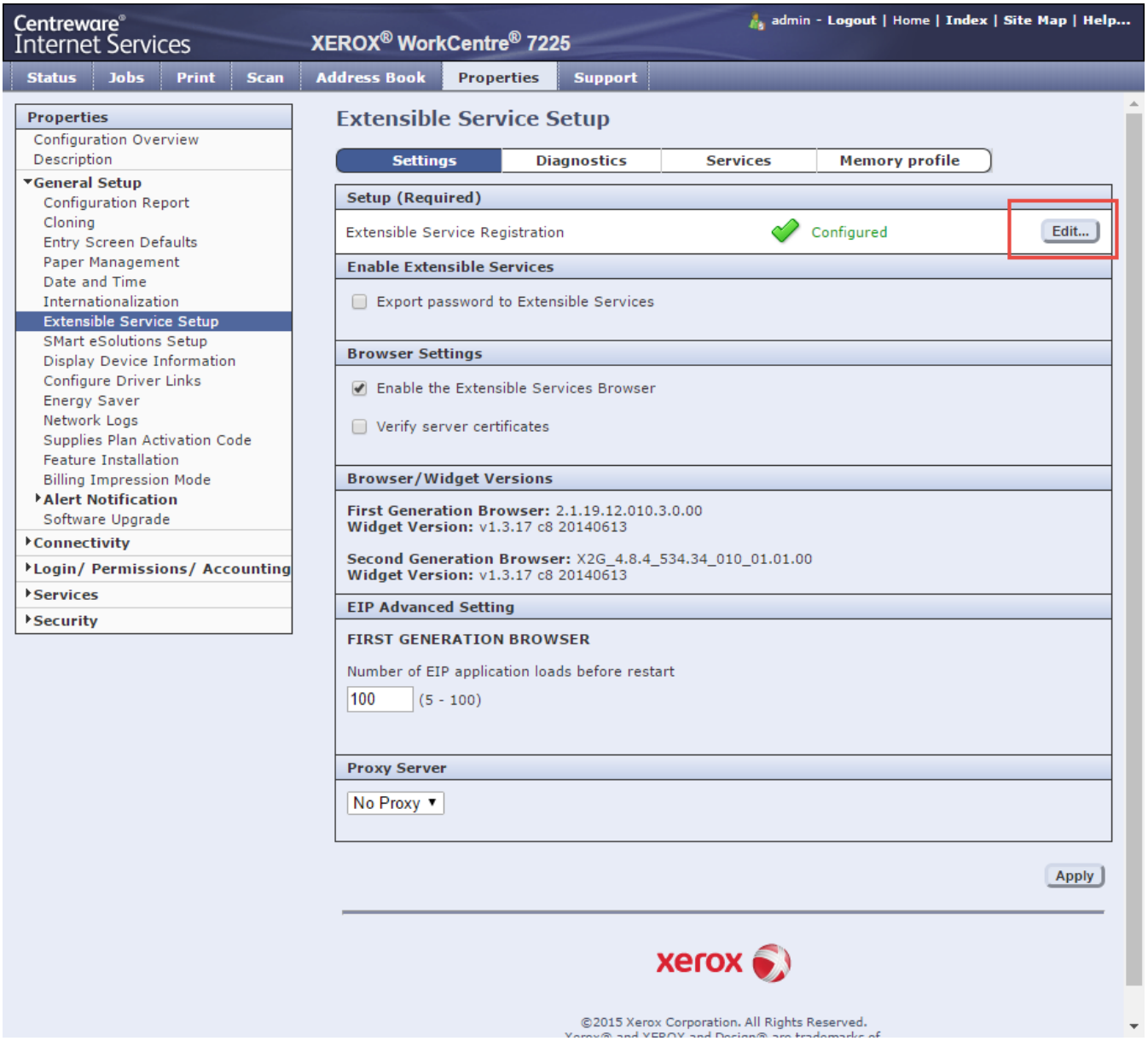
9.2.2 Xerox WorkCentre ConnectKey models

For the installation of OptimiDoc to ConnectKey models it is necessary to enable all features in Extensible Service Setup. There are no other requirements.



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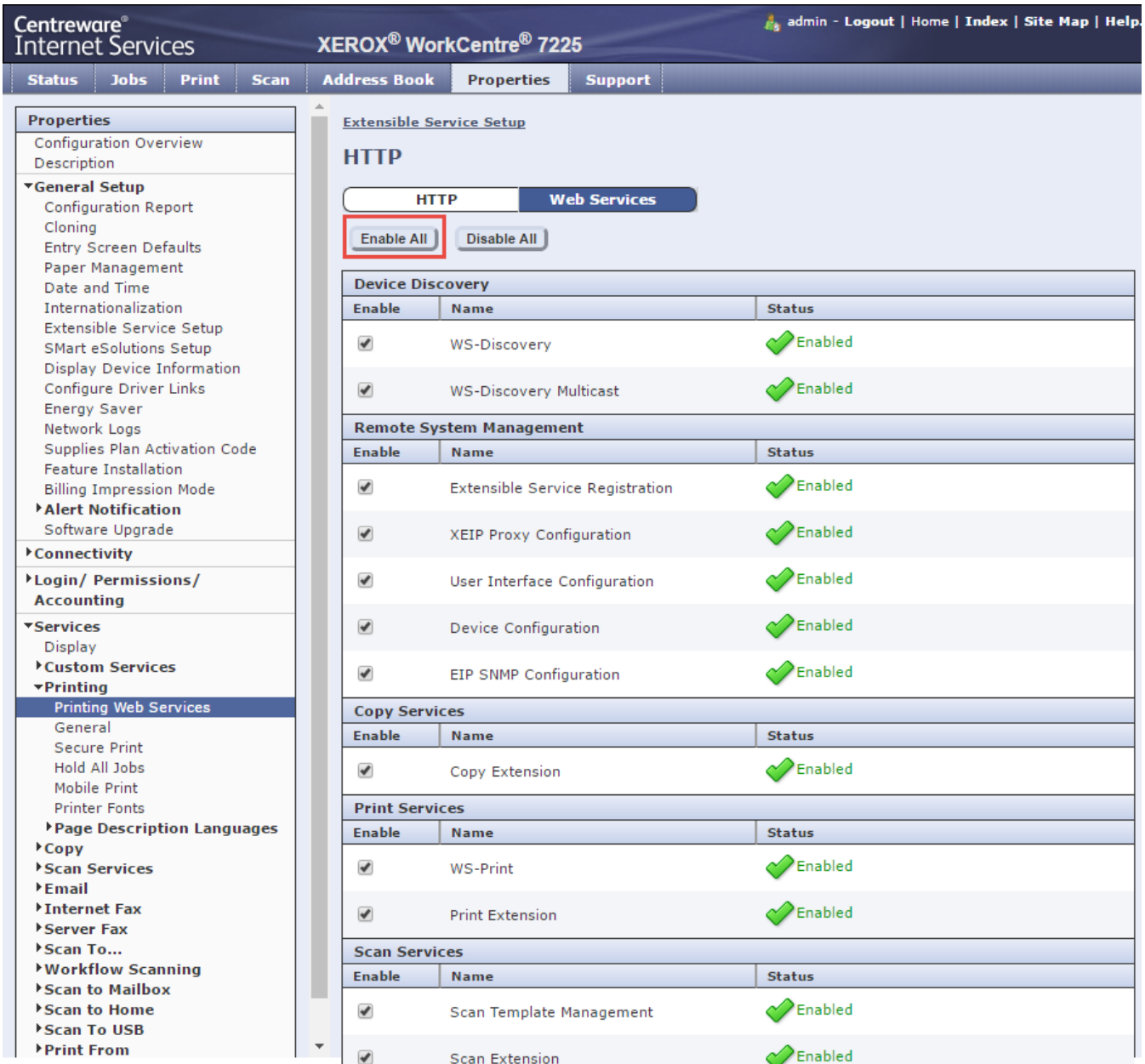
Centreware® Internet Services
XEROX® WorkCentre® 7225
admin - Logout | Home | Index | Site Map | Help
Status
Jobs
Print
Scan
Address Book
Properties
Support
Properties
Configuration Overview
Description
General Setup
Configuration Report
Cloning
Entry Screen Defaults
Paper Management
Date and Time
Internationalization
Extensible Service Setup
SMart eSolutions Setup
Display Device Information
Configure Driver Links
Energy Saver
Network Logs
Supplies Plan Activation Code
Feature Installation
Billing Impression Mode
Alert Notification
Software Upgrade
Connectivity
Login/ Permissions/ Accounting
Services
Display
Custom Services
Printing
Printing Web Services
General
Secure Print
Hold All Jobs
Mobile Print
Printer Fonts
Page Description Languages
Copy
Scan Services
Email
Internet Fax
Server Fax
Scan To...
Workflow Scanning
Scan to Mailbox
Scan to Home
Scan To USB
Print From
Extensible Service Setup
HTTP
HTTP
Web Services
Enable All
Disable All
Device Discovery
Enable
Name
Status
WS-Discovery
Enabled
WS-Discovery Multicast
Enabled
Remote System Management
Enable
Name
Status
Extensible Service Registration
Enabled
XEIP Proxy Configuration
Enabled
User Interface Configuration
Enabled
Device Configuration
Enabled
EIP SNMP Configuration
Enabled
Copy Services
Enable
Name
Status
Copy Extension
Enabled
Print Services
Enable
Name
Status
WS-Print
Enabled
Print Extension
Enabled
Scan Services
Enable
Name
Status
Scan Template Management
Enabled
Scan Extension
Enabled
WS-Scan
Enabled
Job Management
Enable
Name
Status
Job Management Extension
Enabled
Hardware
Enable
Name
Status
Mass Storage Access
Enabled
Card Reader Access
Enabled
Authentication & Accounting
Enable
Name
Status
Xerox Secure Access
Enabled
Authentication & Accounting Configuration
Enabled
Session Data
Enabled
Job Limits
Enabled
Security
Enable
Name
Status
Digital Certificate Management and Security Configuration
Enabled
McAfee Embedded Control
Enabled

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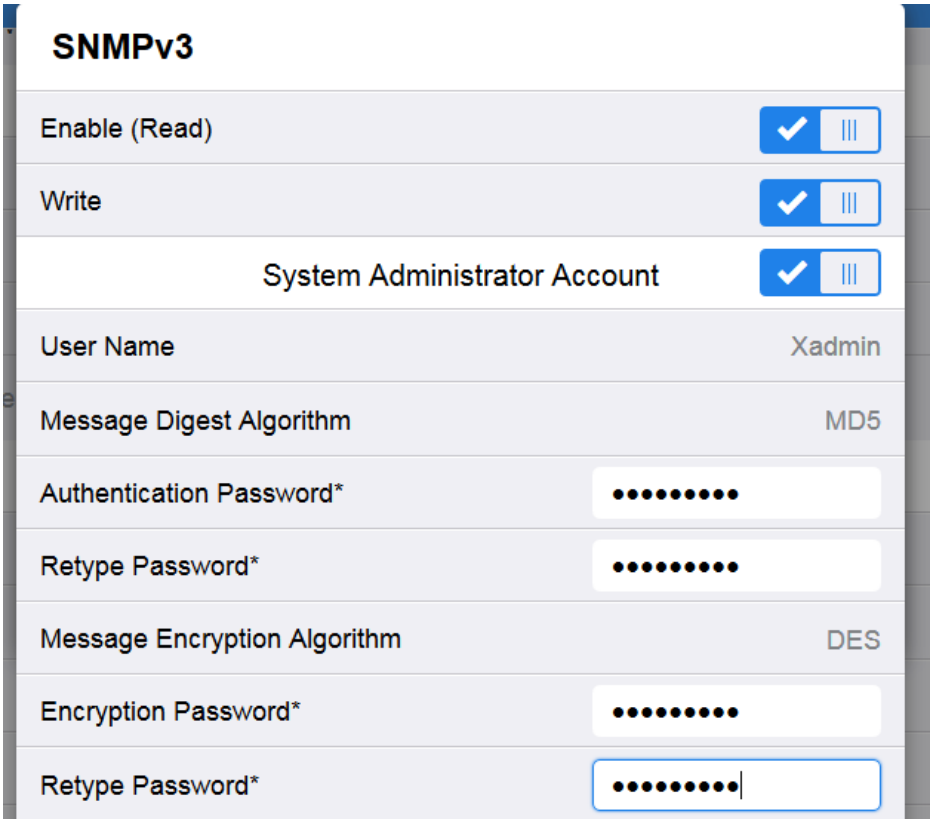
9.2.3 Xerox VersaLink models

Xerox VersaLink devices require some **additional settings**.

1. Latest FW installed
2. SNMP v3 must be enabled on the device, set the password



3. Create SNMP v3 configuration in OptimiDoc with the settings you used on the device (without Context name)

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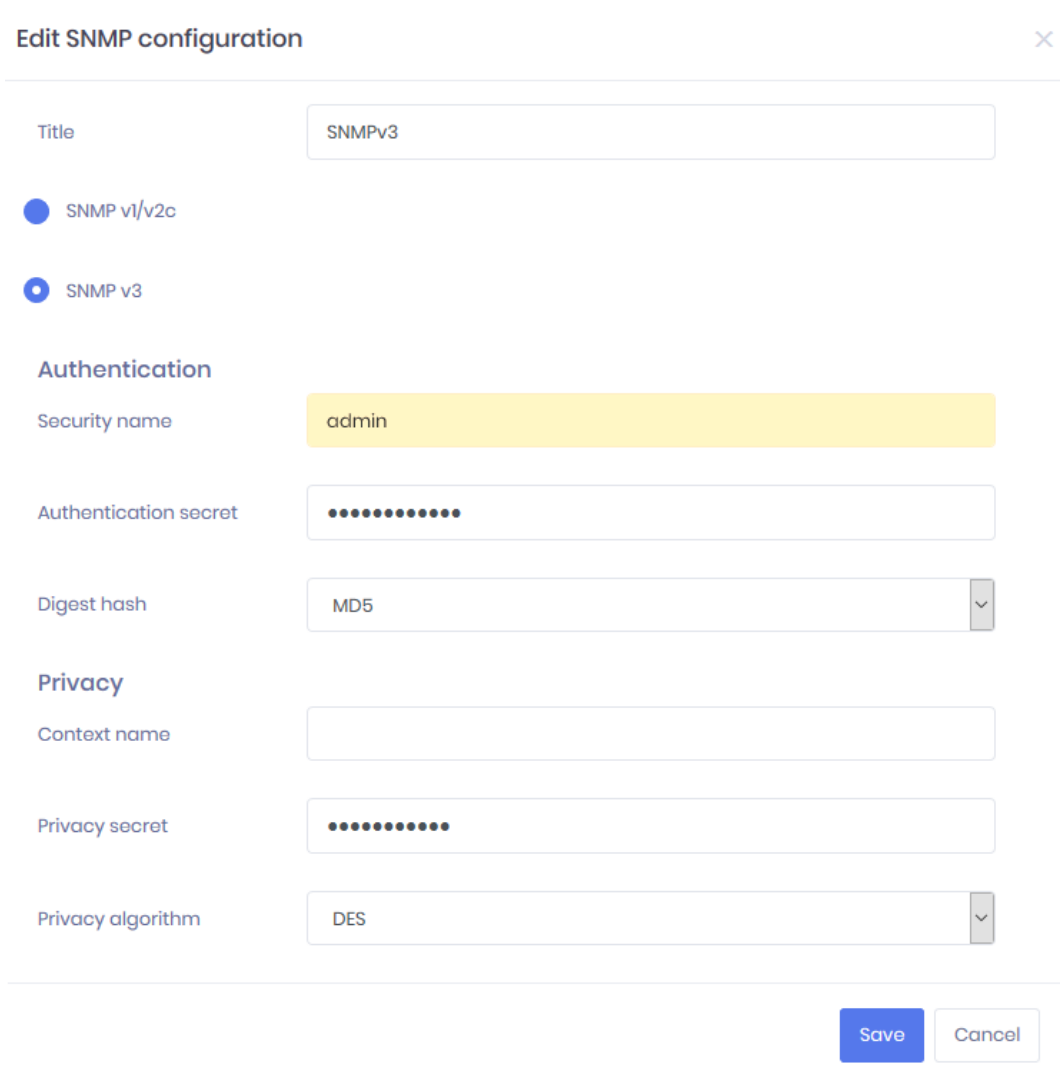

4. Before installing the application on the device via OptimiDoc, the "Model" field must contain the word "VersaLink"

5. Finally, you need to lock the device screen in VersaLink settings:

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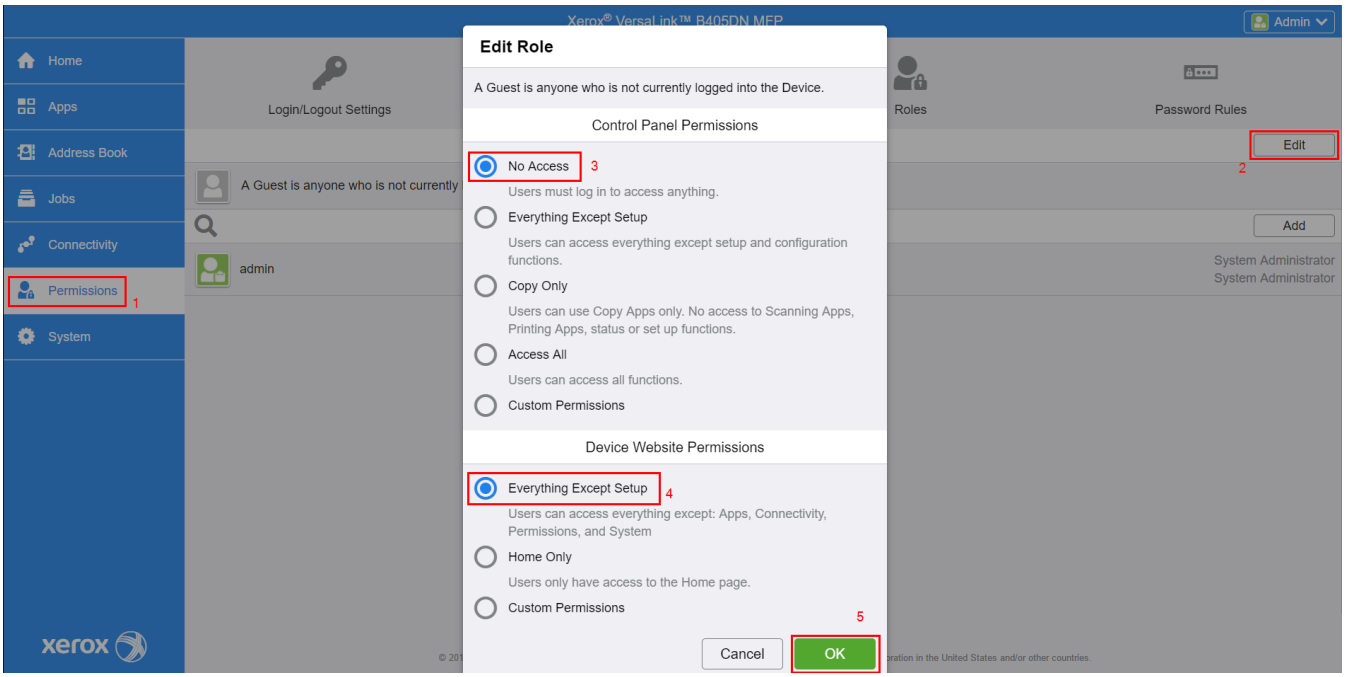
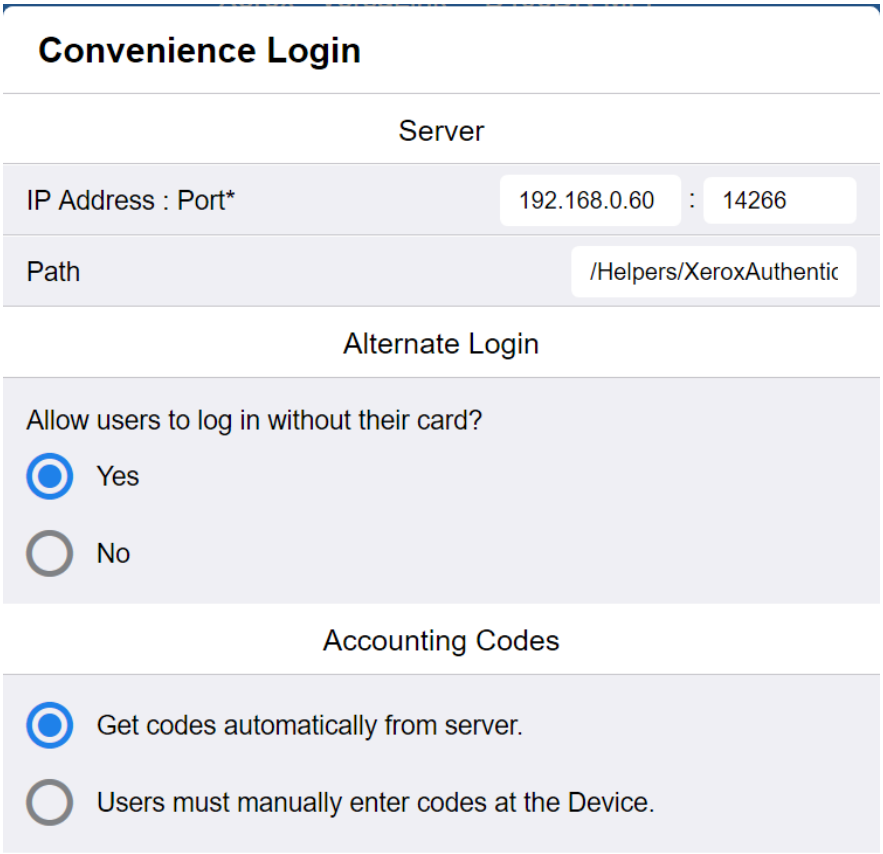


If you want **to use** a card reader, just to remind you, **install the Card Reader Plug-in**.

Please, also make sure the following options are selected:



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9.2.3.1 Job management permission denied

If you encounter message **jbmgmnt:PermissionDenied** on **Xerox VersaLink** devices you need to make additional settings on the device.

1. In the permission settings you need to get into these settings:

2. Change the control panel permissions

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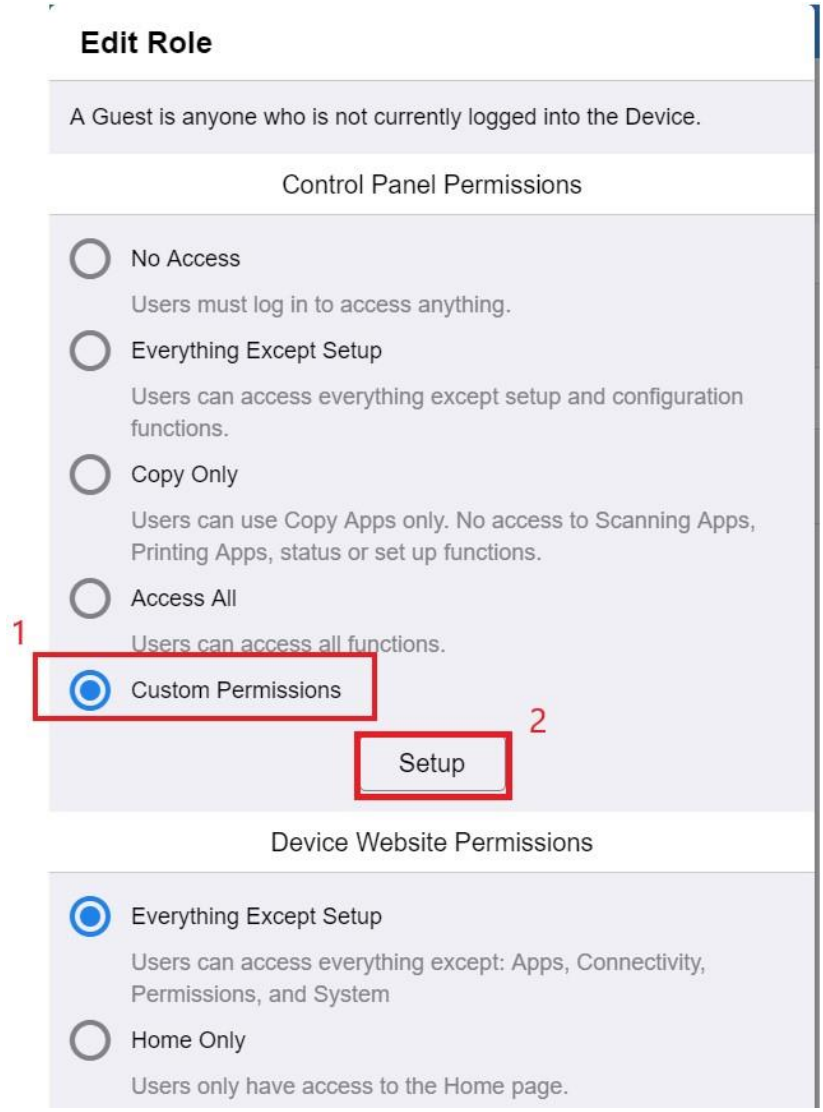

3. Define the permission as you see in the picture

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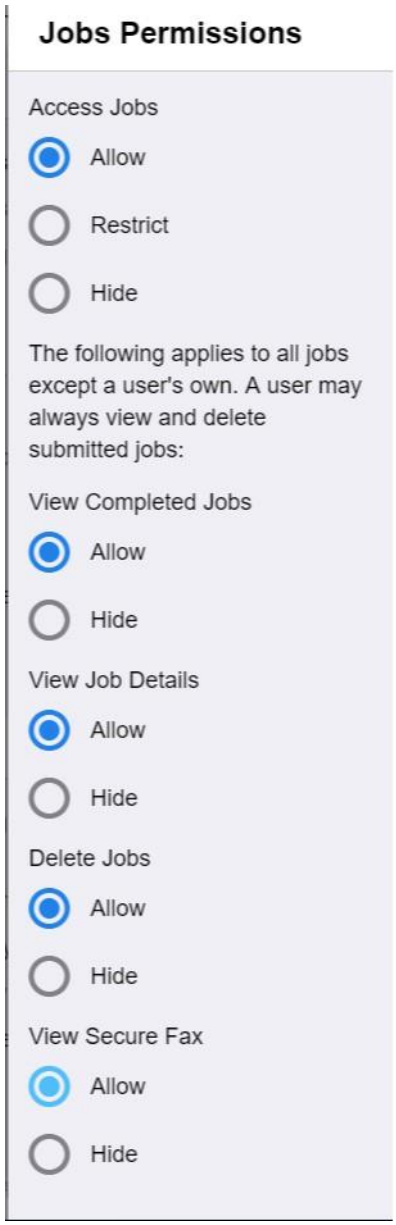

9.2.3.2 Latest firmwares SSL/TLS problem

Within the latest **Xerox VersaLink** firmwares you need to allow TLS 1.0:

1. Go to System/Security settings

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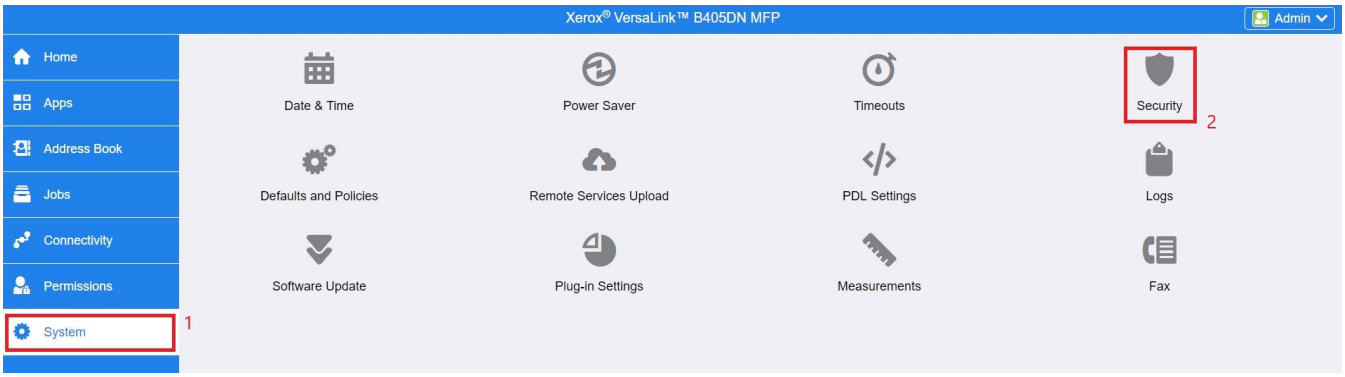
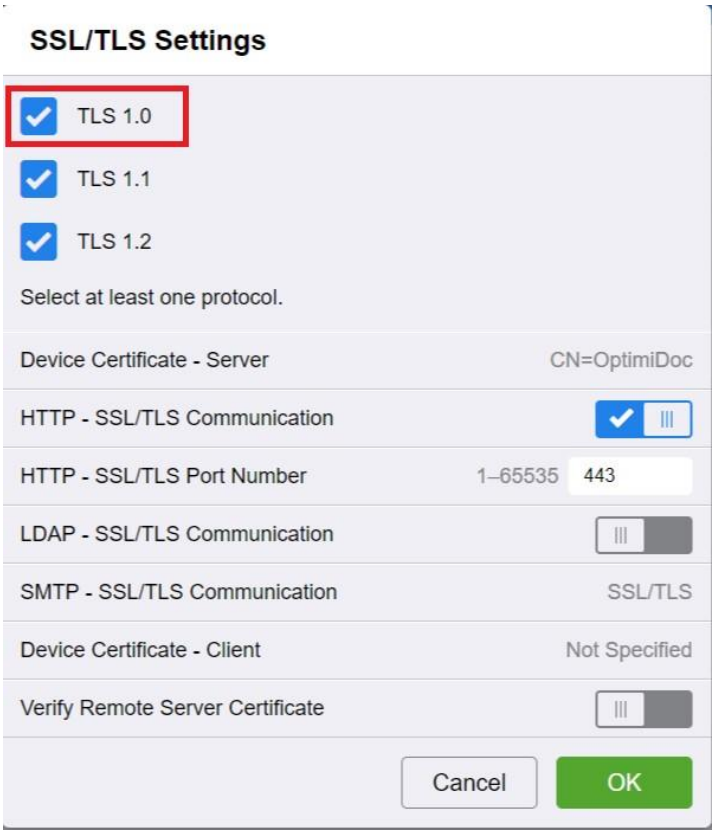


2. Choose SSL/TLS Settings
3. Allow TLS 1.0



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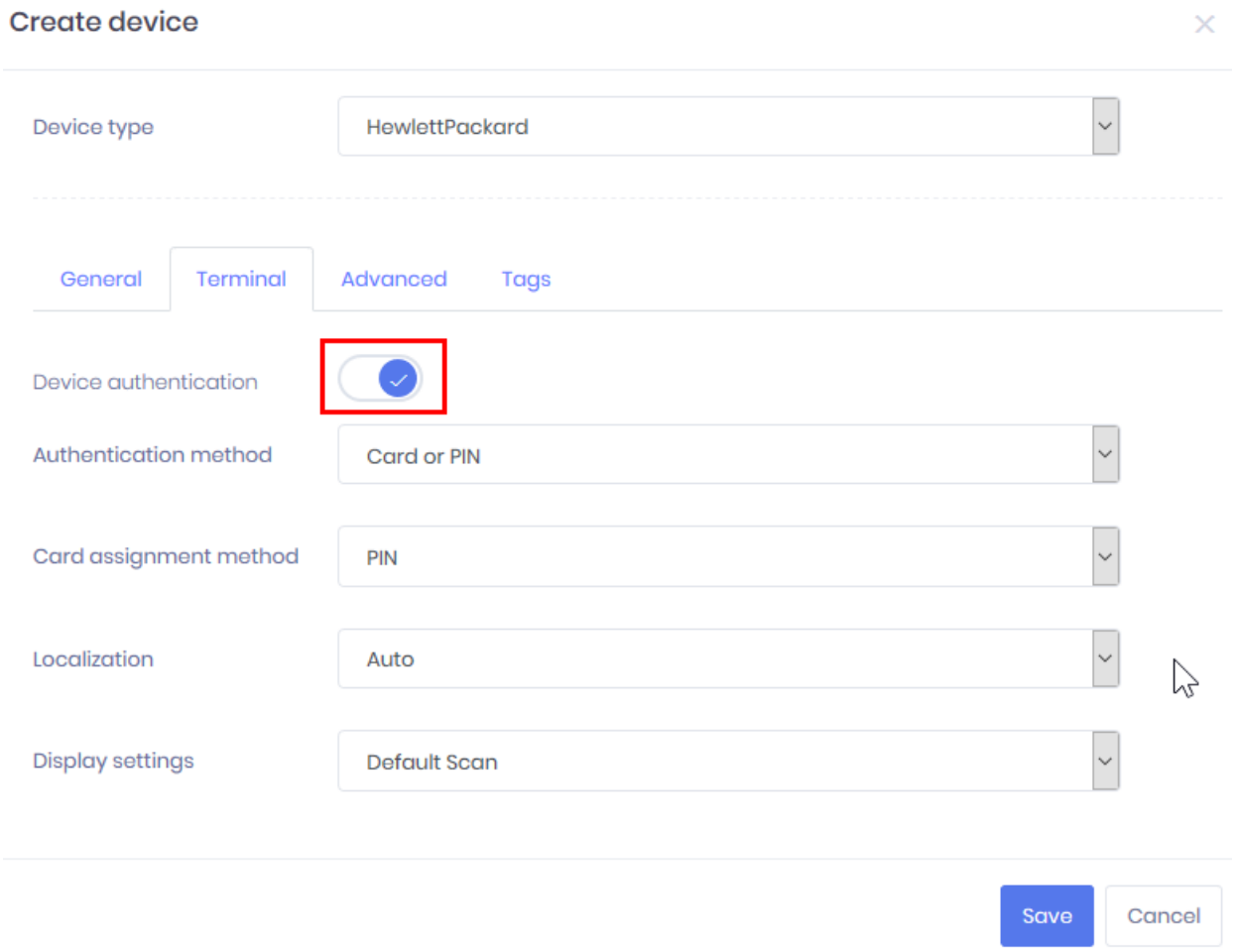
9.3 Hewlett-Packard device configuration

HP devices do not require any special setting to install OptimiDoc.

Authentication to the device

If you are switching to the Device authentication, it is necessary to **restart the device**.



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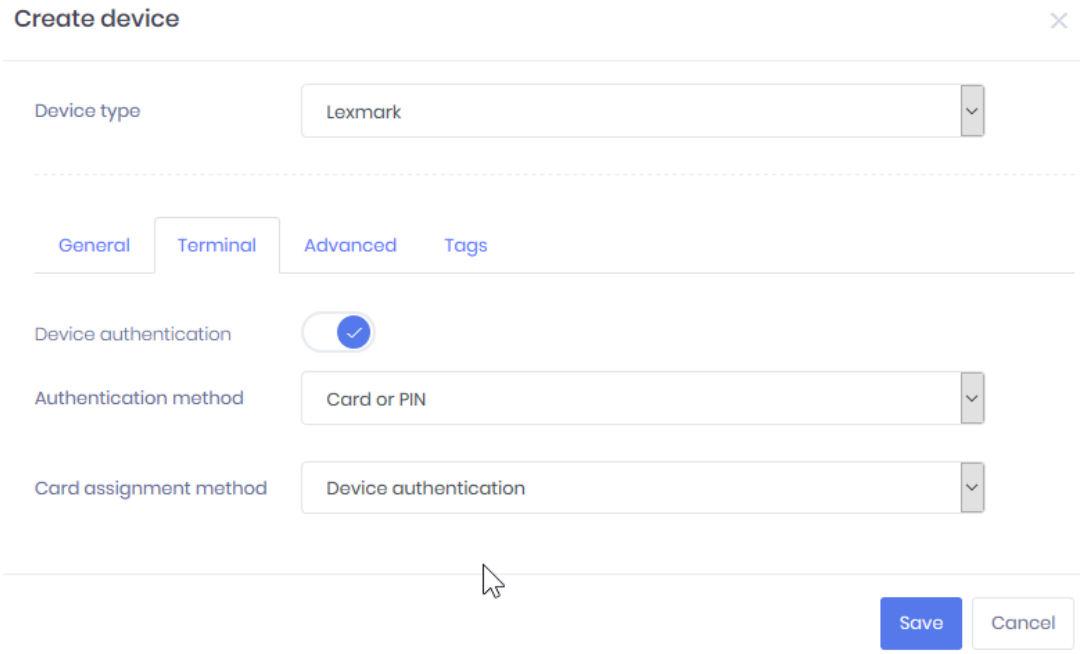
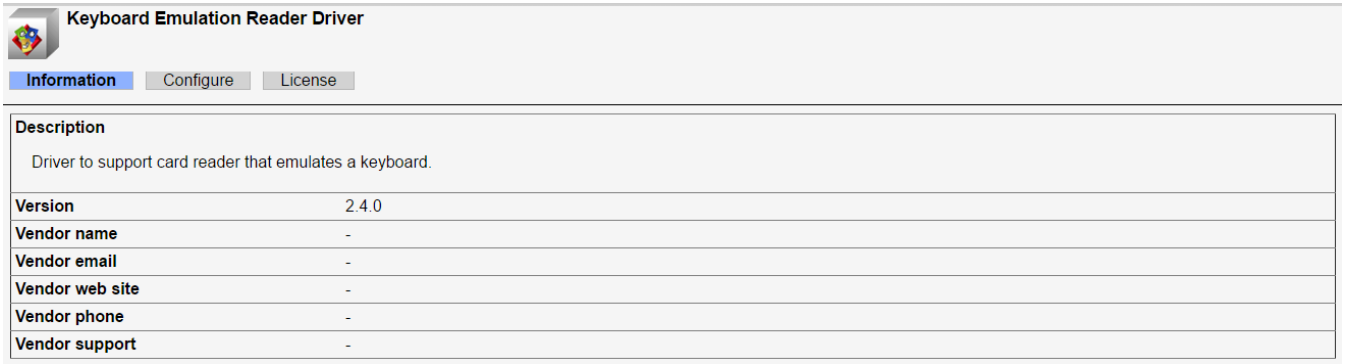
9.4 Lexmark device configuration

Lexmark devices **do not require** any special settings to install OptimiDoc.

There is only Device authentication available, hence the checkbox is selected by default.



If you want to use a **Card Reader with OptimiDoc**, you have to **install** this **plug-in** application as well:



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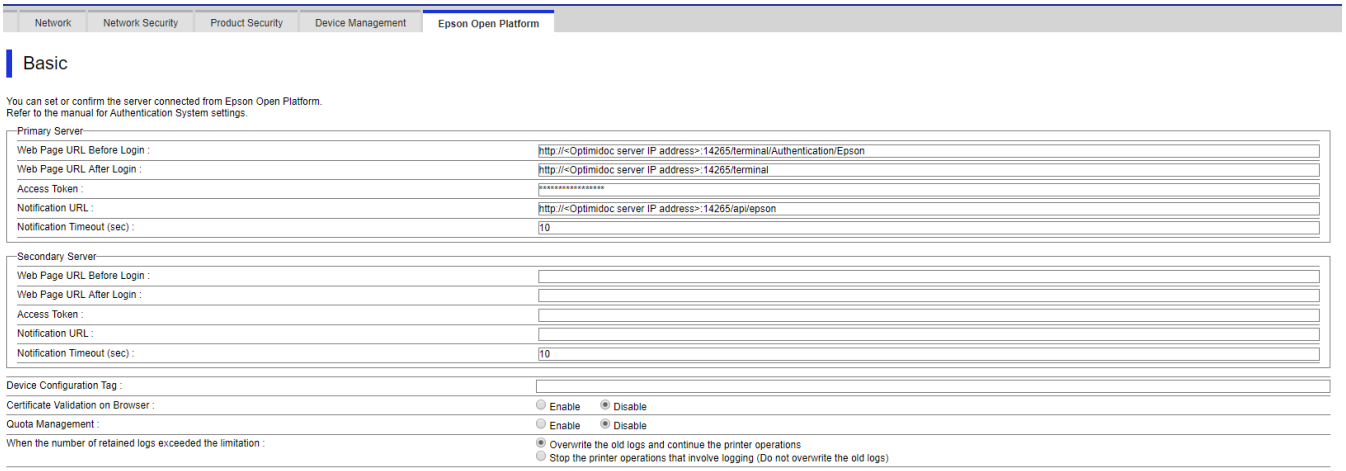
9.5 Epson device configuration

Epson devices **need to have EOP version 1.1 or higher**.



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9.6 Ricoh

This section provides information about the implementation of the OptimiDoc Server on Ricoh devices.

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9.6.1 Installation

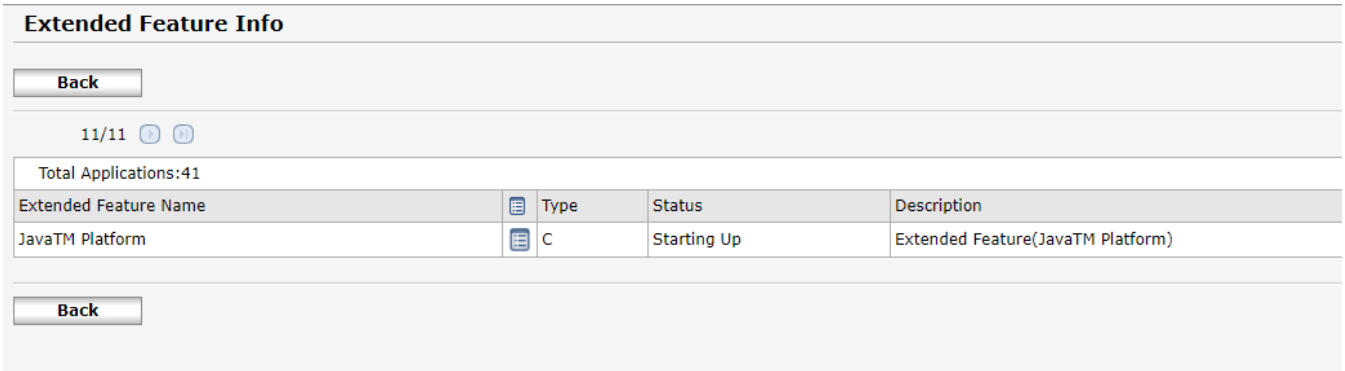
There are certain ways how to install our applications so in this chapter we will cover two basic procedures, first and recommended one is automatically via deploy script and another way is a manual way via Ricoh Remote Operation Client.

9.6.1.1 Installer

The easiest and automatic way of installation process is via our deploy package.

1. Download and unpack Ricoh installer package from Partner Portal.

2. Check whether your device has JavaTM Platform installed. Either you know this or you can find this info in Extended Feature Info (once logged in as admin on the device) by searching for this feature name.

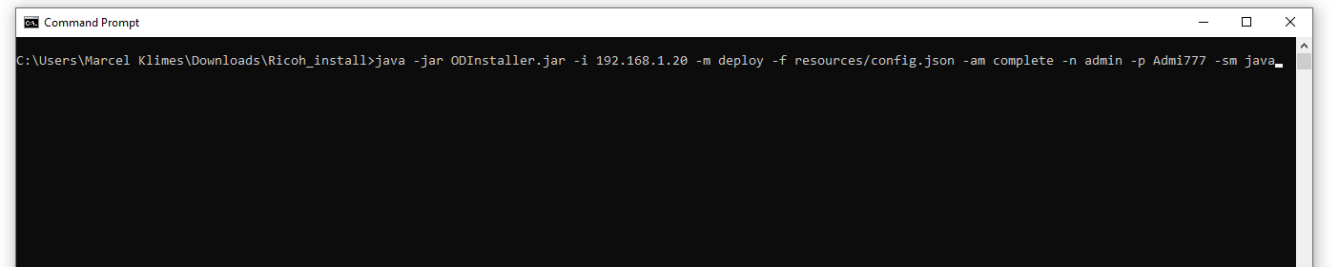


3. When you have Ricoh terminal pack extracted open command_examples.txt file and search for command, with necessary alterations (such as IP, login or password), based on whether you have Java or just SOP available on the Ricoh machine.

4. In order to run the command successfully in CMD execute the command from the folder with extracted files. Installation procedure can take several minutes. For example, installation of application on MFP with Java Platform:

Note If you want to use just OptimiDoc application authorization and you don't want to lock the device, use "-am apponly" argument.

Note Device authorization and authorization app are required to have accounting enabled.



5. Restart the device once the installation process finishes.

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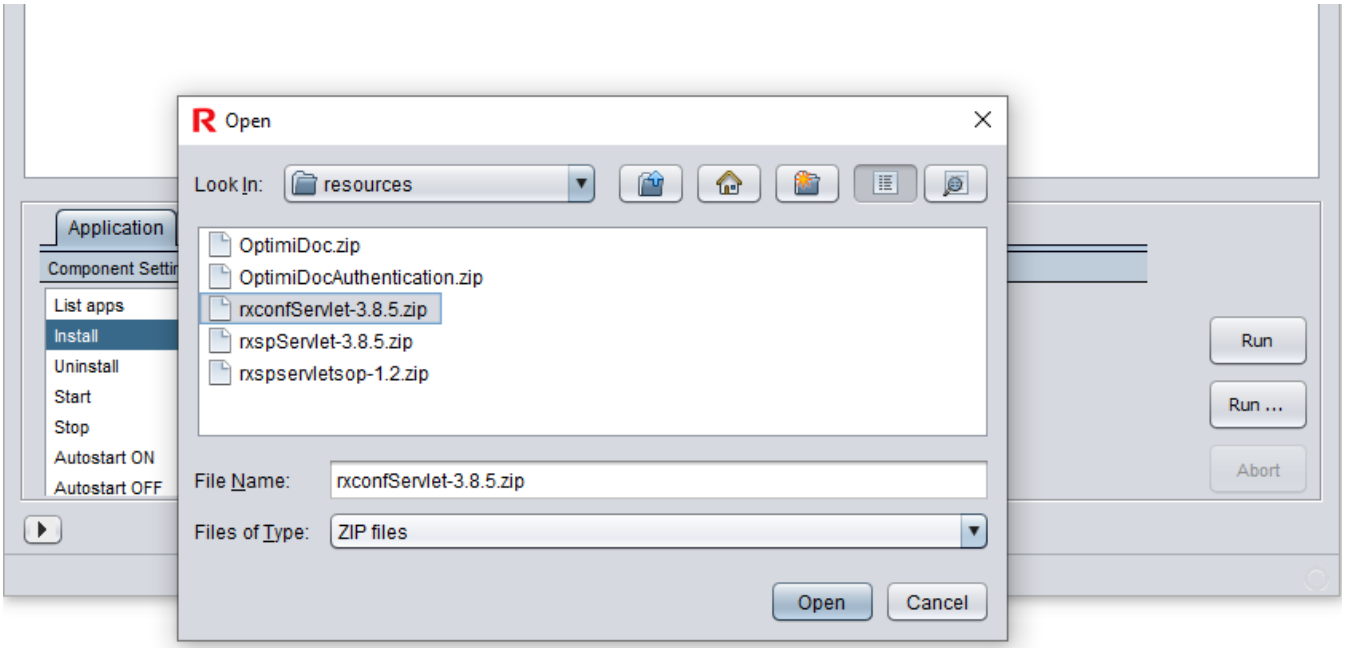
6. Then you can continue with the installation of the device via OptimiDoc web interface in Devices section.

9.6.1.2 Manual

You can install both applications manually via Ricoh Remote Operation Client if you have it (or upon request).

1. Add the device into the Ricoh Remote Operation Client.

2. On Application tab within left pane select Install; then locate and install .zip files located in \resources folder in such order depending on if Ricoh MFP has Java or not (either you know this or you can find this information in Extended Feature Info (once logged in as admin on the device) by searching for this feature name "JavaTM Platform") - if it has Java Platform available install these two servlets "rxconfServlet-3.8.5.zip", "rxspServlet-3.8.5.zip"; if not install just servlet "rxspservletsop-1.2.zip".



3. Navigate to SP tab and load the ACL file from the Ricoh package downloaded from Partner Portal. (eg. \resources\acl.dist). Then apply all these SPs and their values:

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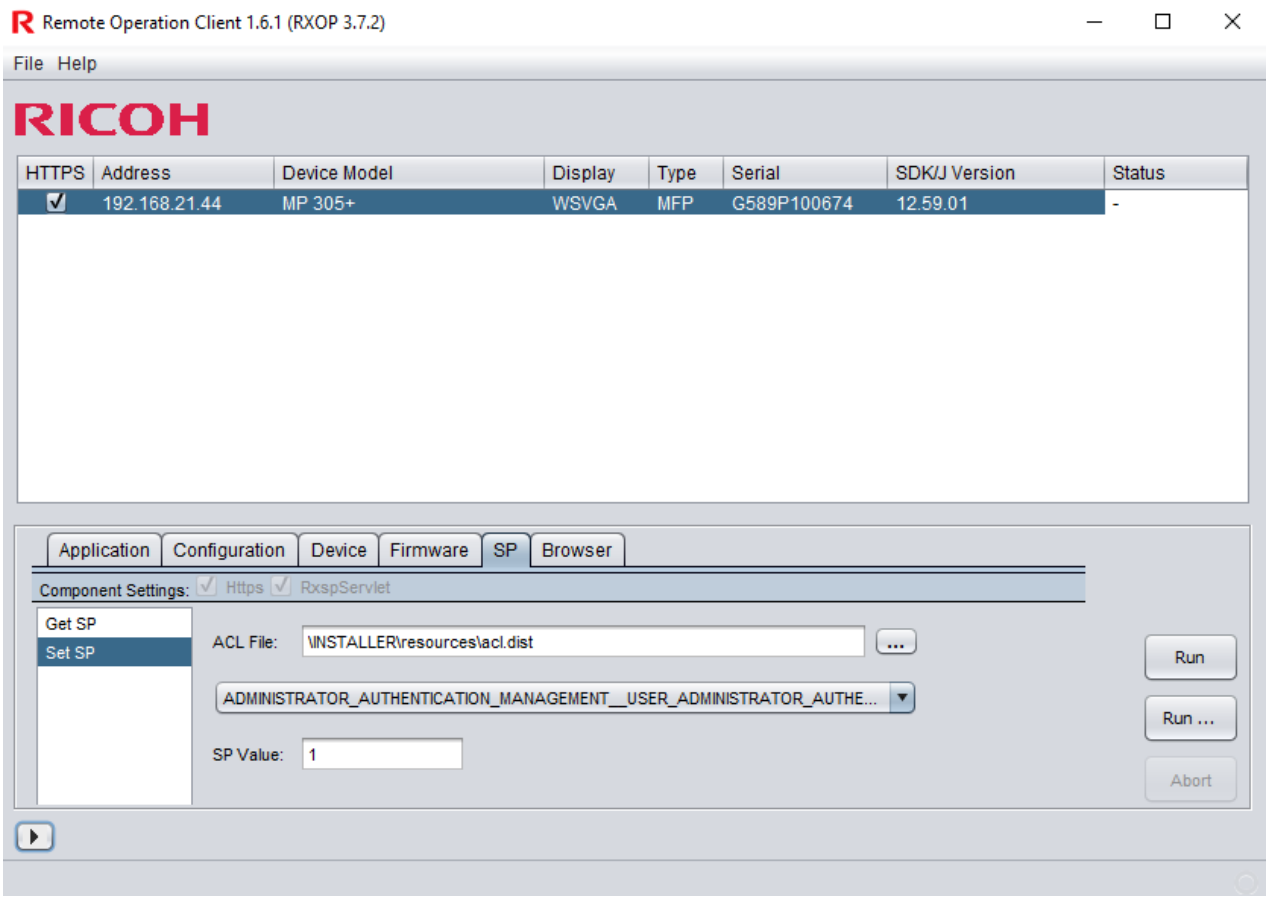

ADMINISTRATOR_AUTHENTICATION_MANAGEMENT__MACHINE_ADMINISTRATOR_AUTHENTICATION_SETTING -> 1
ADMINISTRATOR_AUTHENTICATION_MANAGEMENT__USER_ADMINISTRATOR_AUTHENTICATION_SETTING -> 1
ACCESS_CONTROL__SDK_CERTIFICATION_DEVICE -> 1
USER_AUTHENTICATION_MANAGEMENT -> 4
ACCESS_CONTROL__EXTERNAL_CERTIFICATION -> 0
ACCESS_CONTROL__EXT_AUTH_DETAIL -> 0
OPTIONAL_COUNTER_TYPE__DEFAULT_OPTIONAL_COUNTER_TYPE -> 0
OPTIONAL_COUNTER_TYPE__EXTERNAL_OPTIONAL_COUNTER_TYPE -> 0
MF_KEYCARD_JOB_PERMIT_SETTING -> 1
ACCESS_CONTROL__DETAIL_OPTION -> 1000
TRACK_PERMISSION -> 1
AUTO_DELETE_USER_IN_ADDRESS_BOOK -> 1

4. Back on Application tab within left pane select Install; then install "OptimiDoc.zip" and "OptimiDocAuthentication.zip" files located in \resources folder.

5. If you want to use card reader authentication follow these steps.

6. Finally reboot the device.

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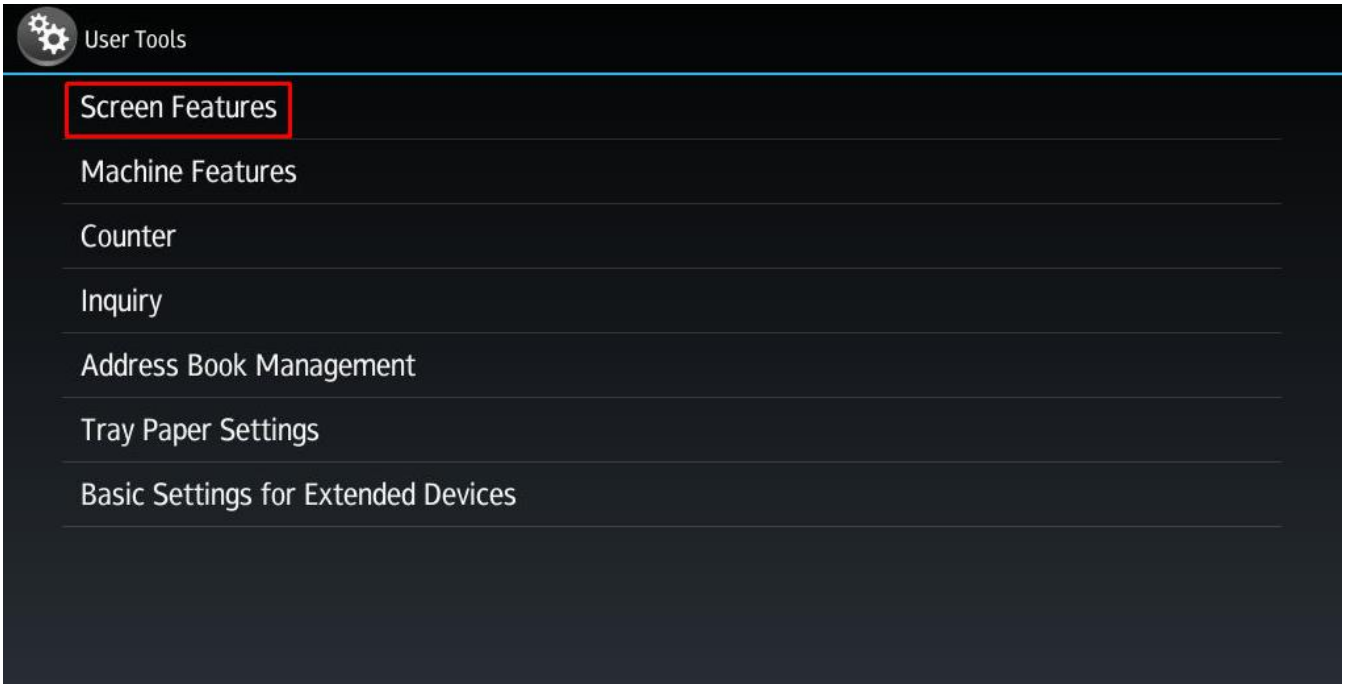
9.6.2 Authentication

In order to set up authentication; install OptimiDoc Server with Device authentication enabled and select the desired authentication method.

9.6.2.1 Card Reader configuration

1. Login as Admin on the Ricoh panel and navigate to User Tools -> Screen Features



2. There select Screen device settings

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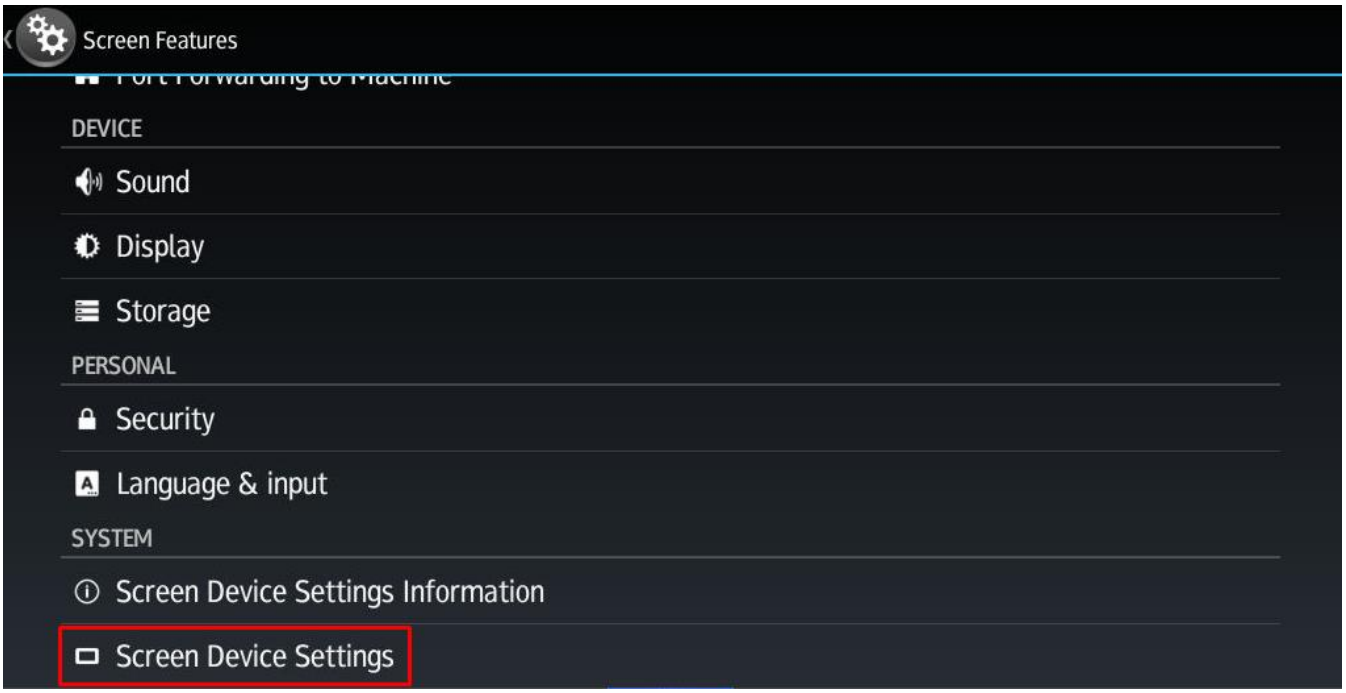
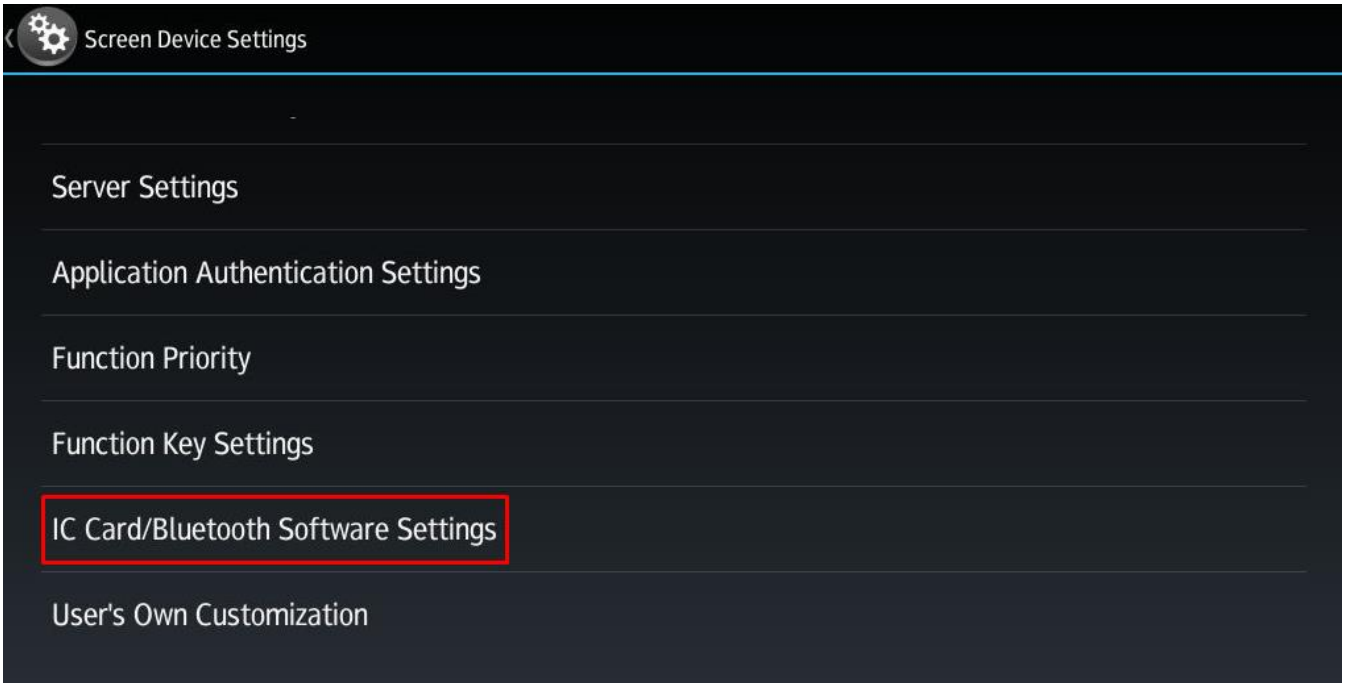


3. Go to IC Card Software Settings



4. Select Proximity Card Reader

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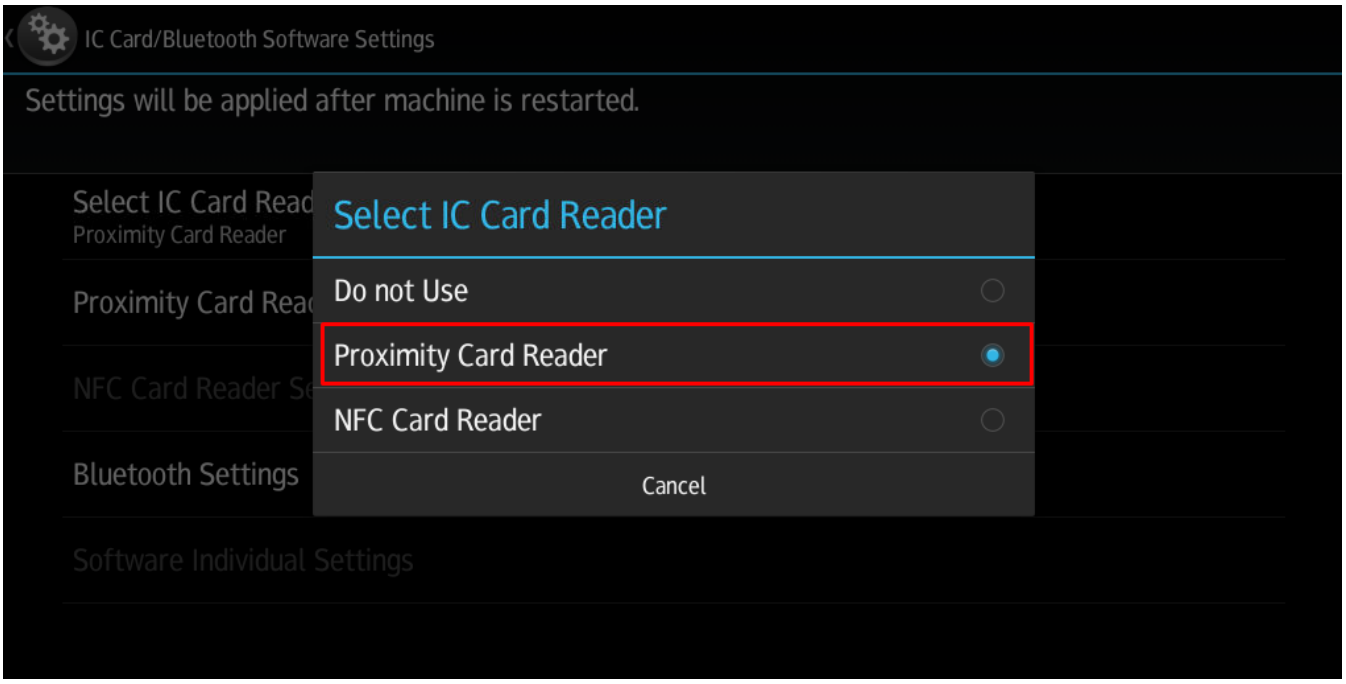
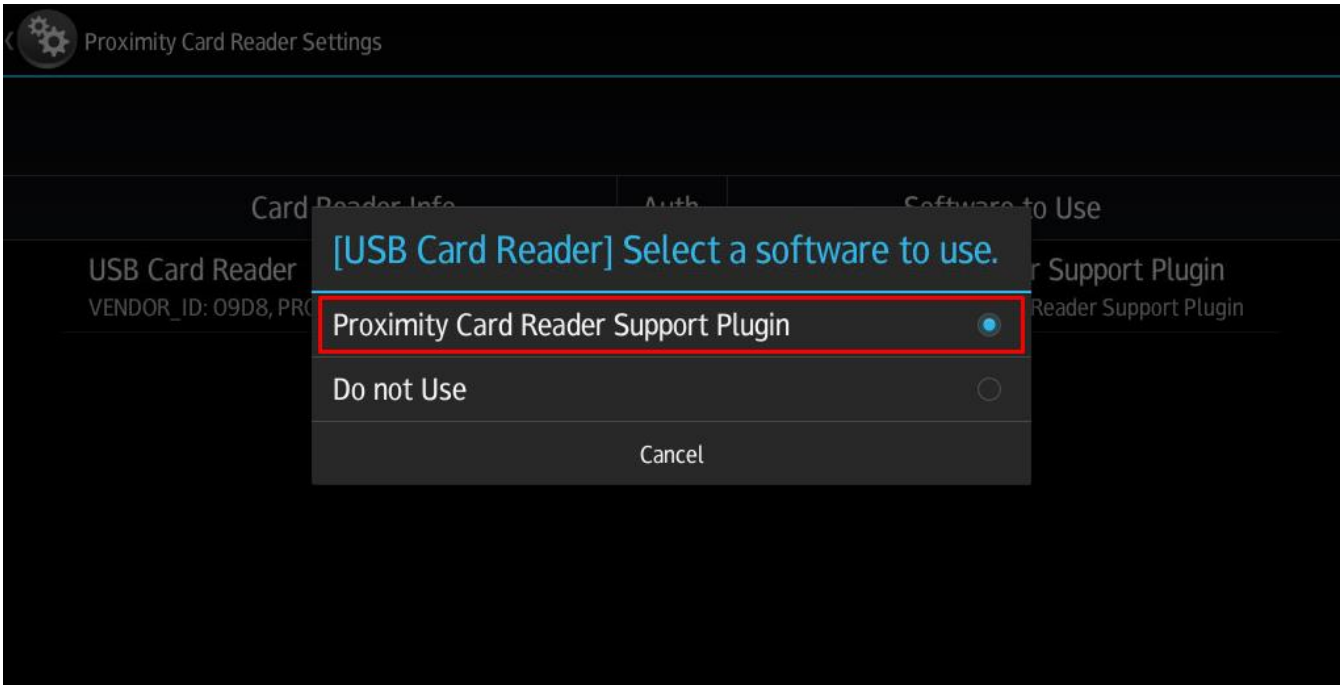


5. Finally plug the reader in and in Proximity Card Reader Settings select CIS plugin



Tested with Elatec readers (PID:0410,VID:09D8)

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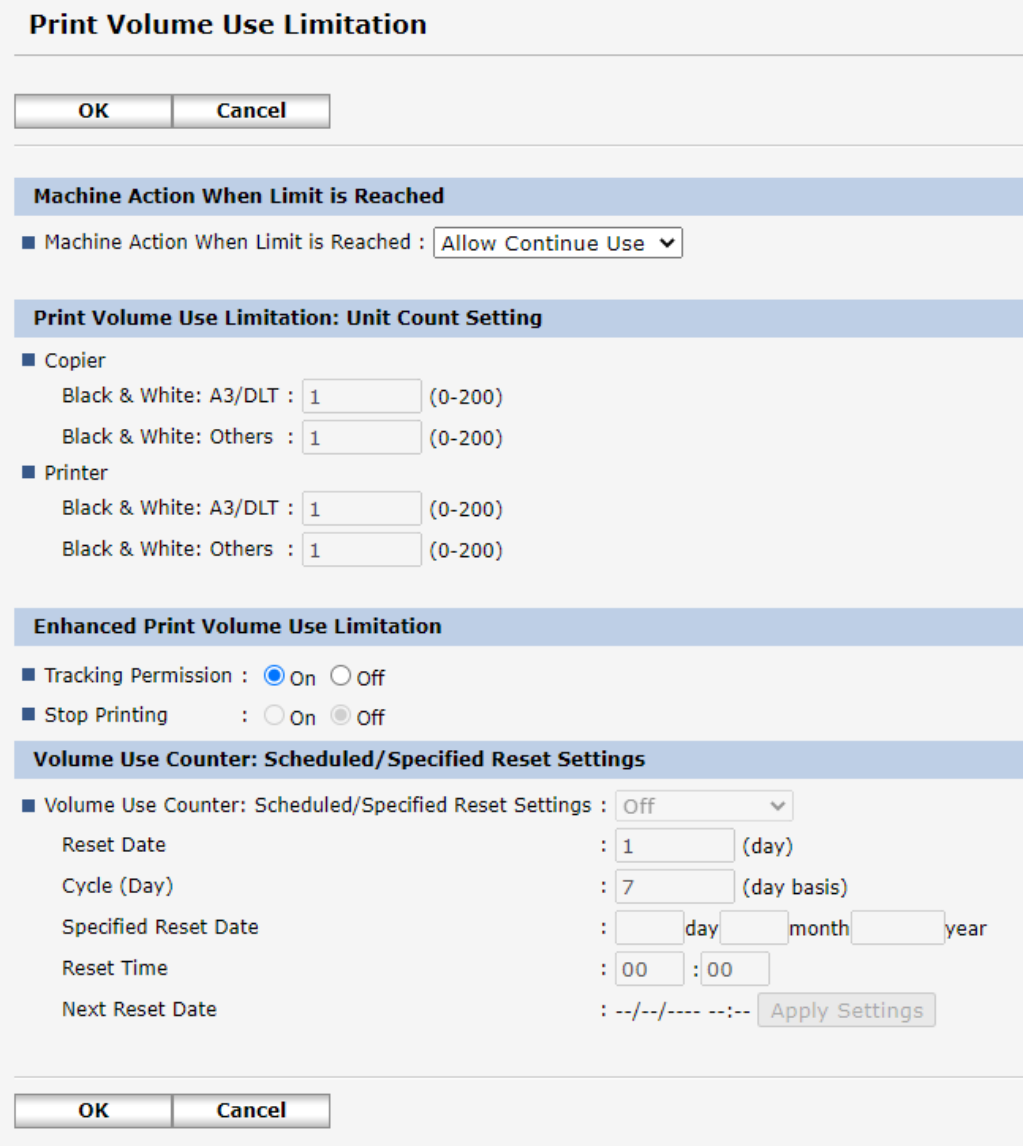
9.6.3 Accounting

The **accounting** should be **by default automatically enabled** during the installation process.

In case when the accounting informations are not visible within the Standard Report section please check the following:

1. Log In to Web Image Monitor of your Ricoh device.
2. Navigate to Device Management -> Configuration -> Device Settings -> Print Volume Use Limitation
3. Turn Tracking Permission on.



Or if you have the Ricoh Remote Operation Client you can check it by running Get SP command on the device (in order to run such command you'll need to load ACL file from the installer pack which you can download from partner.optimidoc.com - \resources\acl.dat):

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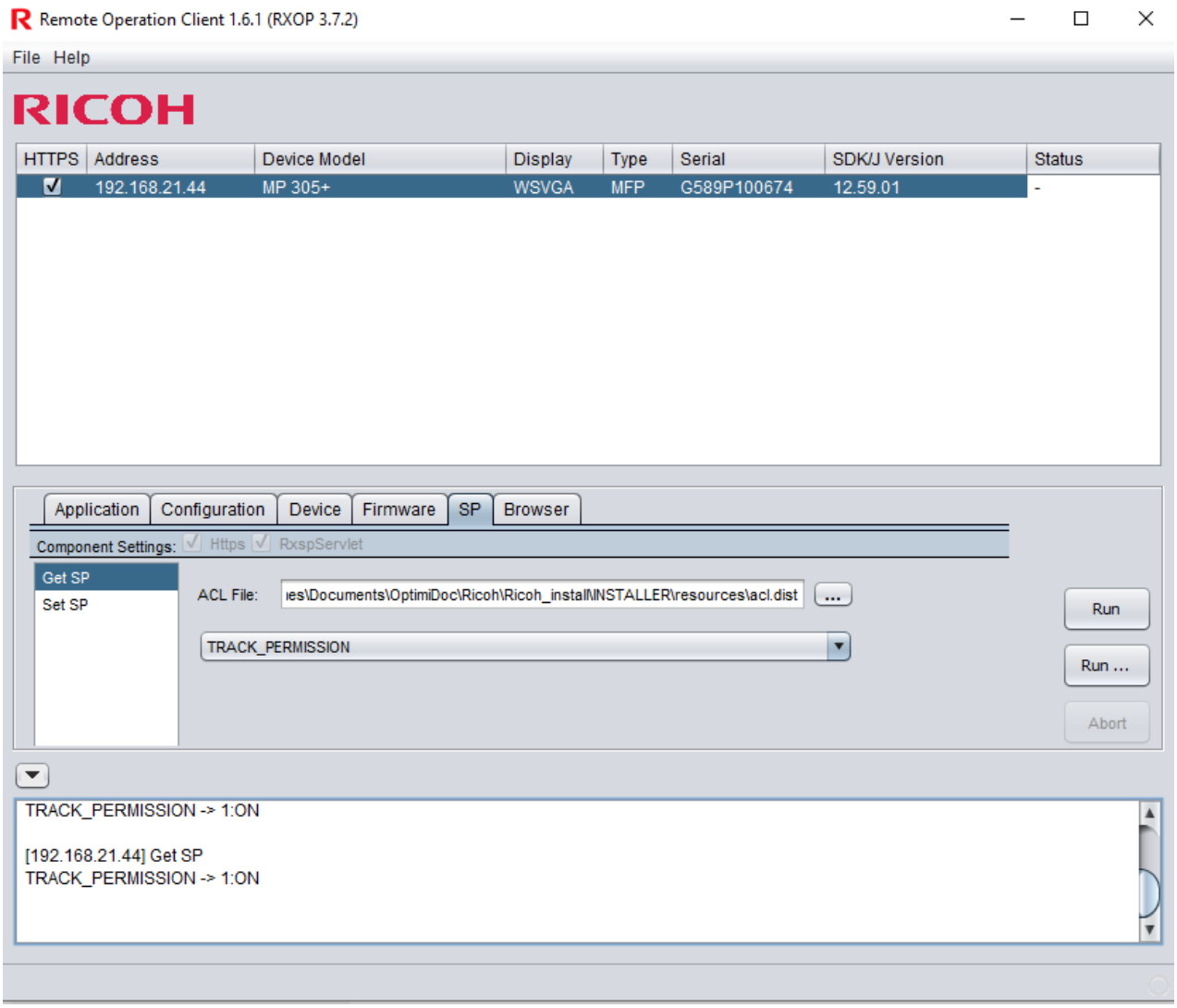
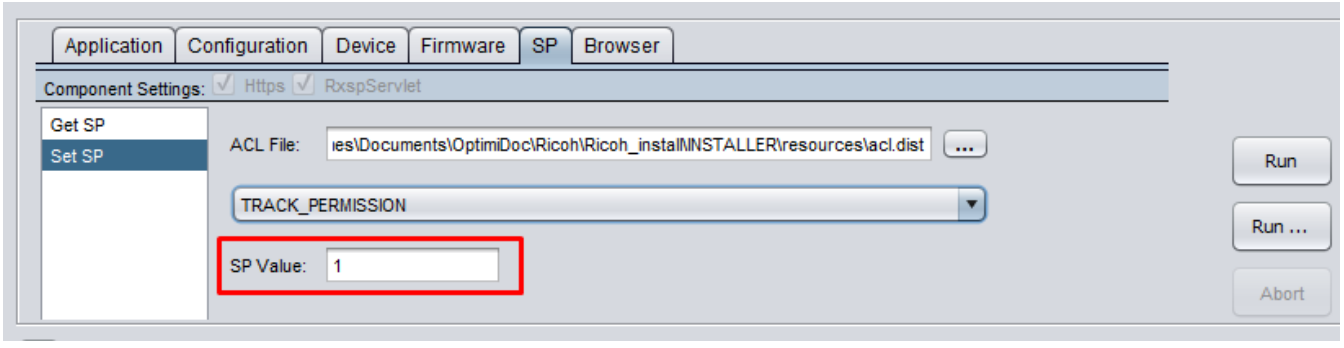


If this TRACK_PERMISSION is 0 then run Set SP command ad set value to 1:



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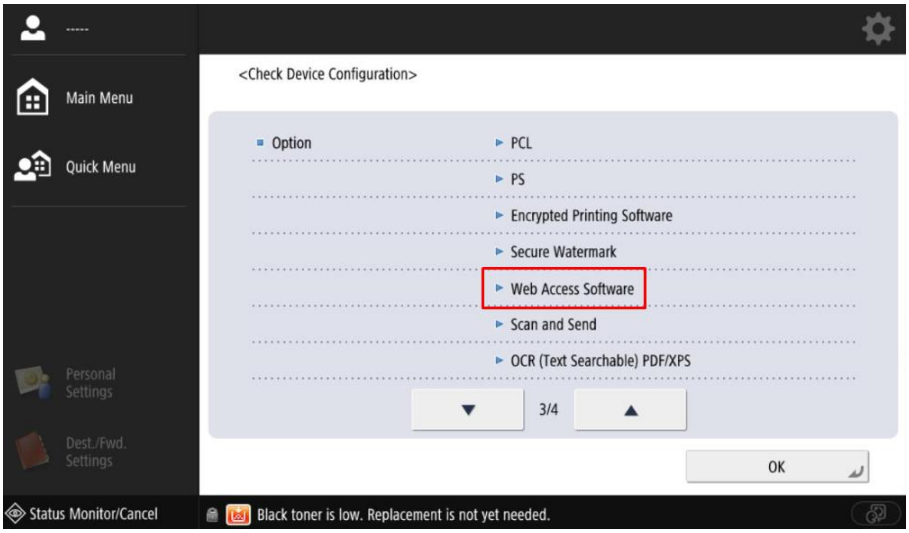
9.7 Canon

This installation guide describes installation process through Canon CDS – device RUI. Installation through CDS is executed on a per-device basis, i.e. you can only install on a single device at a time. This is ideal for cases where not many target devices are involved.

Preconditions:

1. There must be the **Web Access Software activated** on the Canon device prior to installation. You can check whether this option is active or not in menu **Counter [Key] -> Device Info/Other -> Check Device Configuration**.
2. Installation of applications via CDS requires internet connection.

If you by a chance do not see **Web Access Software** option in device's configuration, please get in touch with your local Canon engineer and ask them to activate the web access kit for you on such device.



Overview of the Installation Process

1. Check settings of the device and preconditions
2. Installation of OptimiDoc Terminal application
3. Installation of OptimiDoc Authentication application
4. SNMP configuration
5. Installation of the device through OptimiDoc Server web interface

Installation of applications via CDS

Installation of OptimiDoc Terminal application

1. Access the device **Remote UI (**default login is **Administrator/7654321)** via browser and **select Settings/Registration.**

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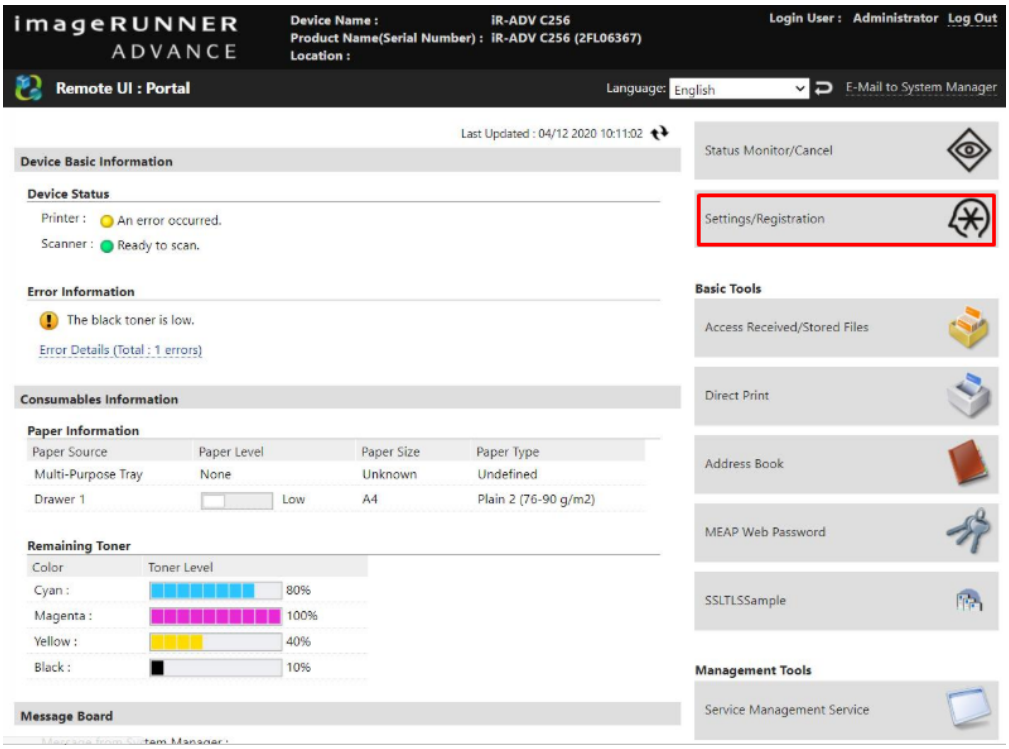
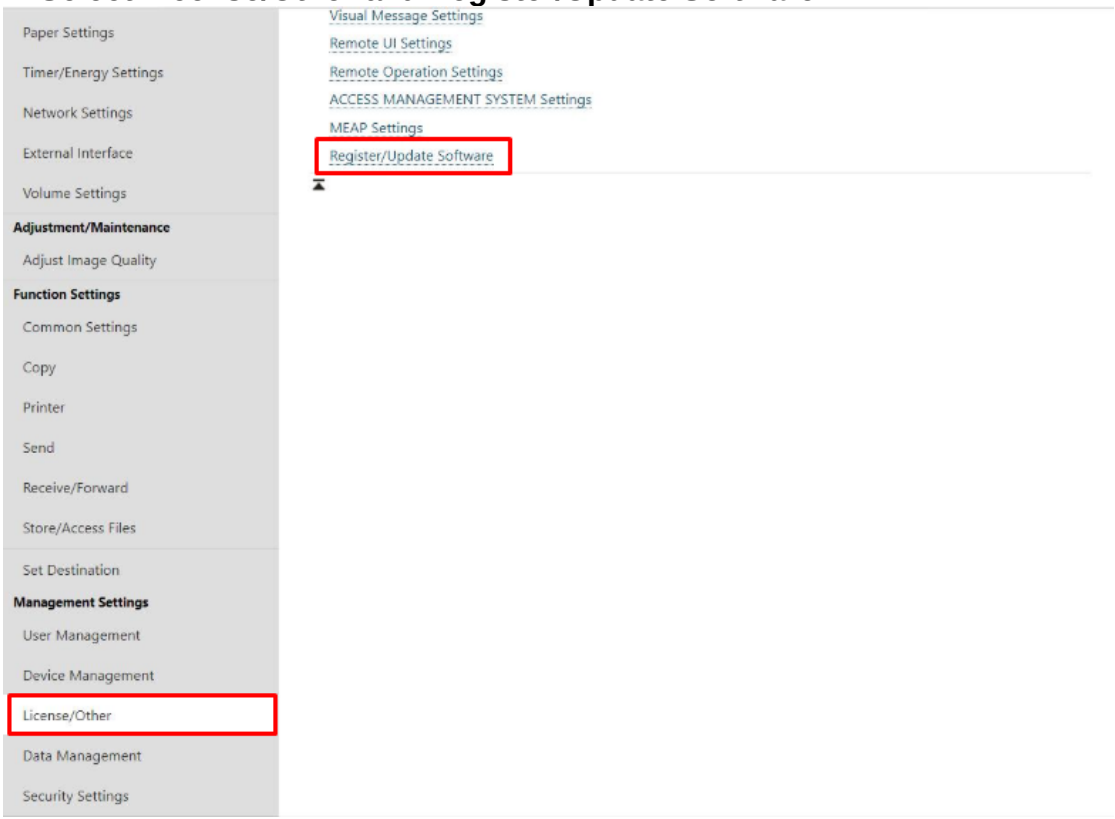


2. **Select License/Other** and **Register/Update Software.**



3. Enter **License Access Number** and click **Next.**
LAN code for **Terminal** application: **7TAQ-XXPJ-CLAB-WSSR**
LAN code for **Authentication** application: **RD97-VWQK-LZ3M-S6KN**

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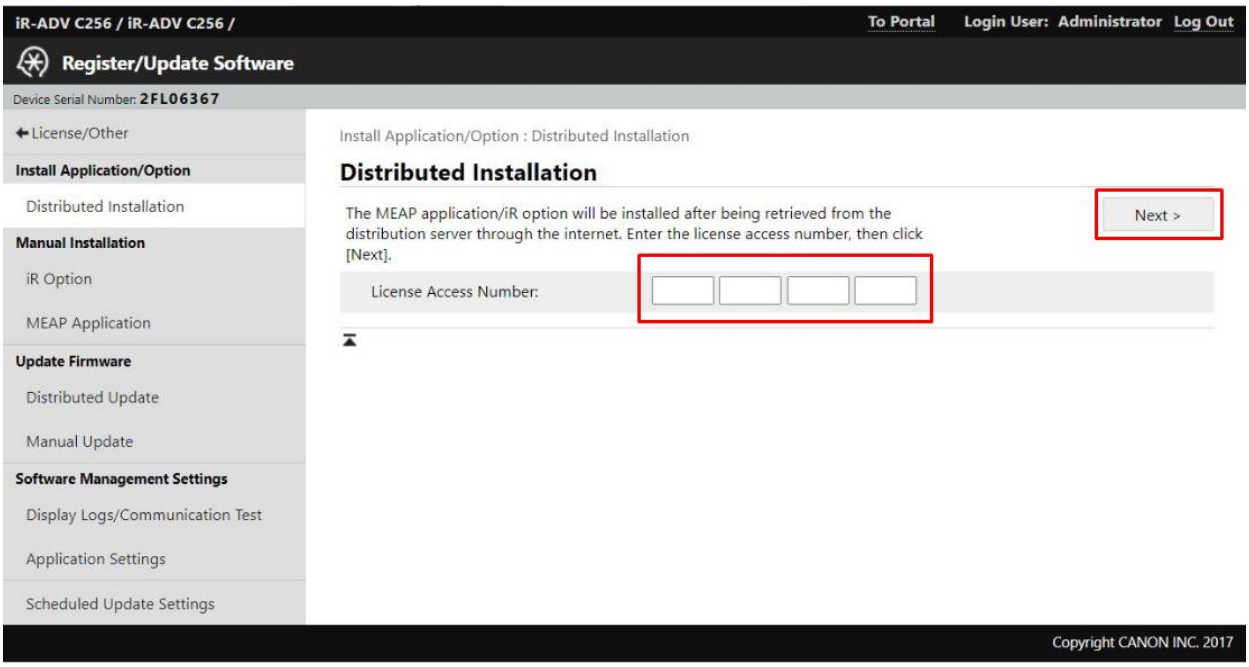
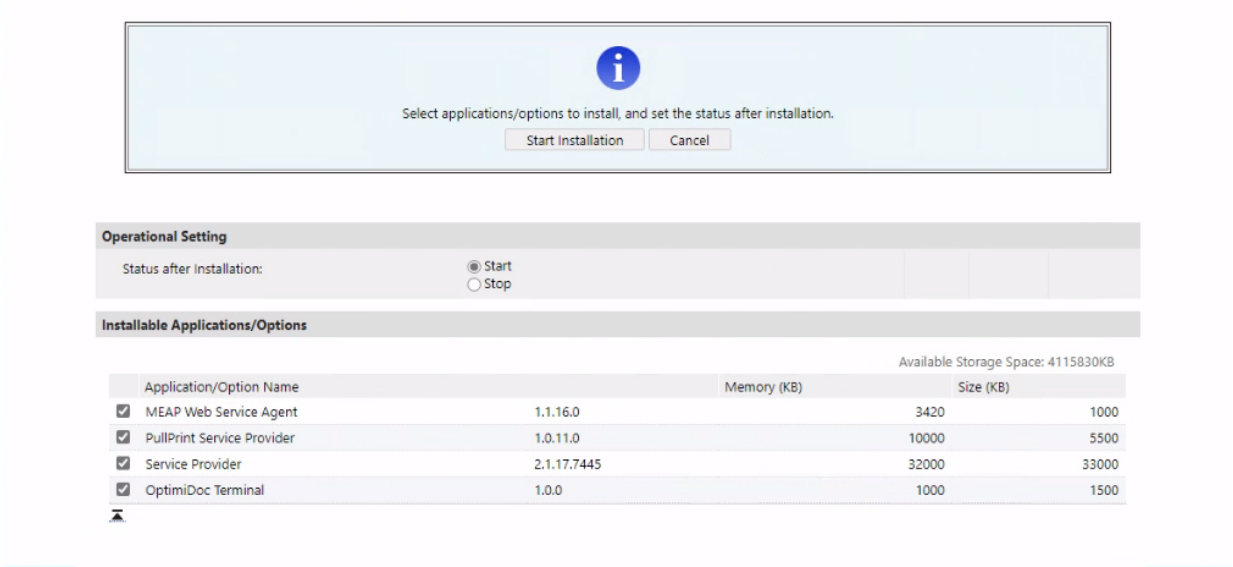


4. **Select** all the **items** to be installed**.**



5. **Accept EULA** terms.

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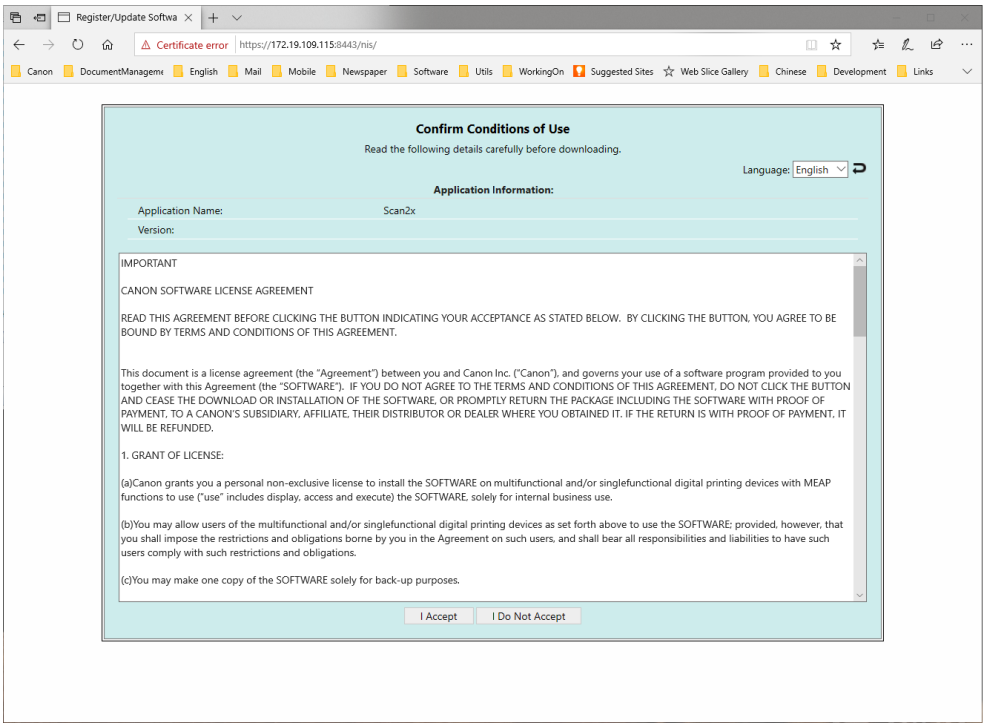
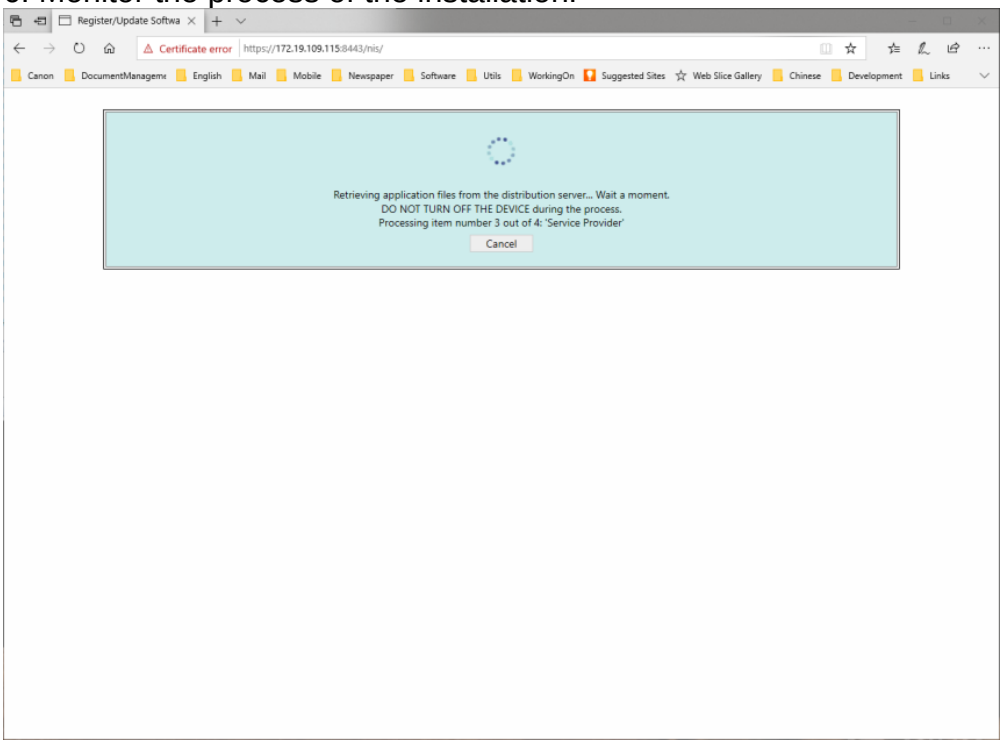


6. Monitor the process of the installation.



7. When the installation process finishes, you will see **confirmation** page.

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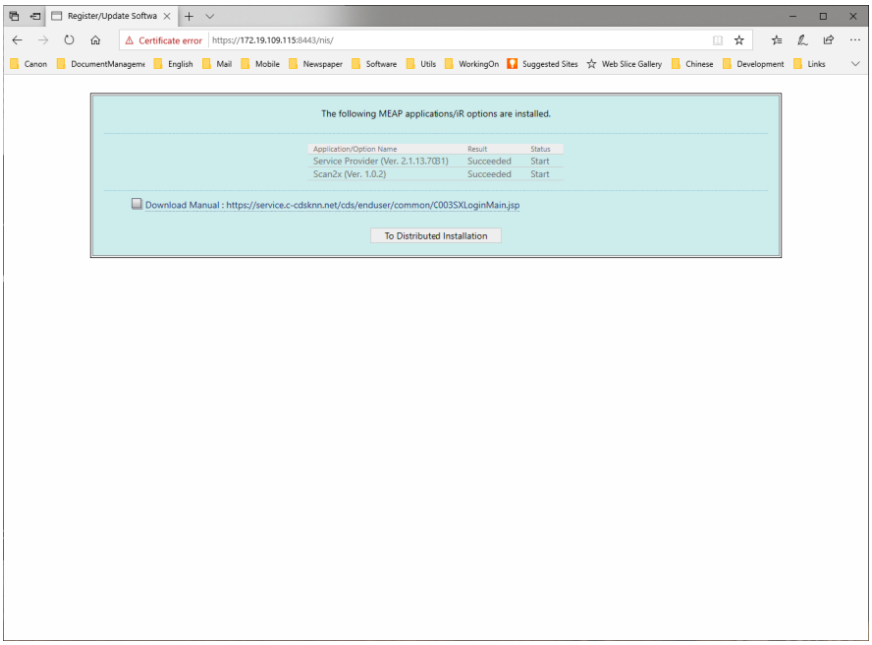
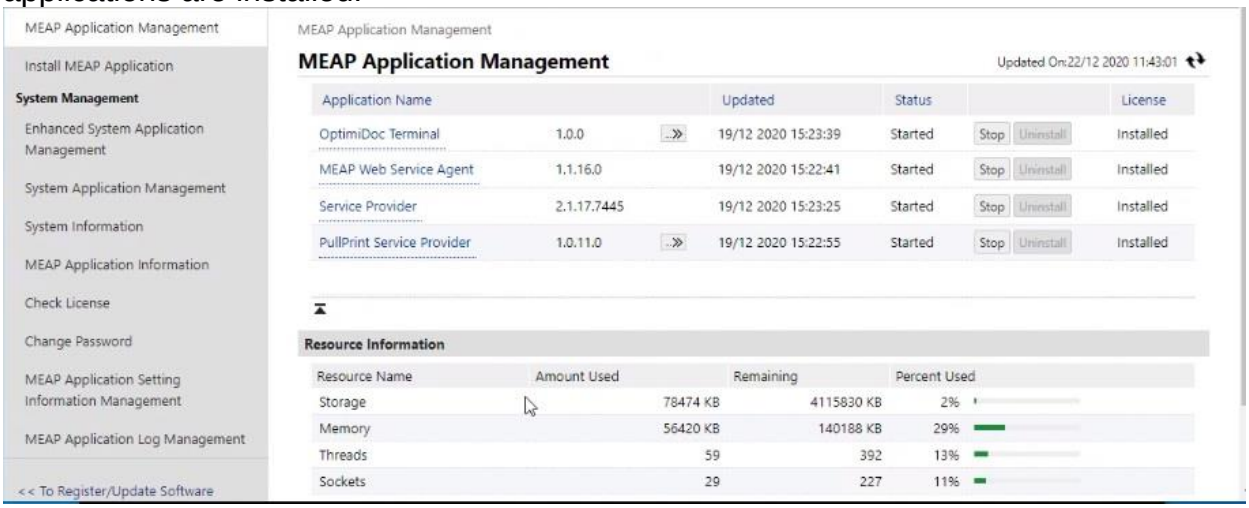


8. You can now check the list in **MEAP Application Management** to ensure that all selected applications are installed.



Installation of Authentication application

Follow the same steps as in case of installation of the Terminal application, just use the appropriate LAN code for Authentication application.

After the successful installation of Authentication application please restart the device to let the OptimiDoc Authentication application start. Then you can check its status in **Enhanced System Application Management**.
RUI login/password is the same **Administrator/7654321**.

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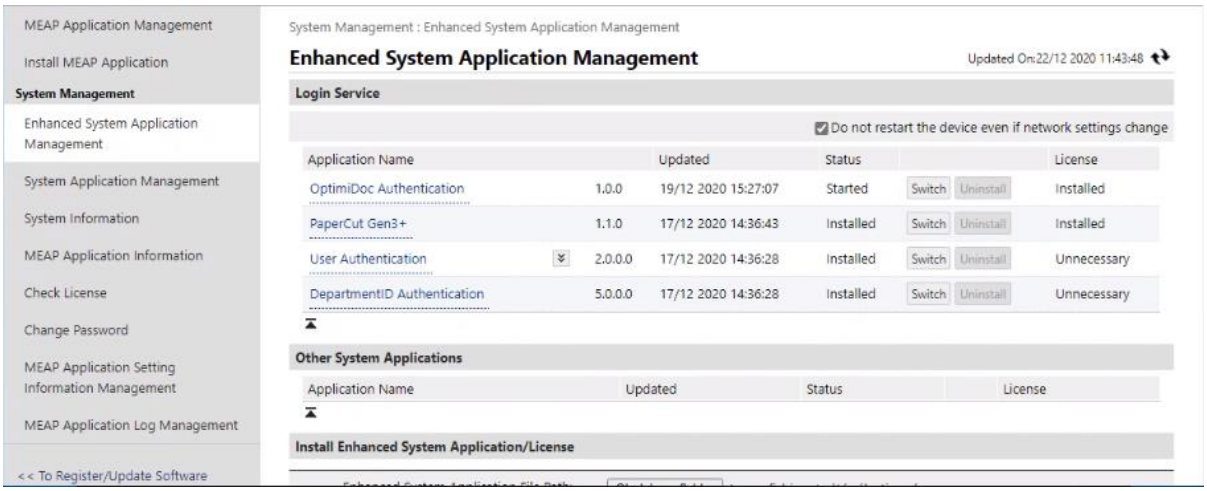

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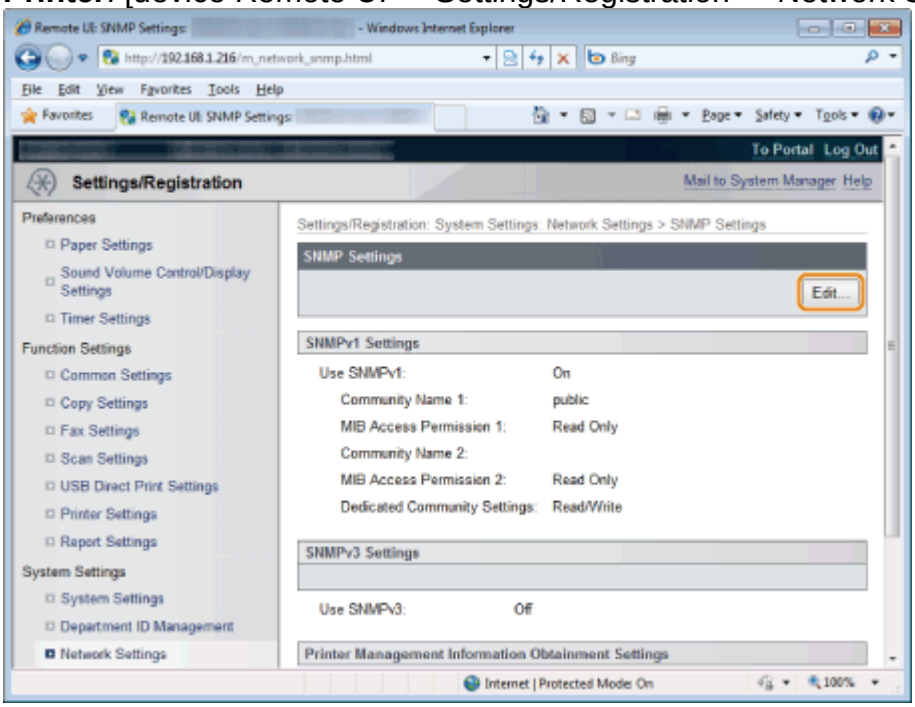
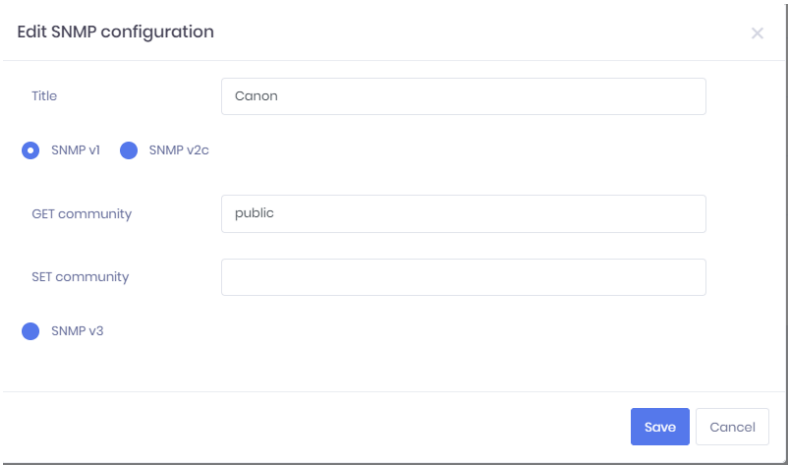
Installation of OptimiDoc Server

SNMP configuration

Before proceeding with the installation itself, check and configure SNMP settings on both sides - the printer and OptimiDoc Server.
By default, there is a SNMPv1 configured on the printer but OptimiDoc uses by default SNMPv2, so please make sure that these two are the same.
Printer: [device Remote UI -> Settings/Registration -> Network Settings -> SNMP Settings]



OptimiDoc Server: [web interface -> Device -> SNMP Configurations -> Add SNMP config]



Installation of the device

To install OptimiDoc Server terminal navigate to Device -> Devices -> Add device in the web interface.

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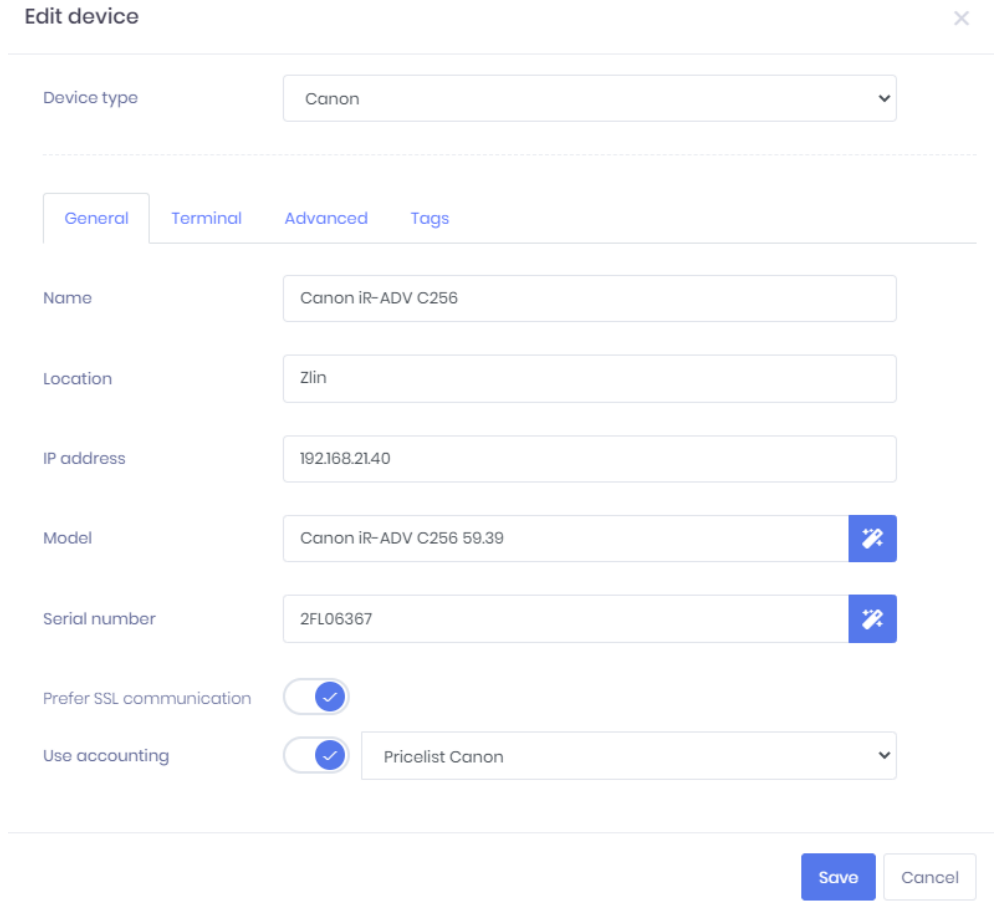
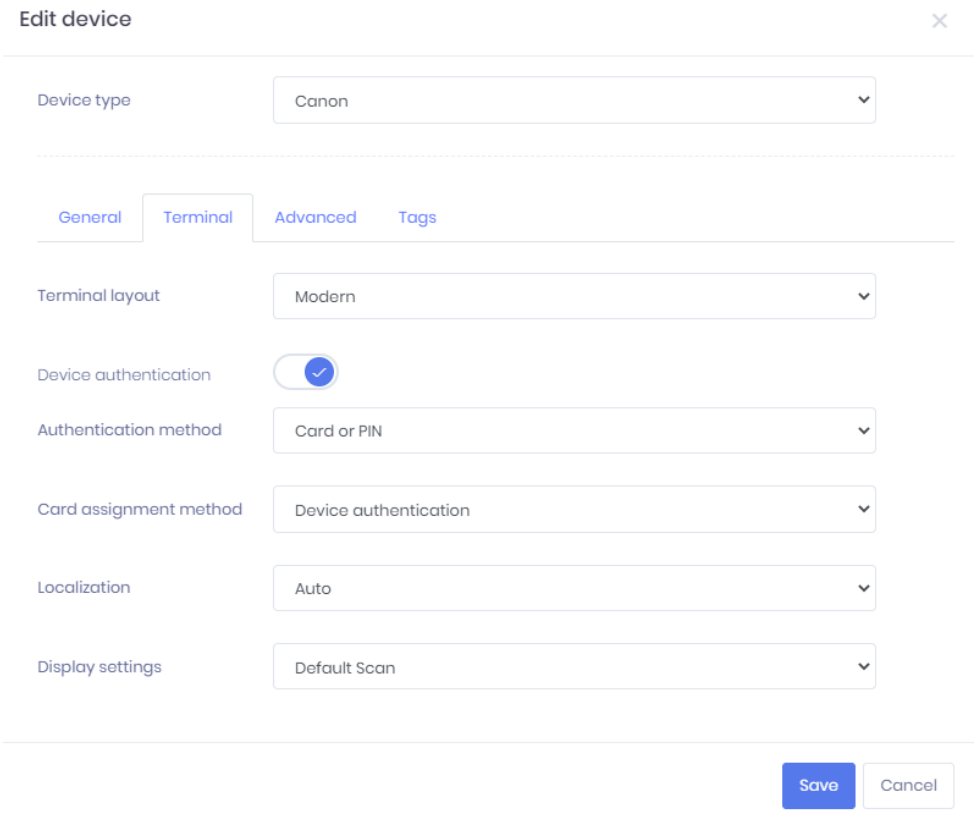
1. Start the configuration on **General** tab and fill out all the fields needed.



2. Configure **Terminal** settings.



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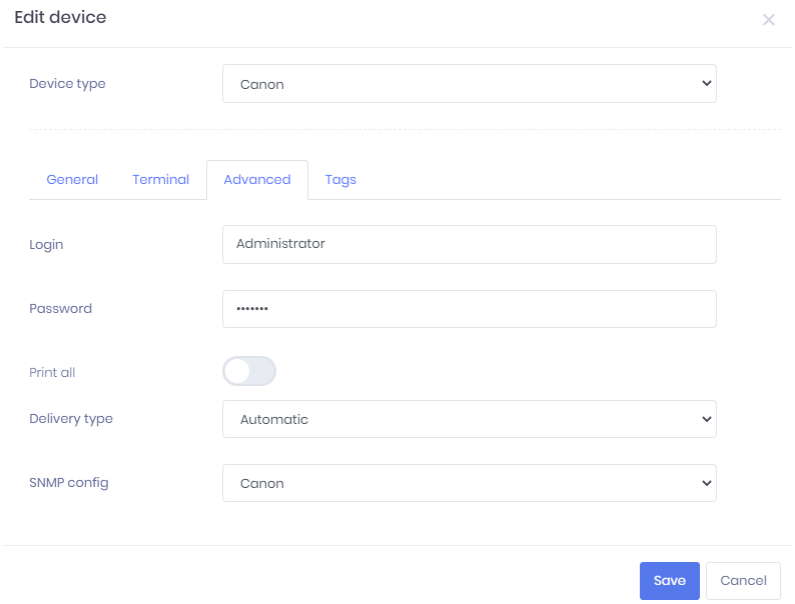
3. And finally configure the **Advanced** tab, select **SNMP** configuration, that you previously set up and **fill in** the administrator's **login and password**. **Default** device's **login** is **Administrator** (case sensitive – with capital 'A') after the installation of OptimiDoc Authentication application on the device and the **password 7654321.**



4. To start the installation/configuration of the terminal click Save.
5. Now you can check whether the installation was successful on the device panel by logging in and performing print and scan tasks.

Known limitations:
When using scanning, user must have only one login in the user's profile in OptimiDoc

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10 Tools & Tips

In this section you can find the best practices and practical guides for everyday administration.

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10.1 How to upgrade

In this section you will find out how to upgrade OptimiDoc to newer versions. Upgrade is possible only if New Version Support is valid.

Caution The downgrade is generally not recommended mainly due to possible changes in the database internal structure and missing files.

There is a general procedure that you can follow in case of OptimiDoc upgrade, but there are also some specific upgrade procedures between certain versions.

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10.1.1 General upgrade between versions

OptimiDoc's installer does not touch any existing config or database files (except files that are being updated because of improvement or a bugfix), therefore no backup is needed but we advise you to do so in case of failure during the installation.

Backup of the local database files:

1. Stop the OptimiDoc WebApp in the Internet Information Services (IIS) Manager.
2. Switch to the path <OptimiDoc_install_dir>\WebApp\App_Data
3. Copy/backup files with suffix .mdf and .ldf

Backup of the License file:

1. Switch to the path <OptimiDoc_install_dir>\WebApp\App_Data\License
2. Backup file <licenseNumber>.lic

Backup of config files:

1. Go to the path <OptimiDoc_install_dir>\WebApp\
2. Backup file Web.config
3. Go to the path <OptimiDoc_install_dir>\WebApp\App_Data\
4. Backup file config.json

Install OptimiDoc Server with installer located on partner.optimidoc.com

or

apply patch you downloaded from partner.optimidoc.com

How to apply patch?

1. Stop the OptimiDoc WebApp in the Internet Information Services (IIS) Manager.
2. Stop the OptimiDoc Service in Windows Services.
3. Unpack and replace/merge files and folders in OptimiDoc installation directory.
4. Start the OptimiDoc WebApp in the Internet Information Services (IIS) Manager.
5. Start the OptimiDoc Service in Windows Services.

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10.1.2 From v8.xx and lower to version 9.xx and higher

Since version 9 we use the newer ABBYY FRE 12, therefore a license upgrade is required. If you have a valid New Version Support please follow these instructions:

1. Contact our support at email address **support@optimidoc.com**. We will update your license.
2. Also we will generate a new license key with ABBYY FRE 12 support.
3. Deactivate the ABBYY licence in LicenseManager.exe (<OptimiDoc-installation-folder>\OCR\Bin64\licensemanager.exe)
4. Continue with general upgrade steps and then continue here
5. Activate your new ABBYY FRE 12 license - Online or Offline

If you don't have a valid New Version Support, please contact the salesperson responsible for your region and discuss your possibilities.

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10.1.3 How to upgrade from version 5 to version 6

Version 6 has different parsers; firstly, you will install OptimiDoc via installer for version 6.13 (available at Partner portal) and then you can use the patch for higher version (actual patch for version 6.14).

More details of the installation procedure are below:

1. **Very important:** If you are using the local DB, please create a backup of database files, new major version during the installation rewrites older local DB files!

How to create a backup copy of local DB files?

a) Start Internet Information Services (IIS) Manager and stop OptimiDoc website.

b) Open the folder **<OptimiDoc>/WebApp/App_Data**.

c) Copy the two files with suffix .mdf and .ldf.

2. Install OptimiDoc version 6.13 via installer from the Partner portal.

3. When the installation is finished, stop OptimiDoc website in IIS Manager again.

4. Copy previously saved files (.mdf and .ldf) back into the folder **<OptimiDoc>/WebApp/App_Data.**

5. Start OptimiDoc website in IIS Manager.

6. After actualization to the version 6.13, it is necessary to make a change in the file web.config (its destination is: **<OptimiDoc>/WebApp).**

a) Find the following:

```
<dependentAssembly>
      <assemblyIdentity name="Newtonsoft.Json" publicKeyToken="30ad4fe6b2a6aeed"
culture="neutral"/>
      <bindingRedirect oldVersion="0.0.0.0-6.0.0.0" newVersion="6.0.0.0"/>
 </dependentAssembly>
```

b) Change the item **bindingRedirect:**

```
<bindingRedirect oldVersion="0.0.0.0-7.0.0. 0" newVersion="7.0.0. 0" />
```

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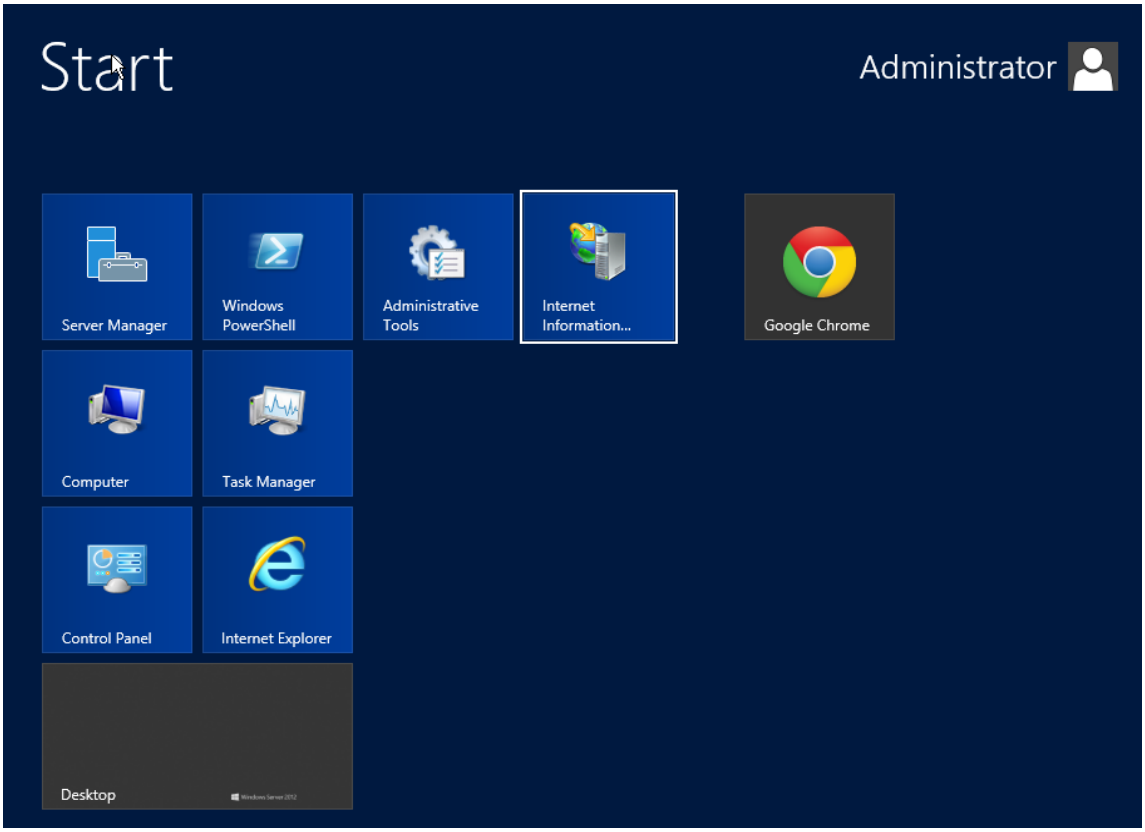
10.2 How to change OptimiDoc web application port

Default ports of the OptimiDoc web interface are 14265/6. To change the port number please follow these steps:

1. From the Start menu, open **Internet Information Services (IIS) Manager**.



2. The **Internet Information Services (IIS) Manager** window opens.

Select the **OptimiDocWeb** site from the left panel. Open the menu by right clicking and select **Edit bindings**.

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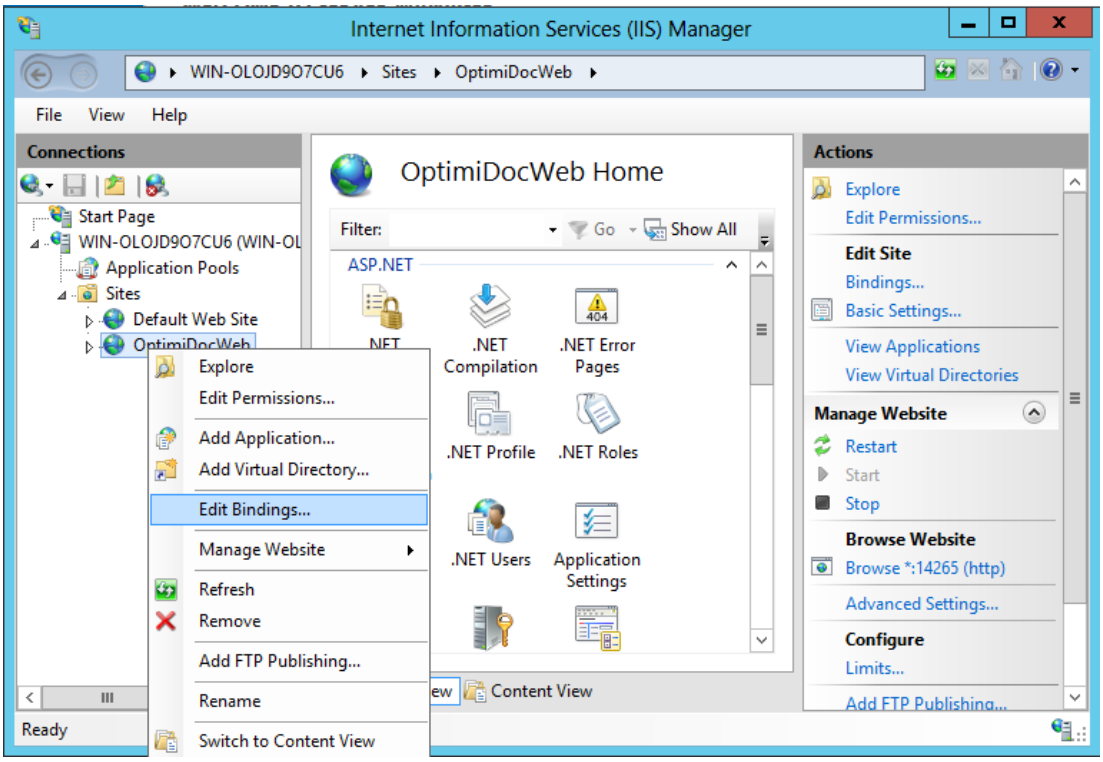
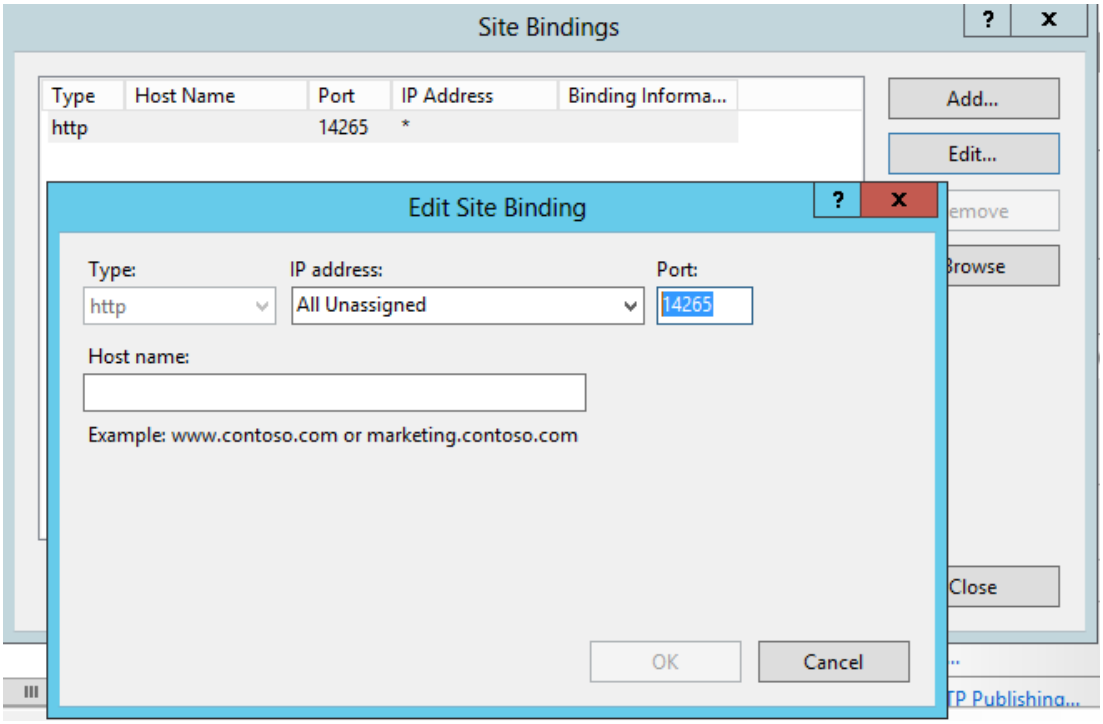


3. The **Site Bindings** window opens.

Click the **Edit** button, enter the desired port number and close the **Site Bindings** window.



4. After the changes it is necessary to restart the site. To restart the site, click on the **Restart** button in menu.

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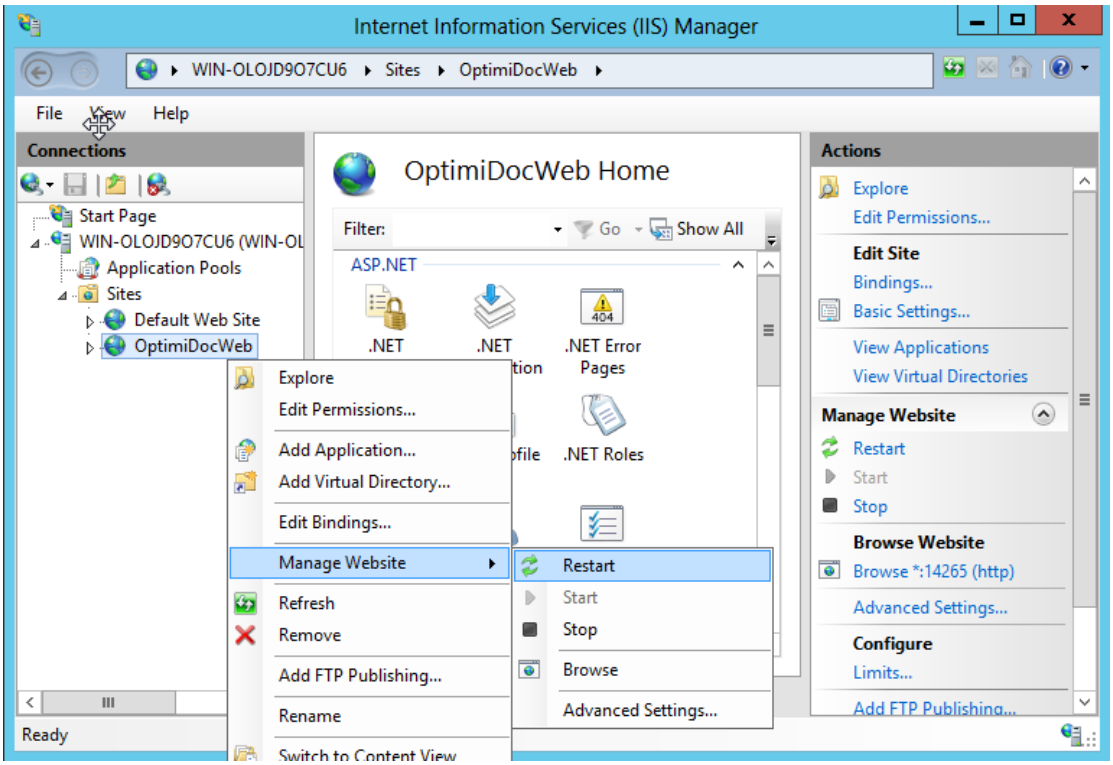

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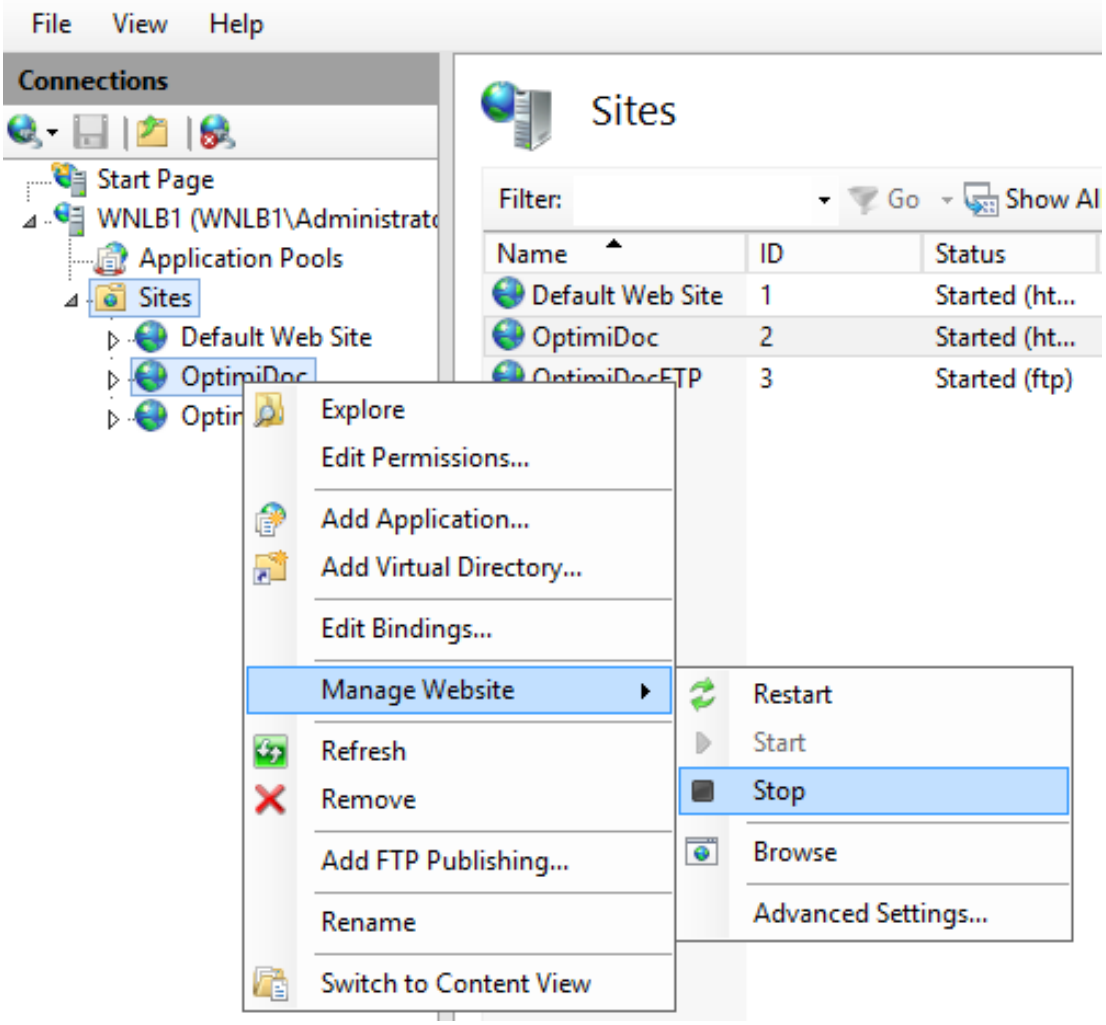
10.3 Migrating OptimiDoc to another server

- Contact OptimiDoc support, tell us your license number and we will enable additional activation.
- If you use a Local DB to store data, follow these steps to preserve the data:
  - Stop the OptimiDoc website in IIS
  - open the folder <optimidoc>\WebApp\App_Data
  - Copy the *.ldf and *.mdf files



- Deactivate the license on the old server. More info here: Old license removal
- Uninstall OptimiDoc on the old server

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- Install OptimiDoc on the new server
- If you have Local DB files copied (step 2), put them into the APP_DATA folder
- Activate the OptimiDoc licence

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10.4 How to move localDB to Microsoft SQL Server

For large traffic it is recommended to use the dedicated Microsoft SQL server instead of the local database. For an already running installation of OptimiDoc with the local database please follow these steps:

1. Microsoft SQL Server installation (optional)
2. Microsoft SQL Express Management Console (optional)
3. Attachment of current database to Microsoft SQL Server
4. Modification of web.config

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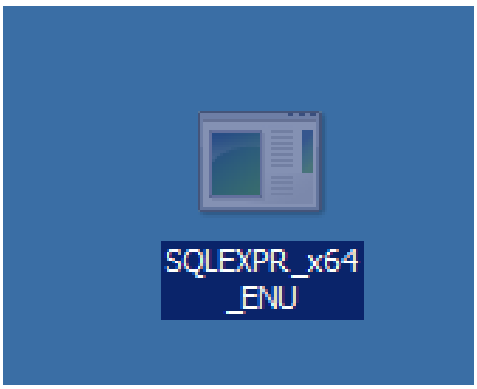
10.4.1 Microsoft SQL Server Express installation (optional)

1. Launch the installation file as a user with administration rights.



2. After the Installer opens the SQL Server Installation Center, select the option **New SQL Server stand-alone installation or add new features to an existing installation**.

3. Installer starts the control of system component.

4. **Accept the license terms** and click on the **Next** button.

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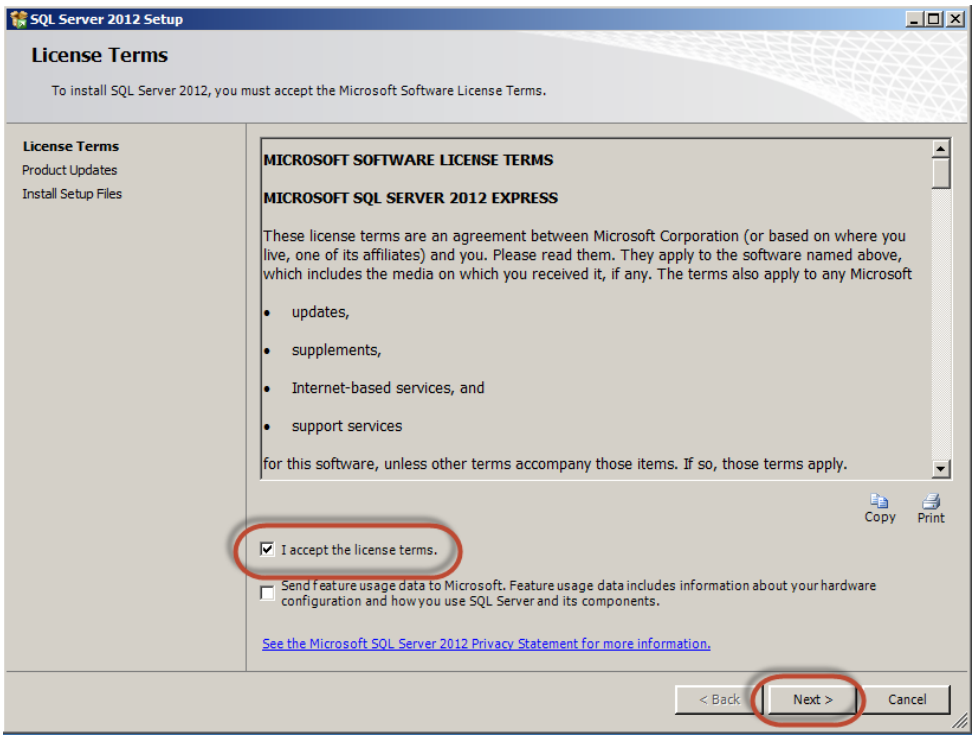
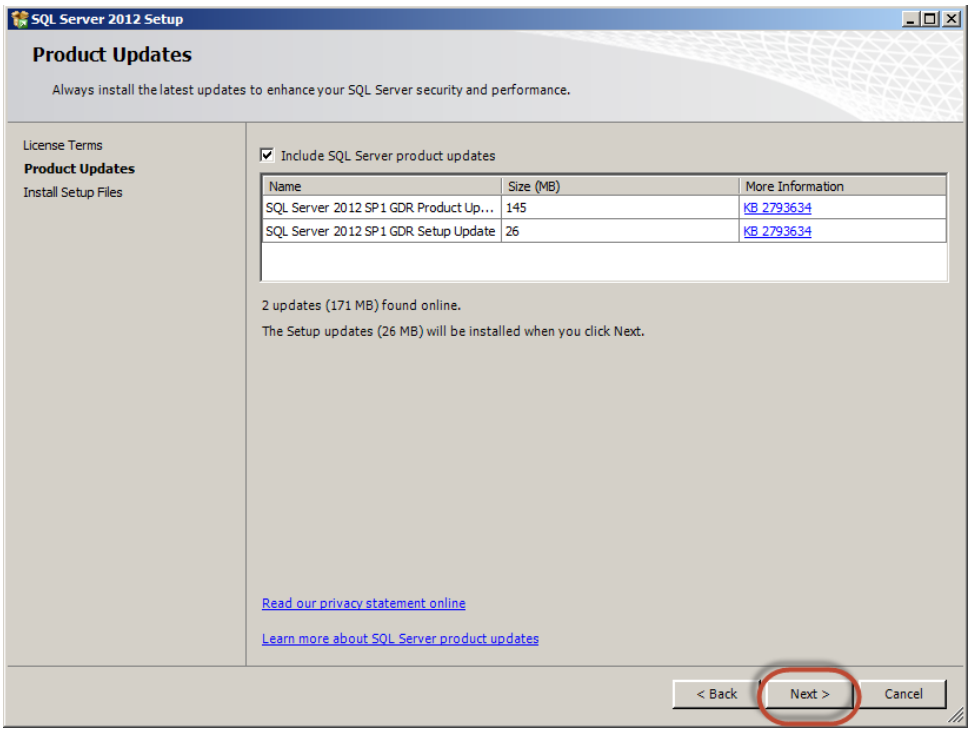


5. Accept the installation of product updates by click on the **Next** button, the system then downloads the setup files.



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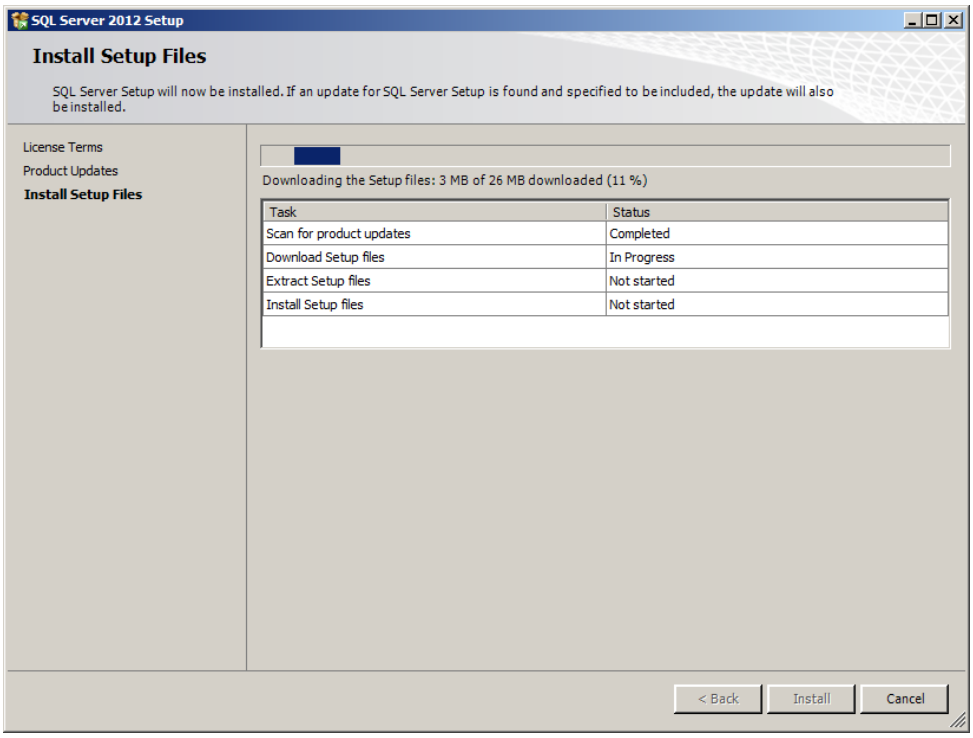
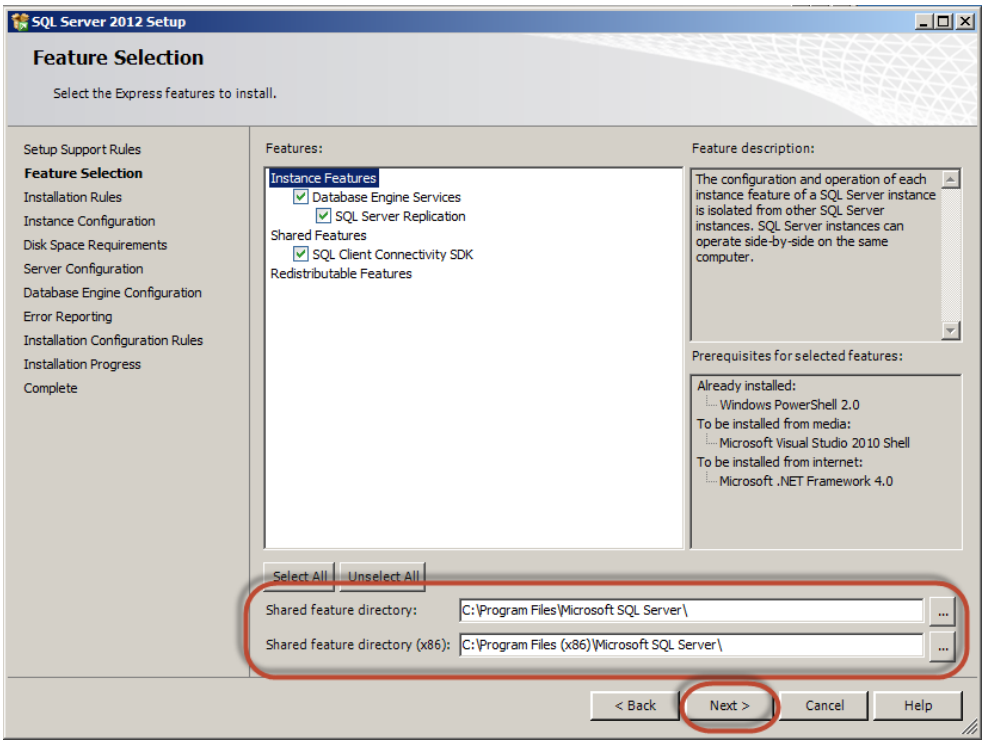


6. Select the installation folders and click on the **Next** button.



7. Put the instance name, ID and location and click on the **Next** button.

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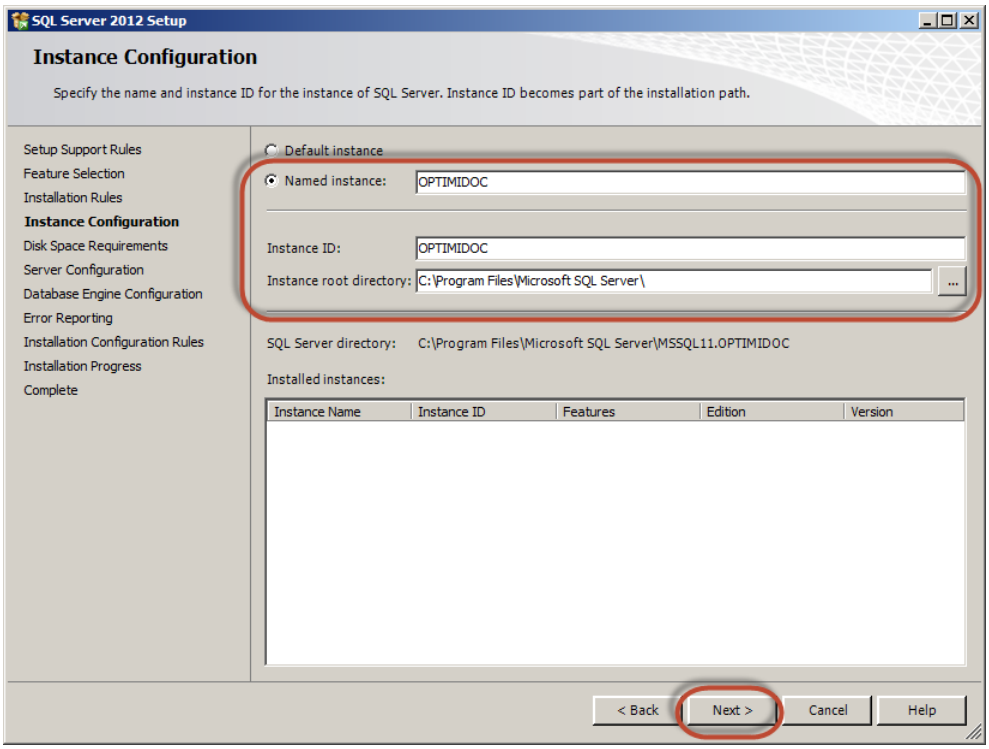
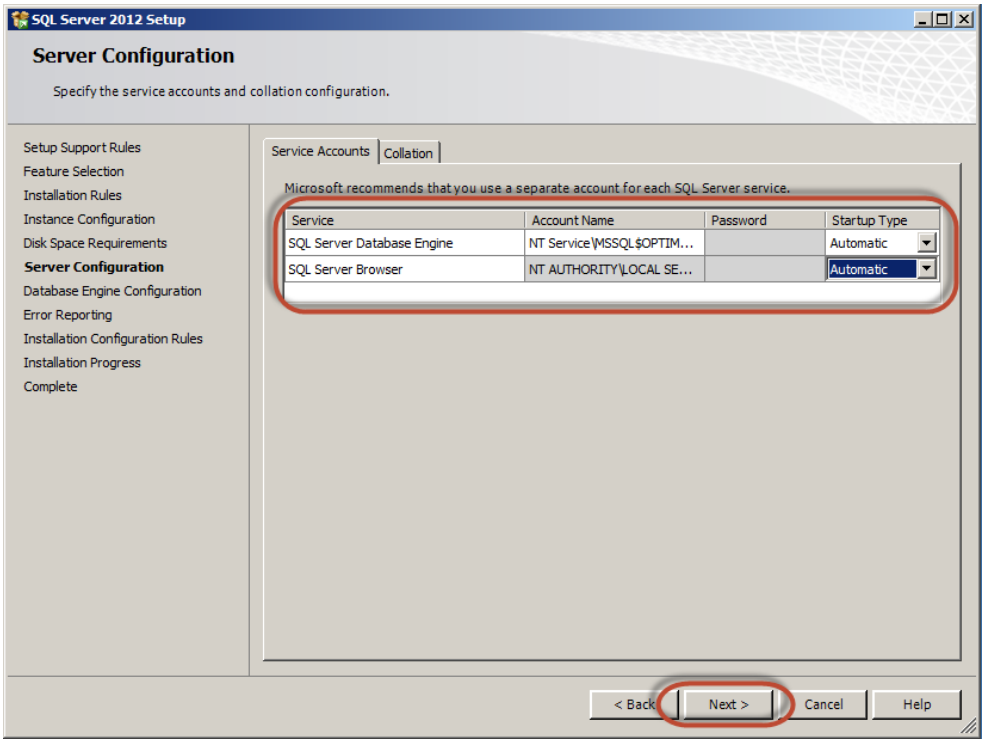


8. Set the Startup Type to **Automatic** on both services and click on the **Next** button.



9. Select the Authentication Mode to **Mixed Mode**, input the system administrator password and optionally add additional system or domain users. To continue click on the **Next** button.

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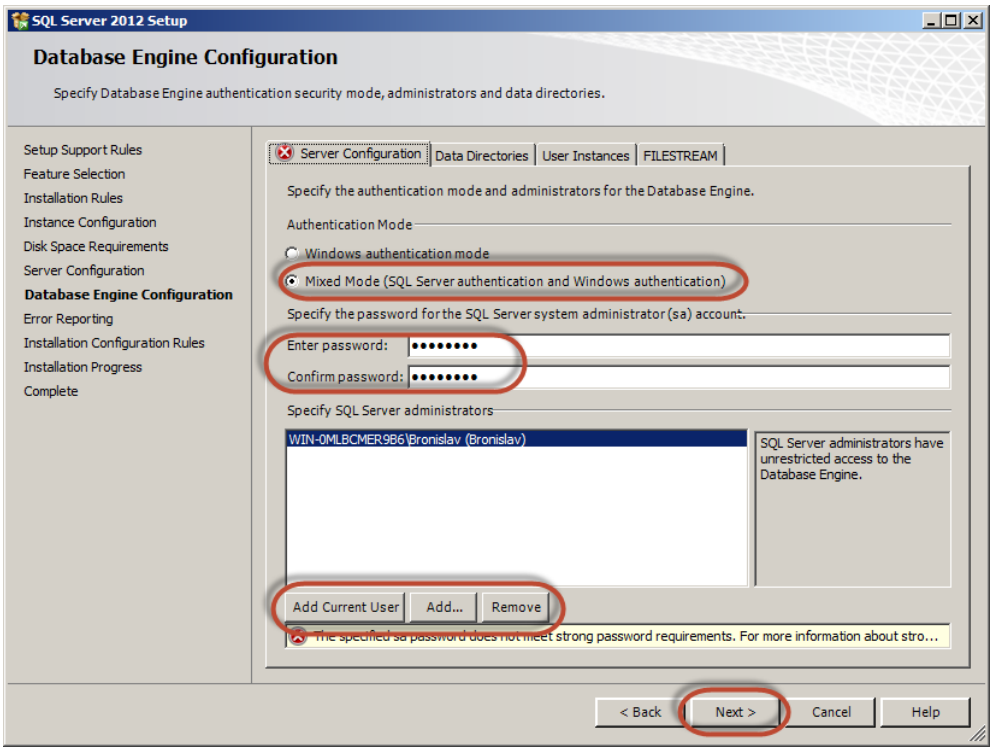
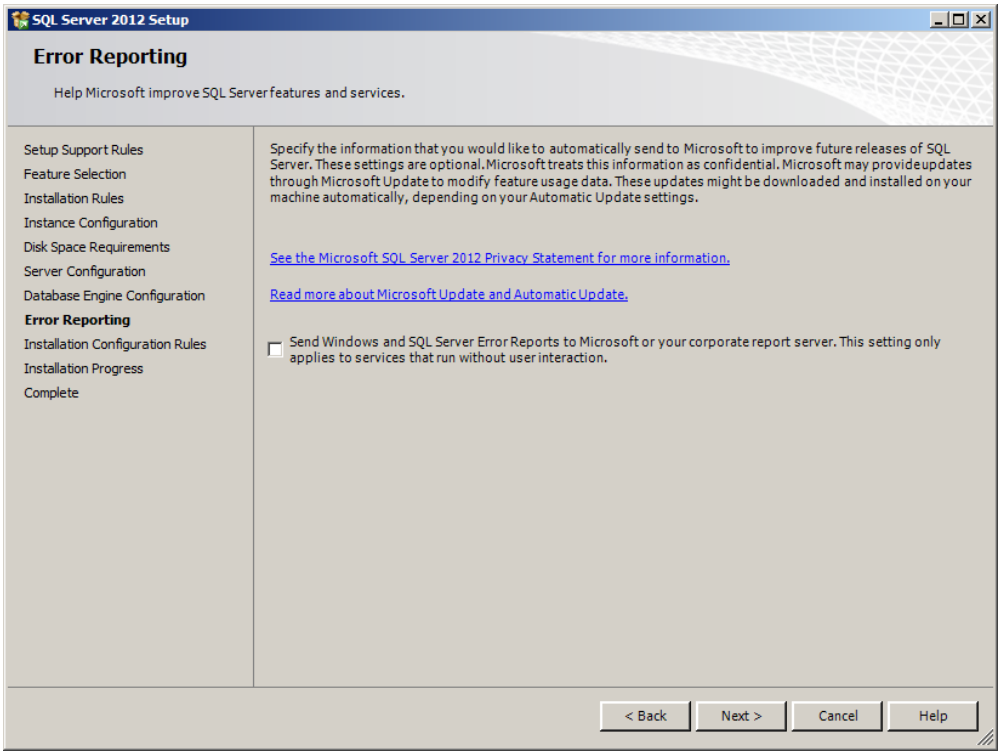


10. Confirm the next page by clicking on the **Next** button.



11. Installation is complete.

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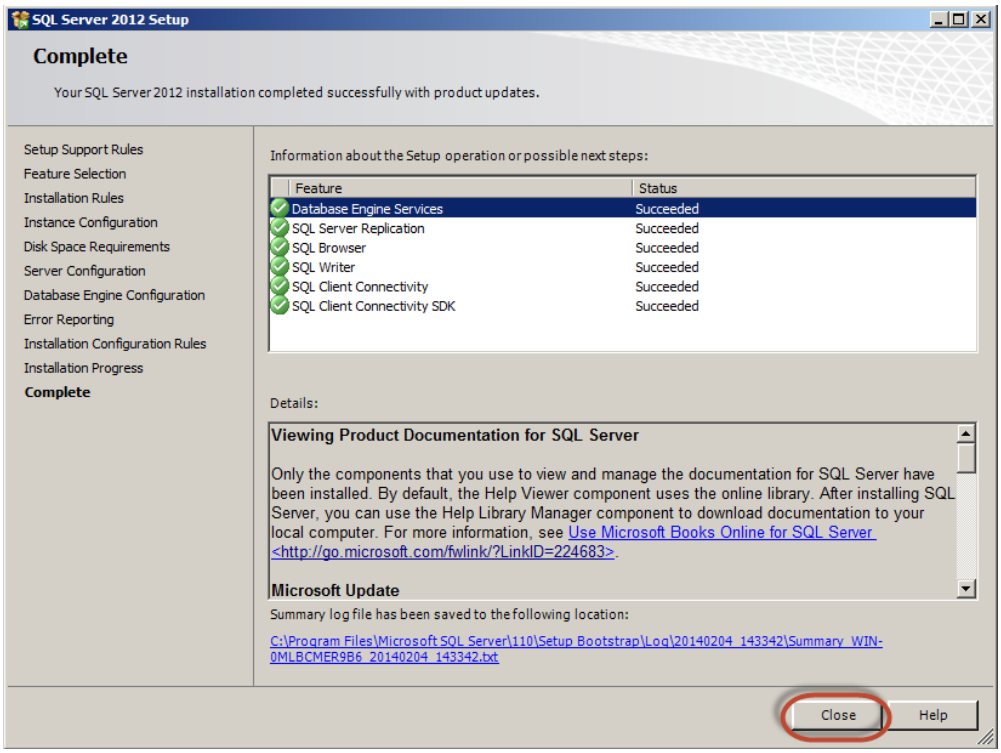

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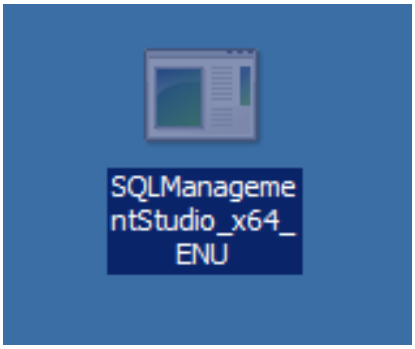
10.4.2 Microsoft SQL Express Management Console installation

1. Launch the installation file as a user with administration rights.



2. After the Installer opens the SQL Server Installation Center select the option **New SQL Server stand-alone installation or add new features to an existing installation**.

3. Confirm the updates and click on the **Next** button.

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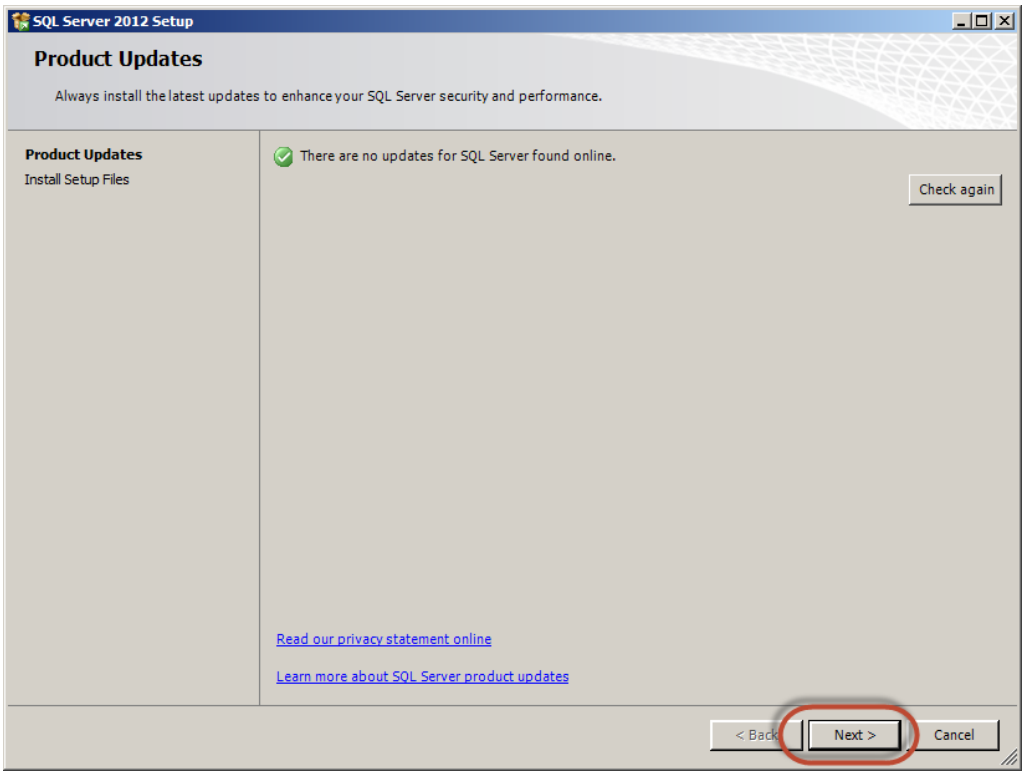
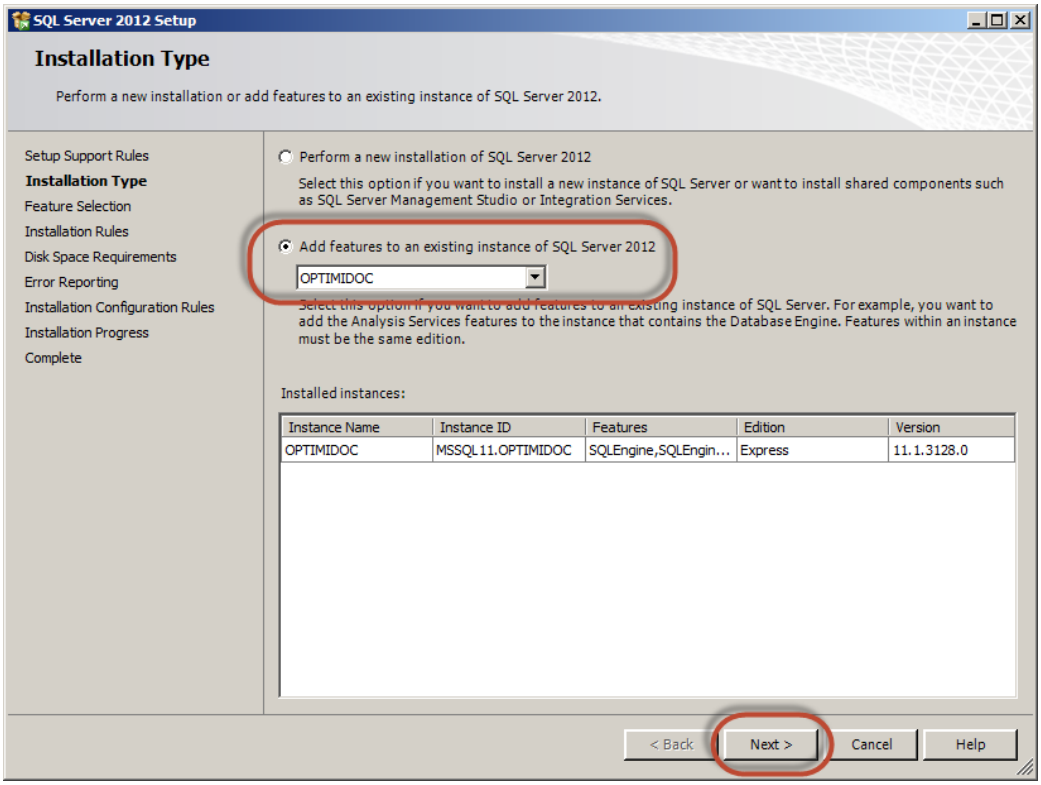


4. Select the OptimiDoc instance and click on the **Next** button.



5. From features select the **Management Tools - Basic** and click on the **Next** button.

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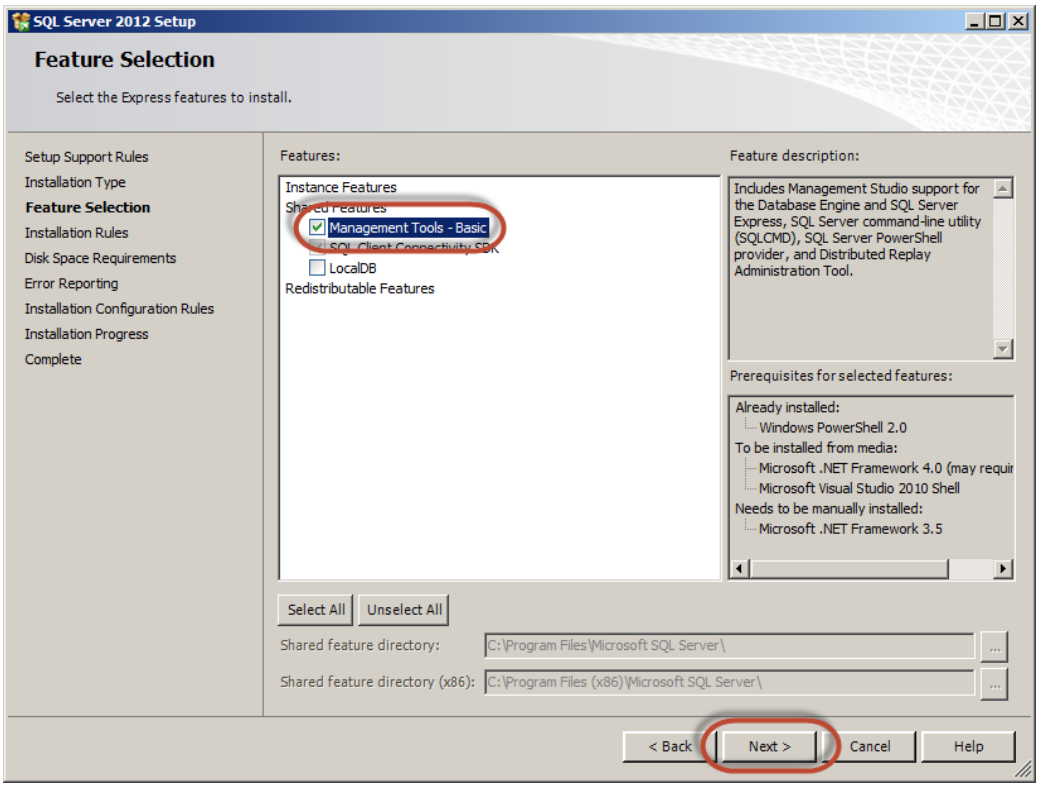
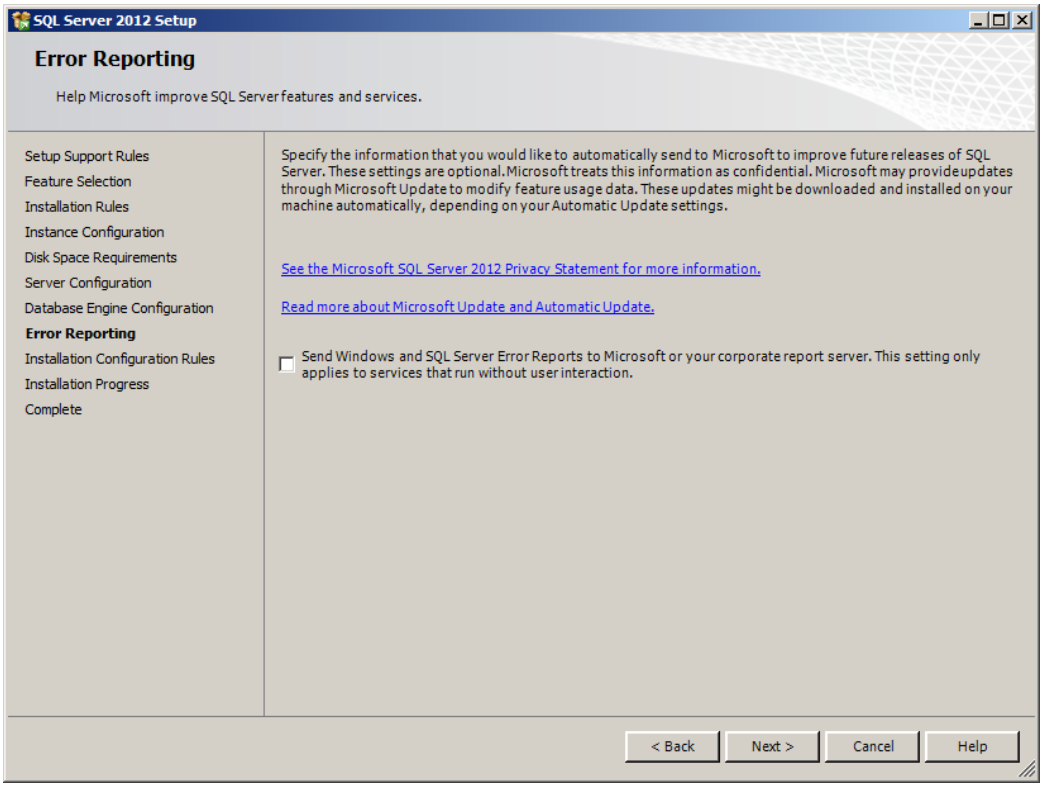


6. Click on the **Next** button.



7. Click on **Close** to finish the installation.

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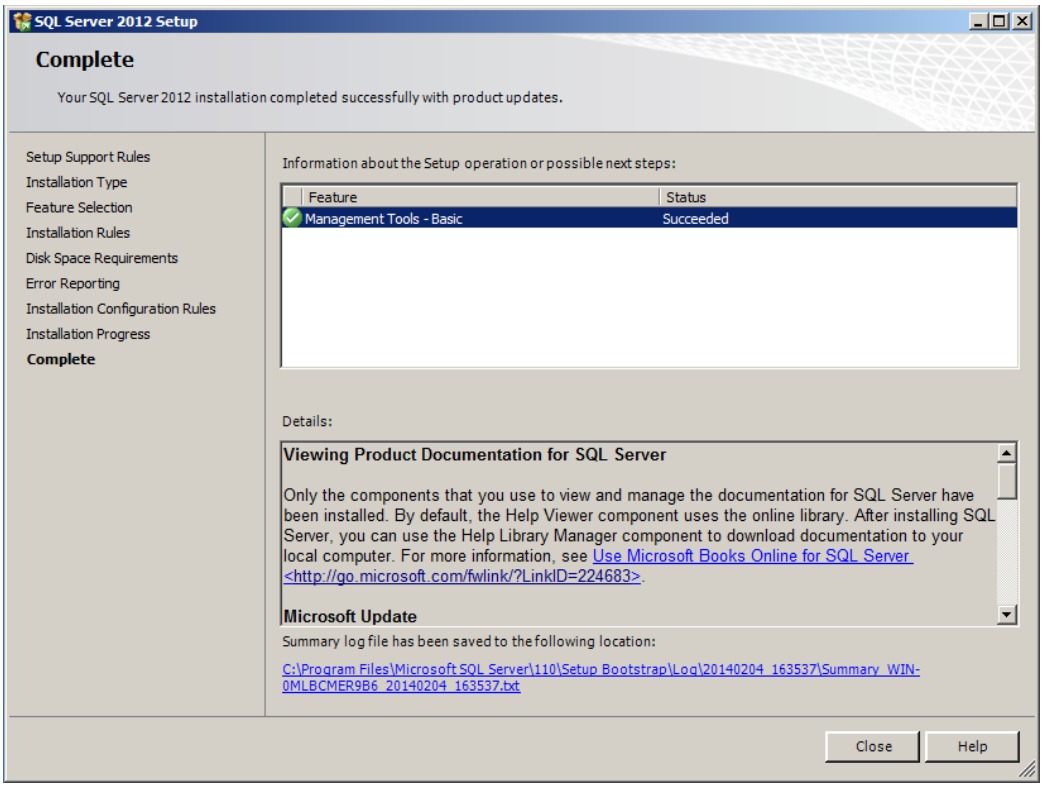

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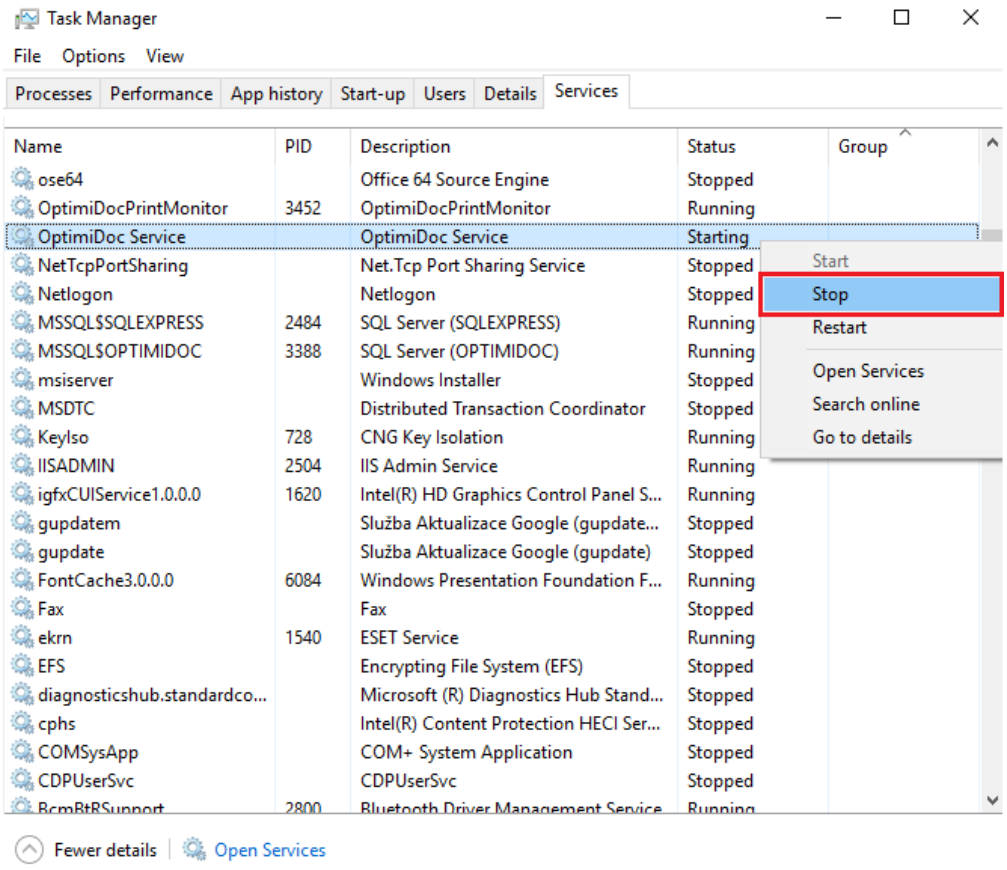
10.4.3 Attachment of current DB to Microsoft SQL Server

Caution Please contact OptimiDoc support before proceeding with following steps

Before launching **Microsoft SQL Server Management Studio**, stop **OptimiDoc Service** in the Task Manager (in Services) and **OptimiDoc** in ISS Manager.



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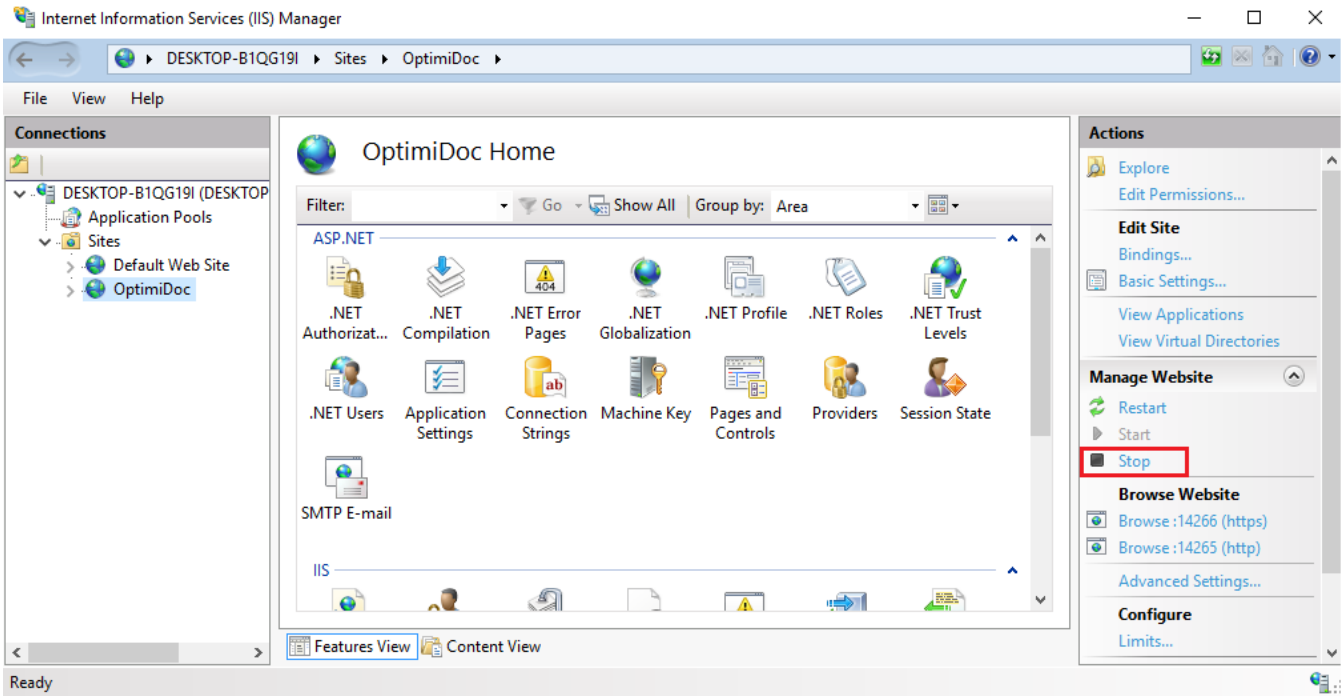
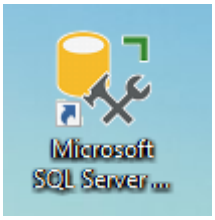


1. Launch Microsoft SQL Server Management Studio



2. Right-click on **Database** and choose **Attach...**

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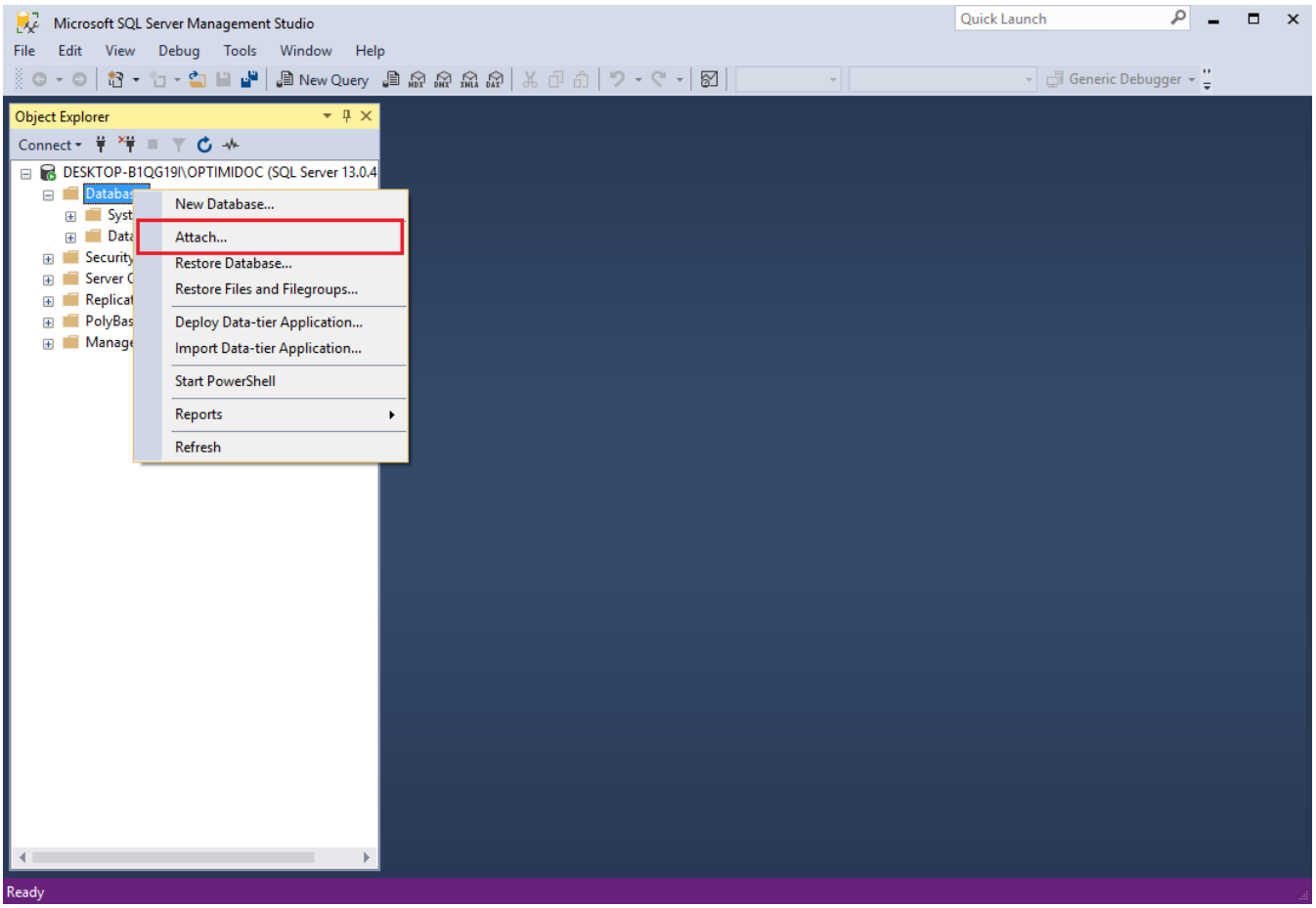

3. Click on **Add**

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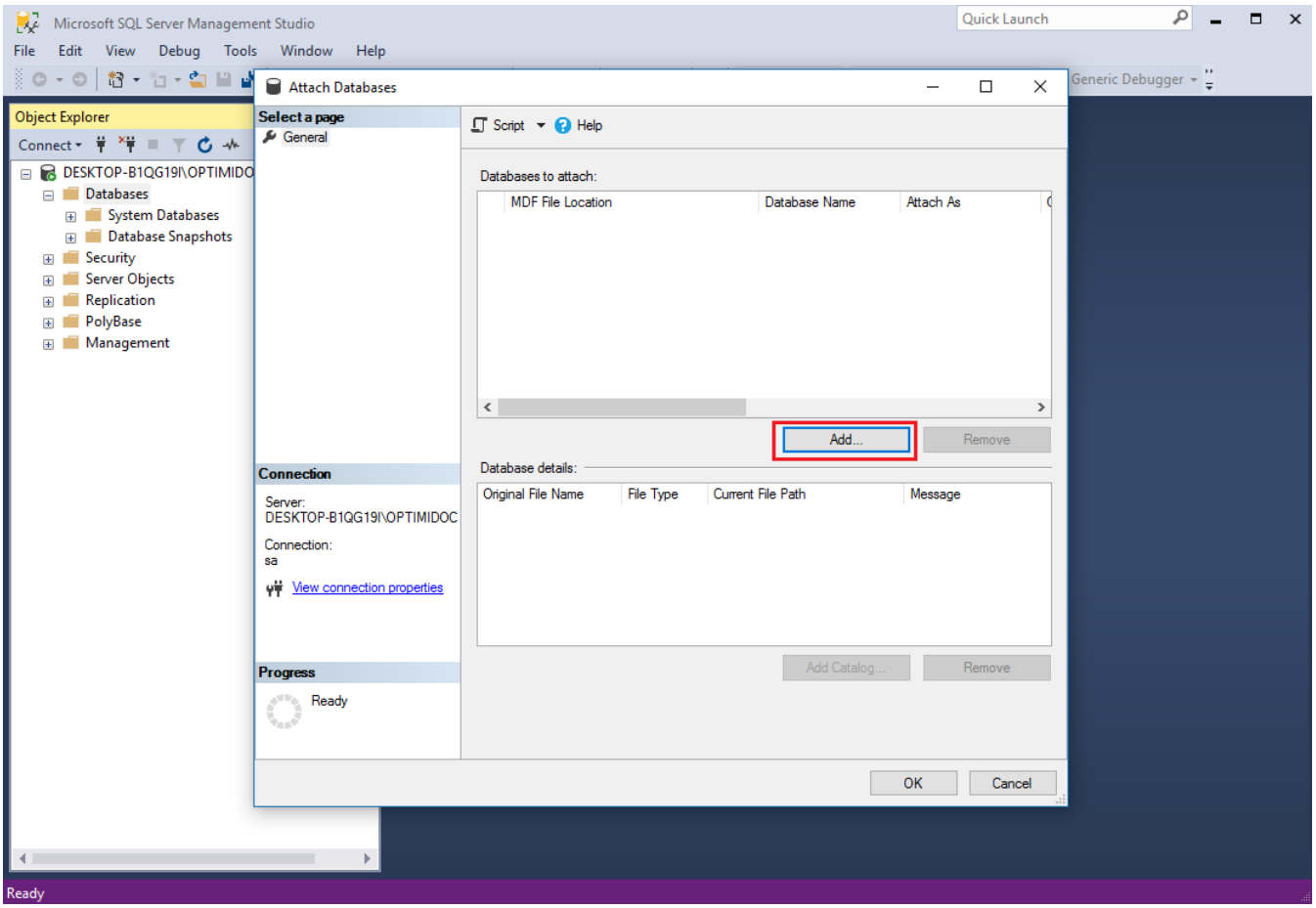

4. Select **OptimiDoc.mdf** in OptimiDoc\WebApp\App_Data and click on the **OK** button

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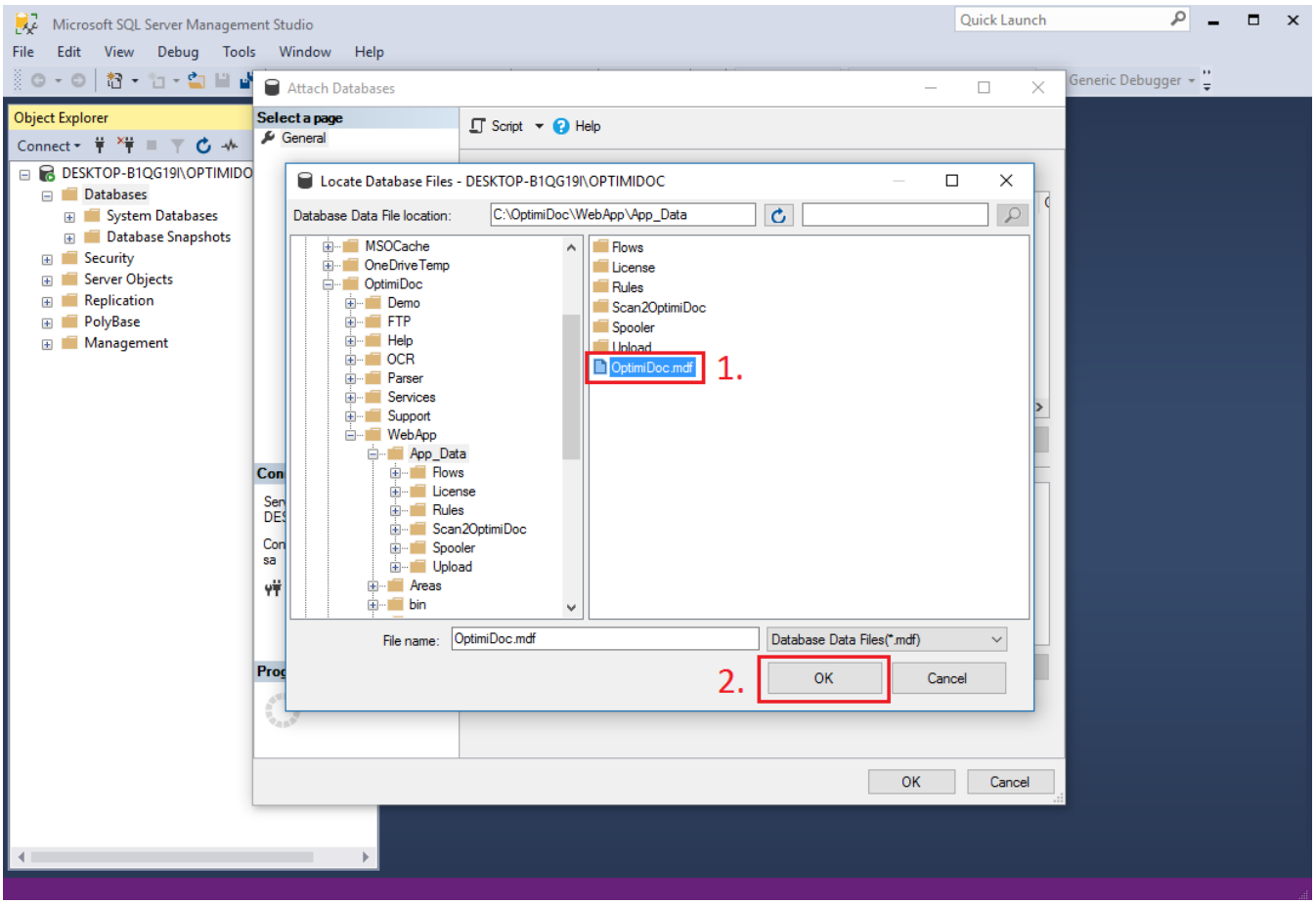

5. To finish the database attachment, click on the **OK** button

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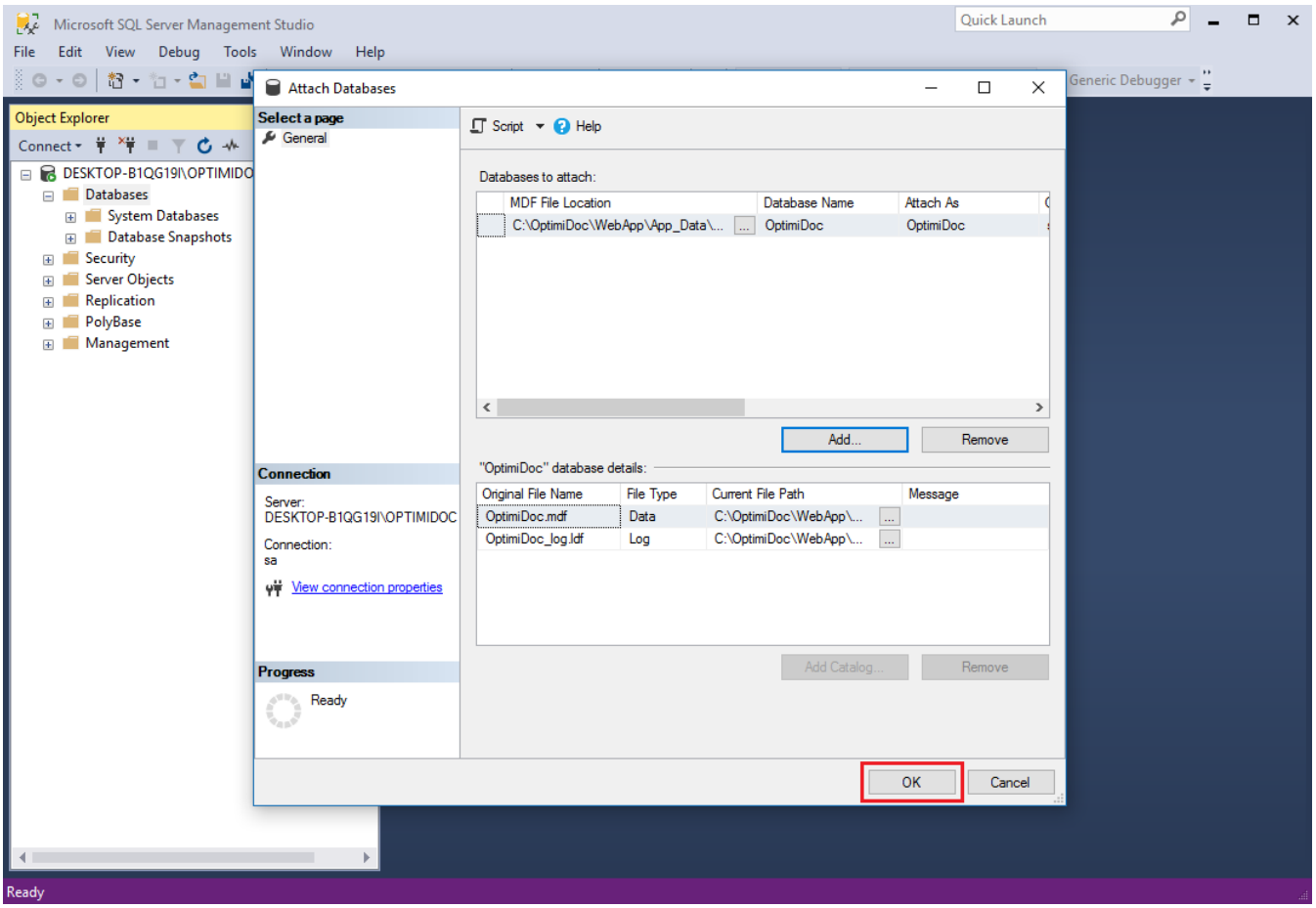

6. Right-click on the new attached database and rename it as "OptimiDoc"

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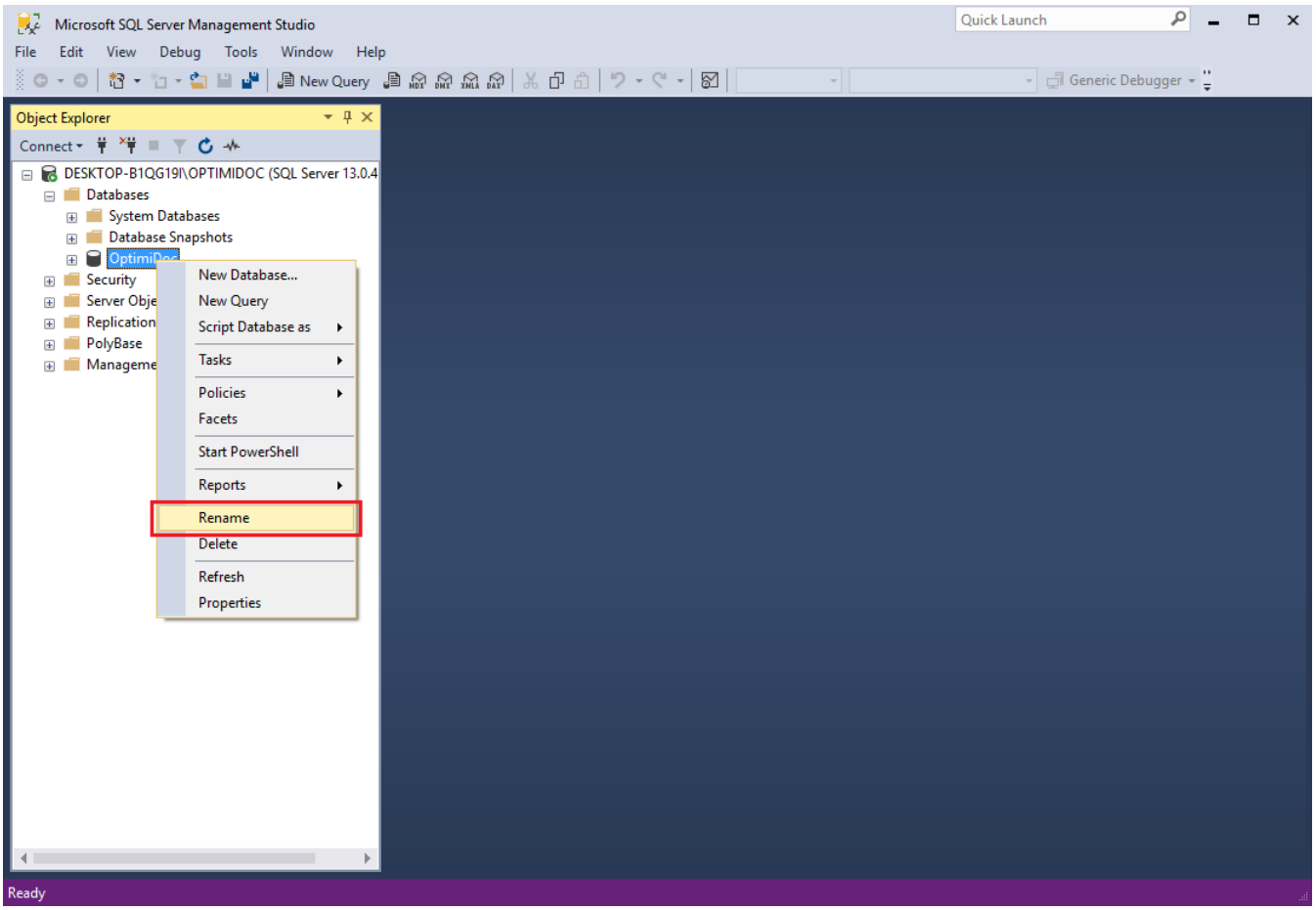

7. Now proceed with the following steps [Modification of connection string at web.config]

Example

Problem description
When I added database (step 4.), program showed me an error: "**An error occurred when attaching the database(s). Click the hyperlink in the Message column for details."**

Solution
Among others there is one frequent cause. Go to OptimiDoc\WebApp\App_Data and right-click on **OptimiDoc.mdf** and choose properties, click on the **Security tab** and change permissions by button the **Edit.** Select the user who is logged in Microsoft SQL Server Management Studio, and **Allow** all permissions.

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10.4.4 Modification of connection string in web.config

1. Modify the web.config file in <optimidoc_install_folder>\WebApp folder.

Find the following section in WebApp\web.config:

```
  <entityFramework>
    <defaultConnectionFactory
type="System.Data.Entity.Infrastructure.LocalDbConnectionFactory, EntityFramework"/>
  </entityFramework>
  <connectionStrings>
    <add connectionString="Server=(LocalDB)\MSSQLLocalDB;Integrated
Security=SSPI;AttachDBFilename=|DataDirectory|OptimiDoc.mdf"
name="OptimiDoc.Dao.OptimiDocDbContext" providerName="System.Data.SqlClient"/>
  </connectionStrings>
```

and replace it with the following settings.

```
 <entityFramework>
    <defaultConnectionFactory type="System.Data.Entity.Infrastructure.SqlConnectionFactory,
EntityFramework" />
  </entityFramework>
  <connectionStrings>
    <add connectionString="Server=<serverName>;Database=<database_name>;User
ID=<user_name>;Password=<password>" name="OptimiDoc.Dao.OptimiDocDbContext"
providerName="System.Data.SqlClient" />
  </connectionStrings>
```

Example

```
  <entityFramework>
    <defaultConnectionFactory
type="System.Data.Entity.Infrastructure.SqlConnectionFactory,
EntityFramework" />
  </entityFramework>
  <connectionStrings>
    <add connectionString="Server=WIN-
0MLBCMER9B6\OPTIMIDOC;Database=OptimiDoc;User
ID=sa;Password=OptimiDoc2014"
name="OptimiDoc.Dao.OptimiDocDbContext"
providerName="System.Data.SqlClient" />
  </connectionStrings>
```

2. Restart the OptimiDoc website in IIS manager.

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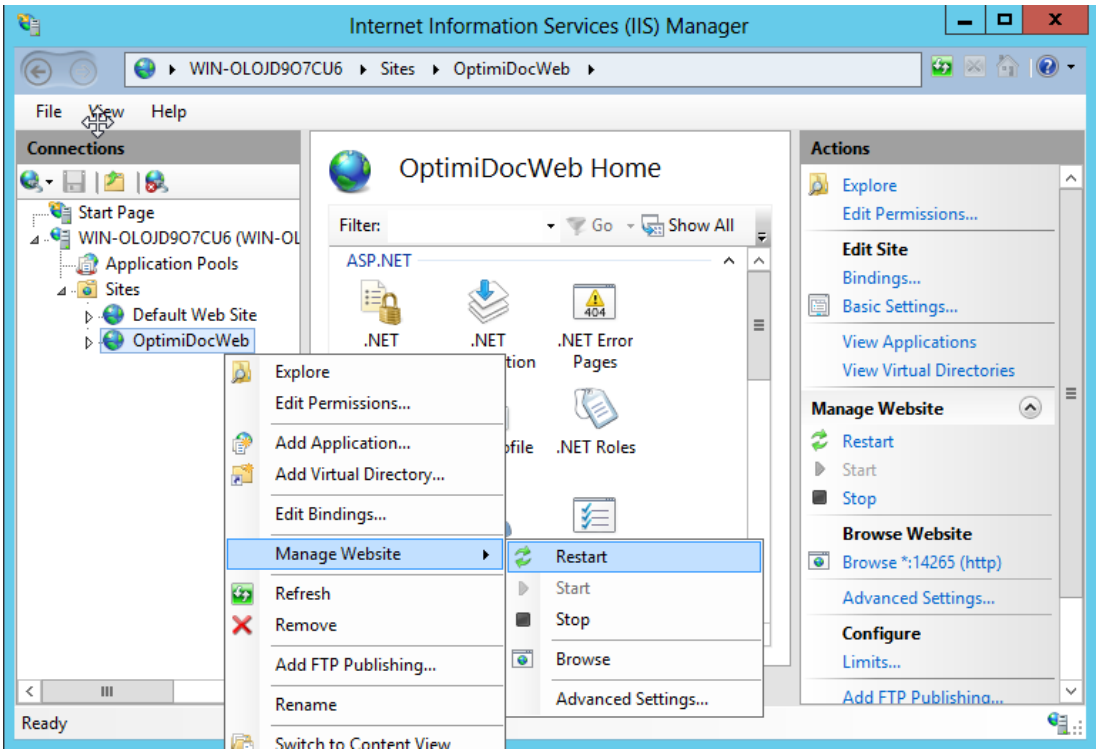
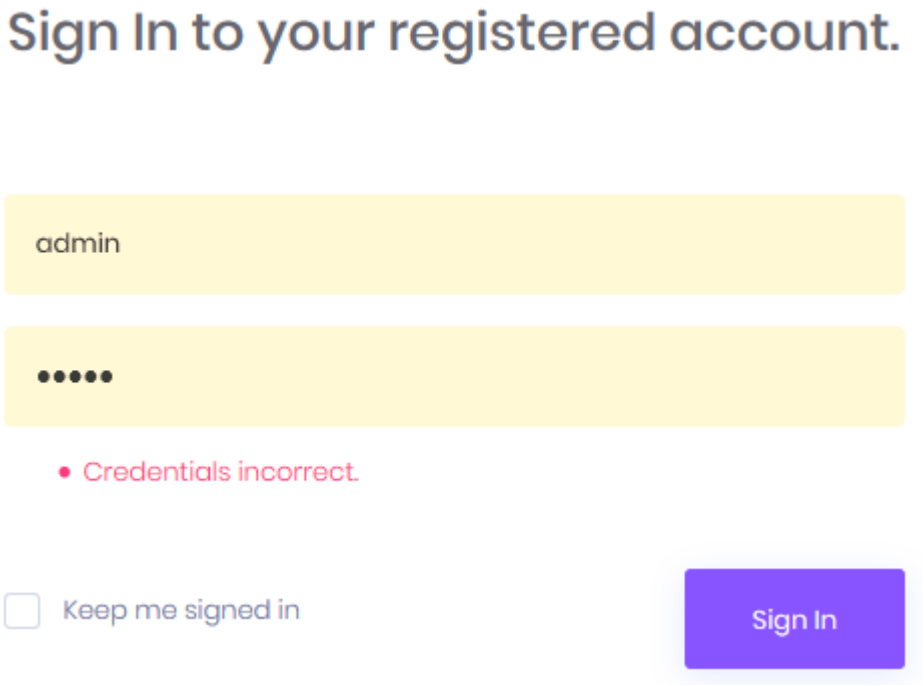


3. Open the OptimiDoc webpage and sign in with the username **admin** and password **admin**. The authentication result is Credentials incorrect.



4. Restart the OptimiDoc website once again and sign in to the OptimiDoc webpage with the username **admin** and password **admin**

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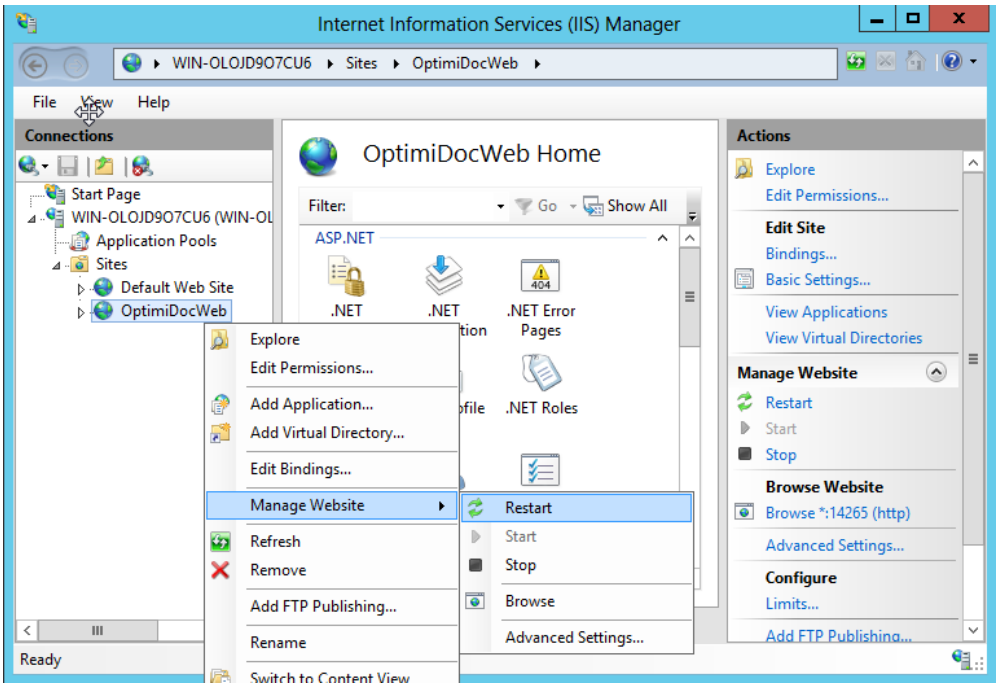

5. The movement of the OptimiDoc database to SQL server is finished.

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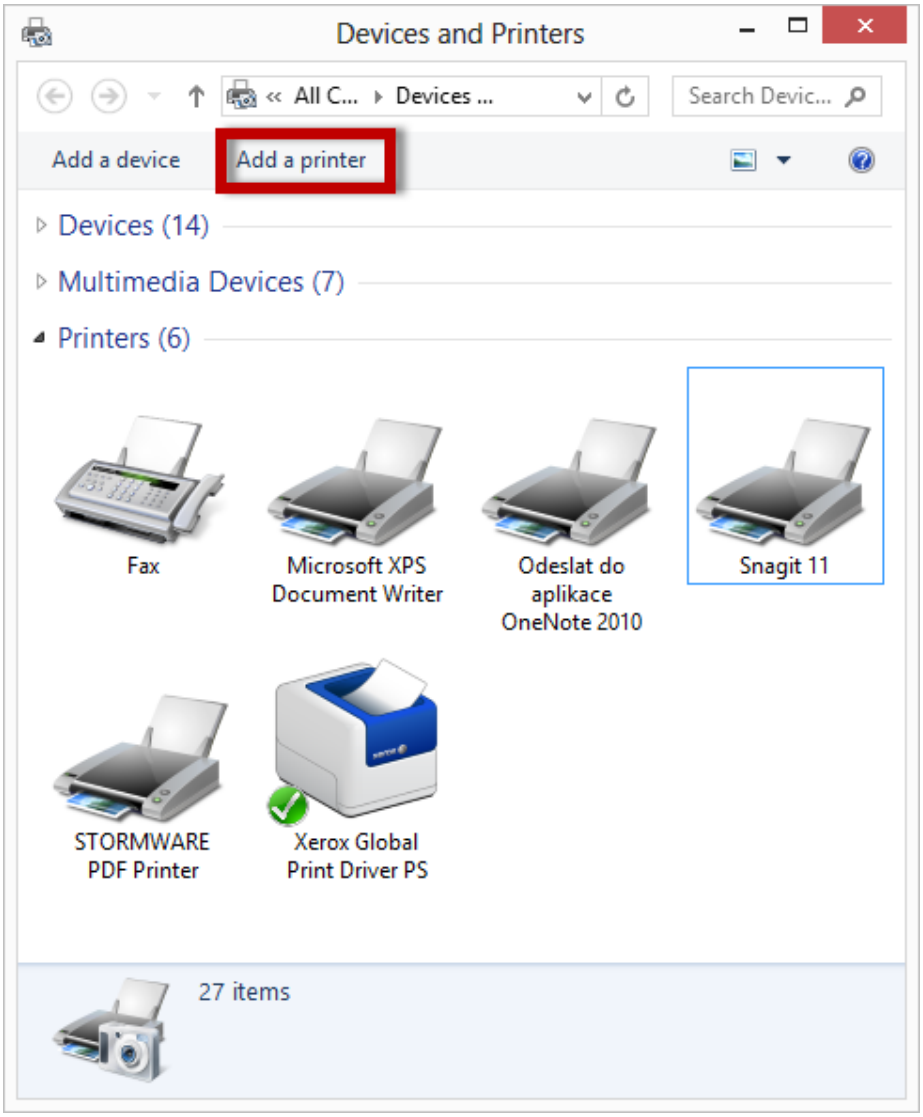
10.5 How to create OptimiDoc IPP pull printer

The following section describes how to add a printer on a user workstation which sends the documents to OptimiDoc.

1. Open **Devices and Printers** from the Start menu.

2. Click on **Add a printer**.



3. The system opens the Add Printer window. Click on **The printer that I want isn't listed**

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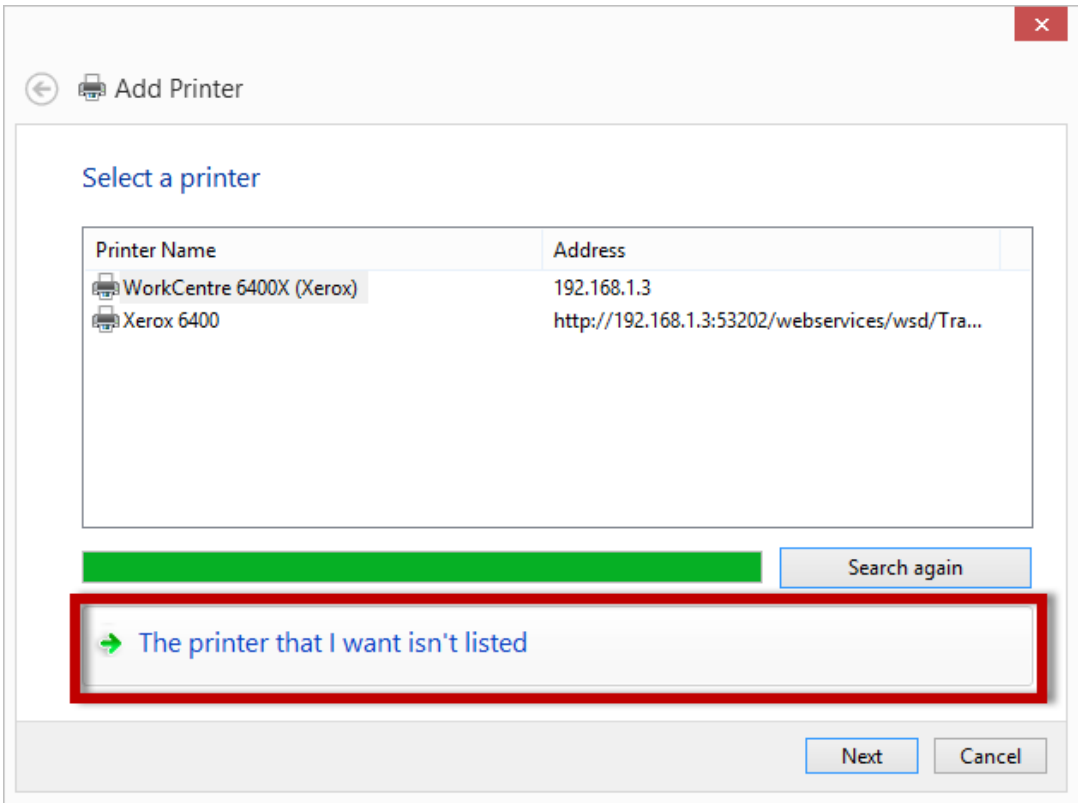
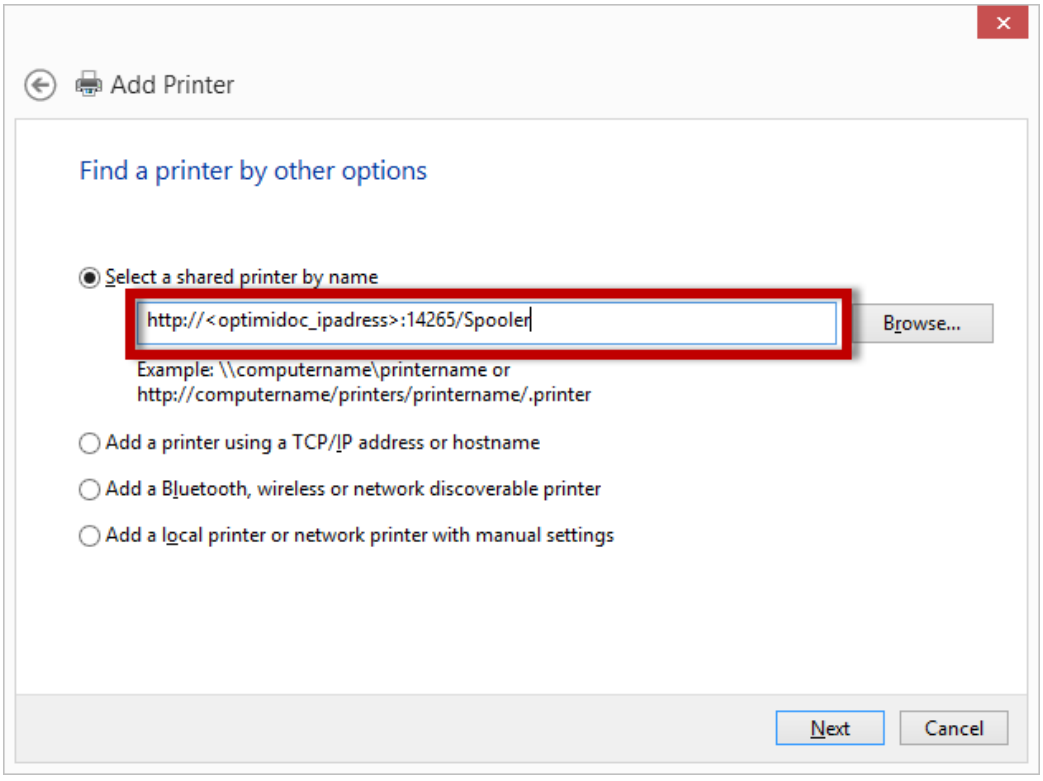


4. Enter the OptimiDoc address in the field **Select a shared printer by name**.

Default address is **http://<optimidoc_ipadress>:14265/Spooler**



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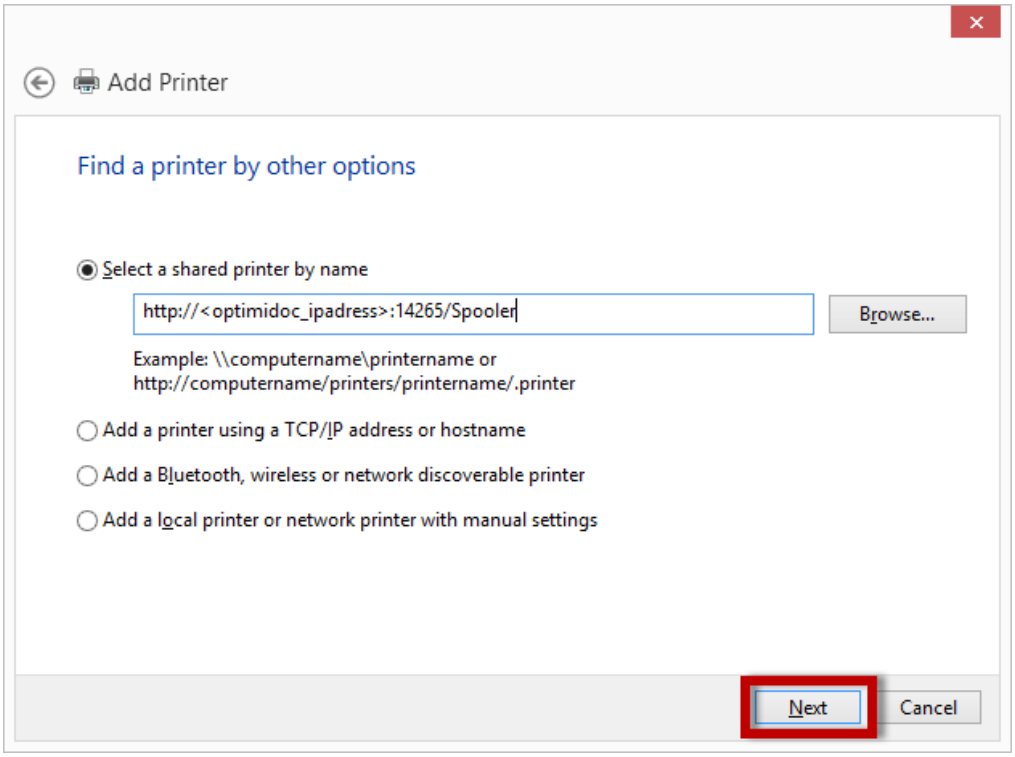
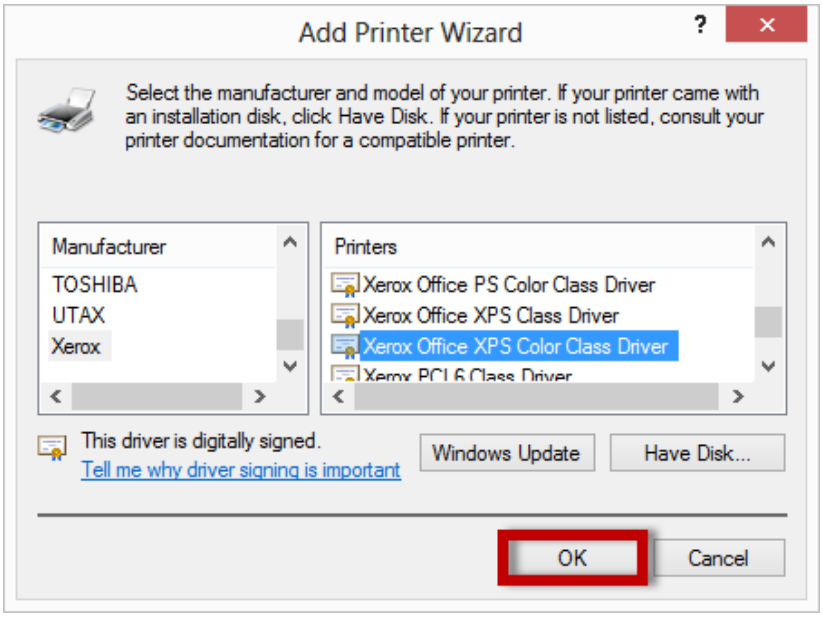
5. Click on the **Next** button, system detects the OptimiDoc server and asks for driver selection.



6. Select driver and click on the **Ok** button.



7. The system installs the new printer and presents a confirmation window. Click on **Next**.

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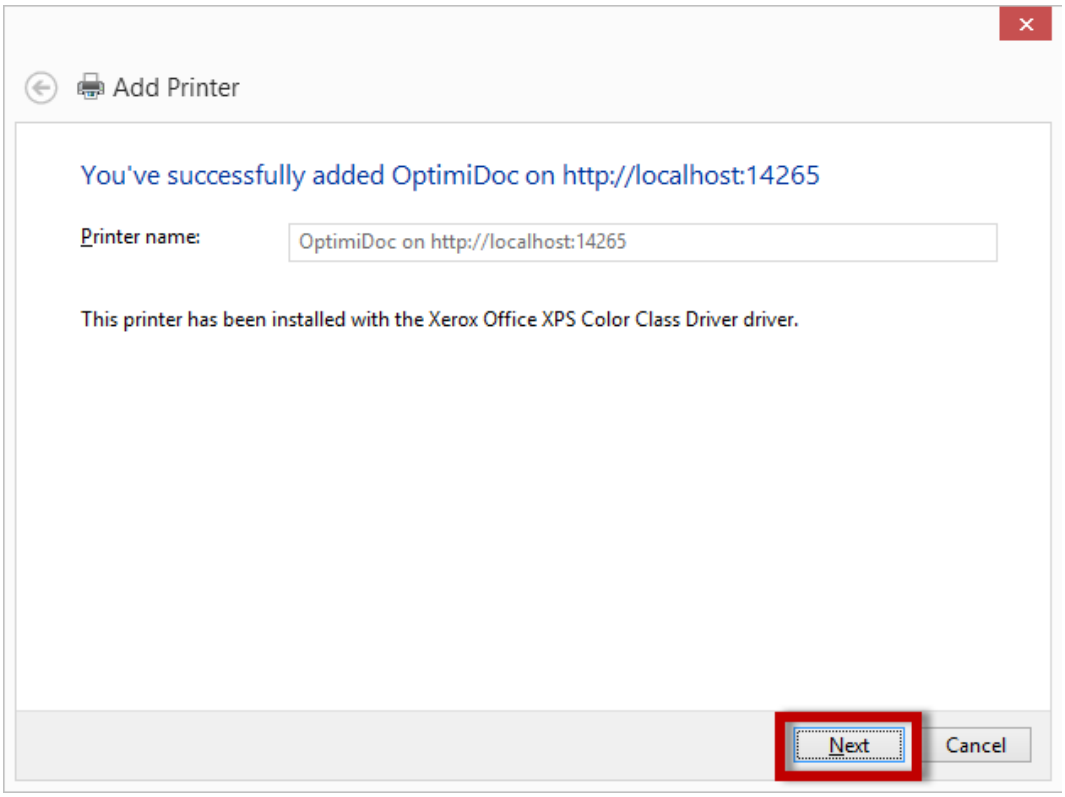
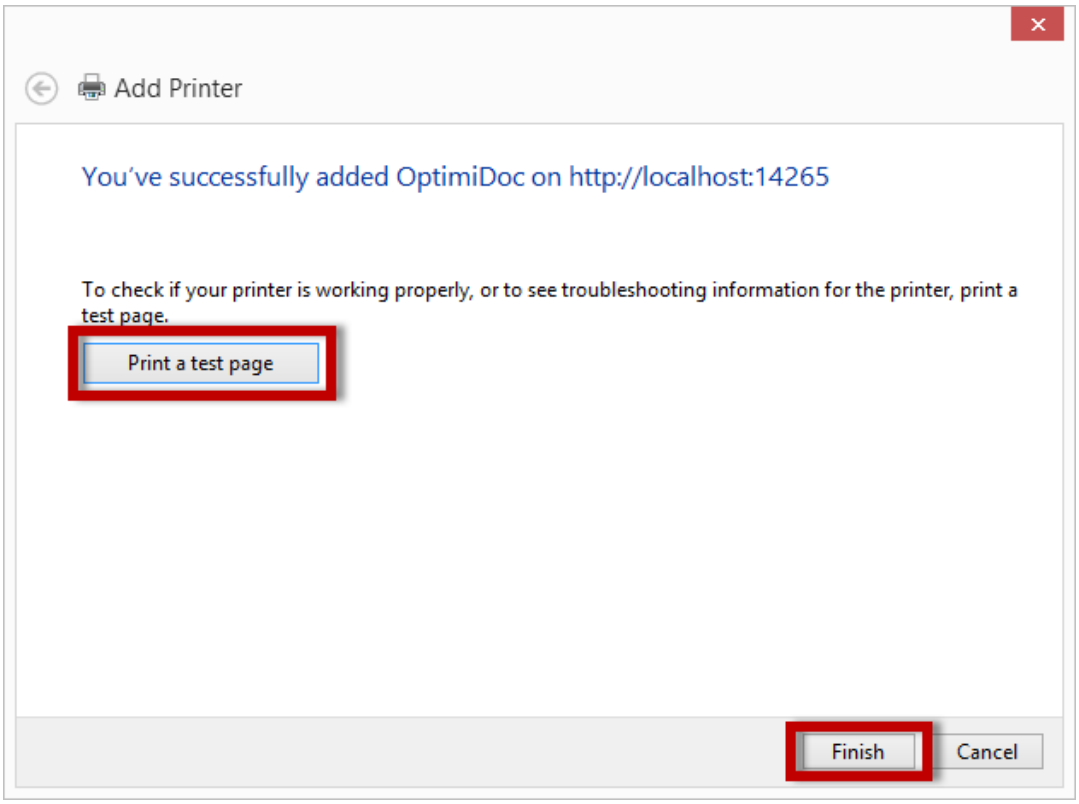


8. You can send a test page to OptimiDoc by clicking on the **Print a test page** button or confirm the printer installation by clicking on the **Finish** button.



9. OptimiDoc printer is installed.

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Note

It is possible to add IPPs printer as well. To do so just modify the protocol and port: **https://<optimidoc_ipadress>:14266/Spooler**
Usually when you have problems with connecting to IPPs printer there is problem with some certificate. All OD server certificates must be trusted on the computer where you're adding this printer.

You can also use IPP for direct queue (instead of printer_number use the number of printer from Device's list in OptimiDoc):
http://<optimidoc_ipadress>:14265/Spooler/Index/printer_number

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10.6 Troubleshooting

In this section you can find the common problems and their solutions:

Print job is not delivered to OptimiDoc

- User login of job is not assigned to any user.
- The server is not accessible from workstation.
- Port 515 (LPR) is not open on a firewall.
- -> Check Unauthorized accesses

Scan job is not processed

- Final destination is not reachable or has wrong configuration. Check web log for errors.

OptimiDoc can not be installed on multifunction device

- The EIP might not be configured properly.
- Device requires the SSL communication.

Card reader does not read my card

- You have installed card reader for another card standard.
- The card reader requires higher version of MFP firmware.

I can not login to the OptimiDoc web interface from another computer

- OptimiDoc server does not have ports 14265, 14266 enabled on firewall.

For the troubleshooting of problems please use the Diagnostic part.

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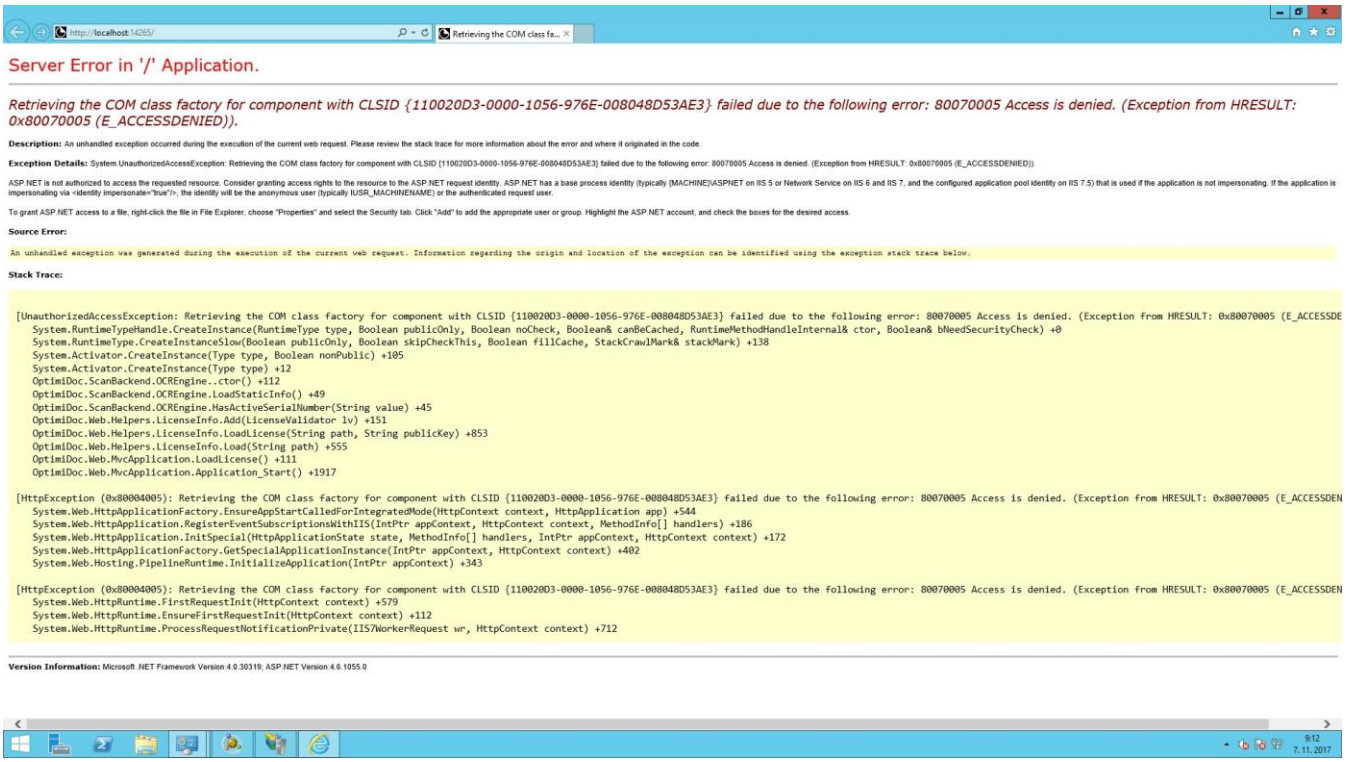
10.7 Access Denied for Components

If you're seeing the following error, the IIS_IUSRS user group doesn't have access rights to components:



The following steps should solve the issue:

1. Open the Component Services application. It can be found in **Start** > **Control Panel** > **Administrative Tools** > **Component Services**

2. In the left most menu, select **Component Services** > **Computers**. Right-click **My Computer** and click **Properties**

3.Open the **COM Security** tab

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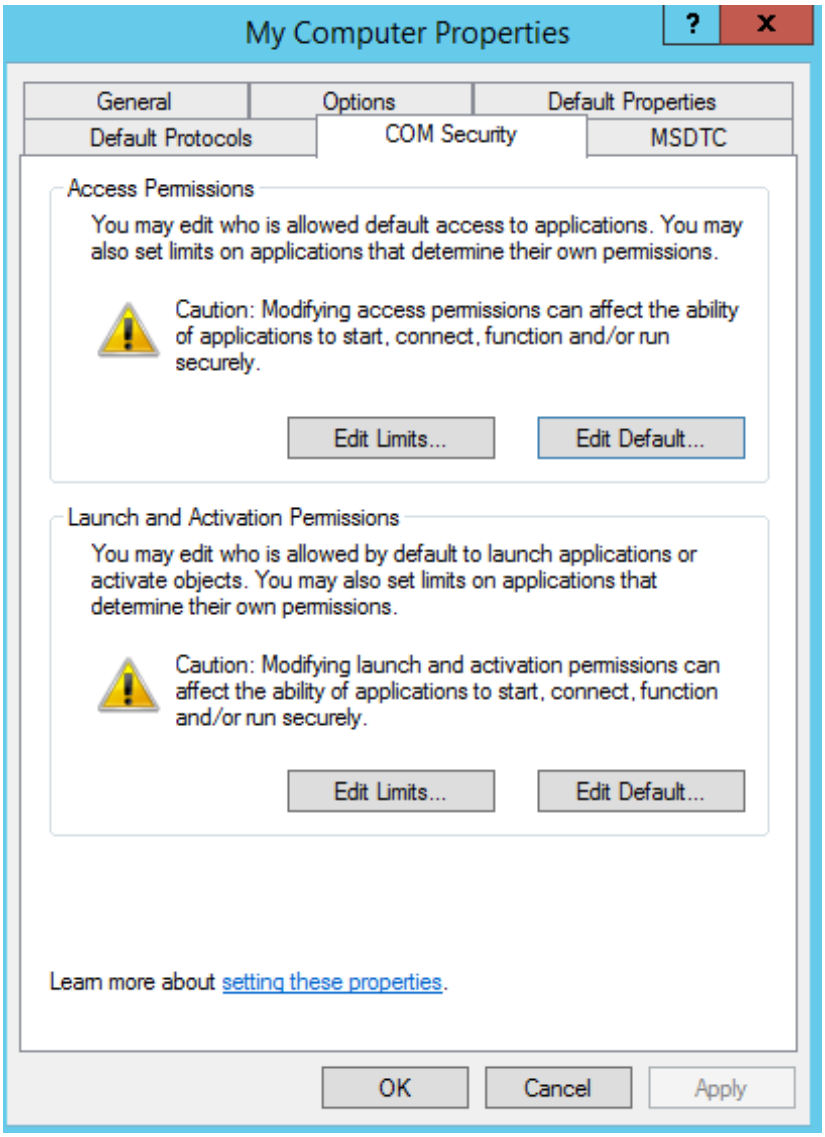

4.In the **Access Permissions** section, click **Edit Default...**

5. Add the **IIS_IUSRS** group. Once added, give the group all access rights

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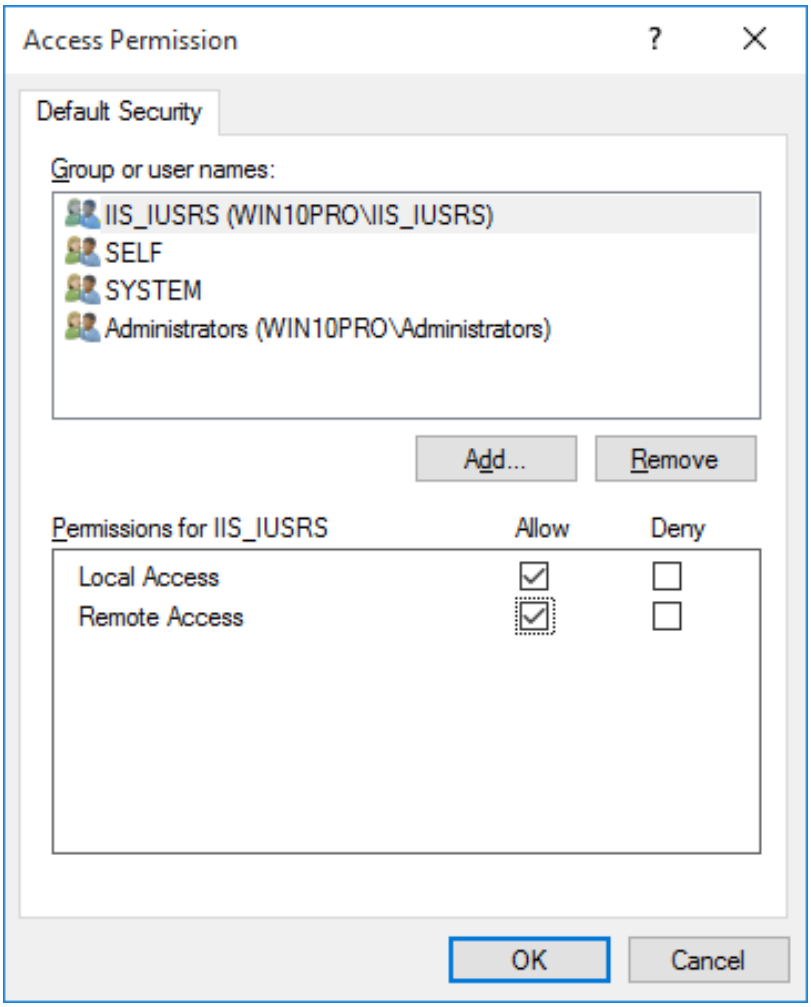
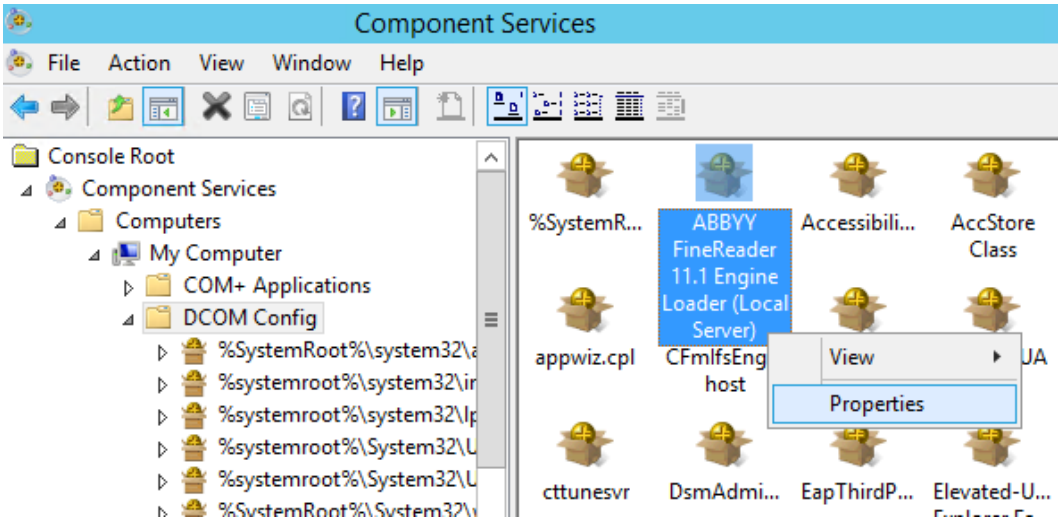


6. Do the same in the **Launch and Activation Permissions** section of the same tab

7. Click **My Computer**, then click **DCOM Config**



8. Right click **ABBY FineReader 11.1 Engine Loader**, click **Properties** and navigate to the **Security** tab

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9. Under **Launch and Activation Permissions** select **Customize**, click **Edit** and **Add** the **IIS_IUSRS** group and give it all rights
10. Repeat the same for **Access Permissions** and **Configuration Permissions**
11. After saving the settings and restarting IIS, the issue should be solved

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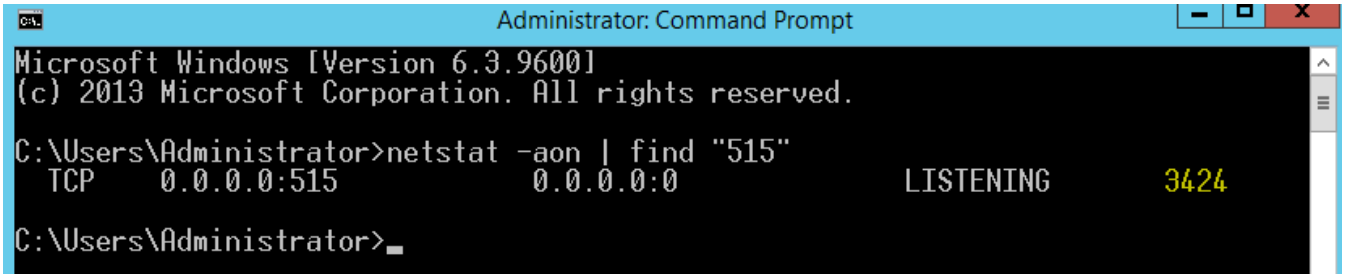
10.8 The OptimiDoc Service on Local Computer started and then stopped

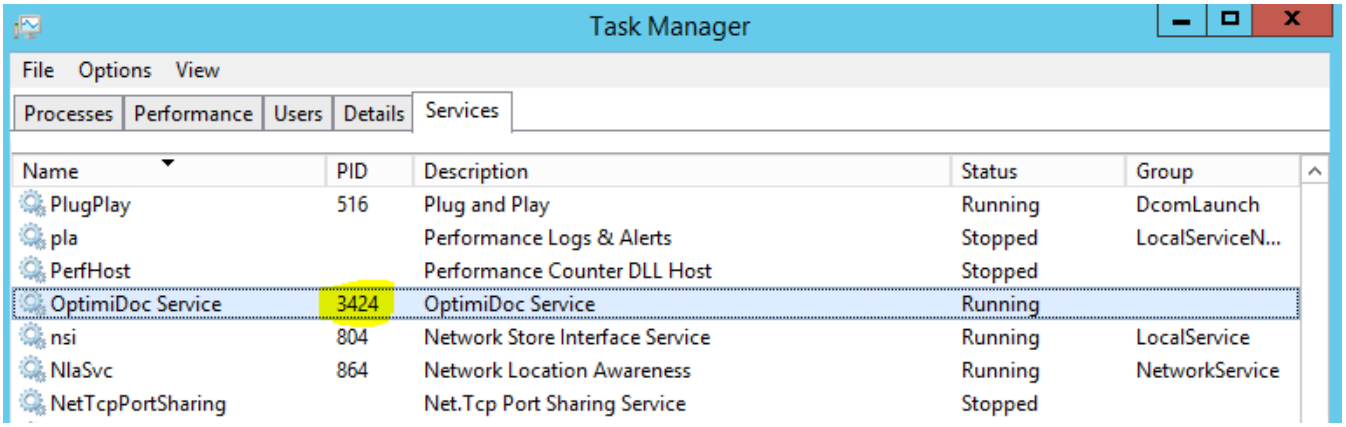
In this section you can find how to check if port 515 (LPR) is listening:
This may solve the problem "The OptimiDoc Service on Local Computer started and then stopped."

Open command prompt. Type: **netstat -aon | find "515"** .
This will show us if port "515" is used by other service than OptimiDoc Service.
We can see that process ID (PID) 3424 is using port "515"



Now check what process is using port **"515"** in Services.

OptimiDoc service is working with port "515" so it is necessary the service is connected to this port.



Other case

- If port "515" is connected to another Service, stop that service and run OptimiDoc Service.

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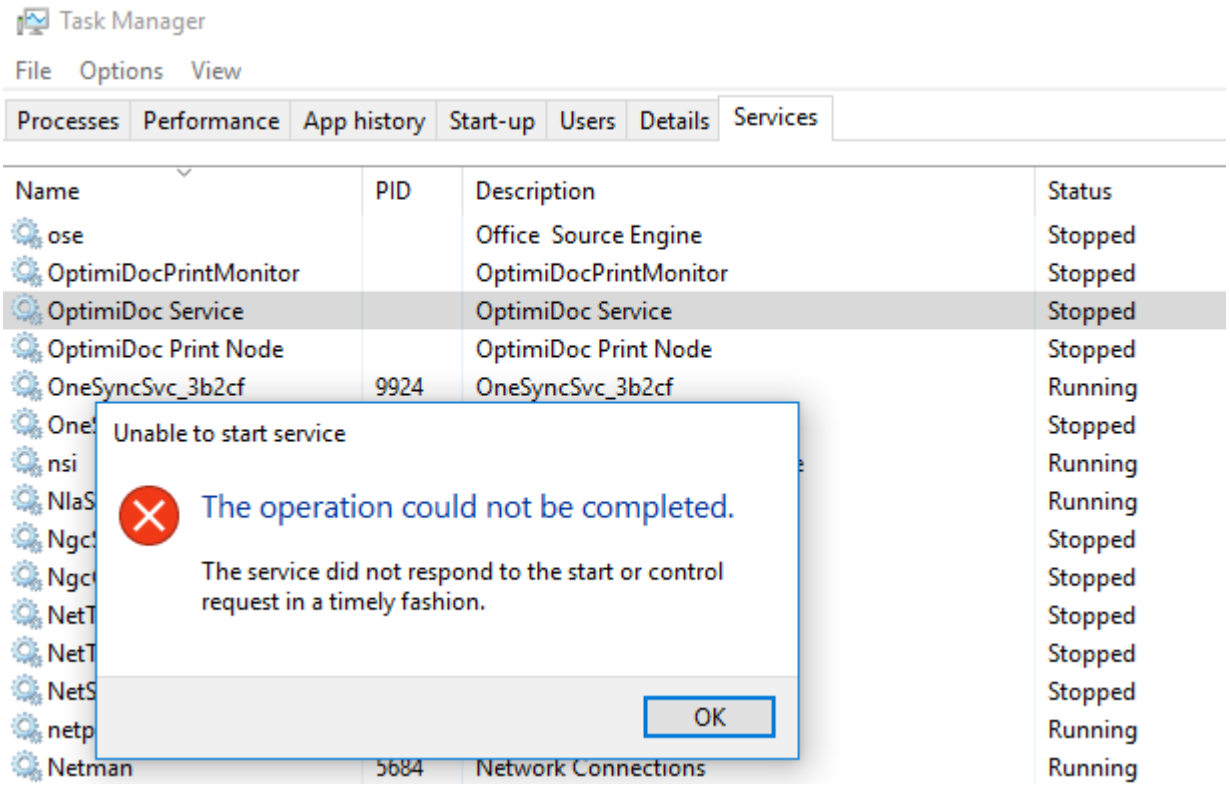
10.9 Extending time of Service load (timely fashion start)

If you have problem with Service timeout (see picture below).



To work around this problem, modify the registry to increase the default time-out value for the service control manager. To increase this value to 60 seconds, follow these steps:

1. Click **Start**, click **Run**, type **regedit**, and then click OK.
2. Locate and then click the following registry subkey:
   HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control
3. In the right pane, locate the ServicesPipeTimeout entry.

NOTE: If the ServicesPipeTimeout entry does not exist, you must create it. To do this, follow these steps:

1. On the **Edit** menu, click to **New**, and then click **DWORD Value**.
2. Type **ServicesPipeTimeout**, then press ENTER.
3. Right-click **ServicesPipeTimeout**, then click **Modify**.
4. Click **Decimal**, type 60000, then click OK.
   (This value represents the time in milliseconds before a service time-out)

5. Restart the server/workstation on which OD is installed.

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10.10 Konica Minolta - Compact PDF configuration

If you want to make compact PDF as an output on Konica Minolta MFP, follow steps below:

1. Go to the folder **\OptimiDoc\Services**
2. Open **OptimiDoc.Service.exe.config**
3. Add these lines to the XML configuration file of Service restart it and **reinstall** OptimiDoc on MFP from **OptimiDoc WebApp.**

```
<appSettings>
   <add key="minolta.compression" value="true"/>
</appSettings>
```

From this point, if you edit Output options in Scan flow as *pdf (Non-searchable PDF) you will see on Konica Minolta MFP file type as **"Compact PDF".**

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10.11 Scan application does not work on older Konica Minolta devices

If the scan application on Konica Minolta brand devices do not work, follow the steps below:

1. Open OptimiDoc **WebApp**
2. Go to Device -> **Devices**
3. Edit Konica Minolta device with the edit button.
4. Type "**Scan4.00**" in the field "Model", next to the current Model details - see the picture below.
5. Save the settings
6. Reinstall OptimiDoc on MFP through the OptimiDoc WebApp in the **Devices** section.

It is possible to enter also: **Print4.00, Auth4.00, or any other API version 3.xx, 4.xx, 5.xx**

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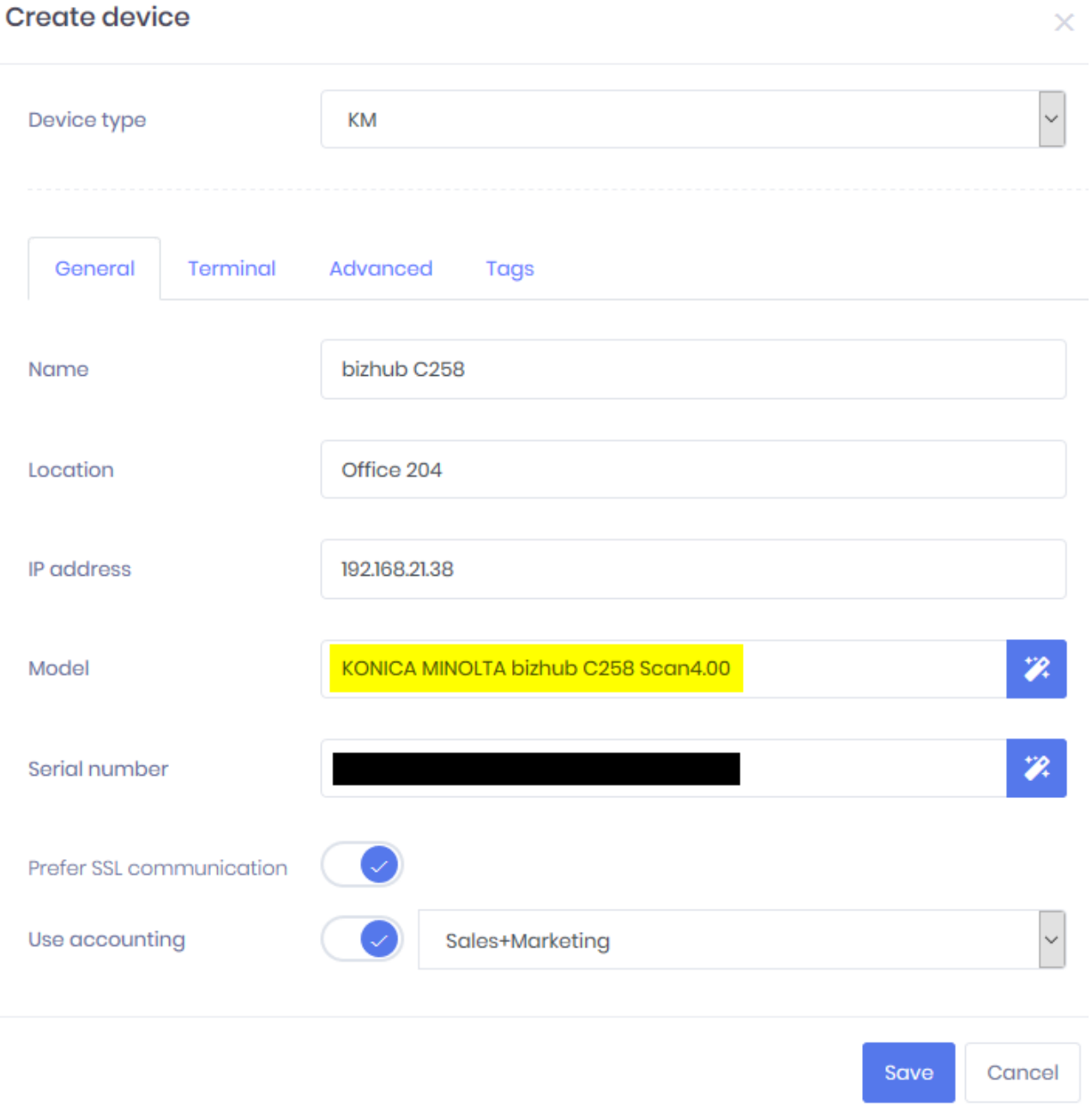

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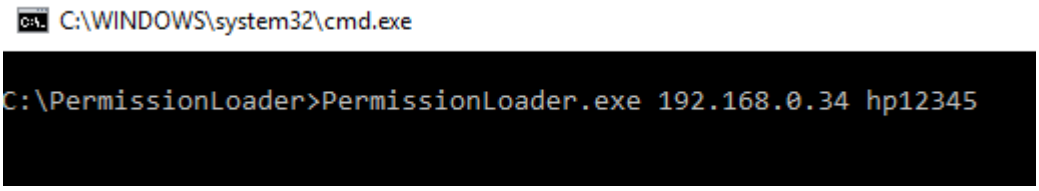
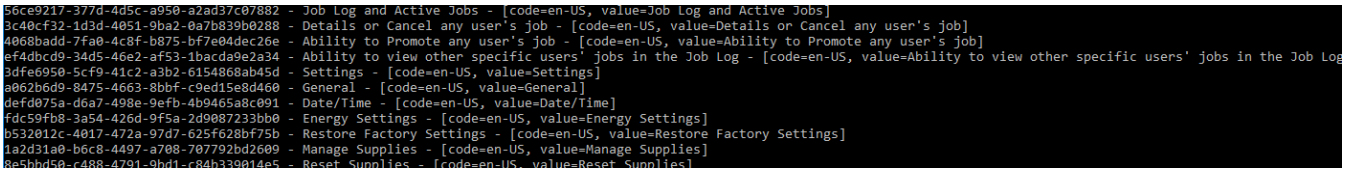
10.12 OptimiDoc HP permissions PRO. ENT

How to use permission codes from HP devices:

1) Download Permission Loader from the link
2) Unzip Permission Loader
3) Open Command Prompt and type PermissionLoader.exe [IP of HP device] [password]



4) If you have typed the correct IP and password, you will get the codes of currently installed apps on the device with a description (example below).



These codes can be applied for **hpent.txt**, **hppro.txt** or **hpguest.txt**

These files are placed in OptimiDoc\WebApp\App_Data

hpent.txt and hppro.txt
In case OptimiDoc is installed and you are **logged** into OptimiDoc.
With modifying these files, we can determine, which applications are accessible for users who **are logged into OptimiDoc**.

For example, as default, all native applications and features which are in hpent and hppro files are allowed after installing and logging into OptimiDoc. By deleting codes from hpent or hppro text file you will achieve the **disabling** of the application for users who are **logged** into OptimiDoc.
On the other hand, if you add some code to these two files you will allow logged users to use the applications/features you have added.

hpguest.txt
In case OptimiDoc is installed and you are **NOT logged** into OptimiDoc
You can also create hpguest.txt which has to be placed in the same folder as the files we mentioned previously OptimiDoc\WebApp\App_Data
If you create hpguest.txt and place codes from the Permission Loader, you can allow usage of applications and features on the device where OptimiDoc is installed and you are **NOT** logged into OptimiDoc.

Note
- After editing hpent, hppro. Restart WebApp in IIS to make the changes work.
- After editing hpguest you must uninstall OptimiDoc terminal, reload/reset mfp and reinstall OptimiDoc.

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- If you have cluster, copy edited hpent, hppro and hpguest to another node
- If you install a new application or add a new feature, you have to run permission loader again to get the code of the new application/feature.

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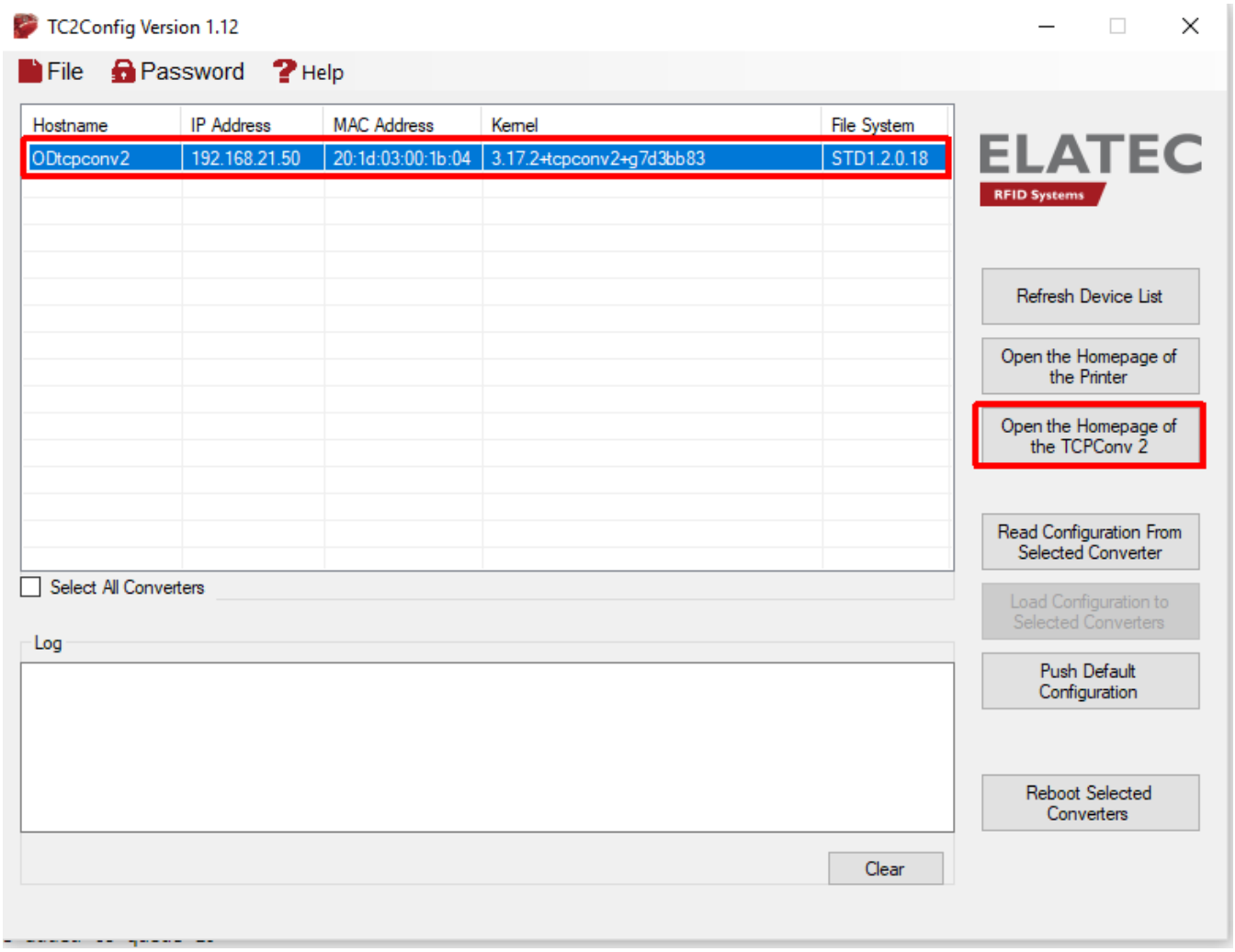
10.13 Card Authentication on Network Printers (TCPConv)

For using card authentication on network printers you need to use TCP convertor.

How to connect TCP convertor:

TCPConvertor needs to have plugged
- Ethernet cable from TCPConvertor - network
- Ethernet cable from TCPConvertor - printer
- USB card reader

Also download TCPConv AdminPack, in which you will find connected TCP convertors in your network. In this package go to the TC2Config folder and start TC2Config.exe.
In the app click on "Refresh Device List" and it should show you the connected TCP convertors with information such as IP address, MAC etc.
Select specific TCP convertor and click on "Open the Homepage of the TCP Convertor" redirect to it via web UI (TC2 Config.png).



Configuration of TCP Convertor:
After redirection to the web interface you need to sign-in.

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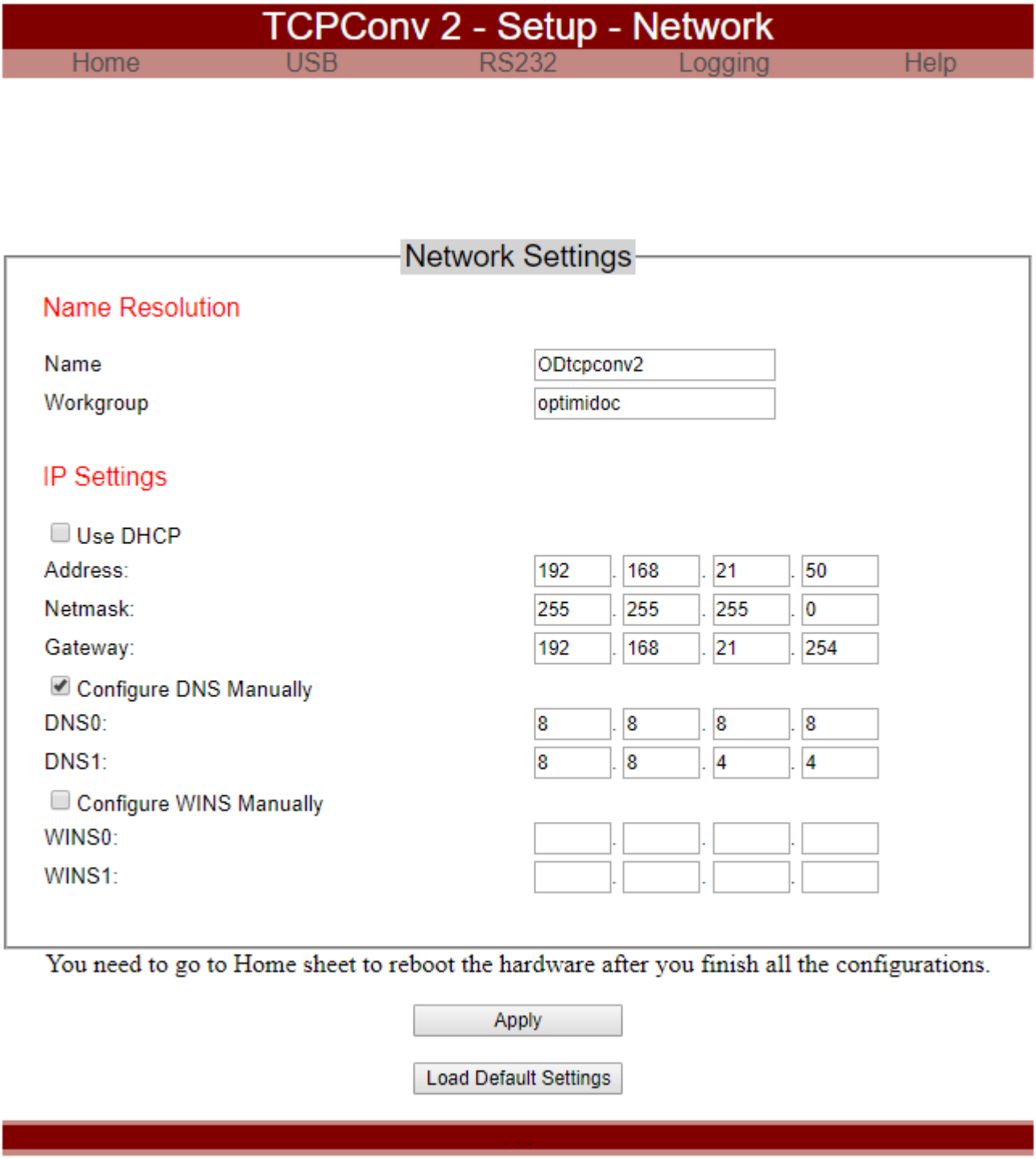
Default credentials are username admin and password admin

1) Go to Setup - Network and insert the correct IP address for this converter.
The IP address should be located on the network, where the OptimiDoc server is installed.



2) Go to Setup -USB setting . Set TCP/IP Configuration to TCPConv 2 as Client.
Insert "Remote Hostname or IP" *<ip address of OptimiDoc server>* and Remote Port: *14263*

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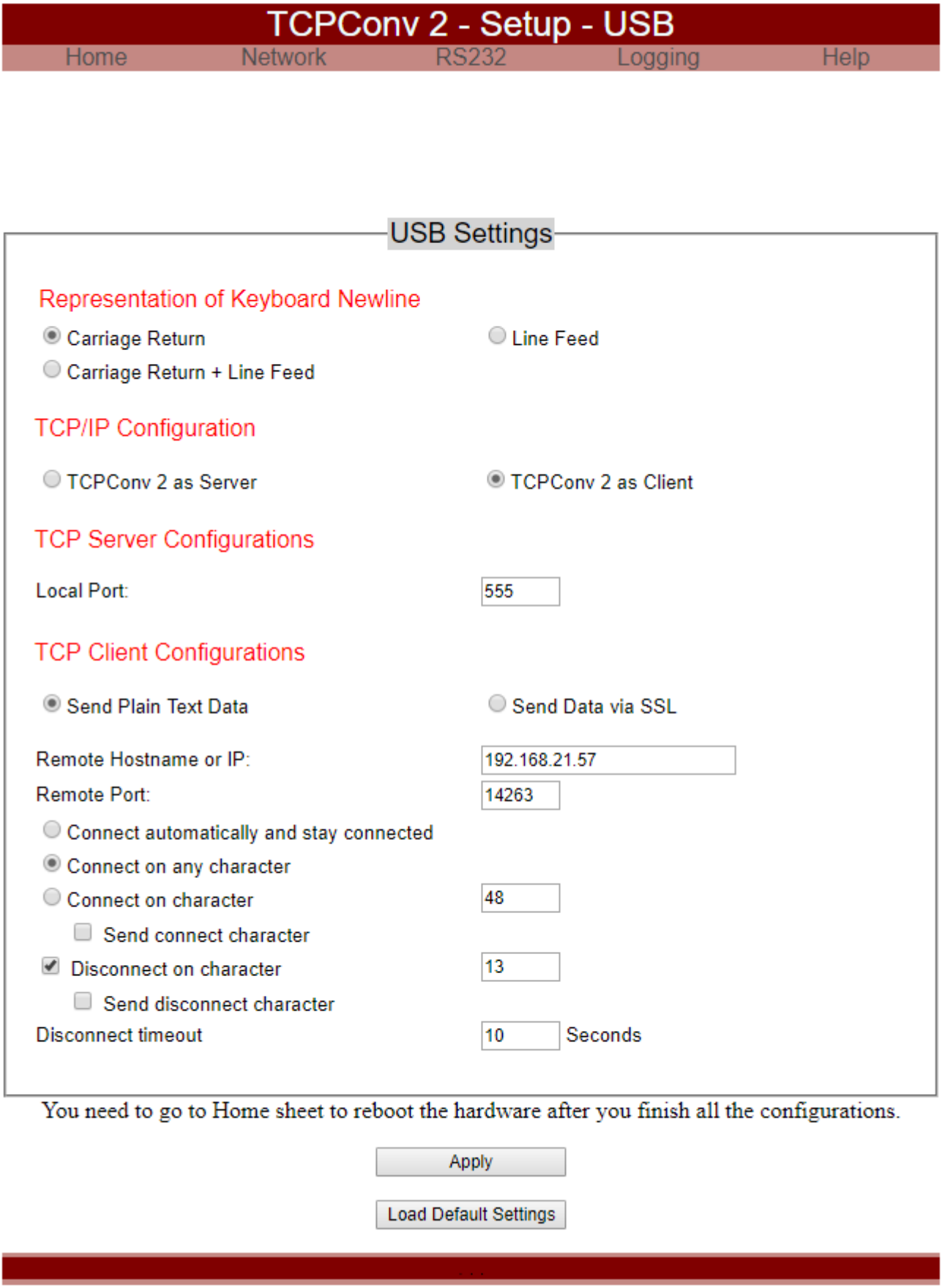

3) Printer, which will be connected to TCPConv, has to have a static IP address, which is

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mentioned on the TCPConv web UI>Status>Printer>Expected Internal IP (viz. 192.168.50.100) and also it needs to have DHCP enabled.
The Status page shows connection status of the printer and USB reader. (Printer status OK, USB reader is displayed)

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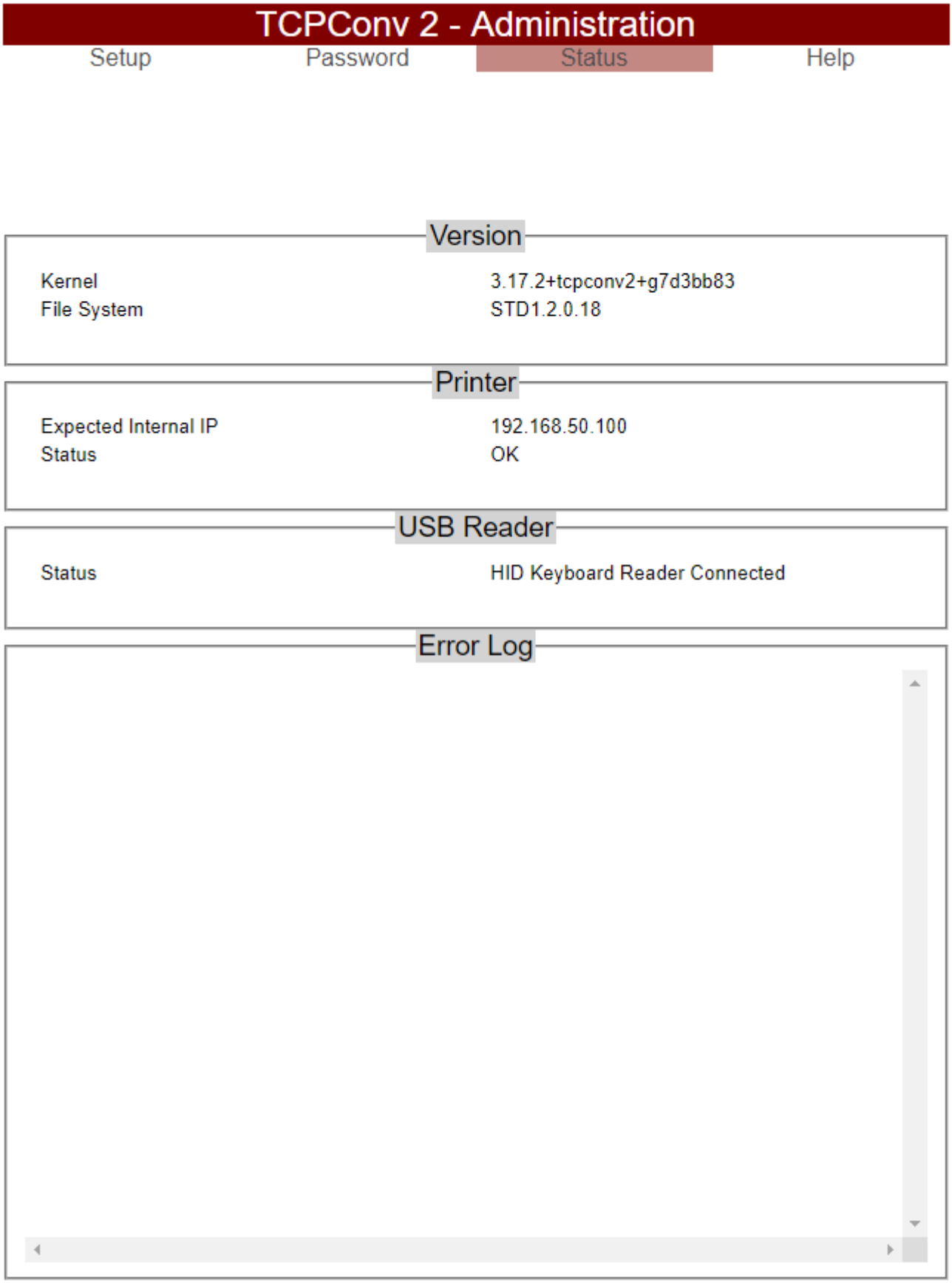

After the changes on the device and TCP convertor webpages, restart your printer, apply and reboot your TCPconvertor.

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OptimiDoc setting:

In the OptimiDoc web interface you need to add device as a network printer and you will use the IP address of your TCPconvertor (192.168.21.50)

Pull print driver setting:
You will normally keep the pull print driver as it is (IP address of the OptimiDoc server, Queue name -> OptimiDoc).
NOTE: For the card authentication process you need to have an assigned card to a user in OptimiDoc.

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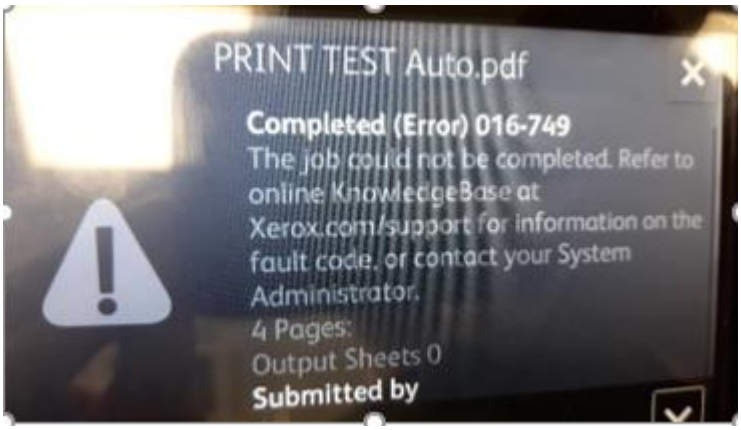
10.14 Versalink losing job issue

If you have a problem with losing jobs or a few pages on Xerox Versalink devices, check on the terminal device utility “Jobs” if there is an error in one of your print jobs. If the Xerox error 016-749 appears



Solution:
Go to the OptimiDoc web interface > Devices > edit device settings (blue button) > in “Advanced” tab set the delivery type to “**Jet Direct**” and save this setting. After this change the situation will be solved.

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Edit device

Device type: Xerox

General | Terminal | Advanced | Tags

Login: admin

Password: ••••

Separate application registration

OptimiDoc as default application

Print all

Use Pre-Authorization

Delivery type: Jet Direct

SNMP config: SNMPv3 Versalink

Save | Cancel

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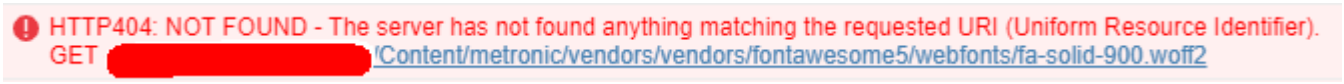
10.15 Problem with loading VOFF files

Some servers do not work with WOFF OR WOFF2 font files. The default configuration for most web servers is to deny a request for any unexpected file types, including this one. This might be the reason for the HTTP 404 response, even though the file exists. (see picture below)



The solution

Simply update your web.config file to tell the IIS webserver that this file is okay to serve, and how to serve it. Use your preferred method to edit the web.config file, including the built-in Configuration Manager module.

Find the <system.webServer> section in your web.config file, and look to see if it already contains a <staticContent> section; if it does not, then create it.

In the example below, the <staticContent> section did not exist and it was added to the top of the <system.webServer> section, before the <modules> section. In your site configuration, you don't need to have this exact placement. Just make sure that the <staticContent> section is somewhere between the open and close <system.webServer> tags.

```
  <system.webServer>
    <staticContent>
      <clientCache cacheControlCustom="public" cacheControlMode="UseMaxAge"
cacheControlMaxAge="365.00:00:00" />
            <remove fileExtension=".woff" />
      <remove fileExtension=".woff2" />
      <mimeMap fileExtension=".woff" mimeType="application/x-font-woff" />
      <mimeMap fileExtension=".woff2" mimeType="application/font-woff2" />
    </staticContent>
    <modules>
```

The important parts of the example above are the <remove> and <mimeMap> tags for your font files. If you already have a <staticContent> section added, make sure those lines are added in your configuration file.
Once you save this update, your site will no longer display or report this HTTP 404 error for your WOFF or WOFF2 files.

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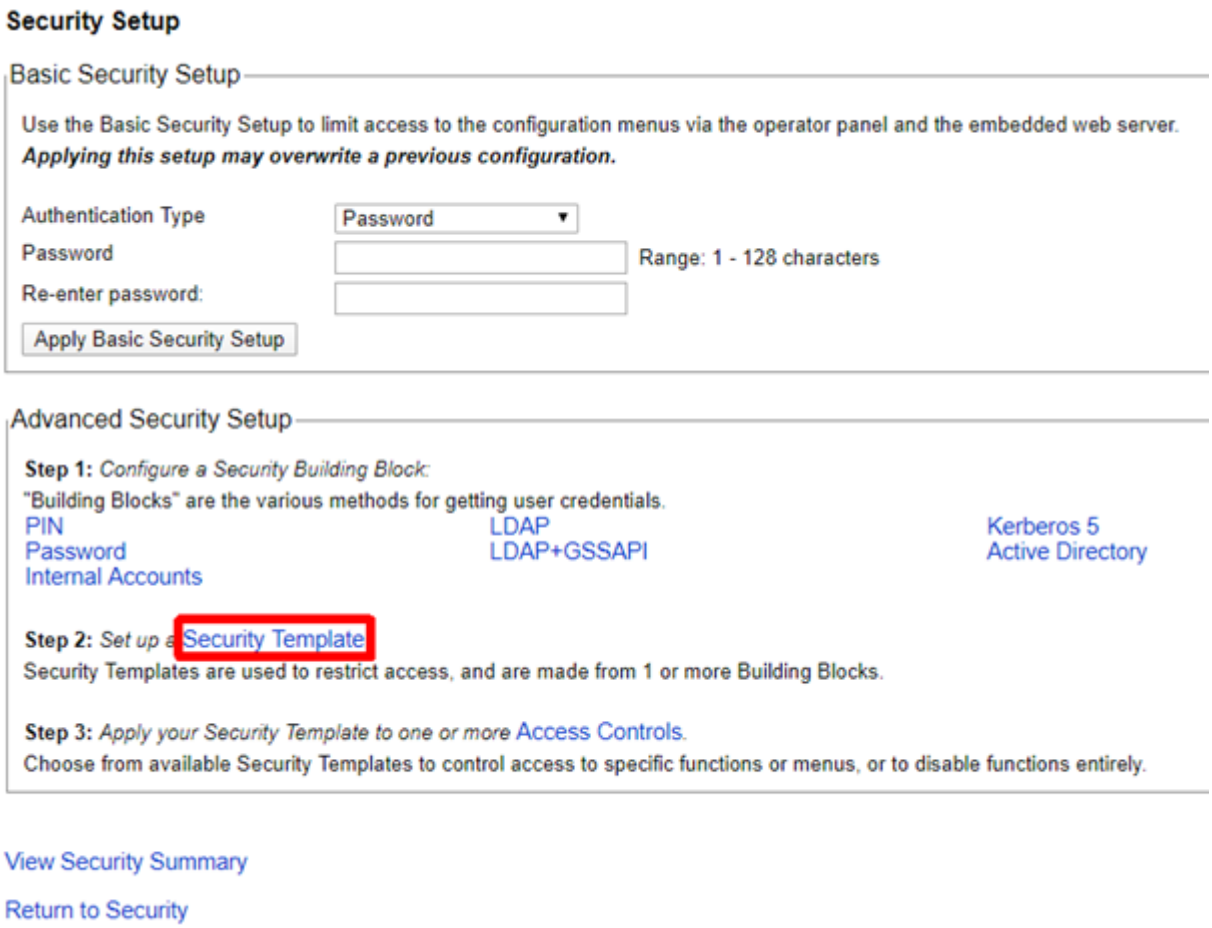
10.16 Lexmark - How to automatically fill TO field in Scan to Email

Open Settings >Security Setup > Select Security template

or

Open the following URL on a device with OptimiDoc installed.

https://printer_ip_address/cgi-bin/dynamic/printer/config/secure/auth/secutemp.html?info=normal



Click on Add a Security Template

Insert the name of the template and leave the OptimiDoc Authentication preselected. Click on Save Template.

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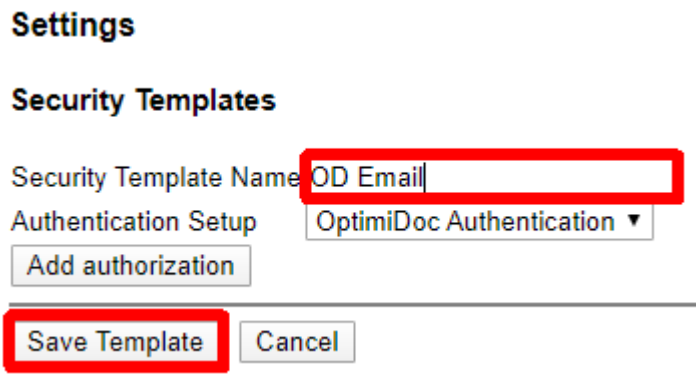
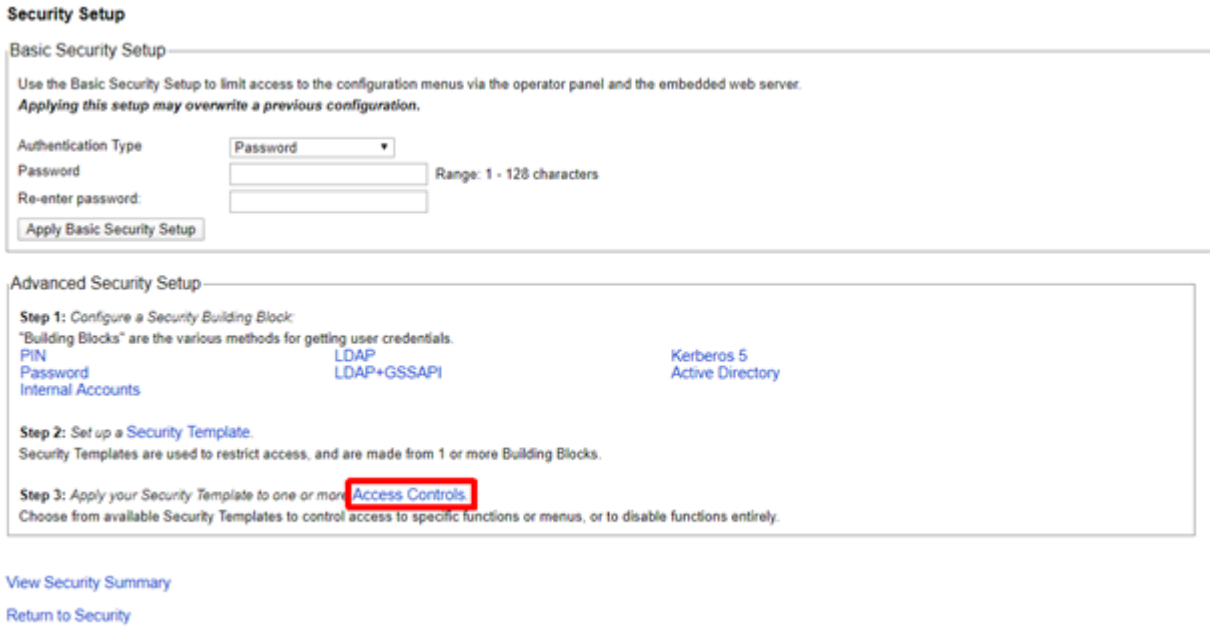


Go back to Security Setup

Go to Access Controls



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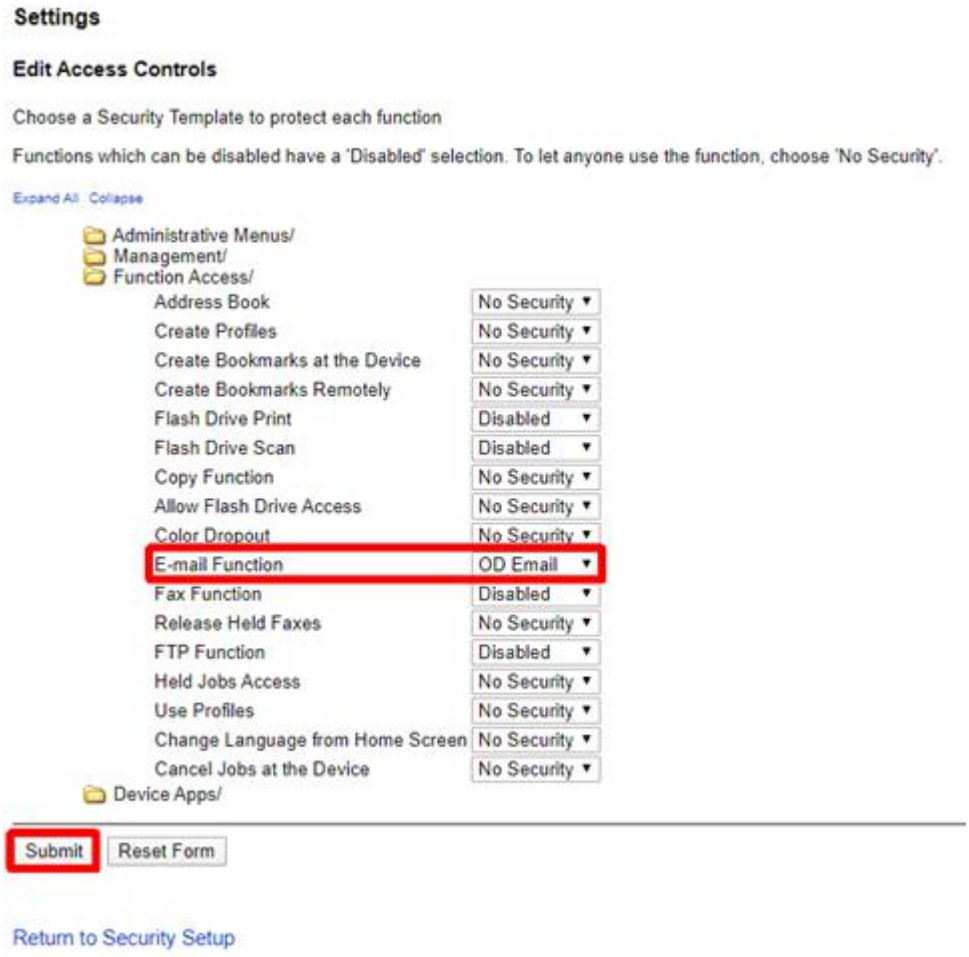
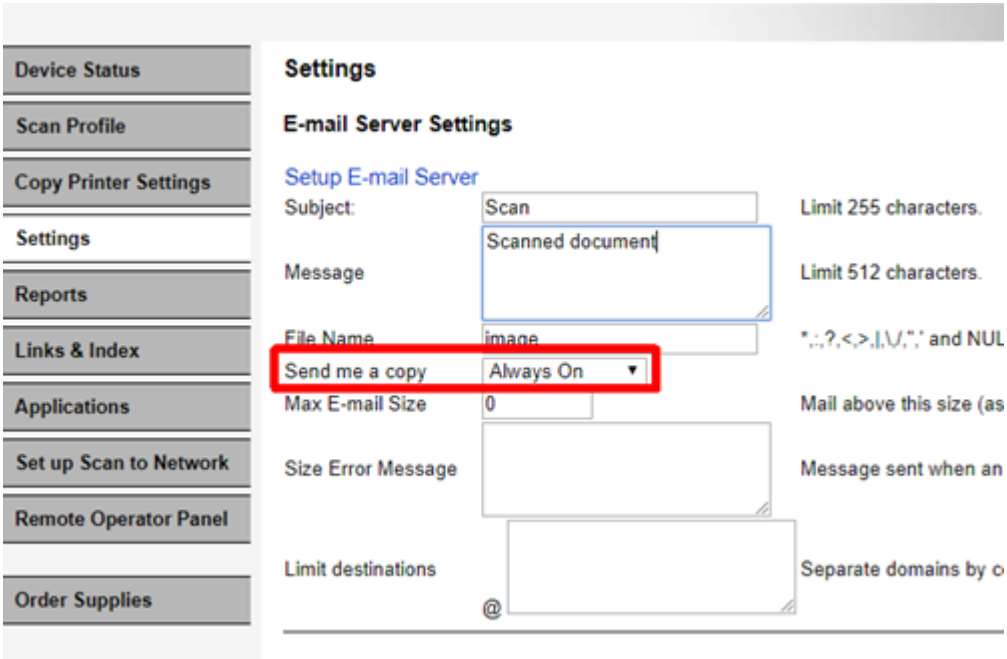
In Function Access/Email function select OD Email and submit.



In email settings select Send me a copy to Always on.



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Done. When you select the email functionality the document is always sent to the logged-in user email.

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10.17 Xerox scan settings based on XST

Import ant Following section applies only to Xerox brand.

There is a possibility to **change** some **setting** which are not editable via OptimiDoc's web interface, such as **darkness, sharpness, contrast**. You can change this globally in the **file common.xst** located here: <OptimiDoc_install_folder>\OptimiDoc\WebApp\App_Data\Flows

In this file locate these lines:

integer Darkness = 0; darkness value ranges from -100 to 100 increasing by thirds eg. 33, 66
integer Sharpness = 0; sharpness value ranges from -100 to 100 increasing by 50
integer Contrast = 0; contrast value ranges from -100 to 100 increasing by 50

You can also change these setting per workflow by naming the .xst file identically to workflow name.

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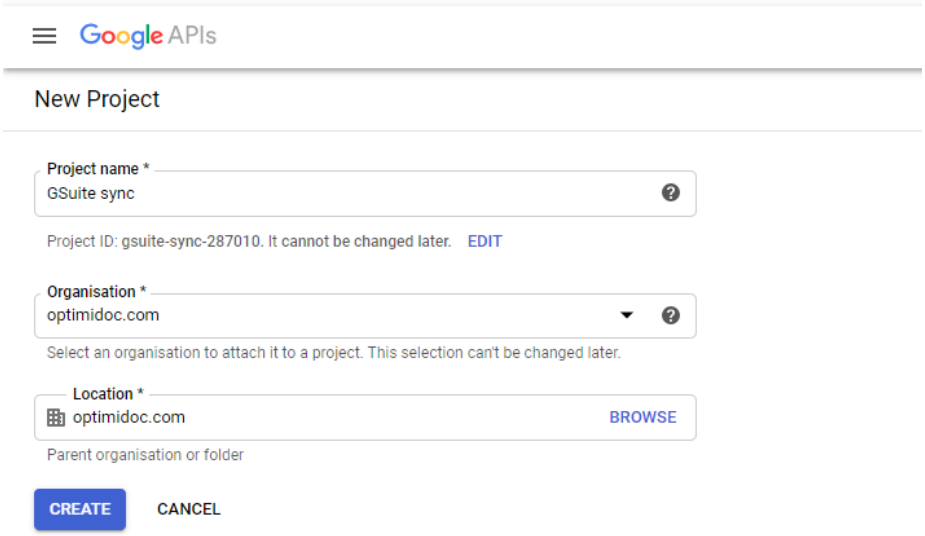
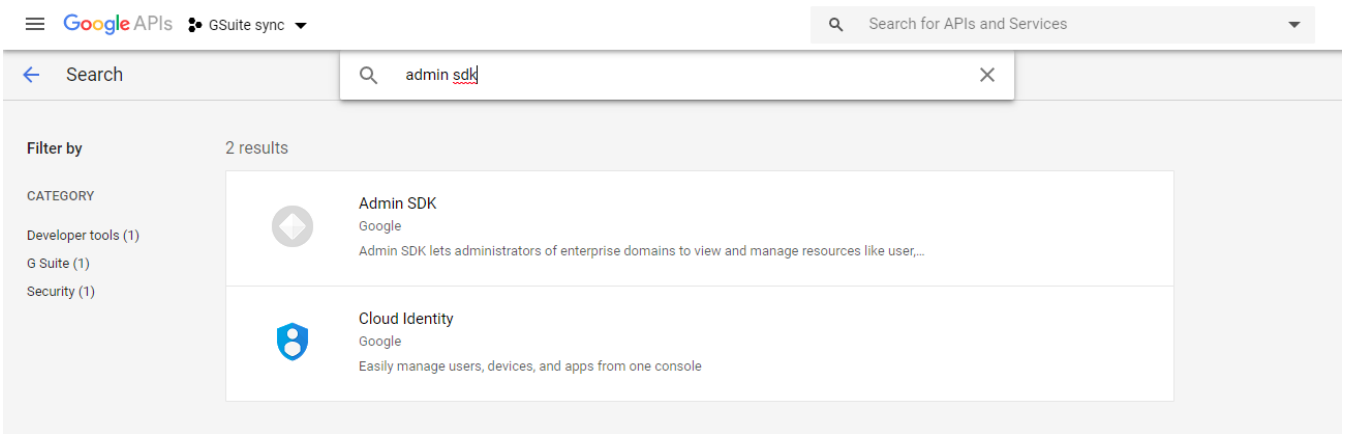
10.18 Google Directory synchronization

Navigate to https://console.developers.google.com

1. Log in with your **admin account**
2. Create a new project (the name doesn't matter)



3. Go to **Library** and search for **Admin SDK** and **enable it**



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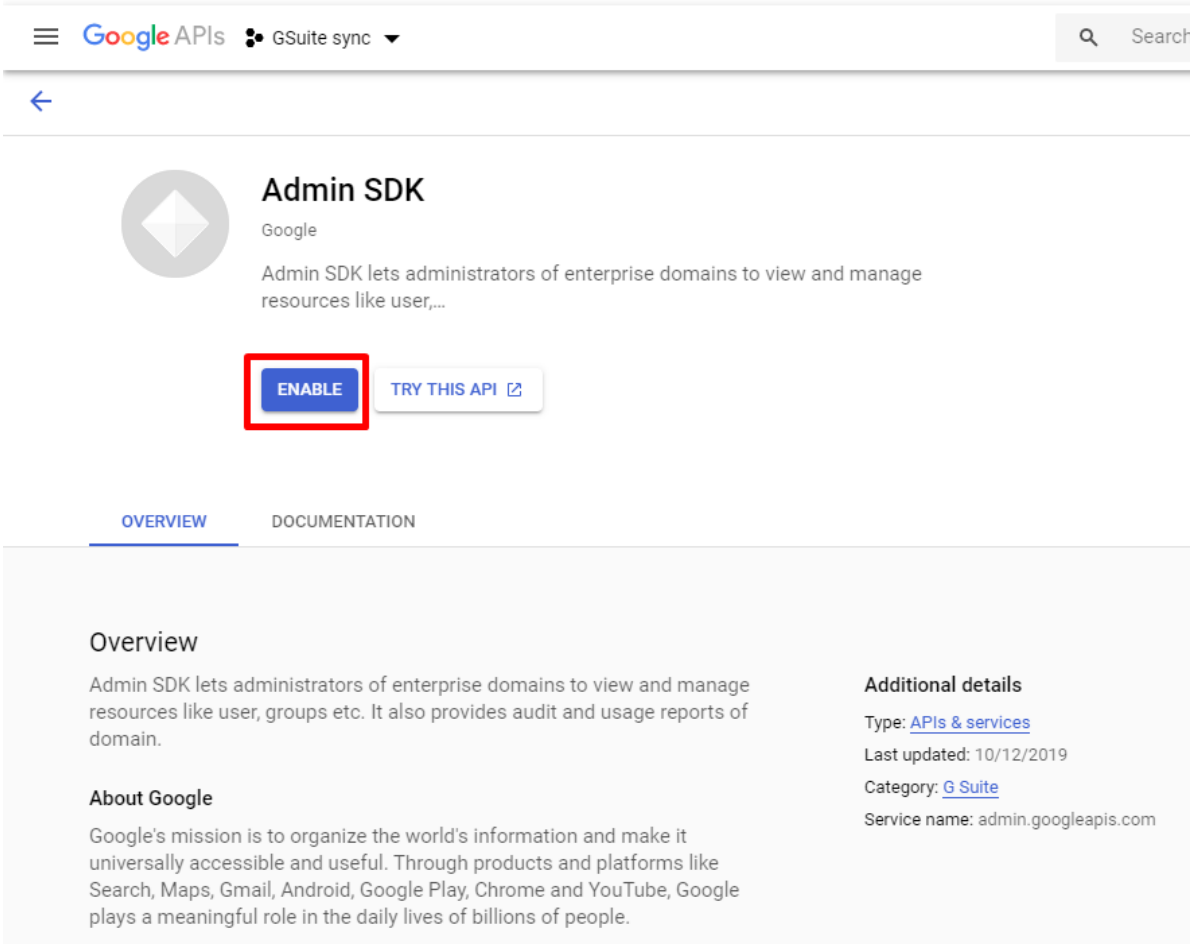
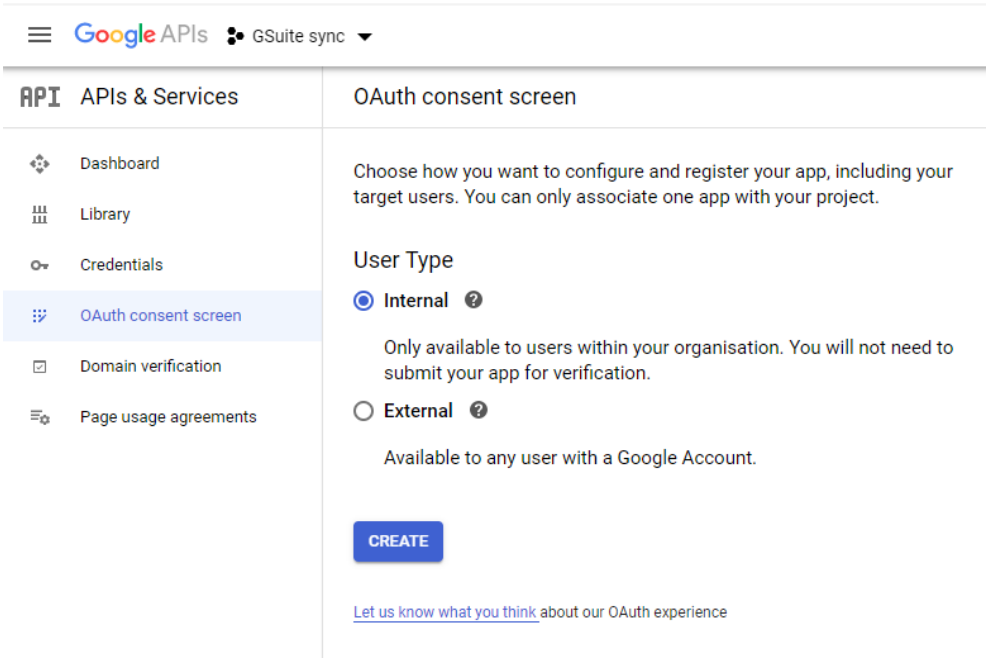


4. Go to **OAuth consent screen** section and set it to **Internal** nastavit internal, enter the name (will be shown when doing authorization in OptimiDoc)



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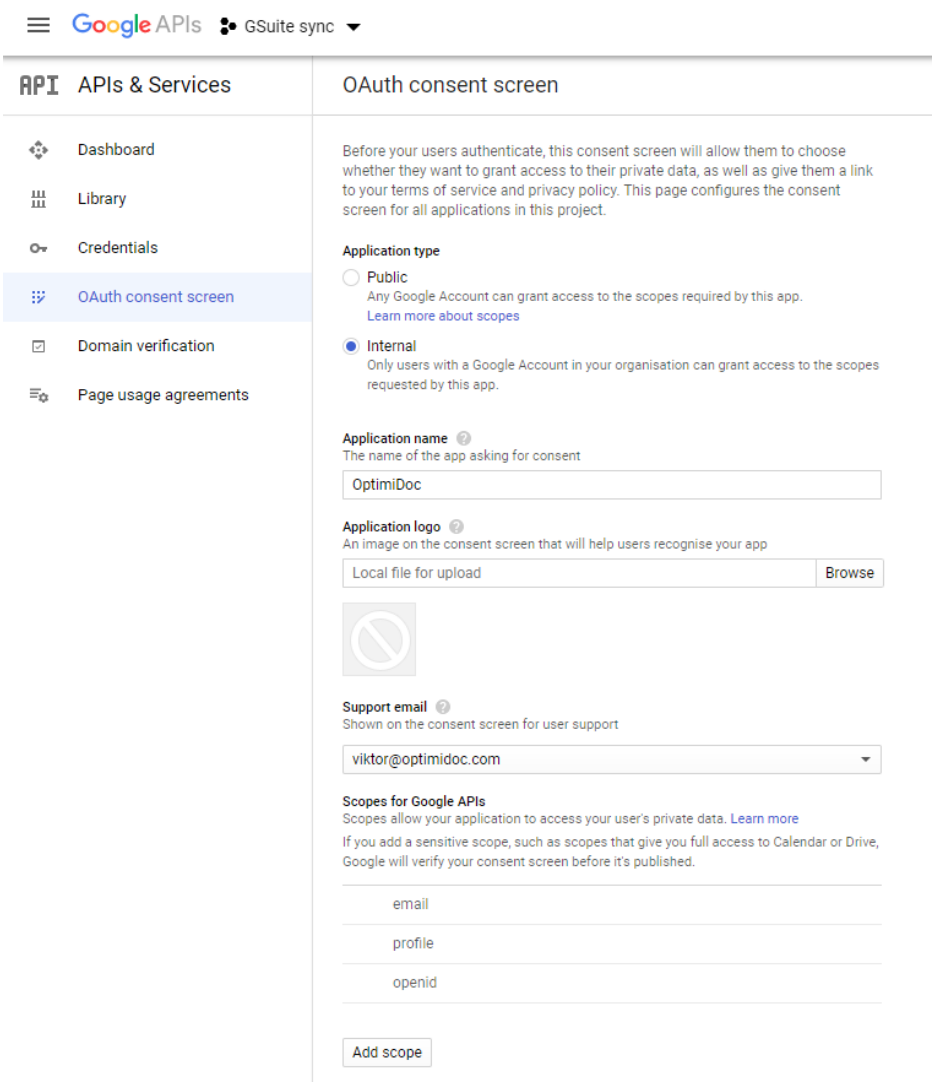

5. Go to **Credentials** and **create new OAuth 2.0 Client**, enter any name you want and add **Authorised redirect URIs: https://oauth.optimidoc.com/GDirectory/**

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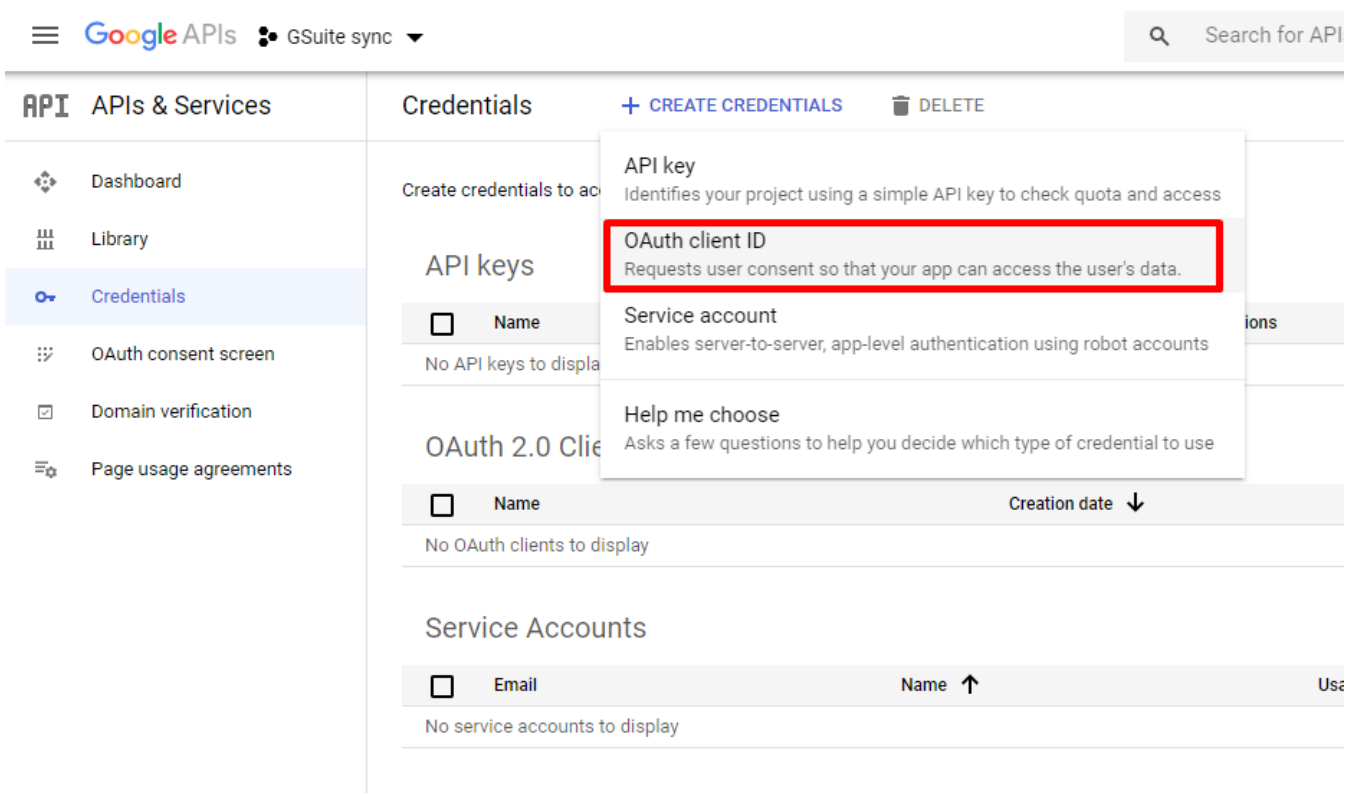

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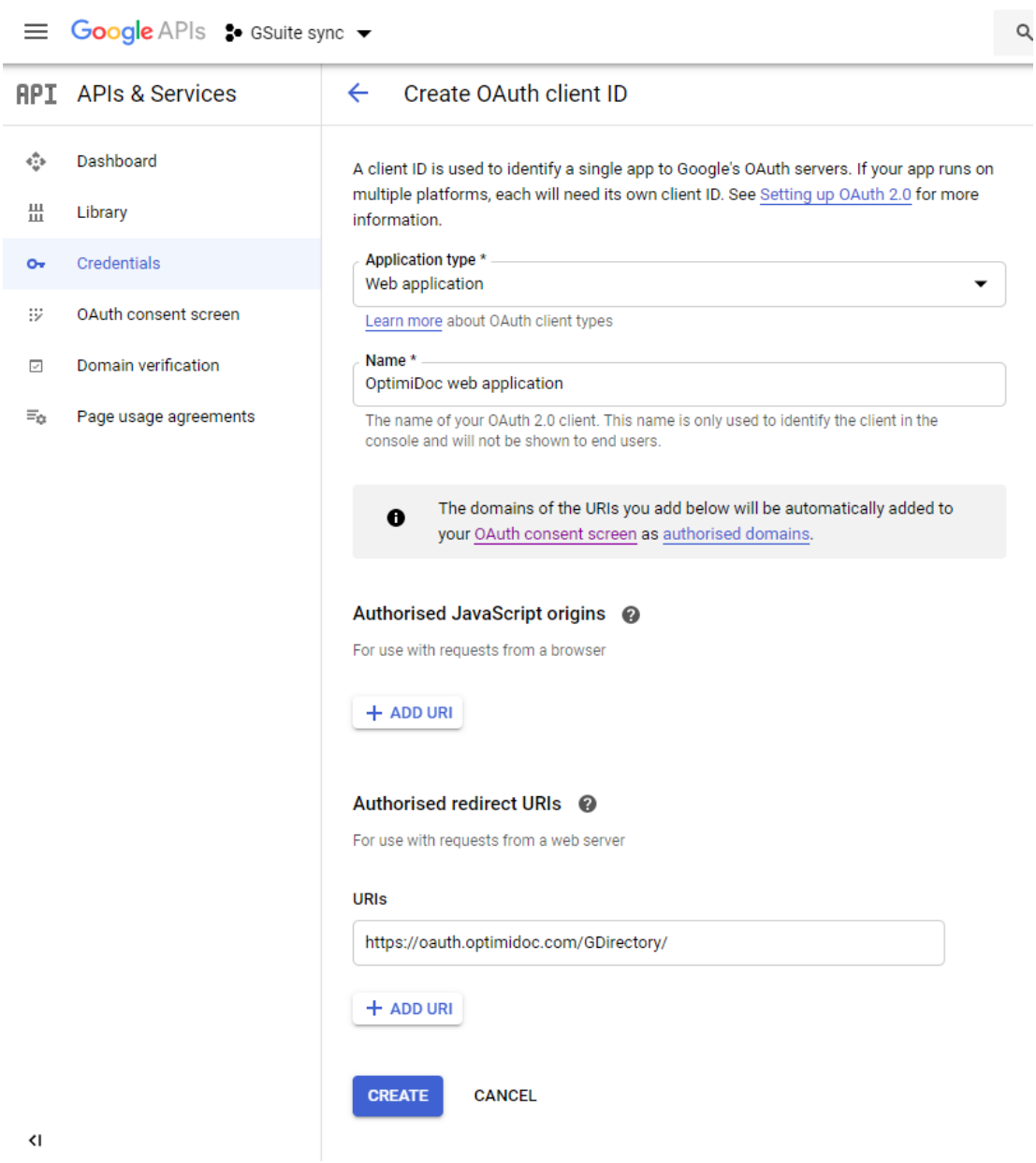

6. **Copy** generated **client ID** and **secret** to **OptimiDoc Google Directory import settings**.
7. In import settings enter domain and other optional atributes (such as groups)
8. **Click** the **Unathorized** button to authorize the GSuite Directory

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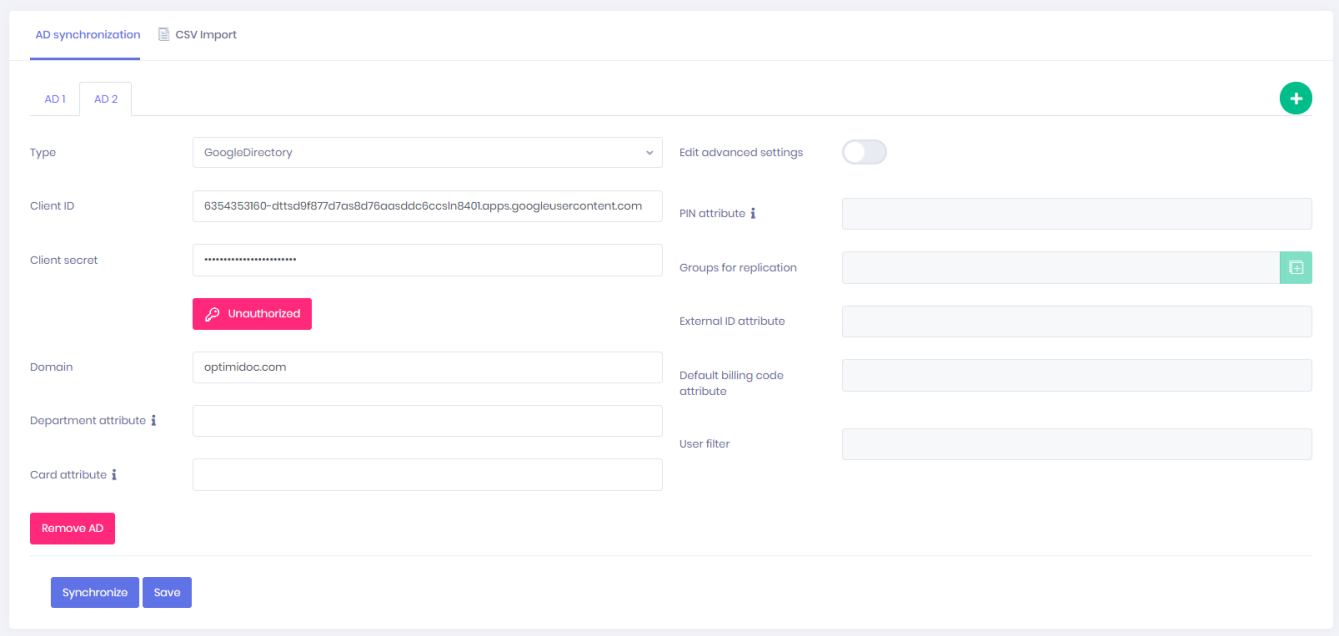

9. Once successfully authorized you can click the **Synchronize** button

Note It might be necessary to enable API at https://admin.google.com/ in Security -> API permissions

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