

HP Capture and Route (HP CR) Installation Guide

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Part I: Server

1 Introduction

The *HP Capture and Route (HP CR) Installation Guide* contains instructions for installing and configuring HP Capture and Route (HP CR), an enterprise solution. The guide is written for system administrators who have detailed knowledge of the Windows operating system and LANs.

This section describes:

[HP Capture and Route overview](#) (3)

[Built-in HP CR server features](#) (4)

[Clients and specialized integrations](#) (4)

[Server deployment summary](#) (5)

[Online help and related documentation](#) (6)

1-1 HP Capture and Route overview

HP Capture and Route (HP CR) is a server-based software application for document capture, which operates on a Microsoft Windows server within a customer's network. Users can access HP CR's document capture and routing capabilities from any scan-enabled MFP or network-connected scanner. HP CR converts captured documents into a variety of image- and text-based document formats and delivers them to a wide range of destinations.

Documents are transferred from a web-based End User Interface, MFP, or network scanner to the HP CR server, which processes and delivers them to specified destinations. If the device used to scan a document is an HP device enabled with the HP OXPd embedded platform, and the capture function or document process requires it, the user may be prompted at the time of scanning to enter indexing metadata or recipient addressing information. Certain document processes may also specify that a user receive notification upon final job delivery through the system. Notification messages can be sent to the scanning user's email address, or as a confirmation page printed back to the source scan device, if that device is an MFP and capable of printing these confirmations.

1-1-1 Scalability and automated failover

HP CR is a highly scalable enterprise application that can be deployed in organizations of all sizes. Its robust server-client architecture supports distributed workloads, versatile throughput, and unmatched document distribution capabilities using numerous delivery systems and methods.

With smaller workloads, the HP CR server can suitably perform all the functions required for document distribution. As an organization grows, the server workload can be distributed or completely off-loaded using one or all of the following components:

- **Remote Administrator** - A remote system hosting HP CR Server Administrator, which is the HP CR server management application. (See [Section 5: Installing a Remote Administrator](#), 51.)
- **Remote Compose (Composer)** - A remote system hosting a Composer, which performs document conversion tasks. (See [Section 6: Installing a remote Composer](#), 55.)
- **Remote Modem Server** - A remote system hosting a modem server. (See [Section 7: Installing a remote modem server](#), 61.)
- **Remote Intelligent Device Client** - A remote system hosting an HP CR Intelligent Device Client. (See [Section 8: Installing the Remote HP CR Intelligent Device Client](#), 69.)

- **Secondary Server** - A secondary system in a failover configuration. (See [Section 15: Setting up an HP CR Server Cluster](#), 131.)

In addition to scalability, the HP CR solution supports automated failover. In case of a system failure on the HP CR server, automated failover promises seamless recovery using a standby server.

1-2 Built-in HP CR server features

The HP CR server includes these built-in features:

- **Centralized administration** - You can manage an HP CR server using the HP CR Server Administrator, a snap-in for Microsoft Management Console. After connecting the HP CR Server Administrator to your HP CR server in the LAN, you can:
 - Modify the configuration of server components
 - Manage the server connectors
 - Manage user permissions and feature access
 - Monitor message processing
 - Manipulate rules for handling inbound and outbound messages
 - Troubleshoot errors
- **Automated self-maintenance** - You can manage the HP CR server databases using the Maintenance component. You can configure the Maintenance component Cleanup feature to remove messages and archive entries from the database after a specified length of time. You can also configure the Archive feature to copy messages to an archive database and remove the messages from the archive after a specified length of time.
- **Customized document workflow** - You can create rules to determine how the HP CR server will process inbound and outbound messages. The rules are highly configurable and can be manipulated to achieve specific results.
- **Configurable user permissions and feature access** - You can create Groups and configure user permissions in the HP CR Server Administrator. The collection of group records determines the access privilege of each user to the HP CR End User Interface and Preview. (Preview is a configurable feature that makes a user's messages available for preview before they are sent.) The user default configuration applies globally to users who do not require special permissions or feature access.

1-3 Clients and specialized integrations

HP CR features are accessible where the users need them most—on the web, office machines, multifunction devices, and business systems that are an integral part of the communication workflow.

HP CR is an intranet-based application for:

- **Multifunction devices and business systems** - Supports software solutions complementing the hardware solutions offered by Hewlett Packard as well as integrating with other vendor devices such as Ricoh Corporation, Sharp Electronics Corporation, and Xerox Corporation.

NOTE: HP CR server does not support HP Chai Device Client. If you are using Chai and are installing HP CR in your environment, install the Embedded Device Client for HP OXPd v1.4 available in the server clients directory. For download, installation, and configuration instructions, refer to the [HP Capture and Route \(HP CR\) Embedded Device Client for HP OXPd Installation Guide](#).

NOTE: When scanning from Ricoh devices, users must choose **Multi-paged PDF** in the scan options of the device.

- **Document and records management systems** - HP CR integrates with document and records management solutions including Microsoft® SharePoint®, FileShare, and iManage (limited support for iManage versions; verify that your version is supported before using).

NOTE: Support for iManage is limited to the following versions in the HP Capture and Route v1.5.0 Server:

- FileSite v8.5 – v9.0
- DeskSite v8.5- v9.0

Refer to [Section 17: Software integrations](#) (153) and the [HP Capture and Route \(HP CR\) Embedded Device Client for HP OXPd Installation Guide](#) for more information.

1-4 Localized clients and device buttons

The HP CR End User Interface, device clients, and standard device buttons have been localized for Simplified Chinese, French, German, Italian, Brazilian Portuguese, and Spanish. Localization includes:

- HP CR Web User Interface and the [HP Capture and Route \(HP CR\) User Guide](#).
- HP CR Legacy Web User Interface and the [HP Capture and Route \(HP CR\) User Guide](#).
- HP CR Embedded Device Client and the associated [Quick Start Guide](#).
- HP CR for HP OXPd v1.4 Device Client and the associated [Quick Start Guide](#).
- HP CR for Microsoft SharePoint and the associated [Quick Start Guide](#).
- iManage and the associated [Quick Start Guide](#).

Standard device buttons have been localized. Note, however, that the Administrator can modify the text as it appears on a device button. These buttons will not appear as localized unless the Administrator enters the text in the applicable language.

1-5 Server deployment summary

To deploy the HP CR server:

1. Complete the installation requirements using the guidelines provided in [Section 2: Requirements](#) (7).
2. Install the HP CR server using the instructions in [Section 3: Installing the HP CR server](#) (11).
3. Perform required configurations using the instructions in [Section 4: HP CR Server Administrator overview and post-installation configuration](#) (23).
4. Set up SMTP integration. Refer to the SMTP connector information in the [HP CR administrator online help](#) for instructions.
5. Set up other server-side related features such as:
 - Remote Administrator ([Section 5: Installing a Remote Administrator](#), 51)
 - Remote Composer ([Section 6: Installing a remote Composer](#), 55)
 - Remote Modem Server ([Section 7: Installing a remote modem server](#), 61)
 - Remote HP CR Intelligent Device Client ([Section 8: Installing the Remote HP CR Intelligent Device Client](#), 69)

6. Set up the HP CR End User Interface where users can create Distribution Rules. Refer to [Section 10: HP CR End User Interface](#) (77). In addition, see the [HP CR User Guide](#), which contains links to the HP CR End User Interface and all other related documentation for the HP CR server.

1-6 Online help and related documentation

Click the **Help** button at any time to access [HP CR online documentation](#).

Refer also to the [HP Capture and Route v1.5.0 Release Notes](#).

2 Requirements

The streamlined HP CR Server installation and configuration process automates a series of verification, installation, and configuration tasks. However, before you can install the HP CR server on a system, you need to make some initial server configurations and assure hardware and software requirements are met.

This section discusses the hardware and software requirements for the HP CR server installation, as well as the required server configurations.

For more information on the automated pre- and post-installation tasks handled by the installation process, refer to [Automated pre- and post-installation and configuration tasks](#) (11).

This section describes the following:

[Hardware and software requirements](#) (7)

[Creating the HP CR service account](#) (9)

[Creating the HP CR Admins group](#) (9)

[Installing Microsoft SQL Express on the HP CR server](#) (10)

2-1 Hardware and software requirements

The HP CR server installation requires a dedicated system that meets the following minimum requirements:

- Dual core processor, 2 GHz, 4GB of RAM, RAID 5W with 100 GB of disk space, and Microsoft mouse or compatible pointing device.

NOTE: Hardware requirements are subject to change based on the configuration of implementation.

- Windows 2012 64-bit, Windows 2008 R2 SP-1 64-bit
- Windows Active Directory - HP CR can only be installed in a Windows Active Directory environment. All server security and authentications are dependent on the Active Directory authentication.
- Microsoft.Net Framework:
 - MS.Net 4.6.1 is required to install the HP CR Server.

NOTE: The installation includes MS.Net 4.6.1, if not currently installed.

- MS.Net 3.5.1 is required to install the Embedded Device Client, the Intelligent Device Client, and the End User Interface.

NOTE: In a Windows 2012 environment, MS.Net 3.5.1 is not included or configured with the pre-installation pack. As a requirement for Device Client installations, you need to independently download and install MS.Net 3.5.1 to your Windows 2012 system.

- Microsoft Internet Explorer 11, or later
- Acrobat Reader 9.0 or 11.0 or later
- Internet connection (required for installing Microsoft.Net and for using cloud-based Folders)

IMPORTANT: Do not run any other enterprise application on the HP CR server.

2-1-1 Supported devices

HP CR supports the Embedded Device Client for HP OXPd on many devices. Refer to the [HP Capture and Route \(HP CR\) Embedded Device Client for HP OXPd Installation Guide](#) for a current and comprehensive list of supported devices.

For information on the supported devices for HP OXPd v1.6 and v1.4, refer to the [HP CR Embedded Device Client for HP OXPd Installation Guide](#).

2-1-2 Additional installation requirements

An HP CR server installation also requires the following:

- HP CR service account. For instructions to create the HP CR service account, see [Creating the HP CR service account](#) (9).
- Windows user account that belongs to the local Administrators group. For instructions to create this group, see [Creating the HP CR Admins group](#) (9).
- Installed MS SQL application. For instructions, see [Installing Microsoft SQL Express on the HP CR server](#) (10). If undetected during the automated prerequisites check, a minimum version of Microsoft SQL is automatically installed.
- (Optional) Installed, configured, and tested fax module for an HP CR server that supports faxing. Fax options are installed (or planned out) if faxing is going to be used in the HP CR environment. Faxing is available through the Telco, T37 SMTP, or HP Lanfax connector, depending on your environment. For information on modem installation, consult the fax connector options in the [HP CR administrator online help](#).
- Windows firewall settings: Turning off the firewall will allow exceptions for the mmc.exe and the DCOM port (135). If you do not want to turn off the Windows firewall, keep the firewall on and allow the DCOM port (135) and mmc.exe.

NOTE: If the firewall is on and you do not allow the DCOM port (135) and mmc.exe, you will get the following message when you try to open the HP CR Server Administrator after installing the server:
`0x800706ba) The RPC server is unavailable.`

2-1-3 Additional software considerations for a composer

The HP CR server setup automatically installs a local Composer on the server. This is needed to compose documents into the specified final formats.

A remote Composer is available (see [Section 6: Installing a remote Composer](#) (55) for details). The local and remote Composer must have the following applications installed if using the native application to convert documents. For example, if you are planning to use Crystal Reports for composing, then Crystal Reports must be installed on the compose server.

- Microsoft Visio 2007 for *.VSD and *.VDX message attachments (required)
- Crystal Reports v10.0 or earlier for *.RPT message attachments (required)
- Microsoft Office 2007 or higher for *.DOC, *.DOCX, *.PPT, *.PPTX, *.XLS, and *.XLSX message attachments (recommended, but not required)
- Microsoft Word 2007 or higher for *.DOC Routing Sheet templates



IMPORTANT: After installing Microsoft Word, you must open a Word document and register the software. You must also verify that pop-ups do not appear, to ensure successful composition of messages in the HP CR server.

NOTE: Routing Sheet templates are provided in *.DOC and *.OMTPL format. These templates can be edited in Word and WordPad, respectively.

If multiple versions of an application are deployed in the LAN, the most recent version must be installed on the Composer. For example, if Office 2010 and 2007 are deployed, then Office 2010 must be installed on the Composer.

2-2 Creating the HP CR service account

The HP CR service account is a dedicated Windows user account designed to run services on the HP CR server.



IMPORTANT: It is strongly recommended that you do not change this account or the password associated with it.

The HP CR service account user must:

- belong to the Domain Users group in the domain where the HP CR server is being installed.
- belong to the local Administrators group on the system where the HP CR server is being installed.
- have a password that never expires.

You can create or select a Windows user account as the HP CR service account. For instructions on creating Windows user accounts, consult Windows help.

2-3 Creating the HP CR Admins group

The Admins group consists of all HP CR users who run the HP CR Server Administrator (either on the HP CR Server or Remote Administrator). These users must have Distributed COM access, launch, and configuration permissions on the HP CR server.

To create an HP CR Admins group:

1. Go to the Active Directory or LDAP. Locate the domain where the HP CR server is being installed.
2. Create a group for HP CR Server Administrator users. Name this group **HP CR Admins**.
3. Add all users who will run the HP CR Server Administrator to the **HP CR Admins** group.
4. Log in to the system where the HP CR server is being installed using an account that belongs to the local Administrators group.
5. Add the HP CR Admins group to the local Administrators group.

When you need to add additional users to run the HP CR Server Administrator, you can add them to the HP CR Admins group.

2-4 Installing Microsoft SQL Express on the HP CR server

The HP CR server utilizes the Microsoft® SQL Express database to store and archive messages. It requires access to one of the following SQL database applications: SQL Express 2016, 2012, or 2008.

Use one of the following SQL database applications:

- **SQL Express 2016/2012/2008** - This limited Microsoft SQL database application provides the basic database services the HP CR server needs to maintain its SQL databases.
 - SQL Express must be installed local to the HP CR server.
 - SQL Express installation requires Microsoft .NET Framework 4.0

When installed on the HP CR server, the SQL server must only service databases for HP CR. Consider that installing a SQL server instance on the HP CR server might require the purchase of an additional SQL server license.

IMPORTANT: Installing the full SQL Server (2016/2012/2008) on the HP CR server is not recommended.

NOTE: If undetected during the automated prerequisites check, a minimum version of Microsoft SQL Express 2012 is automatically installed.

3 Installing the HP CR server

The HP CR server is installed with:

- Specialized Windows services that carry out the document distribution responsibilities of the server.
- Components that complete message processing tasks.
- Connectors that connect the HP CR server with external systems that submit messages to the server and distribute them to their final destinations.
- HP CR Server Administrator, which is the management application for the HP CR server.

The remainder of this section describes:

[Automated pre- and post-installation and configuration tasks](#) (11)

[Installing the HP CR server](#) (12)

[Creating and configuring the database](#) (18)

[Completing the server configuration wizard](#) (21)

3-1 Automated pre- and post-installation and configuration tasks

The pre-installation package automatically verifies, installs, and/or configures a variety of prerequisites, including:

- Minimum versions of the OS, Internet Explorer, MS.Net, and Microsoft SQL

NOTE: Internet access is required for the system to install Microsoft.Net v3.5.1.

Note also that in a Windows 2012 environment, MS.Net 3.5.1 is not included or configured with the pre-installation pack. As a requirement for Device Client installations, you need to independently download and install MS.Net 3.5.1 to your Windows 2012 system.

- SMTP and IIS services
- 32-bit IIS applications
- DCOM and IIS configuration
- Installation of required runtime libraries
- Application of Windows firewall settings
- Print spooler service set to automatic
- User Access Control (UAC) set to required setting

Post-installation configuration requirements are automated as well. Post-installation configurations for the server include:

- Setting the Doc, Docx, XLS, XLSX, PPT, PPTX, HTM, and HTML formats to use the Aspose compose engine

- Setting a Cleanup task in Maintenance for 30 days

NOTE: It is recommended to run this program on all servers that will run HP CR or remote HP CR components.

3-2 Installing the HP CR server

The HP CR server setup program has a verification utility that checks the server for compliance with installation requirements. All installation requirements must be met before HP CR can be installed.

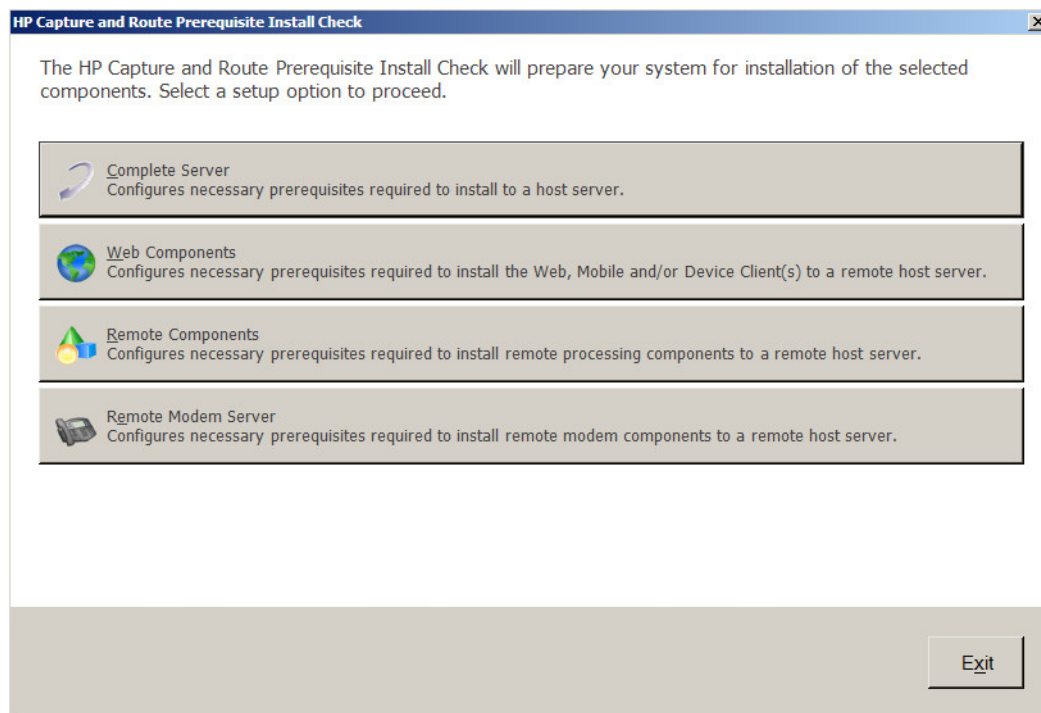


TIP: Before you start installing the HP CR server, review and verify that you have met all [Requirements \(7\)](#).

NOTE: If you are setting up an HP CR server cluster, review the HP Cluster Service setup instructions (see [Section 15: Setting up an HP CR Server Cluster](#), 131) before beginning the HP CR server installation. If you are setting up HP CR with a Telco Connector, see [Section 16: Installing and configuring a Dialogic modem driver](#) (145) before beginning the HP CR server install.

To install the HP CR server:

1. Log in to the system where you are installing the HP CR server using the HP CR service account.
2. Go to a network copy of the HP CR server and open:
`\HPCR\setup.exe`
3. The **HP Capture and Route Prerequisite Install Check** screen opens.



Select the option for which you want your system automatically prepared.

Each option checks for and (if not already present) installs and/or configures the necessary prerequisites for your selection.

Complete Server – prepares the system to install the HP CR Server onto one host server, including:

- Microsoft.NET Framework 4.6.1
- Microsoft.NET Framework 3.5 SP1
- Microsoft SQL Server 2012 Express
- Web Server IIS installation
- Sets the W3SVC Service (from the Web Server) to Automatic Startup
- Microsoft.NET Core 1.0.0 - Windows Server Hosting
- SMTP Service installation
- Sets the SMTP Service to Automatic Startup
- Adds a DCOM Exception in the Windows Firewall
- Sets the Print Spooler Service to Automatic Startup

Web Components – prepares the system to install the Web, Mobile and/or Device Client(s) to a remote host server, including:

- Microsoft.NET Framework 4.6.1
- Microsoft.NET Framework 3.5 SP1
- Web Server IIS installation
- Sets the W3SVC Service (from the Web Server) to Automatic Startup
- Adds a DCOM Exception in the Windows Firewall

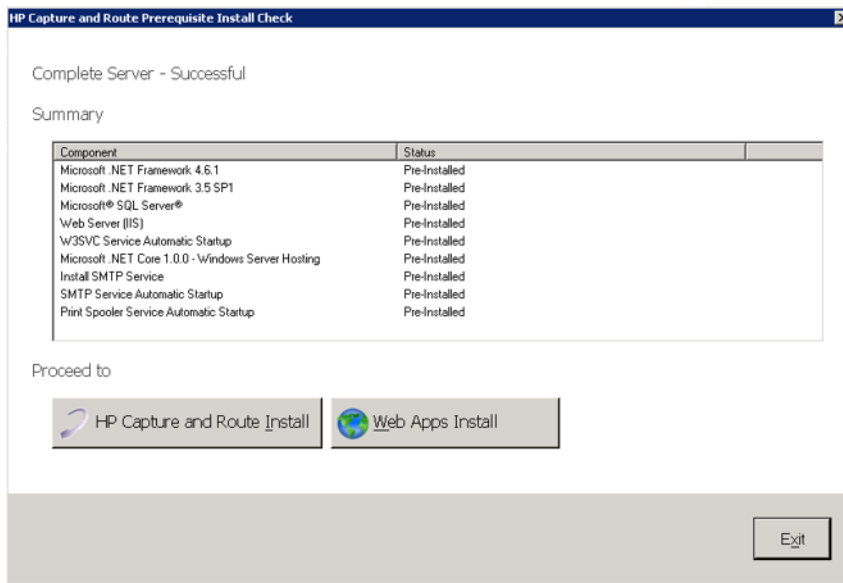
Remote Components – prepares the system to install remote processing components onto a remote host server, including:

- Microsoft.NET Framework 4.6.1
- SMTP Service installation
- Sets the SMTP Service to Automatic Startup
- Adds a DCOM Exception in the Windows Firewall
- Sets the Print Spooler Service to Automatic Startup

Remote Modem Server – prepares the system to install remote modem components to a remote host server, including:

- Microsoft.NET Framework 4.6.1
- Adds a DCOM Exception in the Windows Firewall

4. When the system finishes configuring your prerequisites, a **Successful** summary screen displays, listing components and their status.

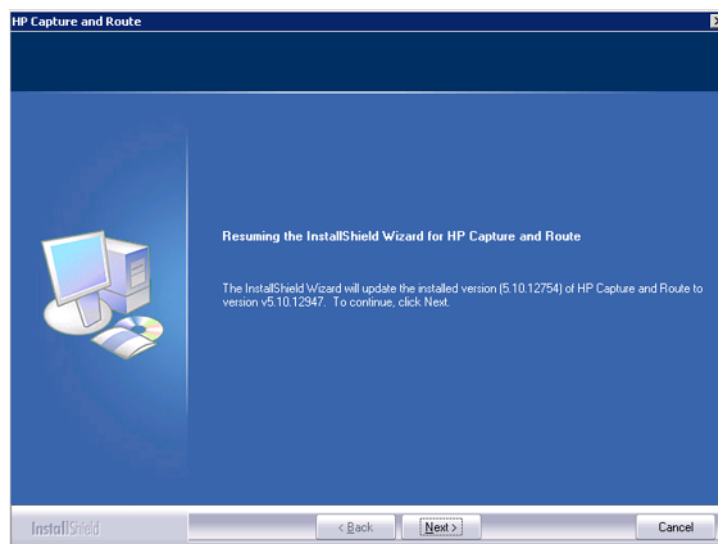


Click the installation type with which you want to proceed (**HP Capture and Route Install** or **Web Apps Install**).

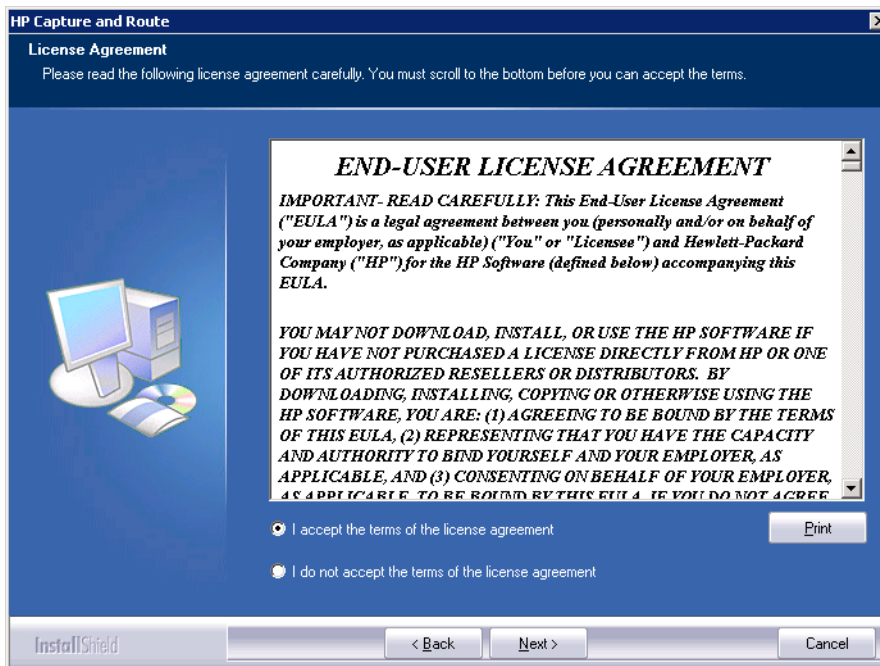
The system prepares the InstallShield wizard for the installation process.



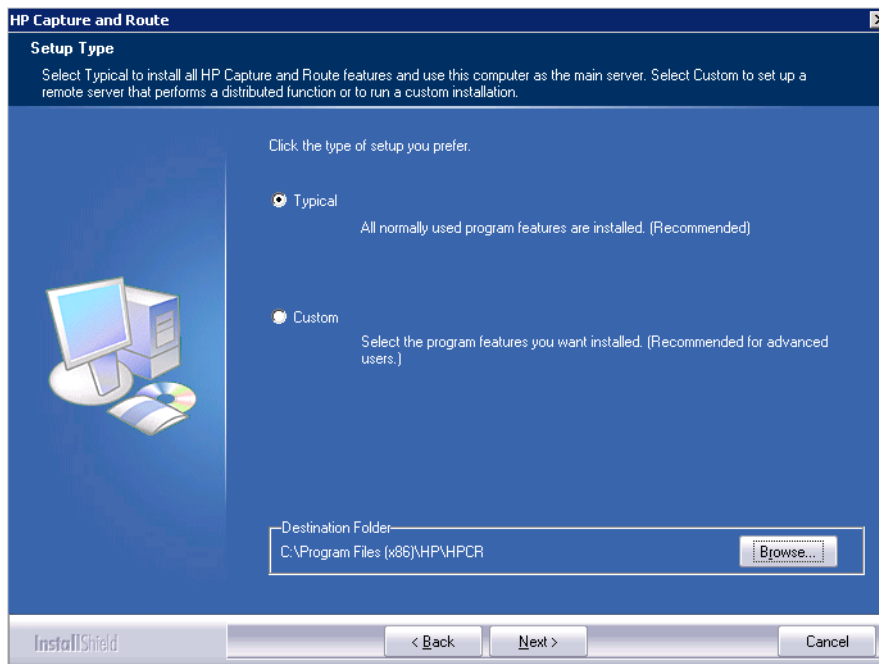
5. The InstallShield wizard resumes. Click **Next**.



6. The **License Agreement** page appears. Scroll down through the End-User License Agreement and select **I accept the terms of the license agreement**. Click **Next**.



7. Installation options appear in the **Setup Type** screen.



NOTE: The default destination folder is: [C:\Program Files \(x86\)\HP\HPCR](#)
 You can change the destination if necessary by clicking **Browse** and then selecting the desired location.

Select one of the following:

- **Typical** for an installation that does not support faxing from a Telco connector.
- **Custom** to select options, such as the modem server.

If you selected **Custom**, select options for the HP CR server installation. The following features are selected by default:

- Message Server
- Connector Package
- Component Package
- Server Administrator
- Intelligent Device Client
- Client Installs
- Server Tools
- Mobile Device API

The following features **must** be selected for a server installation:

- Message Server
- Connector Package
- Component Package
- Server Administrator
- Client Installs

The remaining features can be installed on remote systems depending on the planned environment structure.



IMPORTANT: Select the Modem Server option to support faxing with a local modem server.

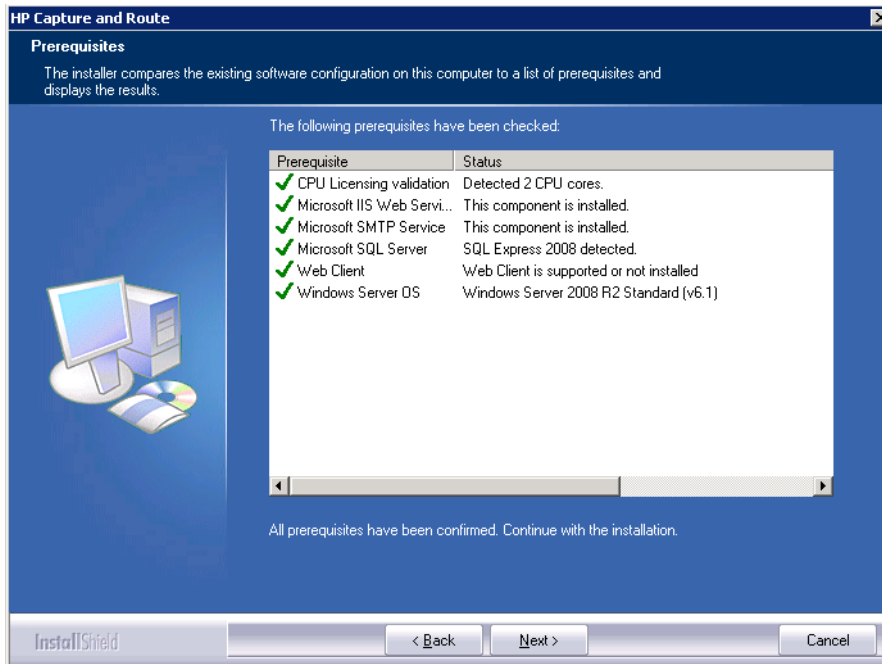
8. Review the results and perform one of the following listed actions.



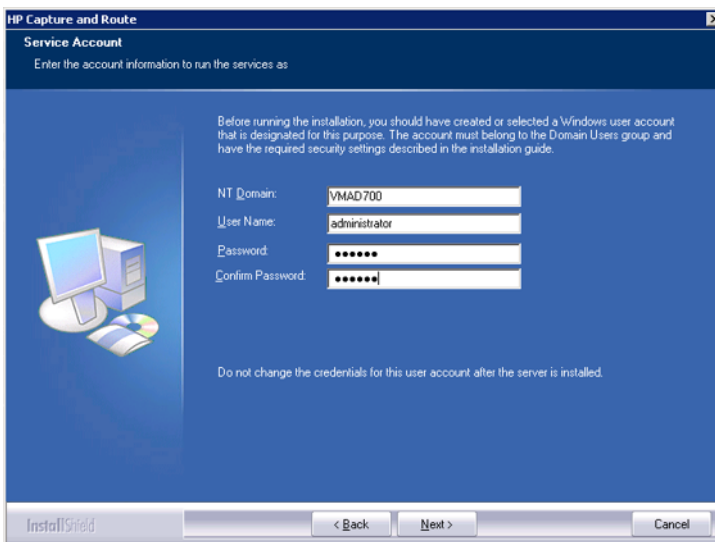
IMPORTANT: If Microsoft Office is partially detected by the setup, exit the setup and verify that Office is configured for first-time use. Start an Office application and, if prompted, enter a user name and initials. Wait for a new document to open and then exit the Office application. If Microsoft Office is still only partially detected, verify that Word, Excel, and PowerPoint are installed and continue with the HP CR server installation.

- To **exit** the setup or to install components that are required for the installation, click **Cancel** and then click **Yes** to exit the setup.
- To **continue** with the installation, click **Next**.

9. The **Prerequisites** screen displays as the installer compares your configuration with the required setup components and lists the results. Click **Next**.



10. In the **Service Account** screen, the setup requests logon credentials for the HP CR service account. By default, the **User Name** field is populated with the name of the user logged into Windows.



Provide the HP CR service account logon credentials:

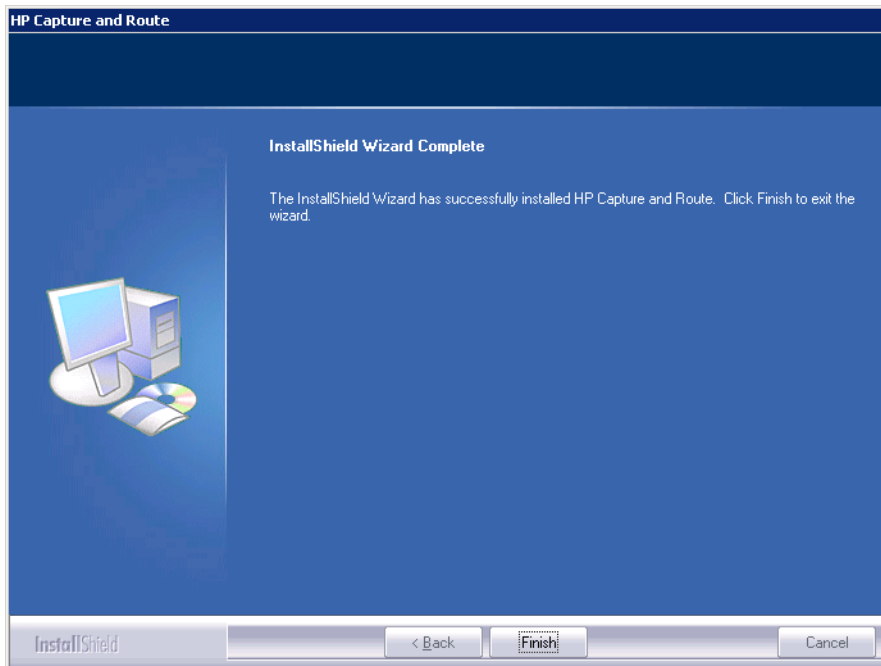
- a For **NT Domain**, enter the Windows domain name.
- b For **User Name**, enter the user name.
- c For **Password** and **Confirm Password**, enter the user password.

Click **Next**.

11. Review the installation settings on the **Installation Settings** screen. Click **Next** to proceed with the installation.

Progress details appear on the **Setup Status** screen.

12. The **InstallShield Wizard Complete** screen displays. Click **Finish**.

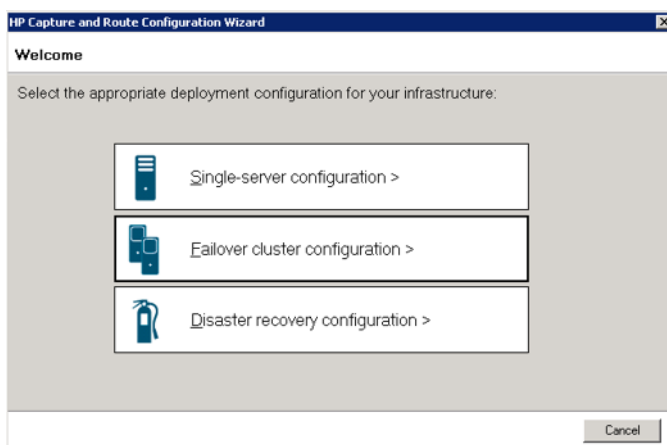


The setup launches the database configuration wizard (described in the next section).

3-3 Creating and configuring the database

Continue the installation process by creating and configuring the database.

1. The HP Capture and Route database configuration wizard **Welcome** screen opens.

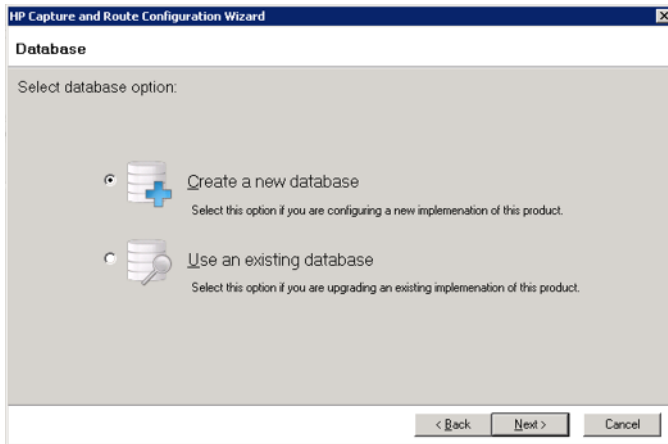


2. For a typical server installation, select **Single-server configuration**.

NOTE: For more information about **Failover cluster configuration**, refer to [Setting up an HP CR Server Cluster](#) (131).

NOTE: For more information about **Disaster recovery configuration**, refer to [Configuring Disaster Recovery](#).

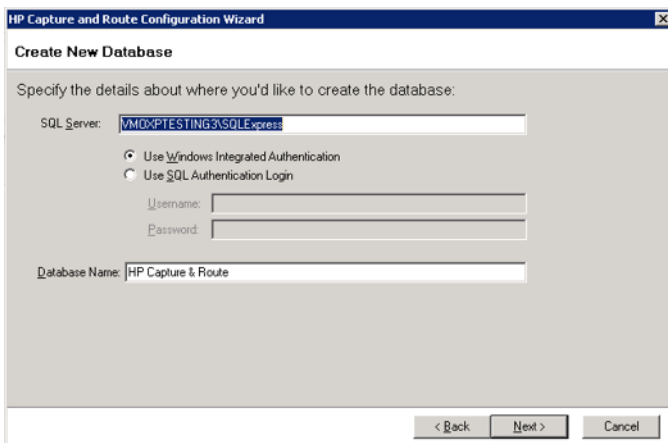
3. The **Database** screen opens.



Select **Create a new database** and click **Next**.

NOTE: Only select **Use an existing database** if you are upgrading an existing release of this product. See [Appendix: Upgrading HP CR v1.4.0 to HP CR v1.5.0](#) for more information.

4. The **Create New Database** screen opens.



To create the database:

- a Enter the SQL Server name:
 - If the setup detects **Microsoft SQL Server Express 2008/2012/2016**, verify that the **SQL Server** field is populated with the name of the server running the Microsoft SQL server database application and that `\SQLExpress` is appended to the server name.
 - If the setup detects **SQL Server 2008 SP2** or **SQL Server 2012/2016**, verify that the **Server** field is populated with the name of the server running the Microsoft SQL server database application.

NOTE: The default value is the local server where the setup is running.

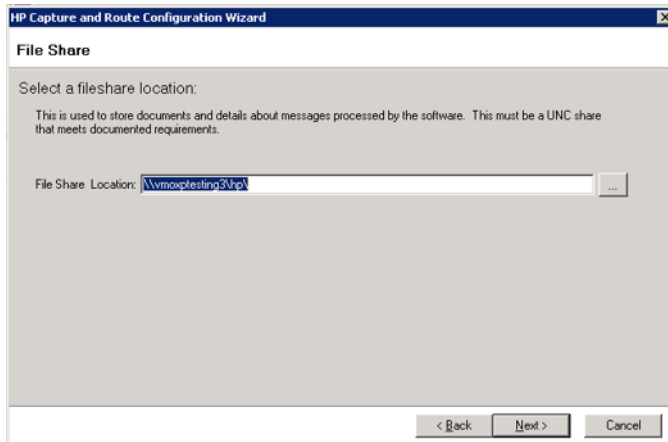
- b Select the authentication method that the HP CR services use to access the database. Choose one of the following:
 - **Use Windows Integrated Authentication** to use the HP CR service account. This is the default choice.

- **Use SQL Authentication Login** to use SQL server authentication. If you select this option, enter the login credentials in the **Username** and **Password** fields.
- c In the **Database Name** field, review the database name and modify it if necessary.

NOTE: Special instructions apply to an HP CR server cluster. For the first server being set up, enter the database server name. For the second server being set up, allow the setup to create a local database. (The second server is configured to use the database server, so the local database is not used.) For more information, refer to [Section 15: Setting up an HP CR Server Cluster](#) (131).

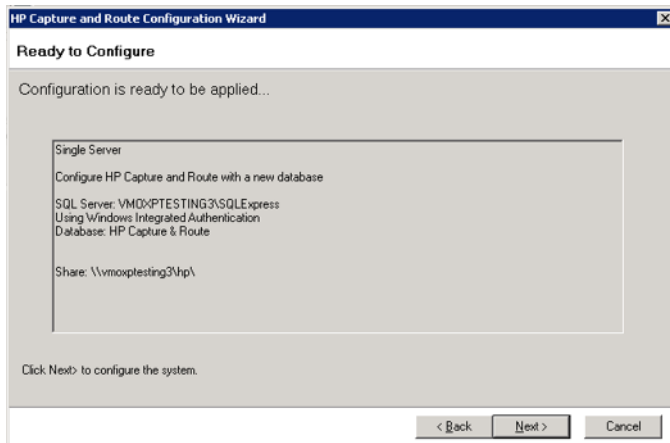
- d Click **Next**.

5. The **File Share** screen appears.



Enter the **File Share Location** at which you want the system to store message documents and details, and click **Next**.

6. The **Ready to Configure** screen opens. Click **Next** to configure the new database.



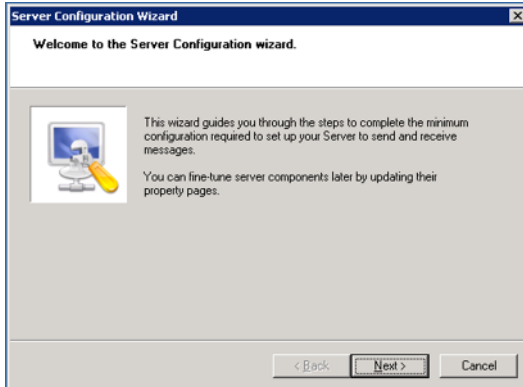
7. You can view progress of the configuration on the **Configuring...** screen.

Click **Next** when the process is complete to launch the Server Configuration wizard (described in the next section).

3-4 Completing the server configuration wizard

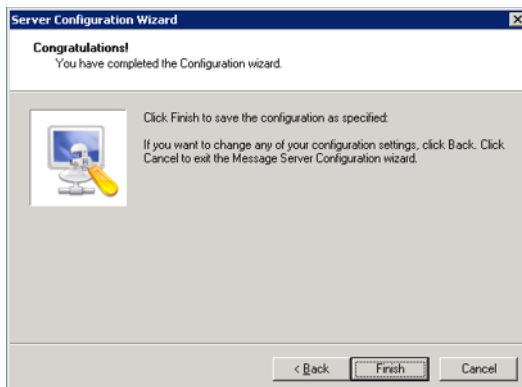
After the HP CR server and database are installed, the Server Configuration wizard automatically launches. You must complete the Server Configuration wizard before starting the HP CR Server Administrator.

1. When the Server Configuration wizard opens to the **Welcome** screen, click **Next**.



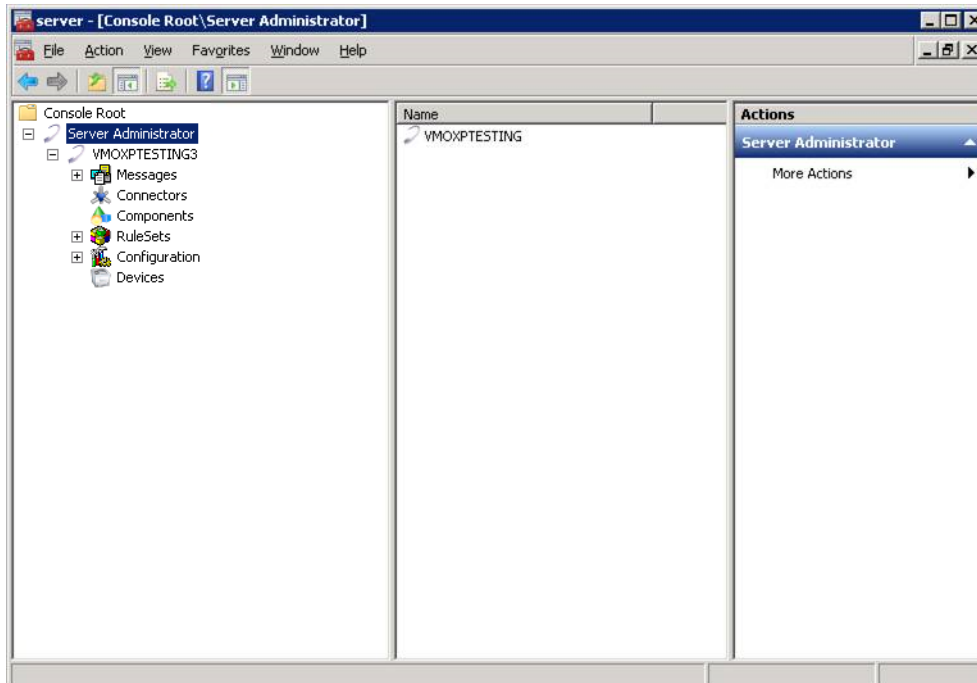
IMPORTANT: When setting up the passive server in an HP CR server cluster, exit the server configuration wizard and click **No** when prompted to run the wizard again when HP CR Server Administrator starts. See [Section 15: Setting up an HP CR Server Cluster](#) (131) for additional information.

2. The **Congratulations!** screen appears to indicate the server configuration is complete.



Click **Finish** to close the wizard.

The Server Configuration wizard saves the configuration and starts the HP CR Server Administrator.



When you close the HP CR Server Administrator, Microsoft Management Console displays a message about saving changes to the MSC file. This file records the current position of items in the console tree. To preserve the console state, save the changes.

If prompted to update the MSC file, click **Yes**.

4 HP CR Server Administrator overview and post-installation configuration

The HP CR Server Administrator lets you manage your company's HP Capture and Route (HP CR) servers, including connectors, components, devices, user permissions, and more.

You can use the Server Administrator to work with routing rules and see exactly what is happening to any message on the server either in process or in history. You can manage custom properties, folders, distribution collections, web client views, and Group permissions from the Server Administrator's Configuration Node.

To launch the HP CR Server Administrator:

Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator**.

The HP CR Server Administrator is installed as part of the default server installation. You can also install the Administrator on a remote system (a **Remote Administrator**), which is useful if you want to manage your servers from a remote location. For more information on the Remote Administrator installation process, see [Section 5: Installing a Remote Administrator](#).

This section provides overviews and post-installation configuration steps for the following topics:

[Server license activation](#) (23)

[Messages](#) (25)

[Connectors](#) (27)

[Components](#) (29)

[RuleSets and rules](#) (30)

[Devices](#) (31)

[Configuration Node options](#) (31)

[The HP CR Intelligent Device Client](#) (46)

For further details related to these topics, see the [HP CR administrator online help](#).

4-1 Server license activation

After installation, the server uses a 60-day demonstration license. At some point during this time, the server license should be activated. This can be done automatically, or through a manual method, depending on whether the HP CR server has access to the internet.

4-1-1 Automatic license activation

Have available a copy of the **Activation Code** received with the software package.

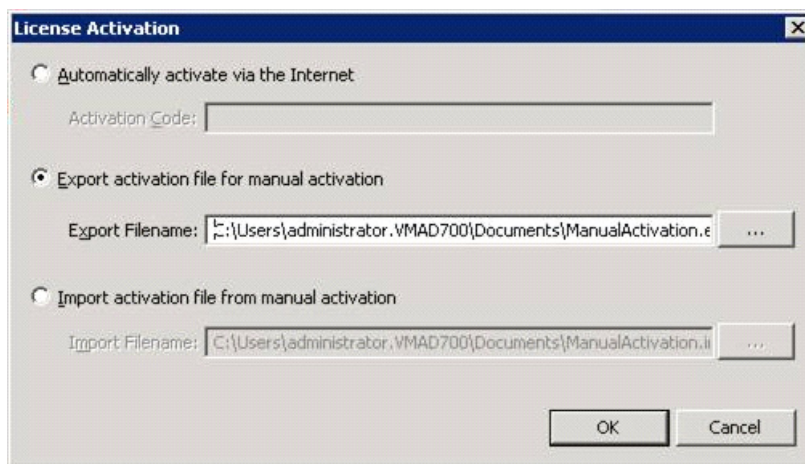
1. Launch HP CR Server Administrator and expand the tree view.
2. Select the server name. Right-click and select **Licensing...**
3. Click the **Activate License...** button.
4. Select the **Automatically activate via the Internet** option.

5. Paste the **Activation Code** in the **Activation Code** page.
6. Click **OK**. The server is updated with the new license.
7. Click **Close** to complete the procedure.

4-1-2 Manual license activation

Have available a copy of the **Activation Code** received with the software package.

1. Launch HP CR Server Administrator and expand the tree view.
2. Select the server name. Right-click and select **Licensing...**
3. Click the **Activate License...** button.
4. Select the **Export activation file for manual activation** option.
5. Browse to a location to save the file.



6. From a system with internet access, launch the web browser and go to:

<https://license.omtool.com/manual>

The **Manual License Portal** page opens.
7. Paste the **Activation Code** in the **Activation Code** page.
8. Browse to the [ManualActivation.exp](#) file created in Step 5. Click **Upload**, then click **NEXT**.
9. Click **Download** and save the [ManualActivation.imp](#) file to a location available on the HP CR server.
10. From the HP CR Server Administrator, select the server name. Then, right-click and select **Licensing...**
11. Select the **Activate License...** button.
12. Select the **Import activation file from manual activation** option.
13. Browse to the saved [ManualActivation.imp](#) file.
14. Click **OK**. The license has been updated.
15. Click **Close** to complete the procedure.

4-2 Messages

Messages can be inbound or outbound. You can configure special Routing [RuleSets and rules](#) for both on the HP CR server. These rules determine how messages are processed and where they are delivered.

The **Messages** folder in the console tree lists all inbound and outbound messages on the HP CR server. The Messages folder includes two sub-folders:

- **In Process** - Lists messages that were submitted to the HP CR server and are being processed for delivery to the intended recipients. You can view properties of messages listed in this folder. You can also cancel messages intended for delivery.
- **History** - Lists messages the server finished processing. Some messages are delivered to the recipients while some may fail delivery. You can view the properties of messages listed in this folder. You can also resend or delete messages.

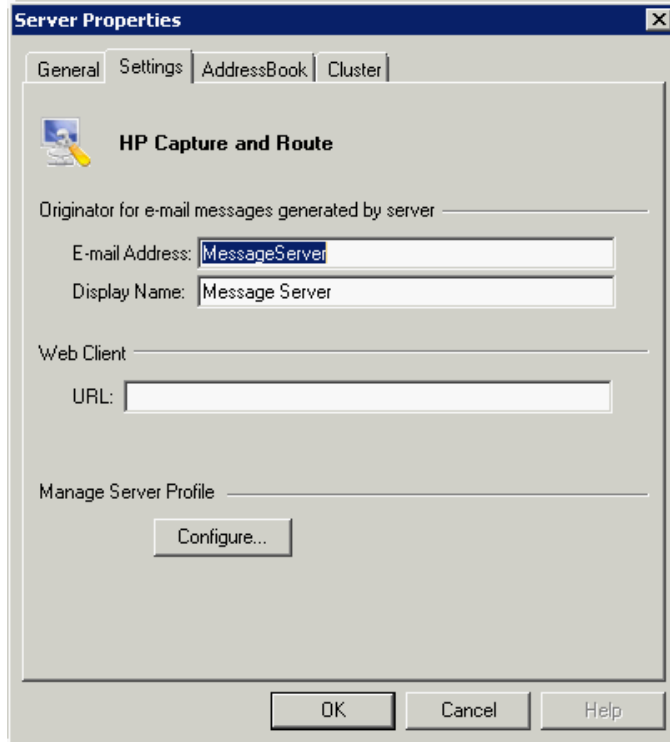
4-2-1 Specifying the originator of notification messages

The HP CR server generates notification messages for various events and sends them to users through the HP CR connectors for SMTP. The display name and email address (originator) associated with these notification messages can be set in the HP CR Server Properties. It is recommended that you set the attributes to a valid email address so users can reply to notification messages if they require assistance. (The default display name is Message Server and the default email address is MessageServer.)

To specify the originator of notification messages generated by the HP CR server:

1. Launch HP CR Server Administrator and expand the tree view.
2. Right-click the HP CR server in the console tree and select **Properties**. The **Server Properties** page opens.
3. Click **Settings**.
4. In the **Email Address** text box, enter the email address you want to associate with notification messages generated by the HP CR server.

5. In the **Display Name** text box, enter the name you want to associate with notification messages generated by the HP CR server.



6. Click **OK** to save changes to the **Server Properties**.

4-3 Connectors

Connectors are the means by which messages enter and leave the HP CR server. With a connector, HP CR can communicate with external messaging systems. Depending on the system, it can either accept, deliver, or accept and deliver a message.

All connectors are managed by a Windows server service called the Connector Manager, which engages connectors as needed and transfers messages between the other systems and the HP CR server. The HP CR server can deliver documents to many recipient types, including network folders, email, fax, printers, and more, through its connector subsystem.

HP CR can also capture and store a document and any related metadata that has been captured from the users or extracted from the document as part of its processing. Documents and metadata can be stored in SQL databases or saved in XML format and stored on network folders. Database or XML output from HP CR is one method to support integration with most archive, content management, workflow, or other information systems. This integration allows HP CR to serve as the platform for all distributed document capture and routing requirements.

The Connector Manager for HP CR is also the means by which new information systems and extensions are made available as upgrade options.

For more details on specific connectors, refer to the [HP CR administrator online help](#). The following table briefly describes the connectors that are automatically included in the HP CR server environment:

Table 1 Connectors

Connector Type	Connector Sub-Type	Description	Additional Requirements
Database		Allows the HP CR server to route inbound messages (documents and faxes) to a SQL database. Extends the usefulness of archiving by allowing for specific routing rules.	SQL database
DMS		Allows the HP CR server to route messages to a document management system (DMS).	
	HP Records Manager	Provides the ability to profile all of your important documents and store them in Records Manager. Users can route both soft copy and hard copy documents to Records Manager quickly and easily, using Records Manager's familiar, native windows.	HP Records Manager
	iManage (DMS)	Allows users to send both soft copy and hard copy documents to iManage quickly and easily.	
	FileShare (DMS)	Allows the HP CR server to route messages to a specified network folder (the FileShare folder). Supports outbound messages.	Shared network folder
	SharePoint (DMS)	Provides tight integration with Microsoft SharePoint through SharePoint's native interfaces.	MS SharePoint FileShare
	Universal Output (DMS)	Picks up and processes the XML documents and submits them to the route server for delivery to the intended recipients.	Shared network folder

Connector Type	Connector Sub-Type	Description	Additional Requirements
Fax		Allows the HP CR server to send and receive faxes.	
	HP LAN Fax	Allows the HP CR server to send outbound fax messages from an HP device to the HP CR server for outbound fax delivery.	Shared network folder
	T.37 Fax	Uses Simple Mail Transport Protocol (SMTP) to generate fax messages conforming to the T.37 protocol. Allows you to send outbound fax messages as an email to another fax server or fax service provider that accepts T.37 SMTP messages.	SMTP services installed
	Telco	Allows the HP CR server to send and receive faxes. The Telco connector works in conjunction with the modem server software that is installed in the HP CR server. Supports outbound messages only.	Modem drivers installed
Bursting		Allows you to split up (or burst) document batches. It uses barcodes to identify and break up documents	Data Extractor License
Filescan		Allows the HP CR server to route messages to and from a specified network folder (the Filescan folder). Acts as an "on ramp" or "off ramp" to the system. Supports both inbound and outbound messages.	Shared network folder
HP CR Server		Allows the HP CR server to manage communication between the server and its connectors. Supports both inbound and outbound messages. All servers require the server connector.	
Printer		Allows the HP CR server to route documents and faxes to printers in the local area network.	Printer drivers installed
SMTP		Allows the HP CR server to communicate with an SMTP mail server. Supports both inbound and outbound messages.	SMTP services installed
Universal Input		Picks up and processes XML documents and submits them to the HP CR server for delivery to the intended recipients. The Universal Input connector enables HP CR to support integration with HP iManage TeleForm.	

4-4 Components

Integral to the HP CR Server, components are the engines that process messages within the system. A component is a part of the HP CR Server that performs a specific task. For example, the Dispatch component determines the appropriate delivery method for every inbound and outbound message on the HP CR Server.

Other components perform functions such as composing a message into a format appropriate for the method of delivery, modifying a fax number, or determining whether a message requires previewing before processing.

All components are managed by a Windows service called the Component Manager that manages the flow of messages through the components and processing steps of a message. Except for the Compose component, you do not need a special license to run these components.

NOTE: Depending on the HP CR Server application you are running, the HP CR Server might only use some of the components in the environment. However, you cannot delete components from the HP CR Server.

For more details on specific components, see the [HP CR administrator online help](#). The following table briefly describes the components that are automatically installed with the HP CR server:

Table 2 Components

Component	Description
Billing	Extracts data from messages and populates a table in the Archive database with this information.
Compose	Converts messages and documents into an appropriate format for delivery. The Compose component handles the conversion of all files. It is also responsible for compression and variable substitution for notifications and routing sheets. The Compose component is the "work horse" of the server and as such, offers great flexibility and scalability. In large environments, additional Compose licenses may be required.
Data Extractor	Allows for the extraction and mapping of barcode data from documents that pass through the HP CR Server. The Data Extractor allows the HP CR Server to read and process barcoded cover sheets (or separator pages) generated by third party systems.
Dispatch	Determines the appropriate delivery method for all messages—inbound and outbound.
Embedded Directive Manager	Detects, decodes, and applies Embedded Directives.
Lookup Manager	Looks up a DID number and finds the appropriate recipient for an inbound fax.
Maintenance and Archive	Performs archiving and cleanup functions on the HP CR Server.
Notification	Generates and sends notification messages from the HP CR Server to the email accounts of message senders and recipients when important events occur during the processing of a message.
Preview Manager	Determines whether or not a message needs to be previewed before the HP CR Server continues processing it for delivery.

4-5 RuleSets and rules

A routing **Rule** functions as a dispatch, telling a message which path to follow. It acts as an "if then" statement, matching criteria with an action (such as splitting attachments, merging attachments, converting one file format to another, sending to different connectors, and more).

RuleSets are collections of related rules. Some RuleSets (User, Received Faxes, and Default RuleSets) are automatically created when you install the HP CR server. You can also create your own (Custom) RuleSets for collections of custom rules. The rules can be inbound or outbound and the system processes them according to how they are arranged on the screen.

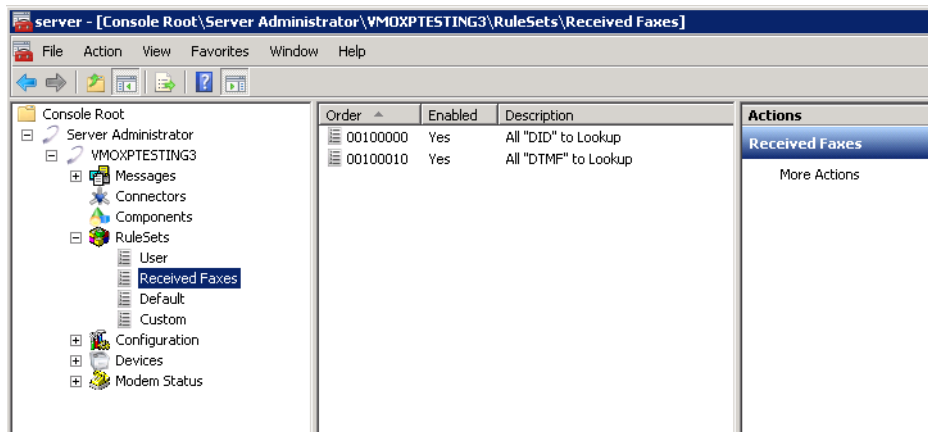
RuleSets offer administrators more opportunities to customize and interact with their system's workflow. For example, you can configure non-linear processing by defining the order in which rules are applied. (You can easily move rules within a RuleSet up and down the list.) You can also configure criteria to be met in order to send or disable user notifications.

4-5-1 How rules work after installation

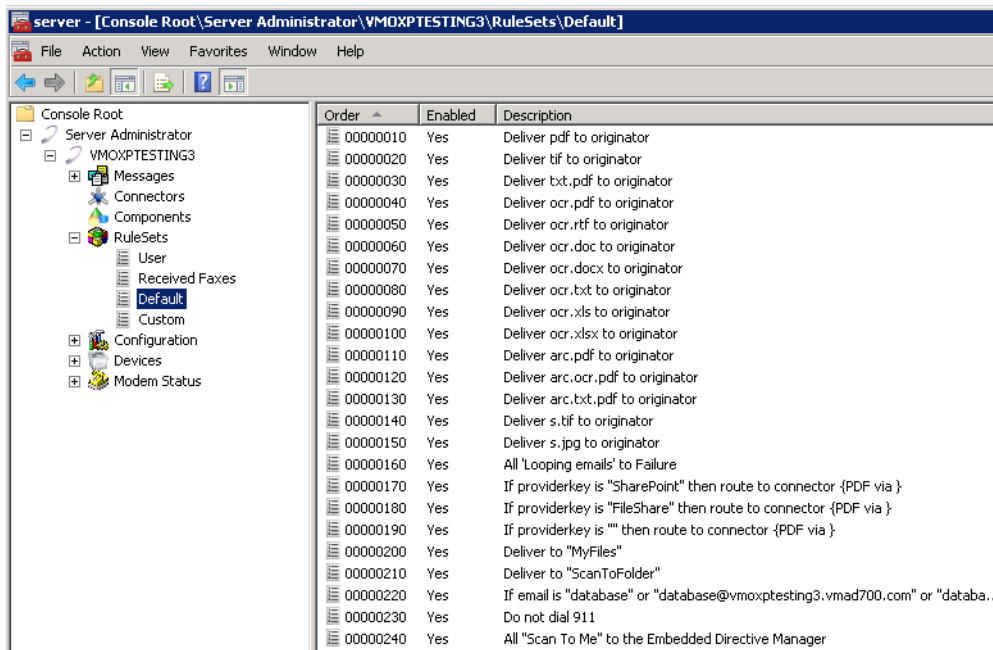
When a message arrives on the HP CR server via a connector, the server tries to match the message against existing rules to determine how it should be processed. When a message matches a rule, the HP CR server begins processing the message according to the actions associated with that rule.

Routing rules can be Received Faxes, User, Default or custom-created:

- **Received Faxes** - The Received Faxes RuleSet contains all of the inbound fax routing rules. The HP CR server uses the Received Faxes rules when processing inbound fax messages. The rules are listed in the same order they are used in processing messages.



- **Default and User** - The Default and User RuleSets list all outbound rules defined for the HP CR server. The system uses them to process outbound messages. The rules are listed in the same order they are used in processing messages.



4-6 Devices

The **Devices** node enables you to manage devices and create groups of devices with customized buttons.

NOTE: The HP CR Embedded Device Client must be installed before being added to the **Devices** node. To learn more about this device client, see [Section 9: HP CR Device Clients for HP OXPd](#).

There are two main methods of pushing the HP CR buttons to the device:

- Using the **Device** node in the HP CR Server Administrator
- Using WebJet Admin

The HP CR Server Administrator **Device** node is a simple method for pushing out a small number of devices. In larger organizations, it may not be practical to push out one device at a time and, therefore, the WebJet Admin should be used.

For more information on managing devices, see the [HP CR Embedded Device Client Installation Guide](#) and the [HP CR administrator online help](#).

4-7 Configuration Node options

The **Configuration** node has options available to create and manage features specific to a company's workflow, including the following features:

- [Custom Options](#) – Configure customized properties to, for example, enhance images, set message priorities, etc.
- [Job Properties](#) – Use properties to display prompts at the HP CR Client, at the device, or at both the HP CR Client and device.

- [Folders](#) – Create and configure the routing of documents to Dropbox, OneDrive, FTP, WebDav and network folder share locations.
- [Search Filters](#) – Configure customized message searches using a wide assortment of message meta-data criteria. Search Filters are also available via the Messages node, to filter all messages, or for either the In Process Queue or Message History. Search Filters can be saved for later use.
- [Document Stamps](#) – Create and configure Document Stamps - like watermarks - to be applied to .PDF messages and distributions.
- [Distribution Collections](#) – Create and configure sets of distributions and associate them to user and device groups.
- [Web User Interface](#) – Assign Applications (such as Inbox, Create Distribution, etc.) to Web Apps Profiles, which in turn are associated to specific user groups, and define the Web Apps user display.
- [Legacy Web User Interface](#) – Define the features available for users of the Legacy Web View on the End User Interface, including access to the Help Desk, Archive Search, Deficiencies, and approval.
- [Groups](#) – Configure user permissions to prompts, scan settings, printers, the Mobile Client, and more.

Find further **Configuration** node details in the [HP CR administrator online help](#).

4-7-1 Custom Options

Custom Options are customized properties created by the HP CR Server Administrator for use by HP CR users.

The Administrator can, for example, configure image cleanup properties for the HP CR Server, thereby reducing white noise when scanning documents. Some examples of Custom Options are image enhancement, set message priority to high, set message priority to low, etc.

NOTE: Custom Options must first be added as a **Property Dictionary** Item in the **Properties** node. See the 'Creating a message property' topic in the [HP CR administrator online help](#).

For more information, see the Custom Options topics in the [HP CR administrator online help](#).

4-7-2 Job Properties

You can create properties for almost any type of template tag. You can use these properties to display prompts at the HP CR Client, the Mobile Client, the device, or all three.

System properties are created when the HP CR Server is installed. You can create additional custom properties in the **User Node** or create a completely new node under **Job Properties** to support any custom meta data needed in a workflow.

You can create job properties or metadata fields, as needed. For more information on Job Properties, Regular Expressions, and Validators, see the 'Job Properties' topics in the [HP CR administrator online help](#).

4-7-3 Folders

The Folders feature supports routing documents to Dropbox™, Microsoft® OneDrive™ (Personal or Business), Google Drive™, box, FTP, WebDav and network folder share locations. Folders can be configured in the HP CR Server Administrator to allow users to navigate, or navigate and create, sub-folders. Users can access the configured Folders from the HP CR Device Client, the HP CR End User Interface, or the Mobile Client, where they can create a distribution containing any Folders defined for their domain group as a recipient destination.

Folder configuration includes:

- [Requirements for using Folders](#) (33)
- [Creating a Folder for cloud-based storage folders](#) (33)
- [Creating a Folder for FTP](#) (34)
- [Creating a Folder for Network Folder Shares](#) (36)
- [Configuring groups to access Folders](#) (37)
- [Configuring the MFP to capture user credentials](#) (38)

NOTE: For information about FTP and FTPS support and configuration, see the 'FTPS Support' topics in the [HP CR administrator online help](#).

4-7-3-1 Requirements for using Folders

The following options are available when creating a Folder:

- Network Folder Shares
- Dropbox
- Microsoft OneDrive (Personal or Business)
- Google Drive
- box
- WebDav
- FTP

When using Folders, be sure the following requirements are met:

- Before you create and configure Network Folder Share (NFS) Folders, verify that UNC share destinations (for example, `\\servername\share`) are remote, not local. Otherwise, your share destination can be local if specified by a direct path (for example, `C:\fileshare`).
- Before you create and configure File Transfer Protocol (FTP) Folders, FTP services must be accessible to the HP CR server.
- For users to access configured Folders, the Groups Folder tab must be enabled for the applicable Folders.
- To configure the MFP to Capture User Credentials, the Device Client Group node must already be configured before you proceed.
- The HP CR server must have a live connection to the internet. (for Dropbox, MS OneDrive, Google Drive, and box)

NOTE: The software may enable you to send data to third parties in connection with use of their services, including box, Google (Google Drive), or Microsoft (Microsoft OneDrive).

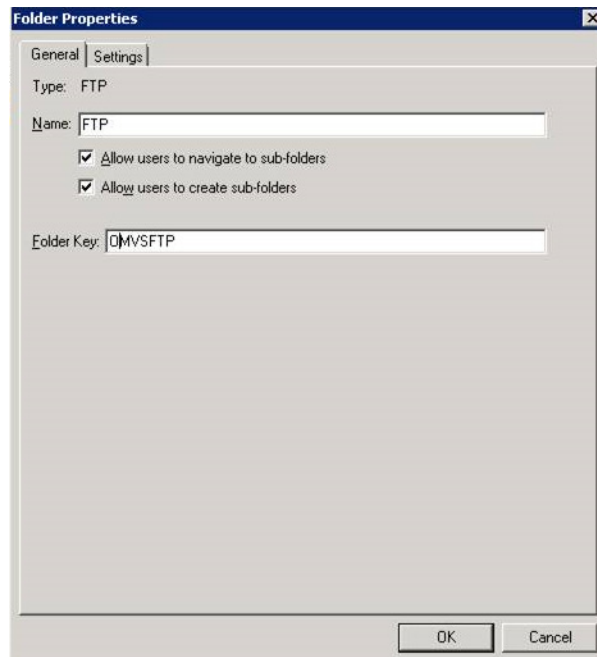
4-7-3-2 Creating a Folder for cloud-based storage folders

1. Launch the HP Server Administrator, expand the **Configuration** node, and select the **Folders** node.
2. Right-click **Folders** and select, for example, **New > Dropbox**. The **Folder Properties** screen appears.

3. In the **General** tab, enter a folder name in the **Name** text box.
4. Select the **Allow users to navigate sub-folders** checkbox, as needed.
If you select the first box, the **Allow users to create subfolders** checkbox becomes active. Select this box, if appropriate.
5. A default **Folder Key** value appears. It is recommended that you change the **Folder Key** value to one specific to the planned destination. For example, a Folder Key of [SalesExpenseShare](#) would be logical to assign to a folder of the same name.
6. Click **OK**. The new folder appears in the **Folders** node.

4-7-3-3 Creating a Folder for FTP

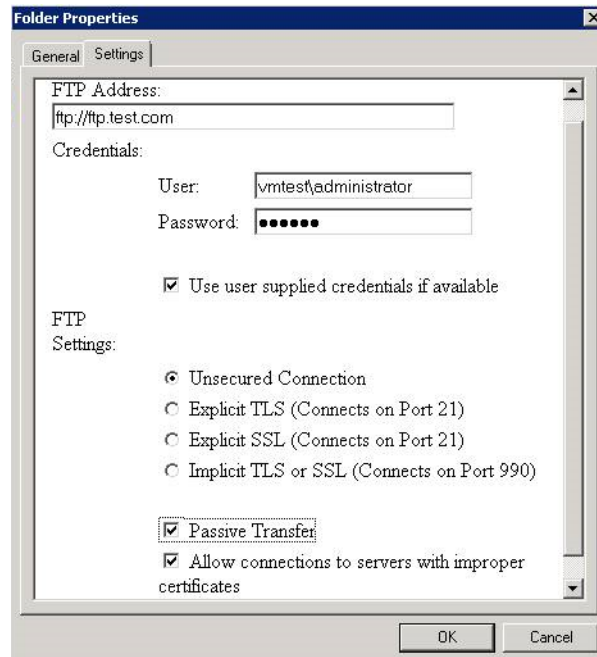
1. Launch the HP Server Administrator, expand the **Configuration** node, and select the **Folders** node.
2. Right-click **Folders** and select **New > FTP**. The **Folder Properties** screen appears.
3. In the **General** tab, enter a Folder name in the **Name** text box.
4. Select **Allow users to navigate to sub-folders**, as needed.



If you select the first box, the **Allow users to create sub-folders** checkbox becomes active. Also select this box if appropriate.

5. A default **Folder Key** value appears. It is recommended that you change the **Folder Key** value to one specific to the planned destination. For example, a **Folder Key** of [SalesExpenseShare](#) would be logical to assign to a folder of the same name.

6. In the **Settings** tab, configure the connection settings as follows:



- **FTP Address:** Enter the connection string for the FTP server.

The FTP address can be either the machine name or the IP address of the machine.

When entering the address, you can point it either to the root of the FTP or to a subfolder if one exists. Examples are:

`ftp://123.45.67.89`

`ftp://123.45.67.89/Sales`

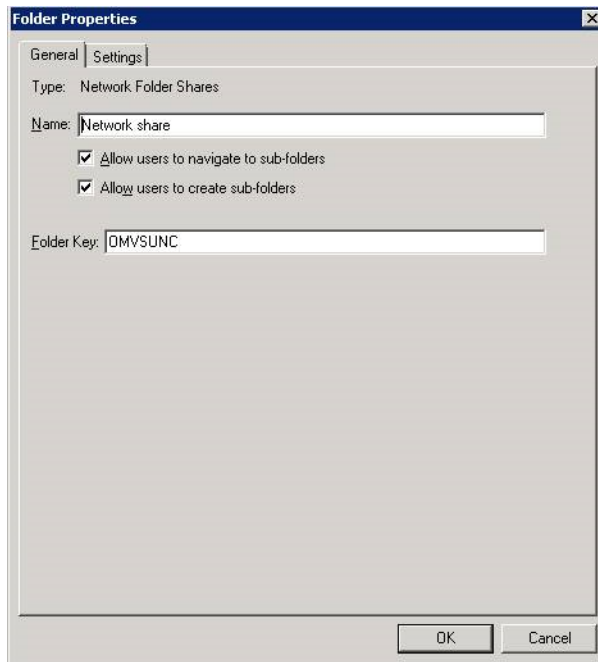
- **Credentials:** Enter the Administrator account with permissions to write to the FTP server folders.
- Select **Use user supplied credentials if available**, as needed.
- Select the appropriate option for **FTP Settings**:
 - **Unsecured Connection**
 - **Explicit TLS**
 - **Explicit SSL**
 - **Implicit TLS or SSL**
- Check either **Passive Transfer** or **Allow connections to servers with improper certificates**, as appropriate. Click **OK** to complete the FTP folder information.

7. Click **OK**. The new Folder appears in the **Folders** node.

NOTE: For more details about FTP and FTPS support and configuration, see the [HP CR administrator online help](#).

4-7-3-4 Creating a Folder for Network Folder Shares

1. Launch the HP Server Administrator, expand the **Configuration** node, and select the **Folders** node.
2. Right-click **Folders** and select **New > Network Folder Shares**. The **Folder Properties** screen displays.
3. In the **General** tab, enter a folder name in the **Name** text box.
4. Select **Allow users to navigate to sub-folders**, as needed.

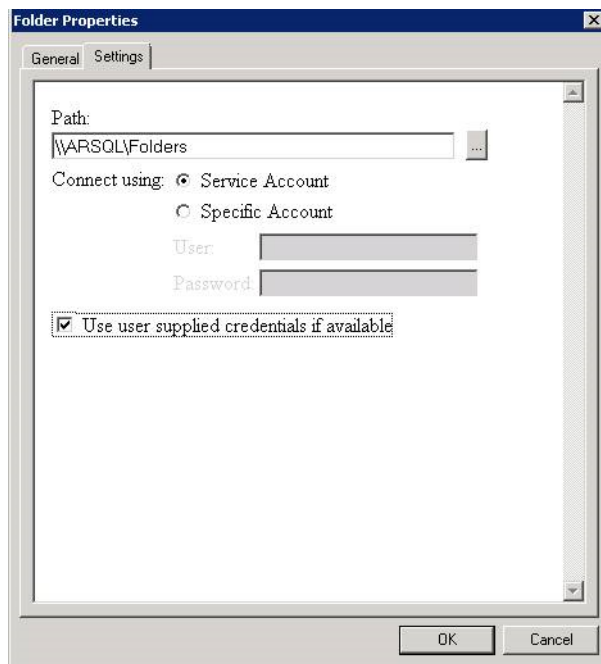


If you select the first box, the **Allow users to create sub-folders** checkbox becomes active. Also select this box, if appropriate.

5. A default **Folder Key** value appears. It is recommended that you change the **Folder Key** value to one specific to the planned destination. For example, a **Folder Key** of `SalesExpenseShare` would be logical to assign to a folder of the same name.
6. In the **Settings** tab, enter the **Path** to the network folder share of interest. For example:

```
\\<server_ip_address>\HP\HPCR\shared
```

NOTE: The server IP address or the computer name can be used in the UNC path.



7. In the **Connect using** section, select either:

Service Account - The service account that starts the HP CR services will need permissions to the folder. When a document is stored in this folder, the service account is the user responsible for storing it.

Specific Account - Enter a user name and password. Regardless of who was authenticated at the device, this specific user will store the document in the folder and requires permissions at the operating system level.

8. If you want to require MFP users to sign in, select the **Use user supplied credentials if available** checkbox, and click **OK**. Otherwise, just click **OK**.

When a user logs on to a device as an authenticated user, the system uses the credentials provided when it passes the document through to be stored in a folder.

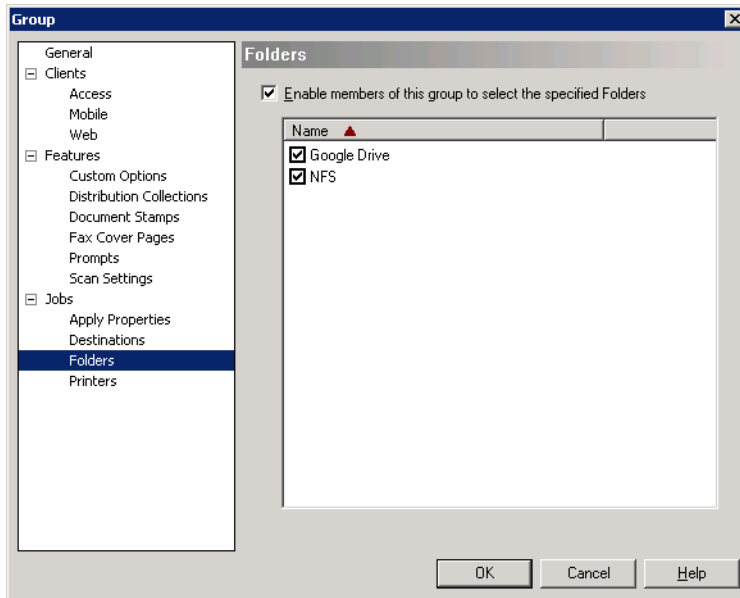
NOTE: If you select the **Use user supplied credentials** option, then you must also enable the **capture user credentials** option for the **Folder** button in the Device Group.

The new Folder displays in the **Folders** node.

4-7-3-5 Configuring groups to access Folders

1. Launch the HP CR Server Administrator, expand **Configuration > Groups**.
2. Right-click the group of interest and select **Properties**. The **Group** screen opens.

3. Select **Folders** In the **Jobs** section, and select **Enable members of this group to select the specified Folders**.



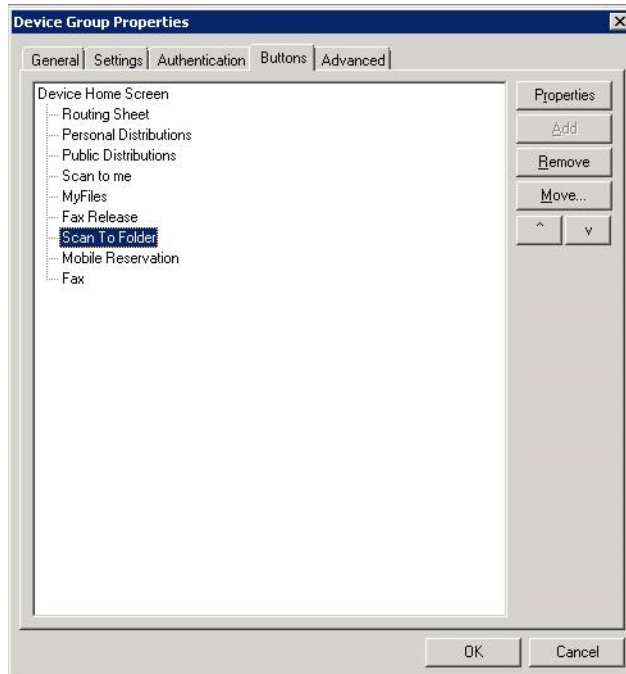
4. Select the Folders of interest from those configured. Click **OK**.

4-7-3-6 Configuring the MFP to capture user credentials

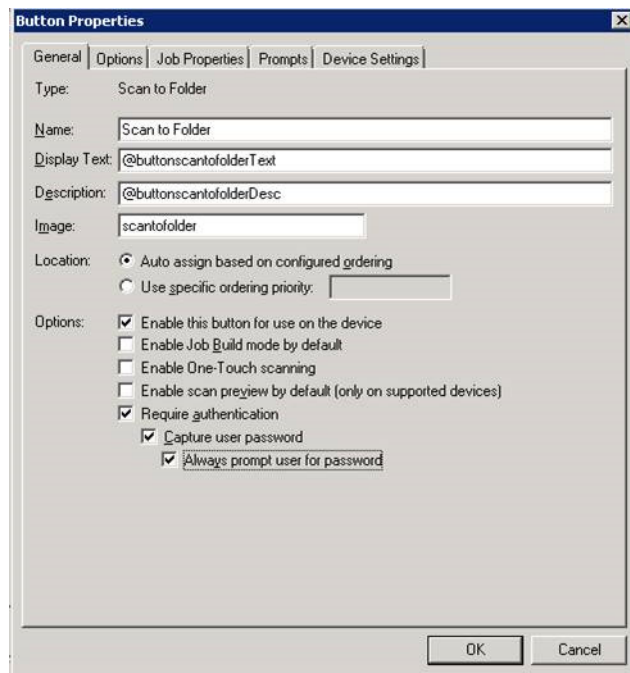
User credentials can be used to deliver files to specific folder locations. In order to apply these to a delivered document, the MFP must be set to capture the user's login credentials.

1. In the HP CR Server Administrator, expand **Configuration > Devices**.
2. Right-click the device of interest and select **Properties**.
3. In the Device Group Properties screen, click the **Buttons** tab.

4. Select a button that will capture the user password (such as **Folders**), and click **Properties**.

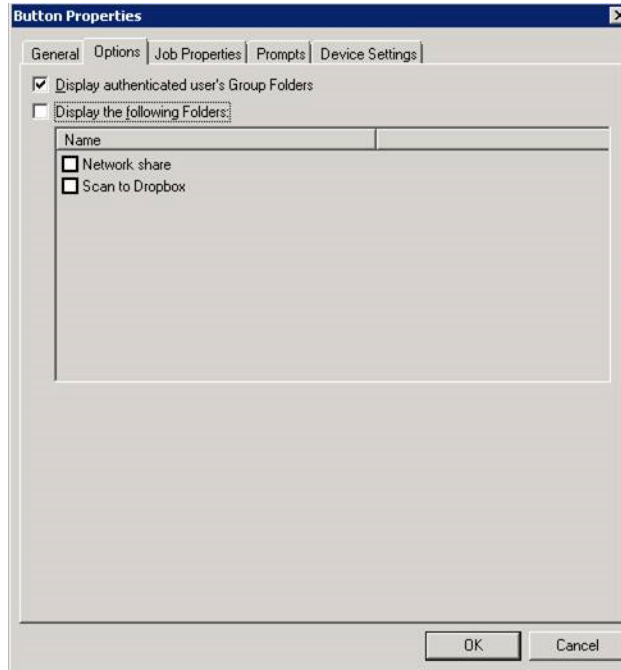


5. In the General tab, select **Require authentication** and **Capture user password**.



6. If you want the device user to be prompted to login when using this button, select **Always prompt user for password**.

7. Select the **Options** tab and enable the Folder functionality that is appropriate for your intended workflow, as follows:



- Display authenticated user's Group Folders – enable when the user must authenticate in order to be able to select the folders assigned to their user group.
- Display the following Folders – enable and select the folders from the list that you want to be available. This setting does not require the user to authenticate.
- Enable both options to create unique folder options for users, based on login permissions and default button folders.

NOTE: Dropbox folder options require authentication in order to access the users personal Dropbox folder.

8. Click **OK** and click **OK** again.

NOTE: Permission (at the share level) for capture and use of user credentials requires that the user account specified or the group the user belongs to has read/write privileges.

4-7-4 Search Filters

You can create customized Search Filters using a wide assortment of message meta-data criteria. You can create Search Filters on the fly for immediate use and save customized searches for future use. The Search Filter feature is also available via the Messages node, from which you can filter all messages, or specifically filter either the In Process or History Queues.

4-7-5 Document Stamps

Document Stamps are like watermarks for your .PDF attachments. Document Stamps are applied by the system during the delivery process, rather than during composition. You cannot view a document stamp on an attachment before sending the document.

NOTE: Document Stamps are only for .PDF documents. If a message includes mixed formats, the stamp only applies to the .PDF files included.

Document Stamps can be used in three ways. You can:

- Provide permission for individual user groups to apply them. You may want particular groups to have access to specific stamps.
- Configure Document Stamps for rule-based application. To do so, you identify the specific Document Stamp as an advanced custom core property when creating the rule.
- Configure Document Stamps to be applied when submitting documents from the FileScan connector. To do so, use the `#prDocumentStampName` control file variable with the `DocumentStampName` as the value.

TIP: HP CR End User Interface and Mobile Client users can apply available Document Stamps per recipient in the **General** tab of the **Options** screen.

For more information on creating and configuring Document Stamps, see the 'Document Stamps' topics in the [HP CR administrator online help](#).

4-7-6 Distribution Collections

You can create Distribution Collections and associate user-created distributions to these Distribution Collections. You can then associate Distribution Collections with the Public Distributions button of specific device groups (via the device group properties). Distribution Collections can also be associated to individual user groups, allowing multiple groups to access specific Distribution Collections.

NOTE: Distribution Collections can be assigned to the **Public Distribution** button for default access by non-authenticated users. Authenticated users can have access to the Distribution Collections associated with the **Public Distribution** button, as well as the Distribution Collections associated with their user group.

For more information on creating and configuring Distribution Collections, see the Distribution Collections topics in the [HP CR administrator on-line help](#).

4-7-7 Web User Interface

Web User Interface is the highly-customizable HP CR End User Interface. In the **Web Apps** node, you can assign specific Applications (such as Inbox, Create Distribution, etc.) and Features (such as PrinttoWeb) to Web Apps Profiles. You can tailor Profiles for different user groups in your organization. Then, you associate the profiles to the specific user groups, defining what individual Web Apps users will see.

The Web Apps node offers the following applications:

- Messages – Inbox, Outbox, Preview, and SentItems
- Distributions – Collections, MobileReservations, My, and Subscribed
- Settings – Assistants, CreateBookmarkPage, CreateMyFilesDistribution, Delegates, Folder Authorizations, Options, and SubscribedDistributions
- CreateDistribution
- DirectSend
- MyFiles

- Nested

Web Apps also supports the DocumentLink, Favorites, PrinttoWeb, ScantoWeb, and SendtoWeb Features.

4-7-8 Legacy Web User Interface

In the **Legacy Web Views** node, the System Administrator can setup different Legacy Web Client View features and then assign the appropriate view (depending on the enabled features) to specific user groups.

Legacy Web Client Views supports the following features:

- setting a Default Routing Sheet template
- enabling the Address Book lookup function
- assigning Fax cover pages
- setting the availability of the following folders to HP CR End User Interface users: Messages, Distributions, My Files, Administration, and Online Help.

NOTE: Access to the Administration folder enables the Help Desk management feature. The Help Desk users can oversee and manage Messages and Distributions, which includes the ability to search, view, cancel, resend, and access attached files from the HP CR server.

Also note, the **Legacy Web Views Node** is the only location to configure access to the Help Desk, Archive Search, Deficiencies, and approval. These features are currently unavailable for Web Apps.

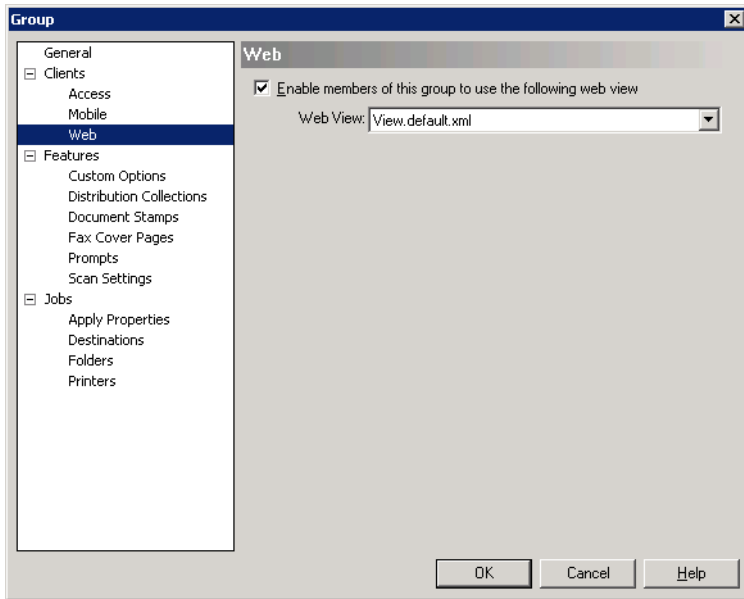
For more information on defining and configuring the Web Client Views node, refer to the [HP CR administrator online help](#).

4-7-8-1 Enabling a Legacy Web Client View

You can specify the Legacy Web Client view (default or admin) to be used by members of a group.

1. Launch HP CR Server Administrator, expand the tree view, and click **Configuration > Groups**.
2. In the right pane, double-click on the **Default** group (or applicable group). The **Group** page opens.
3. Click **Web** in the **Clients** section.

4. Select **Enable members of this group to use the following web view.**

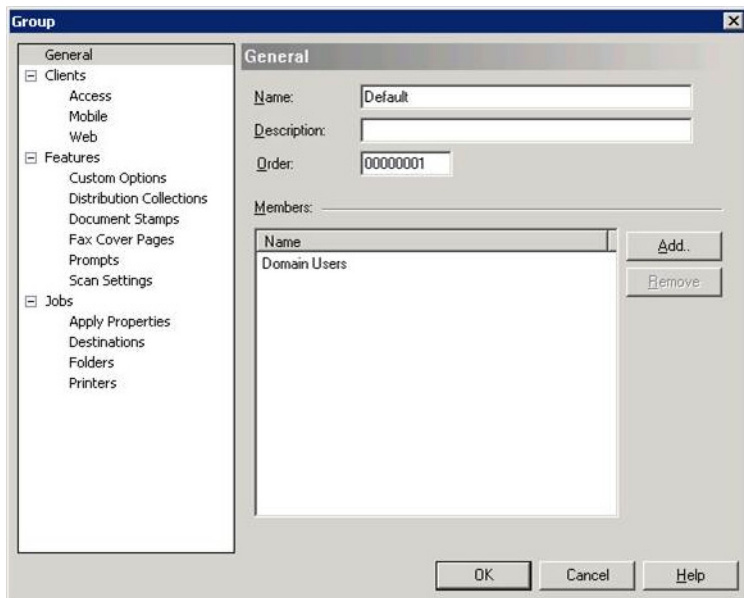


5. Then select the appropriate **.xml** for the Legacy Web Client view.

6. Click **OK** to close the **Group** page.

4-7-9 Groups

You can assign user permissions in groups. You can configure client options, specific features, and jobs for each group. The server functions that use group access permissions are found in the **Group** screen.



The **General** functions include:

- **General** - stores the name and description of the group
- **Clients**
 - **Access**
 - **Members** - lists the Active Directory members that make up the group

- **Clients** - identifies members of the group as users and determines their routing options, access to Distribution Rules, user view configuration, and more
- **Mobile** - determines whether members of the group have permission to use the Mobile Client and the Quick-Use distribution collections
- **Web Client** - determines group permissions to use the HP CR End User Interface client (with or without the administrative view)
- **Features**
 - **Custom Options** - determines what configured Custom Options members of the group can use
 - **Distribution Collections** - indicates which Distribution Collections members of the group have permission to use
 - **Document Stamps** - determines availability of specific Document Stamps to the group
 - **Fax Cover Pages** – lists cover pages available for use
 - **Prompts** - determines what pre-configured prompts members of the group can use
 - **Scan Settings** - determines whether members of the group can use and configure Scan Settings for a particular device or device group
- **Jobs**
 - **Apply Properties** - lists Properties associated with the job
 - **Destinations** - determines availability of specific destinations to members of the group
 - **Folders** - indicates configured Folders that are available as a destination for members of the group
 - **Printers** - indicates configured printers that are available as a destination for members of the group

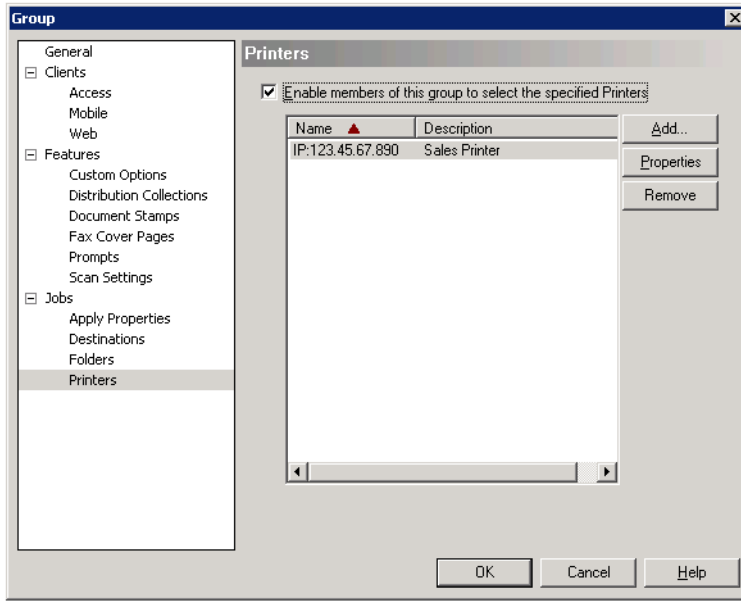
4-7-10 Adding and configuring network printers for groups

4-7-10-1 Adding network printers

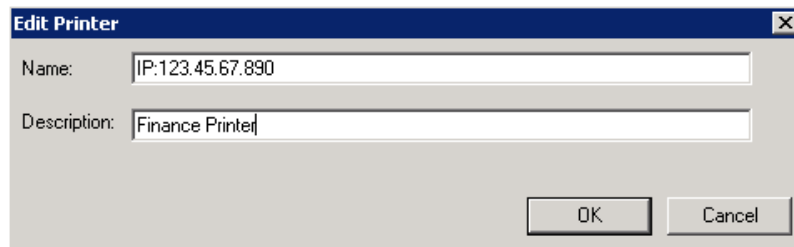
The HP CR End User Interface will read the list of configured network printers on the HP CR server. Before the network printers are listed in the HP CR End User Interface, the network printers must be added to the **Printers** tab in the **Groups** section of the HP CR Server Administrator, as described below.

1. Install the printer driver on the HP CR server using the standard Windows installation procedure.
2. Launch HP CR Server Administrator, expand the tree view, and click **Configuration > Groups**.
3. In the right pane, double-click the **Default** group (or applicable group). The **Group** page displays.
4. Click **Printers** in the **Jobs** section.

5. Select **Enable members of this group to select the specified Printers** and click the **Add** button.



6. The **Add Printer** page is displayed.
7. Enter the printer information. For example:



8. Click **OK**. Click **OK** again to save the changes. See the [Selecting a network printer](#) section of this guide.

4-7-10-2 Modifying network printer properties

1. Launch HP CR Server Administrator, expand the tree view, and click **Configuration > Groups**.
2. In the right pane, double-click the **Default** (or applicable) group.
3. Click the **Printers** tab.
4. Highlight the printer that needs to be modified and click **Properties**.
5. On the **Edit Printer** page, make all needed changes and click **OK**.
6. Click **OK** again to close the **Group** page.

4-7-10-3 Removing a network printer

1. Launch HP CR Server Administrator, expand the tree view, and click **Configuration > Groups**.
2. In the right pane, double-click the **Default** (or applicable) group.
3. Click on the **Printers** tab.
4. Highlight the printer to modify, and click **Remove**.

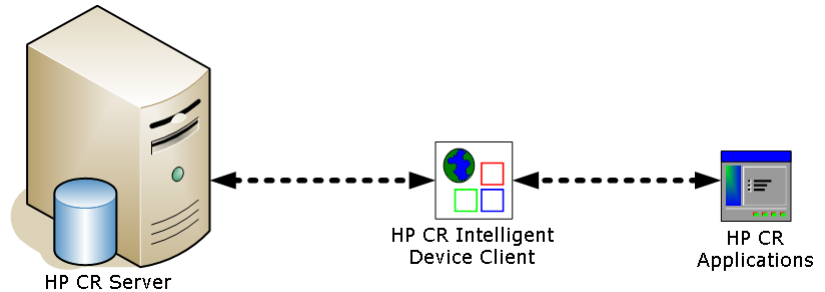
5. Click **OK** to close the **Group** page.

4-8 The HP CR Intelligent Device Client

The HP CR Intelligent Device Client is a request handler for client applications. It is comprised of a group of IIS web server extensions providing a layer for communication between clients and the HP CR server. For example, it allows a client (such as Embedded Device Client for HP OXPd v1.7.2) to submit messages to the HP CR server. It also allows the clients to pull up information about embedded directives from the server.

Figure 4-1 The HP CR Intelligent Device Client environment

Intelligent Device Client facilitates communication between the HP CR server and other HP CR applications.



IMPORTANT: HP CR installs the HP CR Intelligent Device client by default. No separate installation is necessary. You must configure the client and test it, as described below.

If necessary, you can install the client on a remote system. For instructions, see [Section 8: Installing the Remote HP CR Intelligent Device Client](#) (69).

Refer also to [HP CR Intelligent Device Client components](#) and [Optional configuration: Modifying the directory security configuration of virtual directories](#). For information about IIS implementation (Windows 2003 64-bit only), refer to the [HP CR administrator online help](#).

4-8-1 HP CR Intelligent Device Client components

The Intelligent Device Client is the bridge that delivers information from the HP OXPd device to the HP CR server. The HP CR Intelligent Device Client manages the Embedded Device Client for HP OXPd v1.4 and v1.6 separately. Each category utilizes a unique web server extension, application pool, virtual directory, and location.

The main components of the Intelligent Device Client environment are detailed in the following table.

Table 3 Description of Intelligent Device Client components with location and function

Component	Location	Function
WebAPI	C:\Program Files (x86)\HP\HPCR\WebAPI\WebAPI	This folder is utilized for Embedded HP CR intelligent devices. Applications like Embedded Device Client for HP OXPd submit messages to: ... \HP\HPCR\WebAPI\WebAP\FilePostings. The messages are processed by OmISAPIU.DLL, other supporting DLL files, and XML-based configuration files in: ... \HP\HPCR\WebAPI\WebAP\Scripts.

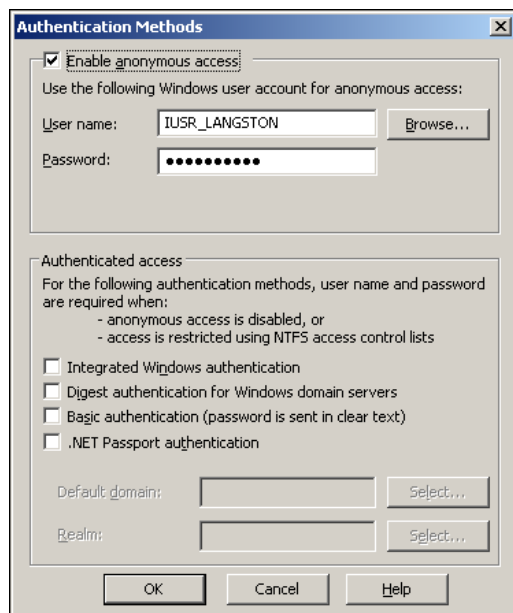
4-8-2 Optional configuration: Modifying the directory security configuration of virtual directories

The virtual directories created by the Intelligent Device Client setup grant authenticated access via integrated Windows authentication.

The default authentication and access control configuration can be modified if it does not comply with the security policy in the LAN. The Intelligent Device Client supports all IIS authentication methods except .NET Passport and Digest Authentication for Windows Domain server. It also supports IP address and domain name restrictions.

NOTE: After the Intelligent Device Client is installed, the virtual directory properties are set to allow read access, allow execute permissions on scripts and executable, and use its associated application pool (WebAPI). Do not modify these settings.

Figure 4-2 Default Authentication and Access Control Configuration for a Virtual Directory



After the Intelligent Device Client is installed, the authentication and access control configuration for the virtual directory enables anonymous access with the local IUSR account or the account specified during installation and enables integrated Windows authentication.

A modified configuration must meet the following conditions:

- If anonymous access is enabled, the account used for anonymous access must have full control to read and write to the folder. These permissions are configured in the Windows security settings on the folder.
- If integrated Windows authentication is enabled, all accounts used to post and download files and gain access to the OmISAPIU.DLL resource, must have full control to read and write to the folder. These permissions are configured in the Windows security settings on the folder. For information on accounts that are used to post and download files and gain access to the OmISAPIU.DLL resource, consult the HP CR documentation on the application being used in conjunction with the Intelligent Device Client. (Refer to [Online help and related documentation](#), 6.)

4-8-3 Testing connectivity to the Intelligent Device Client

An Embedded Device Client for HP OXPd application must be able to access the Intelligent Device Client configuration file OmISAPIU.DLL. Test the connection to the web server and verify that the Intelligent Device Client is installed and configured correctly.

1. Log in to any system in the LAN that is running the HP CR server or client software.
2. Start the browser and go to:

```
http://[web server]/[virtual directory]/Scripts/OmISAPIU.dll?Action=GetConfiguration
```

where `[web server]` represents the web server host name or IP address, and `[virtual directory]` represents the name of the virtual directory in IIS that is accessed by the Embedded Device Client for HP OXPd application.



TIP: A connection to the Intelligent Device Client from a device running an Embedded HP OXPd device client application is similar to:

```
http://localhost/WebAPI/Scripts/OmISAPIU.dll?Action=GetConfiguration
```

When constructing the URL, consider the following:

- The Action command in the URL is case-sensitive.
- If Secure HTTP connectivity is configured for the End User Interface, replace HTTP with HTTPS.

The browser displays the basic configuration for the Intelligent Device Client.

```
<?xml version="1.0" ?>
- <Omtool>
- <Product>
  <Name>Omtool ISAPI Services</Name>
  <Version>1.0</Version>
  <Build>1</Build>
  <Description>Provides a bridge between the Omtool Xlet and HP DCR</Description>
</Product>
- <Servers>
- <Server Name="ServicesServer">
  <PostPath>WebAPI/FilePostings/</PostPath>
  <FileTransfer>http://172.16.20.131/WebAPI/FileTransfer/</FileTransfer>
</Server>
- <Server Name="OmtoolServer">
  <ServerName>VMOXPTESTING3</ServerName>
</Server>
</Servers>
</Omtool>
```

If an error occurs, troubleshoot the web server and repeat the test until it is successful. See the [HP CR administrator online help](#) ("Connectivity issues with the HP CR Intelligent Device Client" topic).

Part II:

Remote components

5 Installing a Remote Administrator

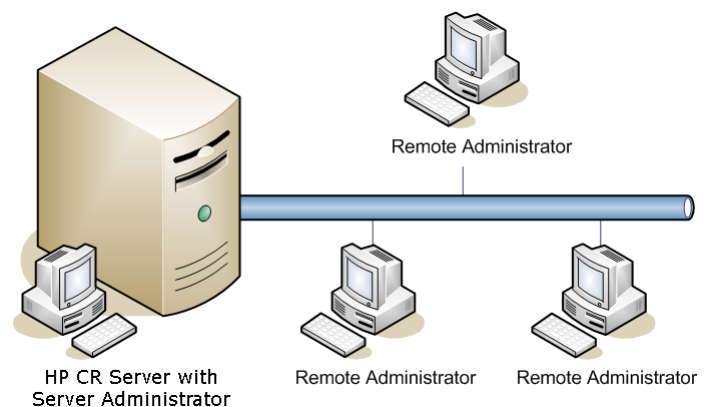
HP CR Server Administrator is the management application for the HP CR server. When installed on a remote system, this server management application is called a **Remote Administrator**.

The Remote Administrator provides convenient access to the HP CR server for administrators who support the implementation. It includes support for Windows 7, which allows administrators to manage the HP CR server from their personal workstations.

NOTE: There is no known limit on the number of Remote Administrators the HP CR server can support.

Figure 5-1 HP CR server with HP CR Server Administrator and Remote Administrators

The HP CR server shown here has HP CR Server Administrator and three Remote Administrators installed. This is an example of a supported configuration. (The HP CR server must be installed with HP CR Server Administrator, but the environment can have more or fewer Remote Administrators than shown in this illustration.)



The remainder of this section describes:

[Requirements for the Remote Administrator](#) (51)

[Installing the Remote Administrator](#) (52)

[Starting the HP CR Server Administrator and connecting to the HP CR server](#) (54)

[Problems connecting to the HP CR server using Remote Administrator](#) (54)

For additional information (including optional configuration), refer to the [HP CR administrator online help](#).

5-1 Requirements for the Remote Administrator

A Remote Administrator requires a system that meets the minimum [Hardware and software requirements](#) (7) and [Additional installation requirements](#) (8) listed for the HP CR server. In addition, a Remote Administrator requires:

- Windows NT domain computer that belongs to the same domain as the HP CR server
- Dual core processor, 2 GHz, 4GB of RAM, RAID 5W with 100 GB of disk space, and Microsoft mouse or compatible pointing device
- Windows 2012 64-bit, Windows 2008 R2 64-bit, Windows 7
- Microsoft Internet Explorer 7 or later
- Acrobat Reader 7.0 or later

- Access to a network copy of the HP CR server setup
- Windows user account running Remote Administrator that belongs to the HP CR Administrators group

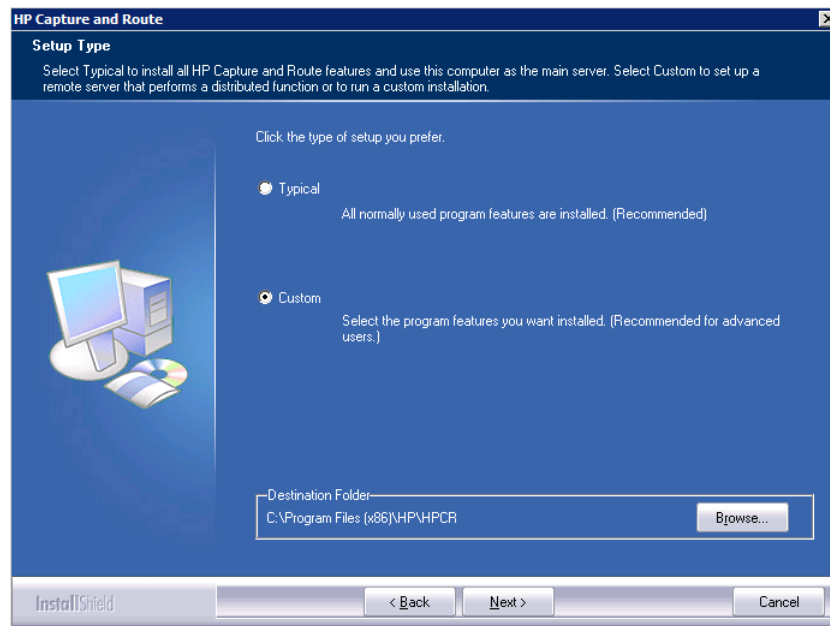
5-2 Installing the Remote Administrator

1. Log in to the system where you will install the Remote Administrator using an account that belongs to the HP CR Administrators group.
2. Navigate to the network share where the HP CR server setup files are located.
3. Run:

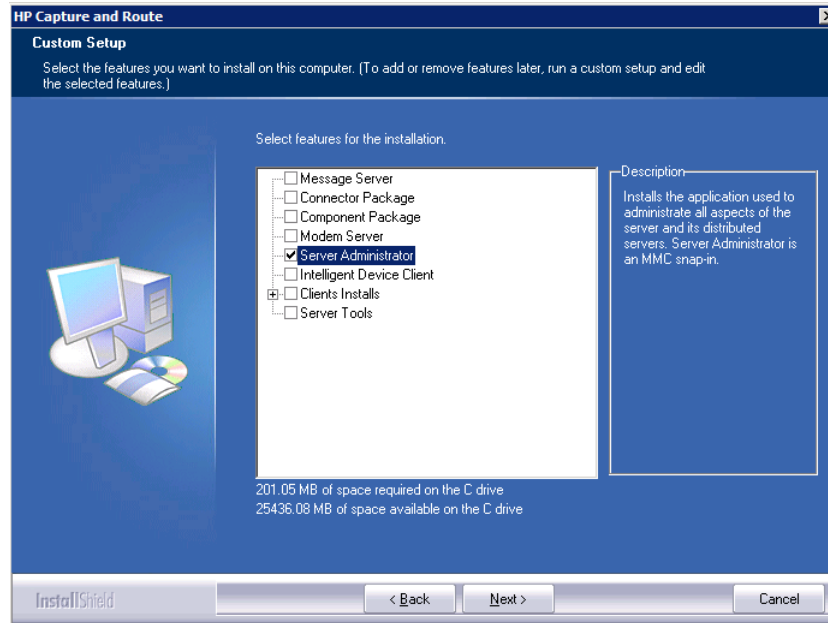
```
\HP CR\setup.exe
```

The system runs the **Prerequisite** checks. When the **Successful Summary** appears, click **Remote Components**. The **InstallShield** wizard opens, configures your system for installation, and displays a welcome message.

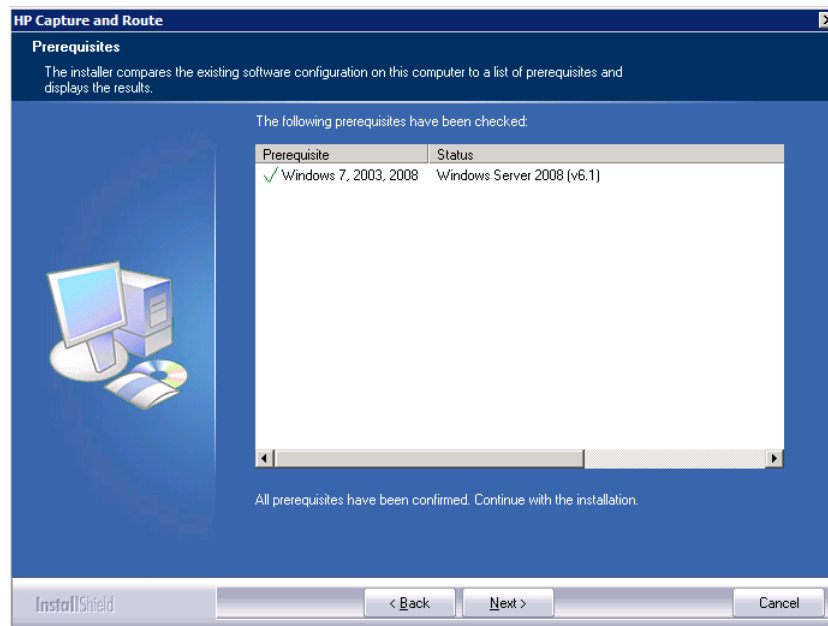
4. Click **Next**. The setup shows the **License Agreement** page.
5. Select **I accept the terms of the license agreement** and click **Next**. The setup shows the installation options.
6. Select **Custom** and click **Next**. The setup shows a list of HP CR features.



7. Select **Server Administrator**. Clear all the other features you are not installing.



8. Click **Next**. The setup checks the system for installation requirements and displays the results.



NOTE: The setup cannot continue until all required components are installed. (Double-click an item in the list for more information.) If any required components were not detected, click **Cancel** and **Yes** to exit the setup and install the components that are required to complete the installation.

9. Click **Next**. The setup shows installation settings.

NOTE: If other installation features are included, the setup might request additional information before displaying installation settings.

10. Review the installation settings and click **Next** to start the installation. The setup installs the selected features and displays a message indicating that the installation is complete.

11. Click **Finish**.

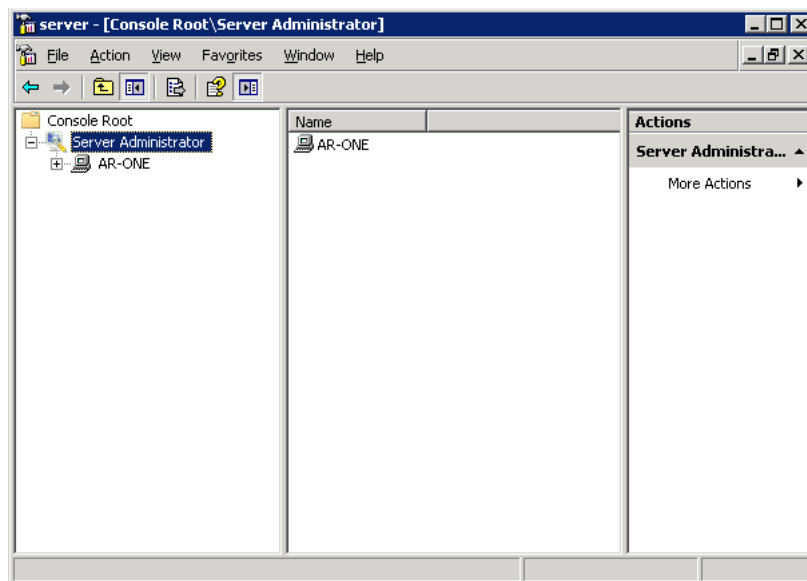
After Remote Administrator is installed on the remote system, start HP CR Server Administrator and connect to the HP CR server, as described below.

5-3 Starting the HP CR Server Administrator and connecting to the HP CR server

1. Log in to the system where you installed the Remote Administrator using an account that belongs to the HP CR Server Administrators group.
2. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator** to open the HP CR Server Administrator.

The **Specify Message Server** page opens and the **Network Address** field is populated with the local system name.

3. Enter the HP CR server computer name or IP address and click **Finish**. The Microsoft Management Console starts and opens the HP CR Server Administrator snap-in.



TIP: When HP CR Server Administrator is closed, Microsoft Management Console displays a message about saving changes to the MSC file. This file records the current position of items in the console tree. To preserve the console state, save the changes. If prompted to update the MSC file, click **Yes**.

5-4 Problems connecting to the HP CR server using Remote Administrator

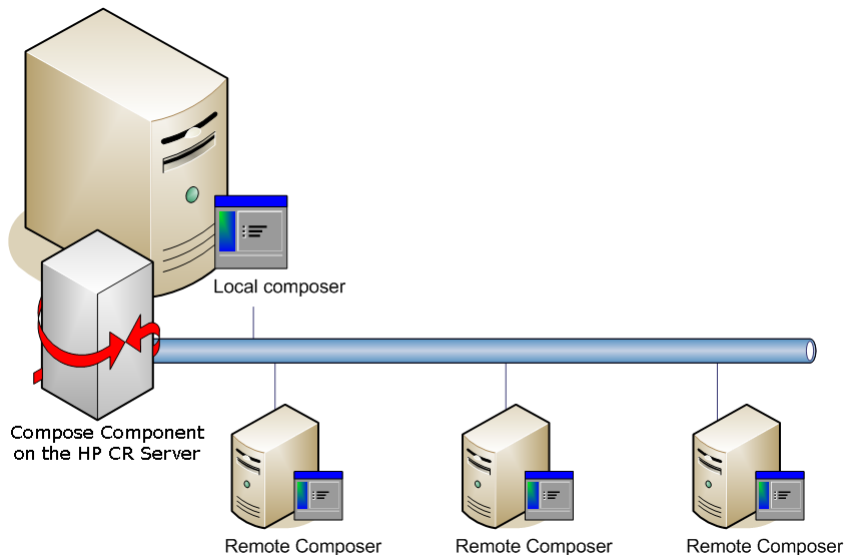
If you have trouble connecting to the HP CR server using the remote Administrator, add the DCOM port [135](#) to the Exceptions list by keeping the Firewall **ON**. You should then be able to connect to and launch the HP CR server without any issues.

6 Installing a remote Composer

HP CR Compose component (Composer) is a system that performs message conversion tasks for the HP CR server. A server supports multiple Composers, all managed by the Compose component on the HP CR server. A remote system that hosts a Composer is called a **remote Composer**.

Figure 6-1 HP CR server with a local Composer and remote Composers

The HP CR server shown here has a local Composer and three remote Composers. This is an example of a supported configuration. (The HP CR server can run without a local Composer, and the environment can have more or fewer remote Composers than shown in this illustration.)



When you install an HP CR server, the Compose component is installed as part of the Component Package and a Composer is created locally. As Composers are added, the Compose component workload is distributed automatically. Workload distribution can be manipulated by modifying the capabilities of each Composer. By default, a general Composer composes all types of messages, all enabled file types and final formats, and all template types. But, each Composer can be modified to accept only certain types of jobs. This filtering enables a Composer to become specialized for certain types of conversions. It is also possible to enforce policies that would cause messages with certain file types or templates to fail.

When scaling an environment with additional connectors or components, you should contact your software representative who can assist you in correctly identifying potential bottlenecks in the system based on workload and other factors. Your software representative can provide helpful information on the overall impact of increasing the system speed and efficiency.

The remainder of this section describes:

[Requirements for a remote Composer](#) (56)

[Installing the remote Composer](#) (57)

[Adding the Composer to the HP CR server](#) (59)

For additional information (including optional configuration), refer to the [HP CR administrator online help](#).

6-1 Requirements for a remote Composer

6-1-1 Basic requirements

A remote Composer requires a system that meets the minimum [Hardware and software requirements](#) (7) and [Additional installation requirements](#) (8) listed for the HP CR server. In addition, a remote Composer requires:

- Windows NT domain computer that always runs in the same domain as the HP CR server
- Dual core processor, 2 GHz, 4GB of RAM, RAID 5W with 100 GB of disk space, and Microsoft mouse or compatible pointing device
- Windows 2012 64-bit, Windows 2008 R2 64-bit
- Microsoft Internet Explorer 7 or later
- Access to a network copy of the HP CR server setup
- Windows user account that belongs to the HP CR Administrators group
- License key for each additional Composer

NOTE: A license key is not required if the local Composer is being moved to a remote system.

6-1-2 Software requirements for message conversion

A specific application is required only if the Composer needs to convert documents into file types associated with the application. For example, if you are planning to use Crystal Reports for compose, it must be installed on the Composer.

NOTE: If Microsoft Office is not deployed in the LAN, the requirement does not apply.

- Microsoft Visio 2007/XP/2000 for *.VSD and *.VDX message attachments
- Crystal Reports v10.0 or earlier for *.RPT message attachments
- Microsoft Word 2007/XP/2000 for *.DOC Routing Sheet templates

NOTE: Routing Sheet templates are provided in *.DOC and *.OMTPL format, and these templates can be edited in Word and WordPad, respectively. If *.DOC templates are used, Word is required because the Composer converts all *.DOC Routing Sheet templates using Word. The Composer cannot be configured to use any other conversion method.

- Microsoft Office 2007/XP/2000 for *.DOC, *.DOCX, *.XLS, *.XLSX, *.PPT, and *.PPTX message attachments (recommended)

If multiple versions of an application are deployed in the LAN, the most recent version must be installed on the Composer. For example, if Office 2010 and 2007 are deployed, then Office 2010 must be installed on the Composer.

6-2 Installing the remote Composer

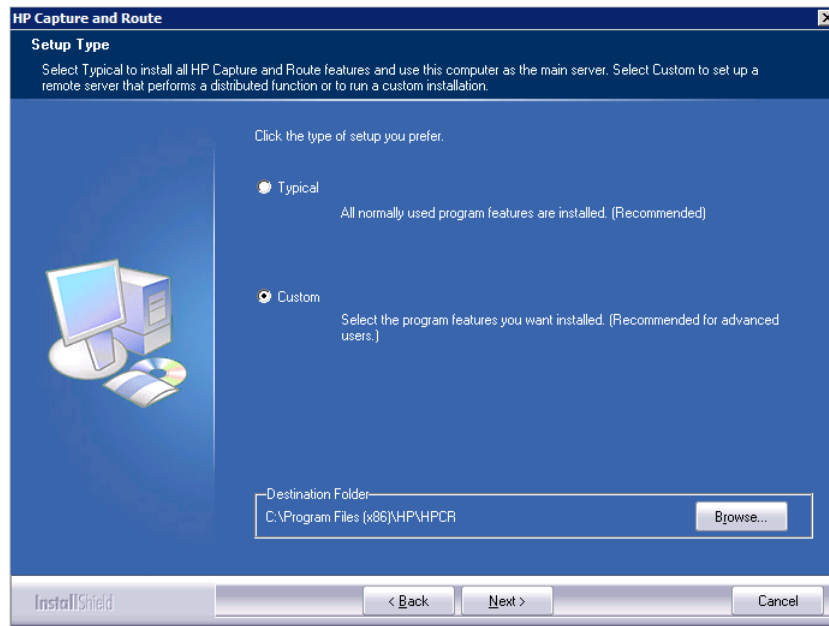
NOTE: Before installing a remote Composer on a Windows 2008 system, allow DCOM port 135 as an exception. Otherwise you will not be able to add the remote Composer.

1. Log in to the system where you will install the remote Composer using an account that belongs to the HP CR Administrators group.
2. Navigate to the network share where the HP CR server setup files are located.
3. Run:

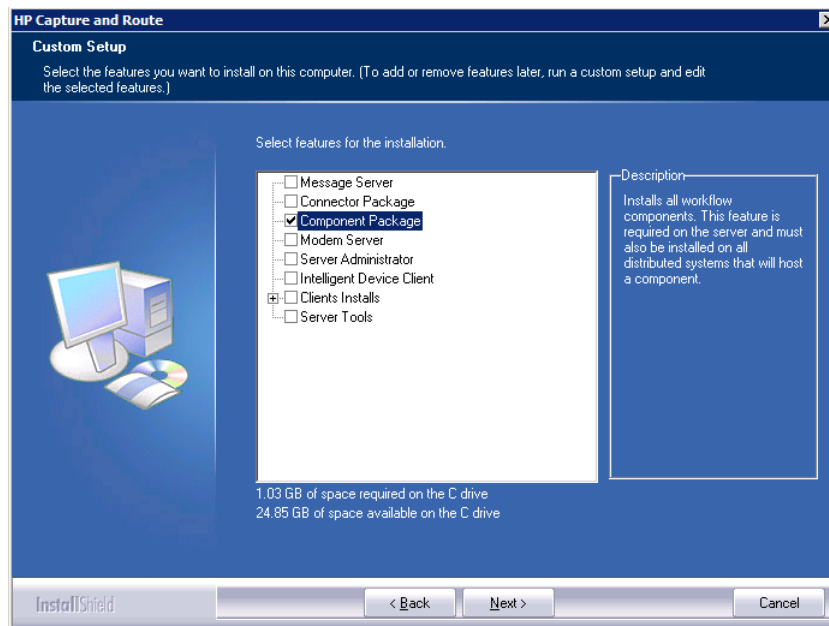
`\MessageServer\setup.exe`

The **InstallShield** wizard opens, configures your system for installation, and displays a welcome message.

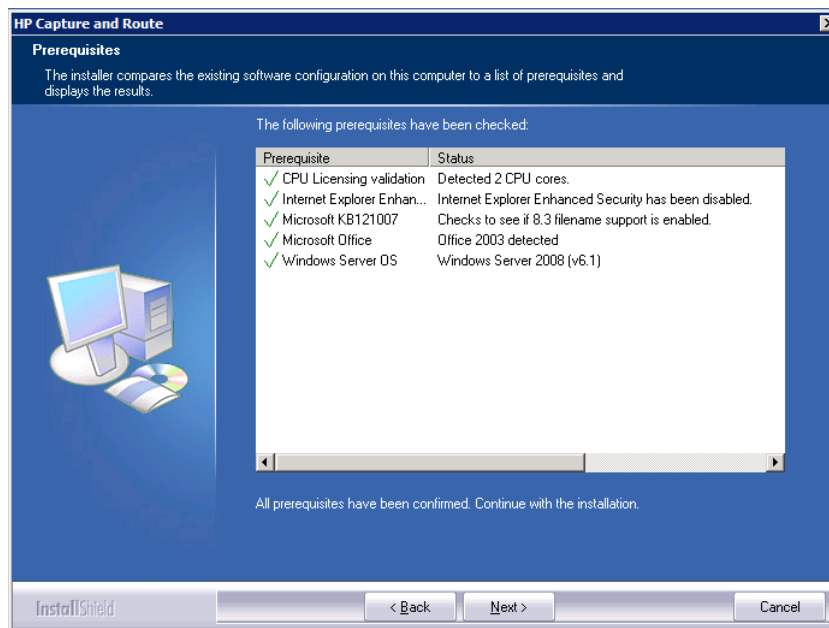
4. Click **Next**. The setup shows the **License Agreement** page.
5. Select **I accept the terms of the license agreement**, and click **Next**. The setup shows the installation options.
6. Select **Custom** and click **Next**.



7. The setup shows a list of HP CR features. Select **Component Package**. Clear all the other features that you are not installing at this time. Click **Next**.

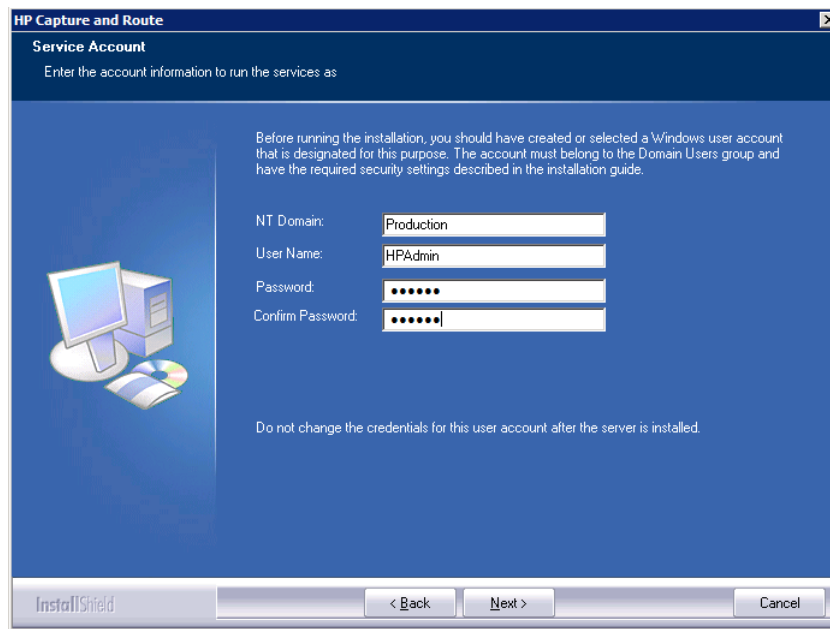


8. The setup checks the system for installation requirements and displays the results. Click **Next** to continue the installation.



NOTE: The setup cannot continue until all required components are installed. (Double-click an item in the list for more information.) If any required components were not detected, click **Cancel** and **Yes** to exit the setup and install the components that are required to complete the installation.

The setup requests logon credentials for the HP CR service account. The **NT Domain** and **User Name** fields are populated automatically based on the current Windows user.



9. Enter the HP CR service account logon credentials.
 - a In the **NT Domain** field, enter the Windows domain name.
 - b In the **User Name** field, enter the user name.
 - c In the **Password** and **Confirm Password** fields, enter the user password.
 - d Click **Next**.
10. The setup validates the user account and then shows installation settings. Review the installation settings and click **Next** to start the installation. The setup installs the selected component and displays a message indicating that the installation is complete. Click **Finish**.

NOTE: If other installation features are included, the setup might request additional information before displaying installation settings.

After the remote Composer is installed on the remote system, add the Composer to the Compose component on the HP CR server, as described below.

6-3 Adding the Composer to the HP CR server

Complete this procedure if you are adding a new Composer or replacing an existing Composer with a new one.

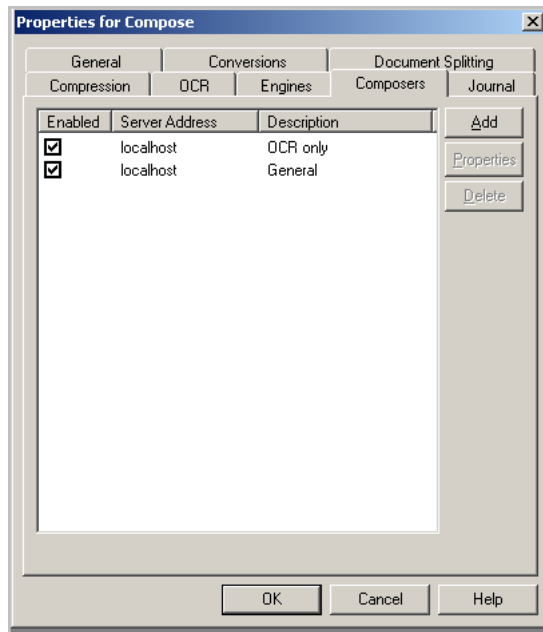


TIP: If you are replacing a local Composer with a new remote Composer, you must first remove the local Composer (as described in the procedure below) so the new Composer can be added without a license key. (If you keep the local Composer and add a remote Composer, you would need another license key.)

For each additional Composer you add to your environment, you must get a license key from your software representative.

1. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator** to open the HP CR Server Administrator.
2. In the console tree, click **Components**.

3. Double-click **Compose** in the details pane to open the **Properties for Composer** page.
4. Click the **Composers** tab.

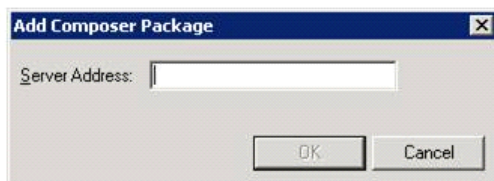


5. If you are not replacing a Composer, but are just adding a new one, continue with Step 6.
If you are replacing the local Composer with a new remote Composer, select **localhost**, click **Delete**, and then click **Yes** to remove the local Composer. You can continue with Step 6.



TIP: The local Composer must be removed first so that the new Composer can be added without a license key.

6. Click **Add**. The **Add Composer Package** page opens. In the **Server Address** text box, enter the remote Composer machine name or IP address. Click **OK**.



The Composer is added to the Compose component.

7. Click **OK** to close the Composer page.

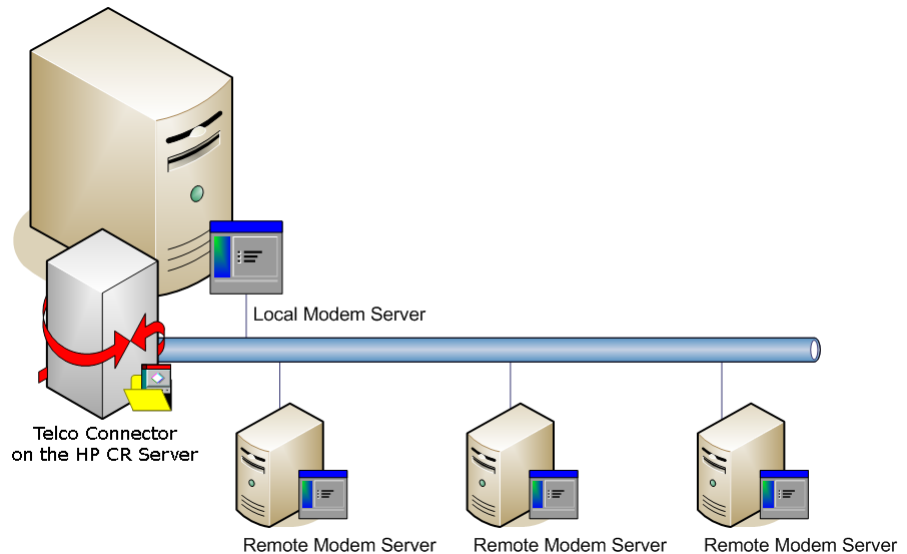
The remote Composer begins performing conversion tasks immediately.

7 Installing a remote modem server

A modem server is a server that sends and/or receives faxes for the HP CR server. It consists of Dialogic Brooktrout System Software, Brooktrout System Drivers, and HP CR modem server software. An HP CR server supports multiple modem servers, all managed by the HP CR connector for Telco on the HP CR server. A remote system that hosts a modem server is called a **remote modem server**.

Figure 7-1 Server with a local modem server and remote modem servers

The HP CR server shown here has a local modem server and three remote modem servers with an HP CR connector for Telco managing all of them. This is an example of a supported configuration.



The HP CR server can run without a local modem server, and the environment can have more Telco connectors or fewer remote modem servers than shown in this illustration. The HP CR connector for Telco can be configured to monitor one Telco share, an intermediary repository for inbound and outbound faxes.

Modem servers are supported in these configurations:

- HP CR connector for Telco with one modem server in the LAN
- HP CR connector for Telco with multiple modem servers in the LAN
- Multiple HP CR connectors for Telco, each with one or more modem servers in the LAN

Using multiple HP CR connectors for Telco delivers additional benefits to environments with special faxing requirements:

- **Reduced faxing costs** - With multiple HP CR connectors for Telco, the HP CR server can be configured to deliver faxes using the modem server closest to the destination. This can reduce long distance telephone charges.
- **Failover support** - Through rules, the HP CR server can be configured to route outbound faxes to one HP CR connector for Telco but if delivery fails, the HP CR server can route the outbound faxes to another HP CR connector for Telco.
- **Increased efficiency** - Multiple HP CR connectors for Telco provide built-in workload distribution based on the HP CR server configuration, HP CR connector for Telco configuration, and rules.

When scaling an environment with additional connectors or components, you should contact your software representative who can assist you in correctly identifying potential bottlenecks in the system based on workload and other factors. Your software representative can provide helpful information on the overall impact of increasing the system speed and efficiency.

The remainder of this section describes:

- [Requirements for a remote modem server](#) (62)
- [Installing and testing Brooktrout system software](#) (62)
- [Installing the remote modem server](#) (63)
- [Detecting channels on the modem server](#) (65)
- [Configuring a path to the Telco share directory](#) (66)

For additional information (including optional configuration and troubleshooting), refer to the [HP CR administrator online help](#).

7-1 Requirements for a remote modem server

A remote modem server requires a system that meets the minimum [Hardware and software requirements](#) and [Additional installation requirements](#) listed for the HP CR server. In addition, a remote modem server requires:

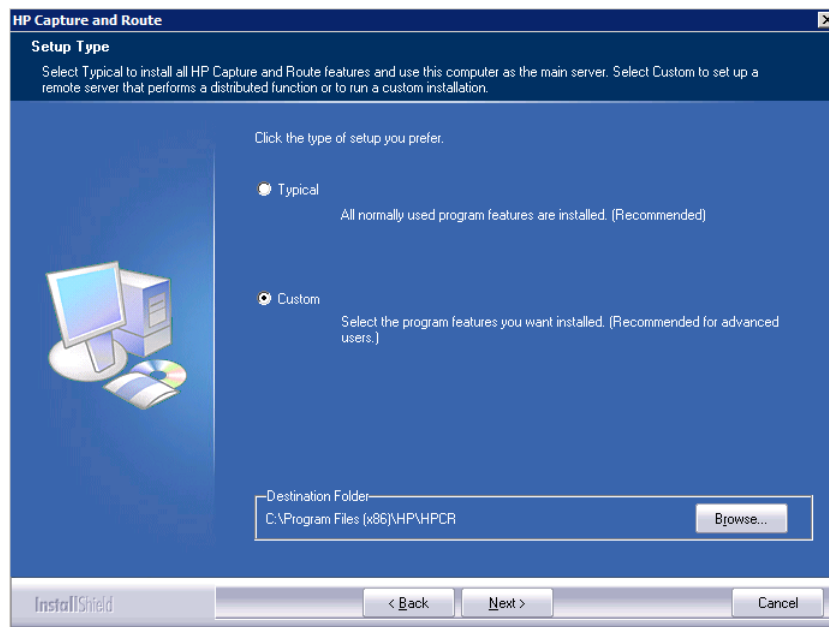
- Windows NT domain computer that always runs in the same domain as the HP CR server
- Dual core processor, 2 GHz, 2GB of RAM for one T1line (2-24 channels) or 4 GB RAM for two T1 lines (24-48 channels), RAID 5W with 100 GB of disk space, and Microsoft mouse or compatible pointing device
- Windows 2012 64-bit, Windows 2008 R2 64-bit
- Microsoft Internet Explorer 7 or later
- Access to a network copy of the HP CR server setup
- Windows user account that belongs to the local Administrators group
- Installation of at least one supported Dialogic Brooktrout System Software. For additional requirements on installing the fax board and Brooktrout System Software, see [Installing and configuring a Dialogic modem driver](#).

7-2 Installing and testing Brooktrout system software

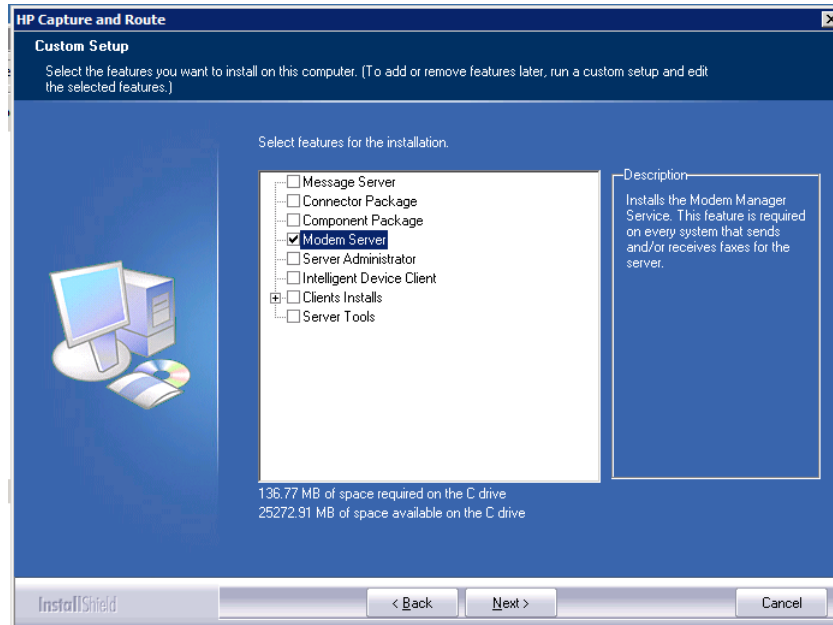
Before a remote modem server is installed with Dialogic Brooktrout SR140 fax channels, install the Brooktrout System Software. Refer to [Installing and configuring a Dialogic modem driver](#).

7-3 Installing the remote modem server

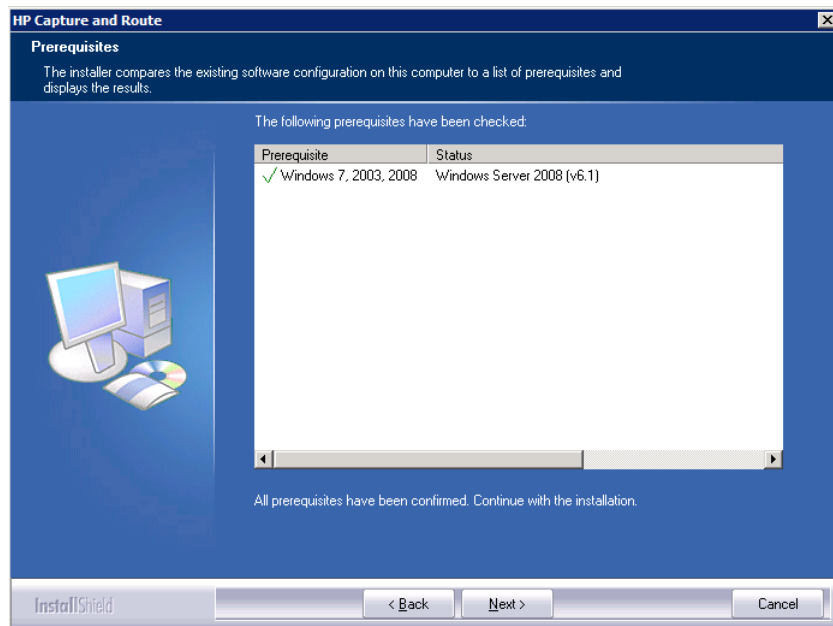
1. Log in to the system where you will install the remote modem server using an account that belongs to the HP CR Administrators group.
2. Navigate to the network where the HP CR server setup files are located.
3. Run: `\\HP CR\setup.exe`
The system runs the **Prerequisite** checks. When the **Successful Summary** appears, click **Remote Modem Server**. The **InstallShield** wizard opens with a welcome message. Your system configures for installation.
4. Click **Next**. The setup shows the **License Agreement** page.
5. Select **I accept the terms of the license agreement** and click **Next**. The setup shows the installation options. Select **Custom** and click **Next**. The setup shows a list of HP CR features.



6. Select **Modem Server**. Clear all the other features you are not installing at this time. Click **Next**.

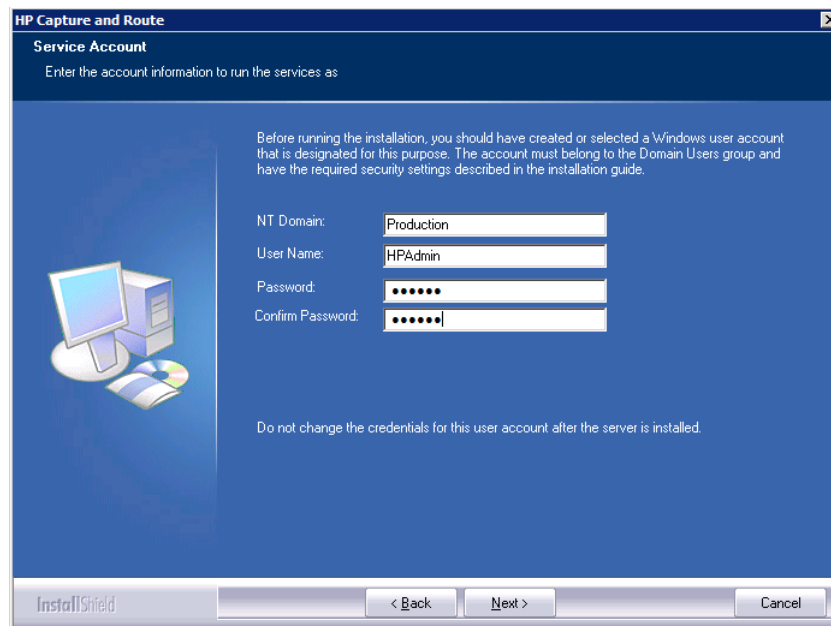


7. The setup checks the system for installation requirements and displays the results. Click **Next** to continue the installation.



NOTE: The setup cannot continue until all required components are installed. (Double-click an item in the list for more information.) If any required components were not detected, click **Cancel** and **Yes** to exit the setup and install the components that are required to complete the installation.

The setup requests logon credentials for the HP CR service account. The **NT Domain** and **User Name** fields are populated automatically based on the current Windows user.



8. Enter the HP CR service account logon credentials.
 - a In the **NT Domain** field, enter the Windows domain name.
 - b In the **User Name** field, enter the user name.
 - c In the **Password** and **Confirm Password** fields, enter the user password.

NOTE: If other installation features are included, the setup might request additional information before displaying installation settings.

9. Review the installation settings and click **Next** to start the installation. The setup installs the modem server and displays a message indicating that the installation is complete.
10. Click **Finish**.
Continue by detecting the channels on the modem server, as described below.

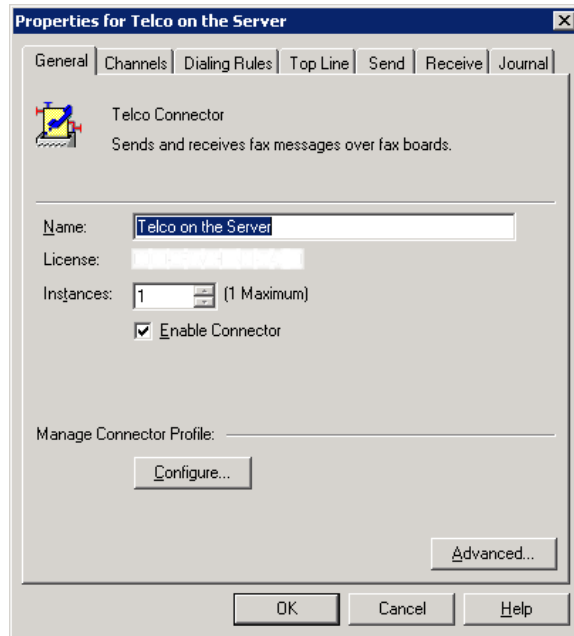
7-4 Detecting channels on the modem server

After installing the remote modem server, you must configure the HP CR connector for Telco to detect the channels on the remote modem server. When the channels have been detected, the properties of each channel, such as send and receive properties, can be configured in the HP CR connector for Telco properties.

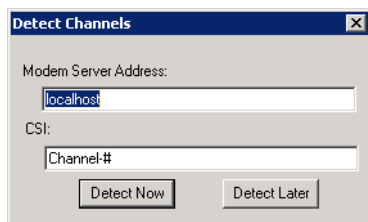
To detect the channels on the modem server:

1. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator** to open the HP CR Server Administrator.
2. Click **Connectors** in the console tree, and double-click **Telco** in the details pane.

The **Properties** page opens.



3. Click **Channels** and then click **Detect Channels**. The **Detect Channels** page opens.
4. In the **Modem Server Address** text box, enter the remote modem server machine name or IP Address. Click **Detect Now**.



5. Configure the channels if necessary, and then click **OK**.
- For more information on configuring the channels, refer to the [HP CR administrator online help](#).

7-5 Configuring a path to the Telco share directory

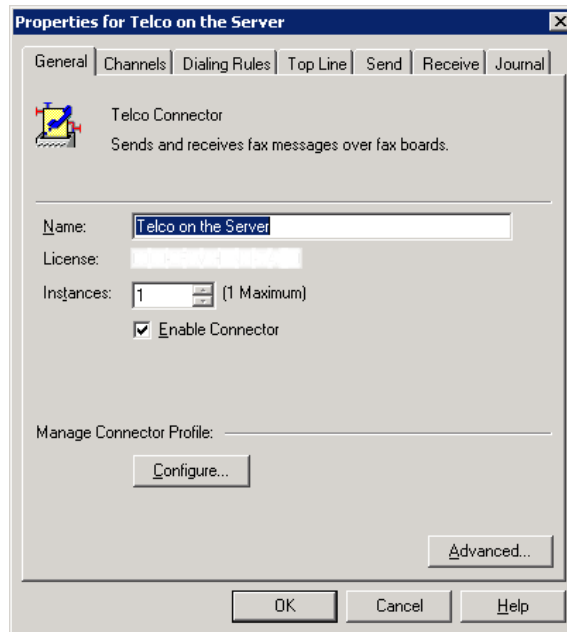
After you detect the channels, you can configure the path to the Telco share directory to be a UNC path.

NOTE: The HP CR server UNC path is filled in by default.

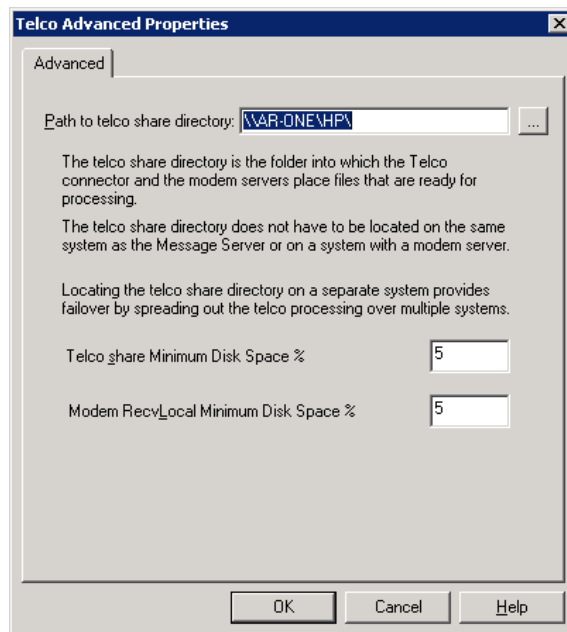
If you specify a full path, when the configuration file is written to the remote modem server, the remote modem channels will look for "c:\\" for the send and receive queues. But they should be looking at the HP CR server for the queues. So, you need to configure the path:

1. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator** to open the HP CR Server Administrator.

- Click **Connectors** in the console tree, and double-click **Telco** in the details pane. The **Properties** page opens.



- Click **Advanced** to open the **Telco Advanced Properties** page.



In the **Path to telco share directory** text box, the HP CR server UNC path is filled in by default.

- Modify the path, if necessary. For example, you can specify the system name instead of providing the IP address. Add a trailing backslash at the end (for example: `\\123.4.5.678\telcoshare\`).
- Click **OK** and then **OK** again to save your changes and close the **Properties** page.

8 Installing the Remote HP CR Intelligent Device Client

The Intelligent Device Client is installed on the HP CR server with a complete installation. You can install the Intelligent Device Client on a remote system using the instructions in this section.

The remainder of this section describes:

[Requirements for the HP CR Intelligent Device Client](#) (69)

[Installing the remote HP CR Intelligent Device Client](#) (70)

[Configuring the remote HP CR Intelligent Device Client](#) (72)

For additional information (including optional configuration and troubleshooting), refer to the [HP CR administrator online help](#).

8-1 Requirements for the HP CR Intelligent Device Client

8-1-1 Basic requirements

The HP CR Intelligent Device Client requires a system that meets the minimum [Hardware and software requirements](#) (7) and [Additional installation requirements](#) (8) listed for the HP CR server. In addition, an HP CR Intelligent Device Client requires:

- A Windows NT domain system that runs in the same domain as the HP CR server and is not a domain controller. If the system is in a different domain, the domain must have bidirectional trust with the HP CR server domain.
- Pentium III-compatible processor, 1 GHz, 512 MB RAM, 500 MB available hard disk space, and Microsoft mouse or compatible pointing device
- Windows 2012 64-bit, Windows 2008 R2 64-bit
- IIS with the following components: Common Files, World Wide Web Service, and Internet Information Services Manager
- Access to a network copy of the HP CR server setup
- Windows user account that belongs to the HP CR Administrators group

8-1-2 HTTP and HTTPS requirements

The Intelligent Device Client supports HTTP and HTTPS connectivity to the HP CR End User Interface. For HTTPS connectivity, you must perform the following tasks prior to installing the Intelligent Device Client on a remote system.

- Create and install a CA certificate on the default web site in IIS.
 - HTTPS for use with Embedded Device Client for HP OXPd v1.6
 - HTTPS for use with Embedded Device Client for HP OXPd v1.4



TIP: To set up a CA certificate using Microsoft Certificate Services, refer to the [HP Capture and Route \(HP CR\) Embedded Device Client Installation Guide](#). For a CA certificate issued by a third party, use the certificate authority's instructions and apply the certificate to the default web site in IIS.

- Enable Secure Socket Layer (SSL) on the default web site in IIS. Refer to the [HP Capture and Route \(HP CR\) Embedded Device Client for HP OXPd Installation Guide](#).

8-1-3 Required COM permissions for the remote HP CR Intelligent Device Client

When performing a typical HP CR server installation, the HP CR Intelligent Device Client is installed by default. No separate client installation is necessary. For custom installations, you can uncheck the HP CR Intelligent Device Client option from the list of components to install.

If you need to install the HP CR Intelligent Device Client on a separate system, you must configure the following DCOM permissions for the Anonymous_User user.

1. Log in to the system where you will install the HP CR server using an account that belongs to the Administrators group.
2. Click **Start > Control Panel > Administrative Tools > Component Services**.
3. In the console, expand **Component Services > Computers**.
4. Right-click **My Computer** and select **Properties** from the dropdown menu.
5. Click **COM Security**.
6. In the **Access Permissions** section, click **Edit Limits**. The **Access Permission** page opens.
7. For user **Anonymous_logon**, select **Local Access** and **Remote Access** permissions.
8. Click **OK** to close the page.
9. In the **Launch and Activate Permissions** section, click **Edit Limits**. The **Launch Permissions** page opens.
10. For user **Anonymous_logon**, select **Local Launch**, **Remote Launch**, **Local Activation**, and **Remote Activation** permissions.
11. Click **OK** and then **OK** again to close the **Properties** page.

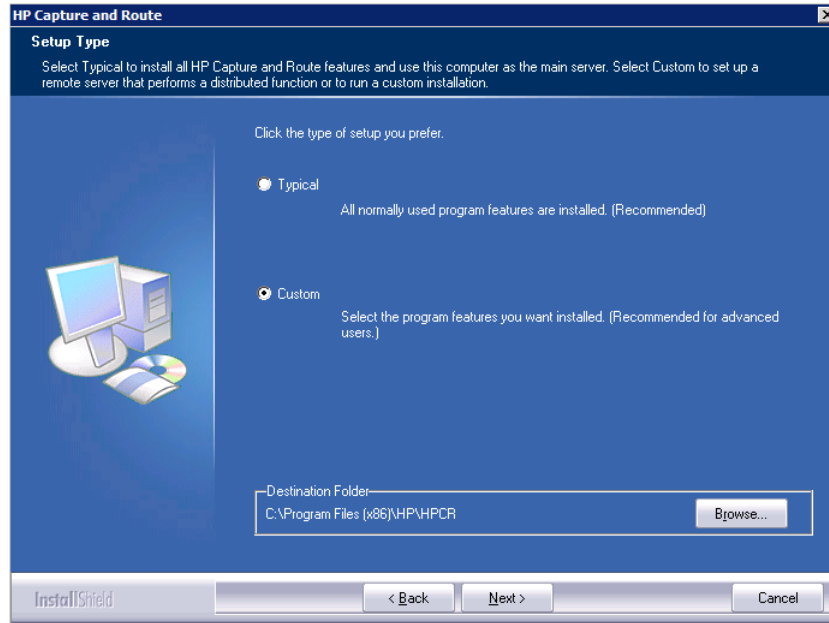
8-2 Installing the remote HP CR Intelligent Device Client

1. Log in to the system using an account that belongs to the HP CR Administrators group.
2. Navigate to the network where the HP CR server setup files are located.
3. Run:

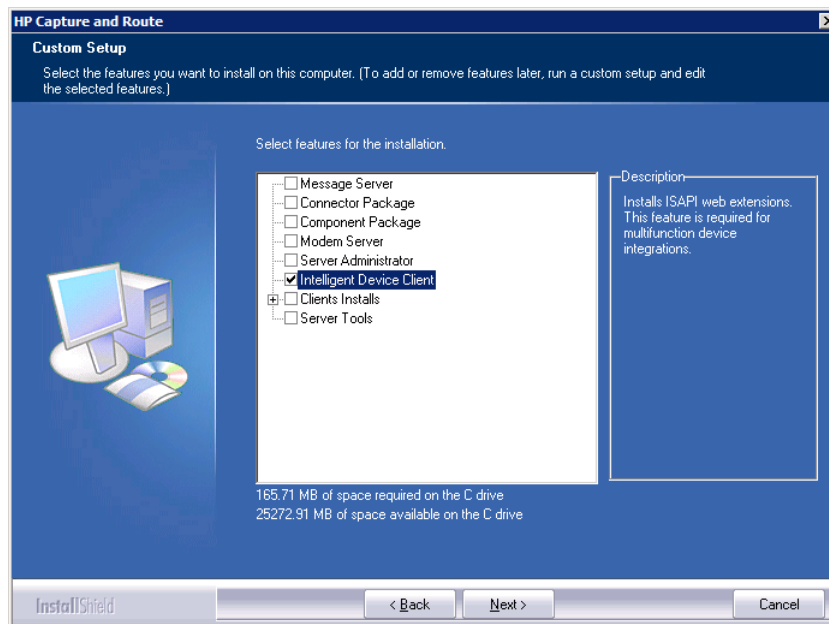
```
\MessageServer\setup.exe
```

The **InstallShield** wizard opens, configures your system, and displays the welcome message.
4. Click **Next**. The setup shows the **License Agreement** page.
5. Read the agreement and select **I accept the terms of the license agreement** option.

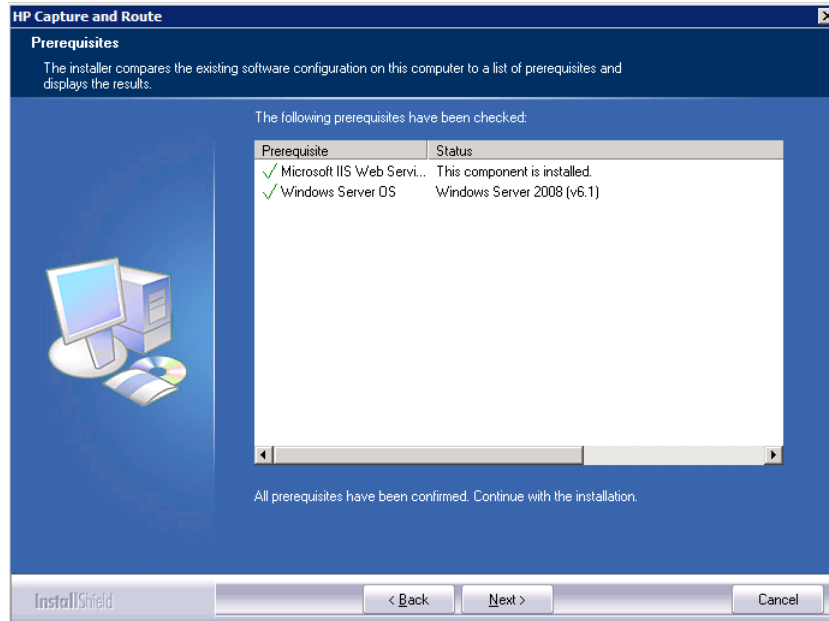
6. Click **Next**. The setup shows the installation options.



7. Select **Custom**. Click **Next**. The setup shows a list of HP CR features.
8. Select **Intelligent Device Client**. Clear any other feature you are not installing at this time.



9. Click **Next**. The setup checks the system for installation requirements and displays the results.



NOTE: The setup cannot continue until all prerequisite components are installed. (Double-click an item in the list for more information.) If any required components is missing, click **Cancel** and exit the installation setup. Install the components, then install HP CR Intelligent Device Client.

10. Click **Next**. The setup shows installation settings.
11. Review the installation settings. Click **Next** to start the installation. The setup installs the selected component and displays a message indicating that the installation is complete.
12. Click **Finish**.
13. Continue to configure the remote Intelligent Device Client, as described below.

8-3 Configuring the remote HP CR Intelligent Device Client

8-3-1 Specifying the HP CR server

When you install the Intelligent Device Client on a remote machine, you must specify the HP CR server IP Address in **OmISAPIU.xml**.

To specify HP CR server name or IP address in **OmISAPIU.xml**:

1. Go to:
`... \HP\HPCR\WebAPI\WebAPI\Scripts`
2. Open **OmISAPIU.xml** for editing.
3. Locate the **ServerName** node.
4. Specify the HP CR server name or IP address. For example:
`<ServerName>12.123.4.5</ServerName>`

NOTE: If the server is part of a cluster, the following setting should be made in the file:

```
<Server Name="MessageServer"><ServerName>  
Primary_Server_name</ServerName>
```

```
<Server Name="MessageServer"><ServerName>Secondary_Server_name</ServerName>  
</Server>
```

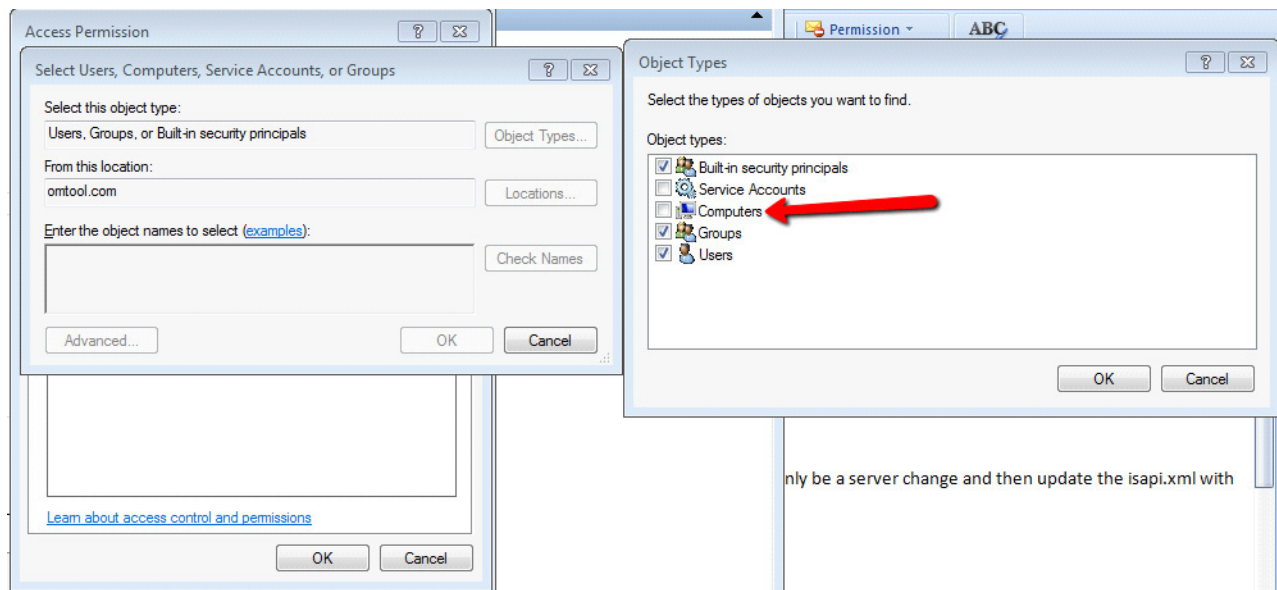
5. Save and close the file.

8-3-2 Adding the remote server's name to DCOM

1. Add the remote server's name to DCOM on the HP CR server. For example: `VMTesting$`.

NOTE: You must append the name with a dollar sign (\$).

2. Select **Computers** in the **Object Types** when adding the server name.



3. Reboot the HP CR server.

8-3-3 Adding the application pool logon account to the HP CR Admins group

The application pool for the WebAPI is the WebAPI managing the worker process that handles requests from other Embedded Device Client for HP OXPd applications. By default, they run as Local System.

NOTE: If the security policy in the LAN does not permit the application pool to run as Local System, the application pool identity can be reconfigured using any account that belongs to the Domain Users group.

If you change your login to a network account, Integrated Windows Authentication will not work for the virtual directories that use the application pool. The work-around requires kerberos protocol changes in the active directory.

If necessary, modify the application pool identity. For instructions, consult the [Windows documentation on IIS](#).

If the Intelligent Device Client is installed on a remote system, add the application pool logon account to the HP CR Admins group which has the required Distributed COM permissions to communicate with the HP CR server. For instructions, see [Creating the HP CR Admins group](#) (9).

NOTE: When the Intelligent Device Client is installed on the HP CR server and both application pools run as Local System, you do not need to modify the application pool identity.

8-3-4 Other configurations

Other configurations include:

- Modifying the directory security configuration of virtual directories (optional)

For instructions, see [Optional configuration: Modifying the directory security configuration of virtual directories](#) (47).

9 HP CR Device Clients for HP OXPd

As an intranet-based application for multifunction devices and business systems, HP CR supports software solutions to deploy the HP CR Device Client to multifunction devices running OXPd SDK v1.6.x and OXPd SDK v1.7.2.

Instructions for installing The HP CR Embedded Device Client are provided in the [HP Capture and Route \(HP CR\) Embedded Device Client Installation Guide](#).

If you have HP MFP devices that are Group 10 devices and support OXPd v1.4, follow the instructions for installing the [Embedded Device Client for HP OXPd v1.4](#).

10 HP CR End User Interface

The HP CR End User Interface, **Web User Interface**, is an intranet-based web application that provides network users a convenient method of delivering documents. Web User Interface is the customizable, tile-based HP CR client from which users can access Applications integral to their workflow.

The intuitive Web User Interface Homepage presents the user with several application tiles, from which they can create Messages, work with Distributions and Files, and set preferences. The Application options available to user groups are defined in the System Administrator.

HP CR also includes **Legacy Web User Interface**, the legacy End User Interface that offers authorized access to the Administration section (only available through Legacy Web User Interface), where users can manage routing tables, hold calendars, and the Help Desk view.

Messages and distributions

Users can send messages and distributions electronically and from hard copy. In both cases, the End User Interface delivers the document as an electronic file attachment using the recipient information.

- For messages and distributions sent electronically, users manually add a recipient or choose a distribution, select and add an attachment, review options and send. The system processes it using the associated routing information.
- For messages and distributions sent starting with a hard copy, users can print Routing Sheets to bring to an MFP with the document, or they can sign-in to the device and use the distributions associated with authenticated buttons on the device, such as Scan to Me.

For more information on messages and distributions, and exact steps for working with them in the End User Interface, see the HP CR User Guide.

Distribution Collections

Users can create their own Distributions or make use of any Distribution Collections to which their user group is assigned in the HP Server. Users cannot edit an existing distribution within a Distribution Collection, but they can modify it and use Save As to generate a new one based on the original settings.

For more information on working with Distribution Collections, refer to Chapter 4: Distributions in the HP CR User Guide.

Administration view

Authorized users of the Legacy Web User Interface can use the Administration section to manage routing, calendars, and the Help Desk.

- Use Routing to manage correlations between fax numbers, devices, and document Hold statuses.
- Use the Calendar to manage Hold time settings.
- Use the Help Desk to view processing details and history. Also search, cancel and re-send messages and related documents.

For more information about using the Administration section, see Using the Administrator Web Client Views Management tool to set up primary options.

Installation and Configuration

The remainder of this section contains instructions on installing and configuring both HP CR End User Interfaces:

- [Web User Interface installation and configuration](#) (78)
- [Legacy Web User Interface installation and configuration](#) (88)

10-1 Web User Interface installation and configuration

These instructions are written for HP CR Server Administrators with detailed knowledge of the HP CR server and clients.

[HP CR Web User Interface requirements](#) (78)

[Installing the HP CR Web User Interface](#) (79)

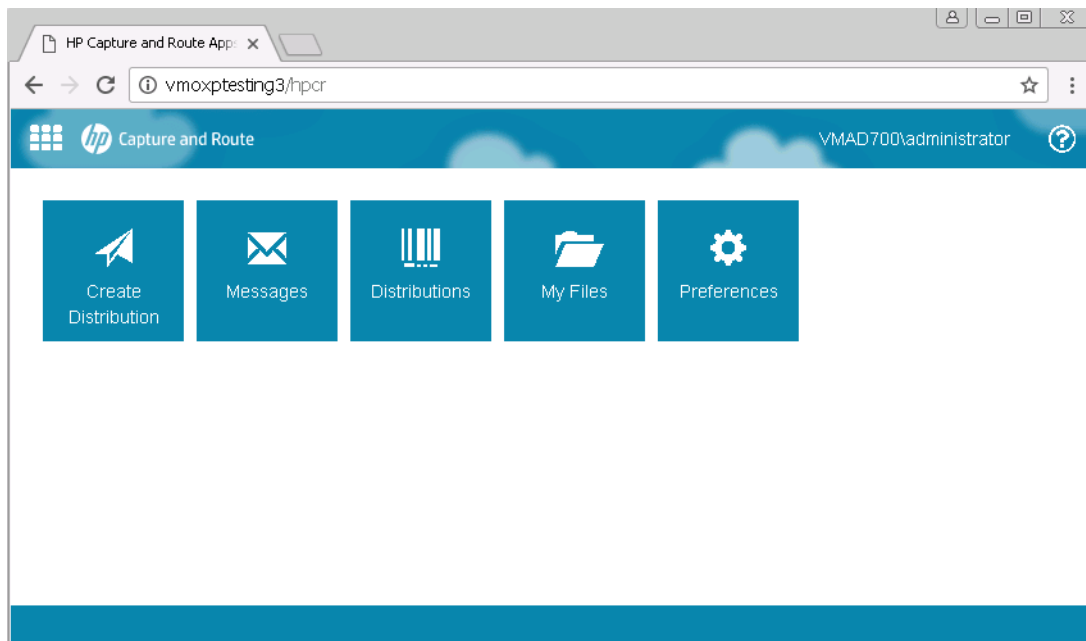
[Required configuration](#) (93)

For additional information (including optional configuration and troubleshooting), refer to the [HP CR administrator online help](#).

For instructions on how to use the HP CR End User Interface, consult the [HP Capture and Route \(HP CR\) User Guide](#).

Figure 10-1 Web User Interface

The default Web User Interface Homepage presents the user with a series of Application tiles.



10-1-1 HP CR Web User Interface requirements

10-1-1-1 Basic requirements



IMPORTANT: You can install HP CR Web User Interface on the system running the HP CR server. If you install HP CR Web User Interface on a system that is not running the HP CR server, you must configure DCOM permissions so that the Web User Interface server can access the HP CR server DCOM objects.

The requirements for the HP CR Web User Interface are:

- Windows 2012 64-bit, Windows 2008 R2 SP-1 64-bit
For Windows 2012 64-bit: Internet Information Services (IIS) v8
For Windows 2008 64-bit: Internet Information Services (IIS) v7
- IIS (Windows component)

NOTE: For IIS v7 or later, configure to allow Active Server Pages. This configuration is located in the Web Service Extensions node in the IIS console tree.

- Microsoft .NET Framework v4.0 redistributable package ([Installing Legacy Web User Interface](#), 91)
- Microsoft Internet Explorer 7 or later
- Acrobat Reader 7.0 or later
- Internet connection

10-1-1-2 Supported Email Applications


- Microsoft® Outlook® 2007 or higher (Outlook Express is not supported)
The HP CR End User Interface has a **Browse Address book** option for new messages page. This feature is available for Microsoft Outlook clients only.

NOTE: The HP CR Web Apps user can choose an email address from the Microsoft Outlook Address Book only if the Outlook client is installed and configured on the client system. (Also see [Enabling the Address Book lookup functionality](#), 97.)

When HP CR Web Apps is configured to integrate with an Address Book for a supported email application, the email application must be selected as the Windows default email application. For more information, consult Windows help.


10-1-1-3 User requirements: email account

The HP CR Web Apps users must have an email account created for them using the mail server (Microsoft Exchange Server).

 **IMPORTANT:** The mail server for any email account created must be installed on the same domain where the HP CR server is installed.

This is necessary because the HP CR Web Apps queries the Active Directory attributes like “mail” and “proxyAddresses”. The “proxyAddresses” attribute is added to the Active Directory properties only if an Microsoft Exchange Server is installed in the same domain as the Active Directory.

10-1-1-4 User requirements: full permissions

 **IMPORTANT:** Full permissions to the Web Apps installation folder for all domain users (including the application pool account user) is required when Web Apps is installed to a non-default location with a custom virtual directory name.

10-1-2 Installing the HP CR Web User Interface

The Web User Interface setup does all of the following:

- Installs the Web User Interface program files

- Creates a virtual directory in IIS and configures IIS authentication
- Configures Web User Interface with the HP CR server location, and the mail system identity and location

10-1-2-1 Installing Web User Interface

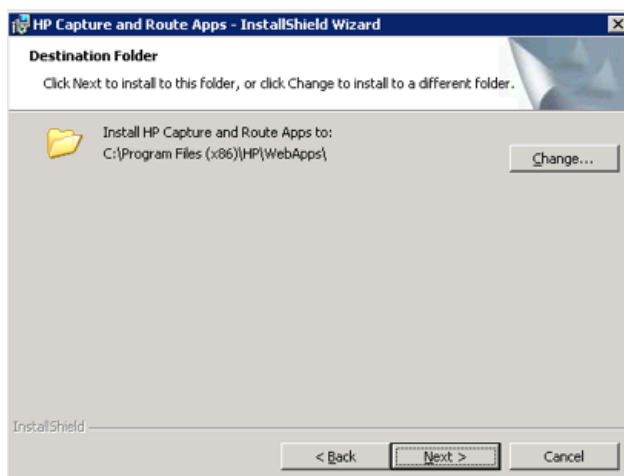
If you have used HP CR End User Interface before, you must keep the deprecated client application and set up files in your system, as deleting those files may interfere with the server usage.

1. Log on to the system where Web User Interface is being installed using an account that belongs to the local Administrators group.
2. Navigate to a network folder containing the Web User Interface setup files and run **setup.exe**. The InstallShield Wizard opens to the **Welcome** screen. Click **Next**.



TIP: The Web User Interface setup is installed with a complete HP CR server installation in `\Program Files (x86)\HP\HPCR\Clients\Web Apps`. Immediately following the HP CR server installation, only the HP CR service account has permissions to access client setup programs on the HP CR server, but additional users can be granted permissions if necessary.

3. The **Destination Folder** screen appears.



If you need to change the destination folder, click **Change** and follow the prompts. Then click **Next**.

4. The **IIS Virtual Directory** screen appears.

Name the Web User Interface by entering the **IIS Virtual Directory name** here. The default is [HPCR](#). You can change the virtual directory name if necessary. Then click **Next**.

NOTE: The virtual directory name is used to create a virtual directory in IIS under Default Web Site.

5. The **Message Server** screen appears.

Enter the **Message Server name**. If the HP CR server is running in the system in which you are installing this client, the name is entered by default. Click **Next**.

NOTE: If you are installing the Web User Interface in a cluster environment, you can enter multiple Message Server names in this field, separated by commas. For example: [Server1](#), [Server2](#). If you need to add servers post-installation, see [Configuring the Web User Interface for a cluster environment](#) (87) for more information.

6. The **Message Server Credentials** screen appears.

HP Capture and Route Apps - InstallShield Wizard

Message Server Credentials

Enter the Service Account used by the Message Server:

VMAD700\administrator

Password:

.....

InstallShield

< Back Next > Cancel

Enter the **Service Account** name and **Password** used by the HP CR Server, and click **Next**.

7. On the **Authentication Type** screen, select an **Authentication type** and enter the **Authentication server name**. Click **Next**.

HP Capture and Route Apps - InstallShield Wizard

Authentication Type

Authentication type:

Active Directory

Lotus Notes

Authentication server name:

VMAD70.vmad700.com

InstallShield

< Back Next > Cancel

8. The **Ready to Install the Program** screen appears. Click **Install**.

HP Capture and Route Apps - InstallShield Wizard

Ready to Install the Program

The wizard is ready to begin installation.

Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

InstallShield

< Back Install Cancel

The InstallShield wizard installs the client and the **Completed** screen appears. Click **Finish** to exit the wizard.

9. To launch the Web Apps End User Interface, open a web browser with a URL of <https://messageservername/virtualdirectoryname>.

10-1-2-2 Required DCOM permissions when installing on a remote system

When you install HP CR End User Interface on a remote system, you must configure the following DCOM permissions on the HP CR server. Without this configuration, the HP CR server cannot communicate with the remote clients. For DCOM configuration instructions, see [Configuring required COM permissions for launching the remote End User Interface](#) (85).

10-1-3 Required configuration

10-1-3-1 Enabling integrated Windows authentication

The End User Interface authenticates users based on their Windows logon credentials. The logon credentials are either passed transparently from the client to the web server or entered manually by the user at the beginning of each session. The login method depends on how authentication is configured; both methods are described in the configuration instructions.

Configure Windows authentication on the web server and then configure Internet Explorer on clients.

Configuring integrated Windows authentication on the web server

1. Log on to the web server using an account that belongs to the local Administrators group and start IIS.
2. Expand the server running the End User Interface and expand **Default Web Site**.
3. Click the virtual directory for the End User Interface. (The default name is `WebClient`.) The End User Interface program files appear in the details pane.
4. Right-click **WebClient** in the details pane and select **Properties**.

NOTE: When right-clicking **WebClient** in IIS for Windows 2008 server, you do not get a **Properties** option. Instead, for 2008 server, double-click authentication and enable anonymous access there.

5. Go to the **Directory Security** tab.
6. Go to **Authentication and access control** and click **Edit**. The **Authentication Methods** page opens.
7. Go to **Authenticated access** section and select **Integrated Windows Authentication** option.
8. Click **OK** to save the changes and close the **Authentication Methods** page.
9. Click **OK** to close the **Properties** page.

Configuring integrated Windows authentication on clients running Internet Explorer 7.0/6.0

You must configure Integrated Windows Authentication on all clients running Internet Explorer 7.0/6.0.

1. Log on to the client using an account that belongs to the local Administrators group and start Internet Explorer.
2. Open Internet Explorer and click **Tools > Internet Options**.
3. Click the **Security** option.
4. Select **Internet** or **Local Intranet** depending on your default zone, and click **Custom level**.

The **Security Settings** page opens.

5. Scroll down to the **User Authentication** section and make the following changes:
 - To authenticate the Windows user transparently, select **Automatic logon with current user name and password**.
 - To prompt the Windows user to enter logon credentials at the beginning of each session, select **Prompt for Username and Password**.
6. Click **OK** to close the **Internet Options** page.
7. Close the Internet Explorer page.
8. Close all other open instances of Internet Explorer for the change to take effects.

10-1-3-2 Adding the End User Interface URL to the list of trusted sites on a client system

You must add the HP CR End User Interface URL to the list of trusted sites on all client systems which will browse to the HP CR End User Interface.

1. Log on to the client system using an account that belongs to the local Administrators group and open Internet Options. (It is accessible from Control Panel or Internet Explorer.)
2. Go to the **Security** tab.
3. Select **Trusted sites** and click **Sites**.
4. Enter the End User Interface URL and click **Add**.
5. Clear **Require server verification (https:) for all sites in this zone** if this option is selected.
6. Click **Close** to close the **Trusted Sites** dialog.
7. Click **Apply** to save the changes and click **OK** to close the dialog box.

The End User Interface URL is now added to the list of trusted sites. To verify that the system recognizes the End User Interface URL as a trusted site, start Internet Explorer and go to the End User Interface URL. Verify that End User Interface loads. (Depending on your Windows Integrated Authentication configuration, you may need to login.)

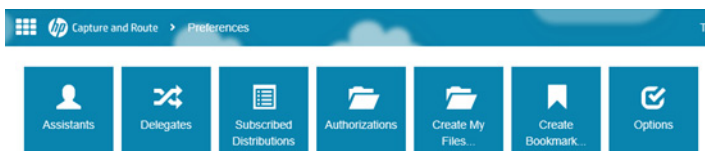
10-1-3-3 Selecting a network printer

1. Be sure the printer driver is installed on the HP CR server and that the printer was added to the **Groups** configuration section of the HP CR Server Administrator, as described in [Adding network printers](#) (44).

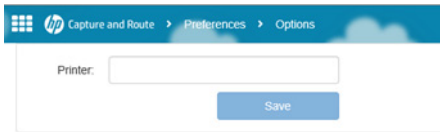
NOTE: Before the network printers are listed in the HP CR End User Interface, the network printers must be added to the **Jobs > Printers** section of **Group Properties** in the HP CR Server Administrator.

The HP CR End User Interface will read the list of configured network printers on the HP CR server.

2. Log in to the HP CR Web User Interface application.
3. Click the **Preferences** tile. The **Preferences** page opens.



4. Click the **Options** tile to access the **Printer** field.



5. In the **Printer** field, enter the printer Name or IP address of interest and click **Save**.

NOTE: If you do not save your preferences, your configuration is valid for the current session only. The HP CR Web User Interface will not remember your choices if you log out or open a new session.

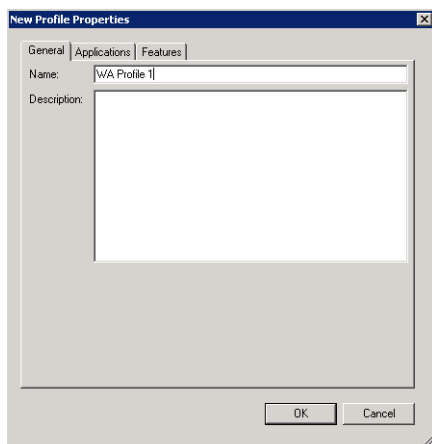
10-1-3-4 Configuring required COM permissions for launching the remote End User Interface

Before you can launch a remote End User Interface, you must configure COM permissions for Anonymous_logon on the HP CR server. To do so:

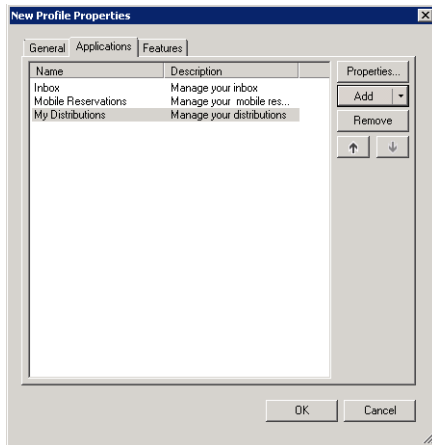
1. Log in to the system running the HP CR server using an account that belongs to the Administrator.
2. Click **Start > Control Panel > Administrative Tools > Component Services**.
3. In the console, expand **Component Services > Computers**.
4. Right-click **My Computer** and select **Properties** from the drop-down menu.
5. Click **COM Security**.
6. In the **Access Permissions** section, click **Edit Limits**. The **Access Permission** page opens.
7. For user **Anonymous_logon**, select **Local Access** and **Remote Access** permissions.
8. Click **OK** to close the page.
9. In the **Launch and Activate Permissions** section, click **Edit Limits**. The **Launch Permissions** page opens.
10. For user **Anonymous_logon**, select **Local Launch**, **Remote Launch**, **Local Activation**, and **Remote Activation** permissions.
11. Click **OK** and then **OK** to close the **Properties** page.

10-1-3-5 Creating a new Web User Interface Profile

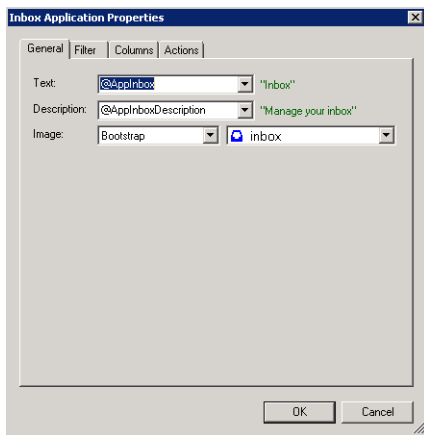
1. In the HP CR Server Administrator, go to the **Configuration** node and right-click **Web Apps > New > Profile**. The **New Profile Properties** screen appears.



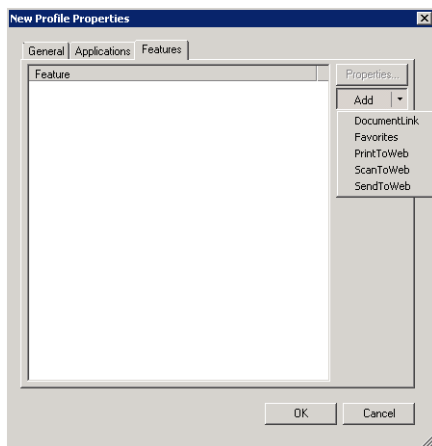
2. Enter a profile **Name**, and optionally, a **Description**.
3. Go to the **Applications** tab, click **Add** and (one at a time) select the applications of interest from the various options in the drop-down menu.



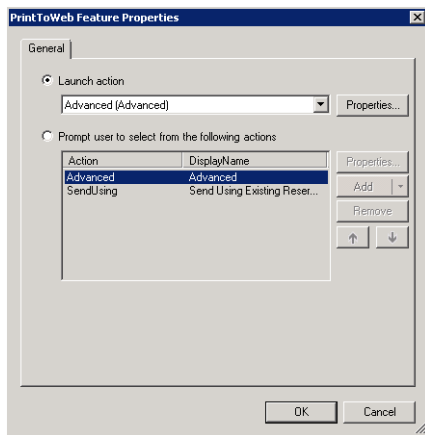
4. For example, click **Add > Messages > Inbox**. The **Inbox Application Properties** screen opens. Here you can further refine specific Inbox properties as needed.



5. Click **OK** to exit the application **Properties** screen. When you return to the **New Profile Properties** screen, you will see the selected Application added to the list.
6. In the **Features** tab, click **Add** and select any Feature you want to associate with the Profile. Options include: **DocumentLink**, **Favorites**, **PrinttoWeb**, **ScantoWeb**, and **SendtoWeb**.



- As it does with Applications, a **Properties** screen appears for any Feature you select. You can further refine a Feature's characteristics in its **Properties** page.

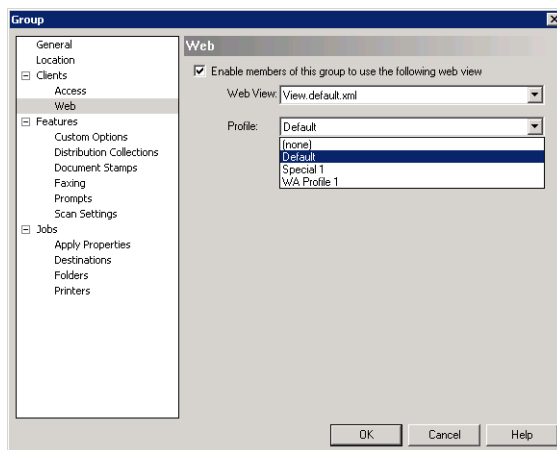


- Click **OK** to exit the **Features Properties** screen, and click **OK** again.
- Your new profile appears in the Web Apps list.

To edit properties of an existing Profile, right-click the profile of interest and select **Properties** to access **Profile Properties**.

10-1-3-6 Adding a Web User Interface Profile to a User Group

- Go to **Configuration > Groups**, right-click the group of interest and select **Properties**.
- In the **Group Properties** screen, click **Clients > Web**.



Make sure **Enable members of this group to use the following web view** is selected.

- Click the **Profile** drop-down list and select the Profile of interest. Click **OK**.

The user group is now updated to use the new Profile in Web Apps.

10-1-3-7 Configuring the Web User Interface for a cluster environment

In order to enable the Web User Interface to communicate with a server cluster, the Administrator needs to edit the [AppSettings.json](#) file on the HP CR Server.

NOTE: If your cluster environment is already set up at the time of the Web User Interface installation, you can enter multiple Message Server names on the **Message Server** installation screen (separated by commas). For more information, see [Installing the HP CR Web User Interface](#) (79).

1. Navigate to the `WebApps` configuration file in

```
\Program Files (x86)\HP\HPCR\Clients\Web Apps
```

and open `AppSettings.json` in a text editor.

2. In `AppSettings.json`, the “`MessageServer`” property can take multiple server names.

At the “`MessageServer`” property, add the secondary server name as a quoted string, separated by a comma, as shown in the following example:

```
{
  "AppSettings": {
    "ProductName": "HP Capture and Route Apps",
    "ProductLogo": "~/images/logo.svg",
    "ProductLogoFlyover": "~/images/logo-flyover.svg",
    "MessageServer": [ "server1", "server2" ],
    "Help": "%HelpUrl%"
  },
}
```

3. Save and close the `AppSettings.json` file.

10-1-3-8 Configuring prompts

See the [HP CR administrator online help](#).

10-1-3-9 Configuring additional custom options

See the [HP CR administrator online help](#).

10-2 Legacy Web User Interface installation and configuration

These instructions are written for HP CR Server Administrators with detailed knowledge of the HP CR server and clients.

[HP CR Legacy Web User Interface requirements](#) (89)

[Installing HP CR Legacy Web User Interface](#) (90)

[Required configuration](#) (93)

[Optional configuration - Customizing the HP CR Legacy Web User Interface](#) (96)

[Optional configuration - Configuring the HP CR Server Administrator](#) (104)

For additional information (including optional configuration and troubleshooting), refer to the [HP CR administrator online help](#).

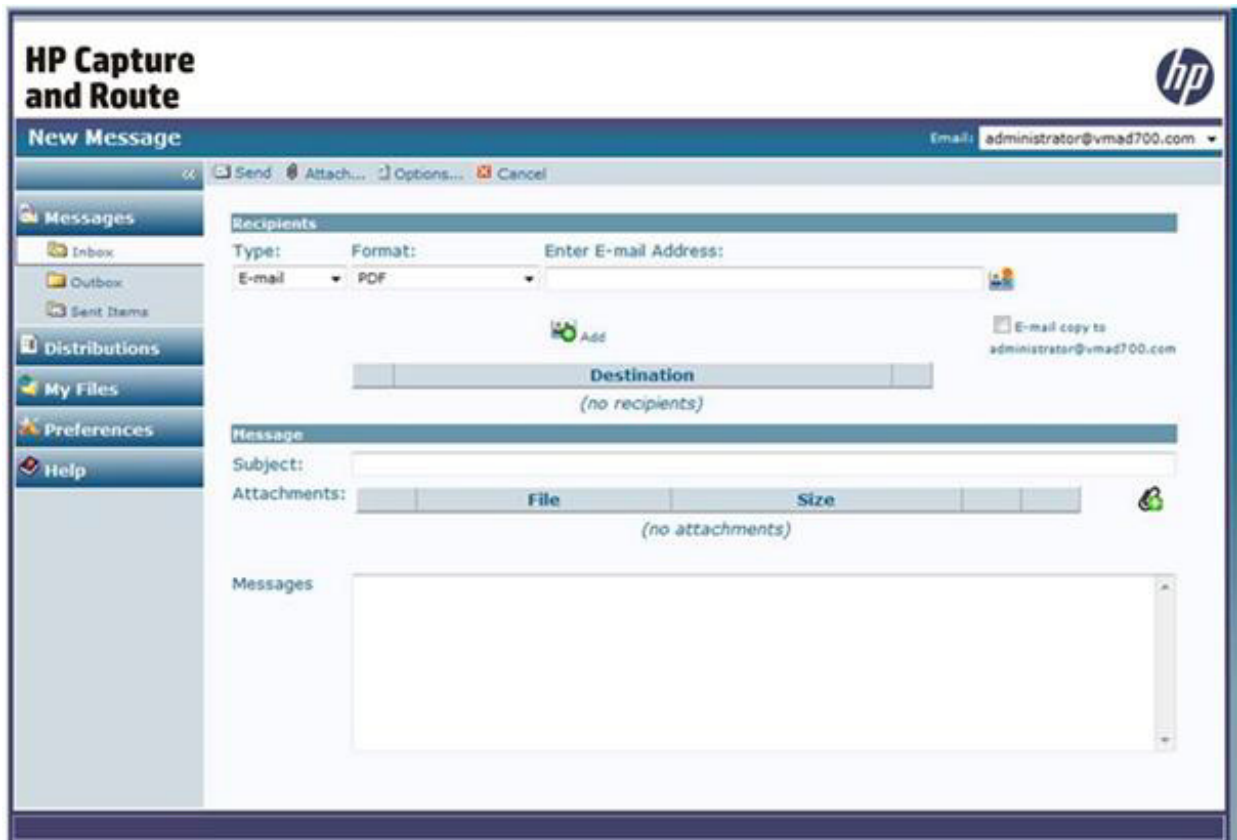
For instructions on how to use the HP CR End User Interface, consult the [HP Capture and Route \(HP CR\) User Guide](#).

NOTE: The following features are *only* available for use with the Legacy Web User Interface Client:

- Routing Table management
- Calendars for Fax Release Schedules
- Help Desk features for searching and managing messages and distributions (viewing, resending, canceling, etc.)

Figure 10-2 Legacy Web User Interface

The default view of Legacy Web User Interface presents the user with a series of options.



10-2-1 HP CR Legacy Web User Interface requirements

10-2-1-1 Basic requirements



IMPORTANT: You can install the HP CR Legacy Web User Interface client on the system running the HP CR server. If you install Legacy Web User Interface on a system that is not running the HP CR server, you must configure DCOM permissions so that the Legacy Web User Interface server can access the HP CR server DCOM objects.

The requirements for HP CR Legacy Web User Interface are:

- Windows 2012 64-bit, Windows 2008 R2 SP-1 64-bit
 - For Windows 2012 64-bit: Internet Information Services (IIS) v8
 - For Windows 2008 64-bit: Internet Information Services (IIS) v7

- IIS (Windows component)

NOTE: For IIS v7 or later, configure to allow Active Server Pages. This configuration is located in the Web Service Extensions node in the IIS console tree.

- Microsoft .NET Framework v4.0 redistributable package ([Installing Legacy Web User Interface](#), 91)
- Microsoft Internet Explorer 7 or later
- Acrobat Reader 7.0 or later
- Internet connection

10-2-1-2 Supported Email Applications

- Microsoft® Outlook® 2007 or higher (Outlook Express is not supported)

The HP CR End User Interface has a **Browse Address book** option for new messages page. This feature is available for Microsoft Outlook clients only.

NOTE: The HP CR Legacy Web User Interface user can choose an email address from the Microsoft Outlook Address Book only if the Outlook client is installed and configured on the client system. (Also see [Enabling the Address Book lookup functionality](#), 97.)

When HP CR Legacy Web User Interface is configured to integrate with an Address Book for a supported email application, the email application must be selected as the Windows default email application. For more information, consult Windows help.

10-2-1-3 User requirements: email account

The HP CR Legacy Web User Interface users must have an email account created for them using the mail server (Microsoft Exchange Server).



IMPORTANT: The mail server for any email account created must be installed on the same domain where the HP CR server is installed.

This is necessary because Legacy Web User Interface queries the Active Directory attributes like “mail” and “proxyAddresses”. The “proxyAddresses” attribute is added to the Active Directory properties only if an Microsoft Exchange Server is installed in the same domain as the Active Directory.

10-2-1-4 User requirements: full permissions



IMPORTANT: Full permissions to the Web Client installation folder for all domain users (including the application pool account user) is required when the Legacy Web User Interface client is installed to a non-default location with a custom virtual directory name.

10-2-2 Installing HP CR Legacy Web User Interface

The Legacy Web User Interface setup does all of the following:

- Installs the Legacy Web User Interface program files
- Creates a virtual directory in IIS and configures IIS authentication
- Configures Legacy Web User Interface with the HP CR server location, and the mail system identity and location

10-2-2-1 Installing Legacy Web User Interface

If you have used HP CR Legacy Web User Interface before, you must keep the deprecated client application and set up files in your system as deleting those files may interfere with the server usage.

1. Log on to the system where Legacy Web User Interface is being installed using an account that belongs to the local Administrators group.
2. Navigate to a network folder containing the setup files and run **setup.exe**.



TIP: The Legacy Web User Interface setup is installed with a complete HP CR server installation in `\Program Files\HP\HPCR\Clients\Web`. Immediately following the HP CR server installation, only the HP CR service account has permissions to access client setup programs on the HP CR server, but additional users can be granted permissions if necessary.

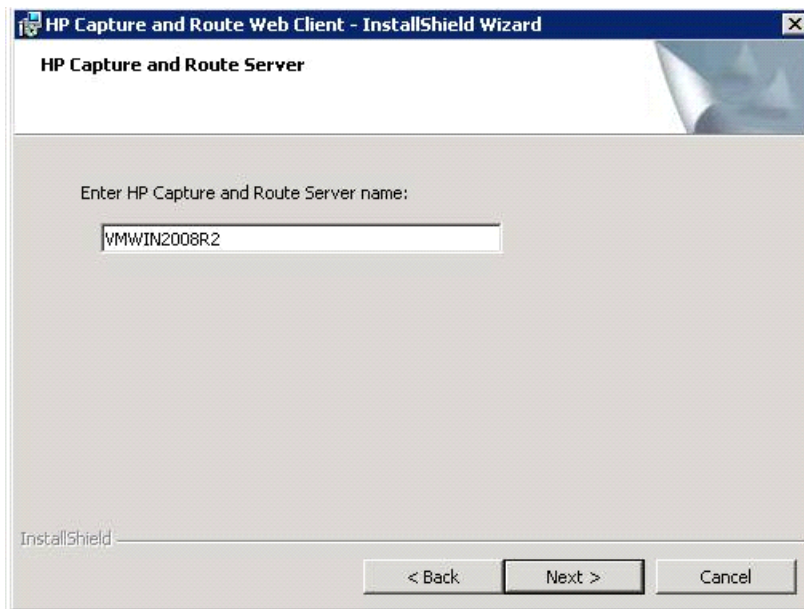
The system runs the **Prerequisite** checks. When the **Successful Summary** appears, click **Web Client Install**. The **InstallShield** wizard configures your system and the **Welcome** message appears.

3. Click **Next**. The **Destination Folder** screen appears.
4. Change the destination folder if necessary by clicking **Change** and then following the prompts. Click **Next**. On the next screen, the **IIS Virtual Directory** name for the End User Interface appears.
5. Change the virtual directory name if necessary. The default is `WebClient`. Click **Next**.

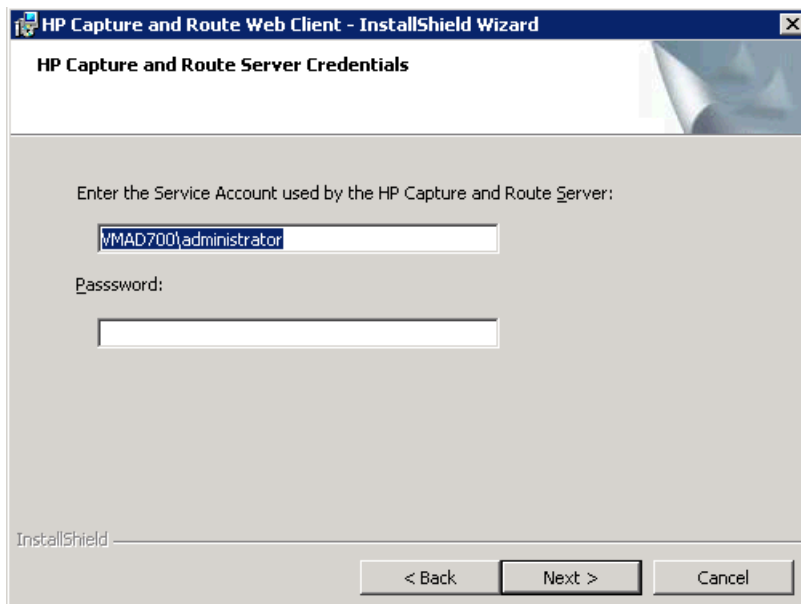


NOTE: The virtual directory name is used to create a virtual directory in IIS under Default Web Site.

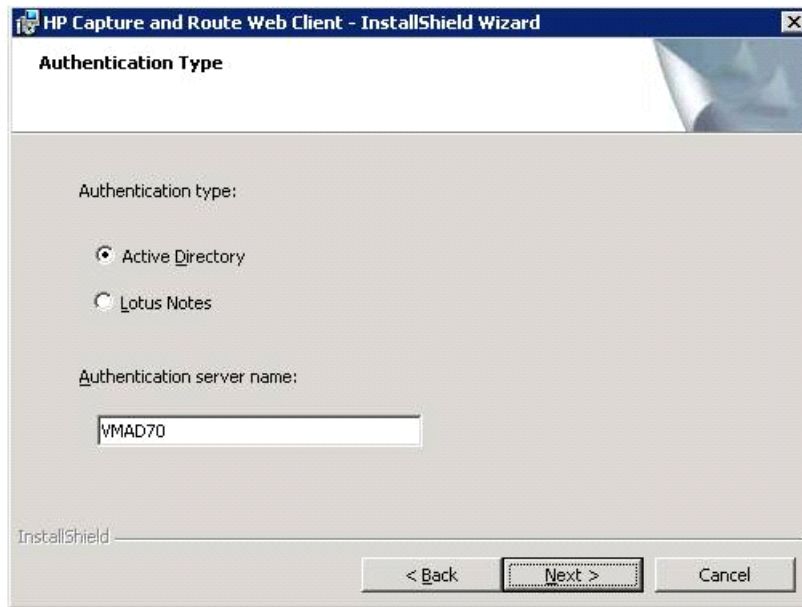
The setup prompts you to enter the **HP CR server name**. If you are installing the client in a system which has the HP CR server running, the name is automatically entered (by default). Click **Next**.



6. In the **Server Credentials** screen, enter the **Service Account name** and **Password** used by the HP CR Server. Click **Next**.



- The setup prompts you to choose the **Authentication type** and enter the **Authentication server name**. Click **Next**.



- The **Ready to Install the Program** page appears.
- Click **Install**. The client is installed. The InstallShield wizard indicates when the installation is complete.
- To launch the End User Interface, check the **Launch the program** box.
- Click **Finish** to close the **InstallShield** wizard.

When installation is complete, a web browser opens and HP CR Legacy Web User Interface is launched with a URL of <http://webservername/WebClient>.

NOTE: If you are configured to use a Secure Socket Layer (SSL) connection, manually configure the End User Interface URL to be <https://webservername/WebClient>.

10-2-2-2 Required DCOM permissions when installing on a remote system

When you install HP CR Legacy Web User Interface on a remote system, you must configure the following DCOM permissions on the HP CR server. Without this configuration, the HP CR server cannot communicate with the remote clients. For DCOM configuration instructions, see [Configuring required COM permissions for launching the remote Legacy Web User Interface](#) (96).

10-2-3 Required configuration

10-2-3-1 Enabling integrated Windows authentication

The Legacy Web User Interface client authenticates users based on their Windows logon credentials. The logon credentials are either passed transparently from the client to the web server or entered manually by the user at the beginning of each session. The login method depends on how authentication is configured; both methods are described in the configuration instructions.

Configure Windows authentication on the web server and then configure Internet Explorer on clients.

Configuring integrated Windows authentication on the web server

1. Log on to the web server using an account that belongs to the local Administrators group and start IIS.
2. Expand the server running the Legacy Web User Interface and expand **Default Web Site**.
3. Click the virtual directory for the Legacy Web User Interface. (The default name is [WebClient](#).) The Legacy Web User Interface program files appear in the details pane.
4. Right-click **WebClient** in the details pane and select **Properties**.

NOTE: When right-clicking **WebClient** in IIS for Windows 2008 server, you do not get a **Properties** option. Instead, for 2008 server, double-click authentication and enable anonymous access there.

5. Go to the **Directory Security** tab.
6. Go to **Authentication and access control** and click **Edit**. The **Authentication Methods** page opens.
7. Go to **Authenticated access** section and select **Integrated Windows Authentication** option.
8. Click **OK** to save the changes and close the **Authentication Methods** page.
9. Click **OK** to close the **Properties** page.

Configuring integrated Windows authentication on clients running Internet Explorer 7.0/6.0

You must configure Integrated Windows Authentication on all clients running Internet Explorer 7.0/6.0.

1. Log on to the client using an account that belongs to the local Administrators group and start Internet Explorer.
2. Open Internet Explorer and click **Tools > Internet Options**.
3. Click the **Security** option.
4. Select **Internet** or **Local Intranet** depending on your default zone, and click **Custom level**. The **Security Settings** page opens.
5. Scroll down to the **User Authentication** section and make the following changes:
 - To authenticate the Windows user transparently, select **Automatic logon with current user name and password**.
 - To prompt the Windows user to enter logon credentials at the beginning of each session, select **Prompt for Username and Password**.
6. Click **OK** to close the **Internet Options** page.
7. Close the Internet Explorer page.
8. Close all other open instances of Internet Explorer for the change to take effects.

10-2-3-2 Adding the Legacy Web User Interface URL to the list of trusted sites on a client system

You must add the HP CR Legacy Web User Interface URL to the list of trusted sites on all client systems which will browse to Legacy Web User Interface.

1. Log on to the client system using an account that belongs to the local Administrators group and open Internet Options. (It is accessible from Control Panel or Internet Explorer.)
2. Go to the **Security** tab.
3. Select **Trusted sites** and click **Sites**.

4. Enter the End User Interface URL and click **Add**.
5. Clear **Require server verification (https:) for all sites in this zone** if this option is selected.
6. Click **Close** to close the **Trusted Sites** dialog.
7. Click **Apply** to save the changes and click **OK** to close the dialog box.

The Legacy Web User Interface URL is now added to the list of trusted sites. To verify that the system recognizes the URL as a trusted site, start Internet Explorer and go to the End User Interface URL. Verify that Legacy Web User Interface loads. (Depending on your Windows Integrated Authentication configuration, you may need to login.)

10-2-3-3 Selecting a network printer

1. Be sure the printer driver is installed on the HP CR server and that the printer was added to the Groups section of the HP CR Server Administrator, as described in [Adding network printers](#) (44).

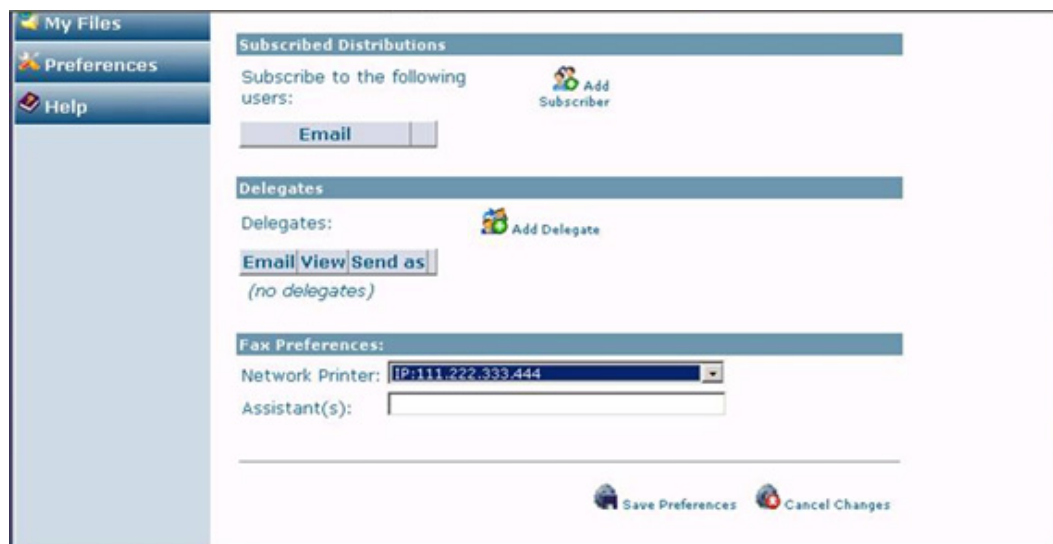
NOTE: Before the network printers are listed in the HP CR Legacy Web User Interface, the network printers must be added to the **Printer** tab in the **Group** section of the HP CR Server Administrator.

The HP CR Legacy Web User Interface will read the list of configured network printers on the HP CR server.

2. Log in to the Legacy Web User Interface client.
3. Click **Preferences**.

The **User Preferences** page opens listing the user information and options.

Choose the network printer from the **Network Printer** drop-down menu.



Click **Save Preferences**.

NOTE: If you do not save your preferences, your configuration is valid for the current session only. The HP CR Legacy Web User Interface will not remember your choices if you log out or open a new session.

10-2-3-4 Configuring required COM permissions for launching the remote Legacy Web User Interface

Before you can launch a remote Legacy Web User Interface, you must configure COM permissions for Anonymous_logon on the HP CR server. To do so:

1. Log in to the system running the HP CR server using an account that belongs to the Administrator.
2. Click **Start > Control Panel > Administrative Tools > Component Services**.
3. In the console, expand **Component Services > Computers**.
4. Right-click **My Computer** and select **Properties** from the drop-down menu.
5. Click **COM Security**.
6. In the **Access Permissions** section, click **Edit Limits**. The **Access Permission** page opens.
7. For user **Anonymous_logon**, select **Local Access** and **Remote Access** permissions.
8. Click **OK** to close the page.
9. In the **Launch and Activate Permissions** section, click **Edit Limits**. The **Launch Permissions** page opens.
10. For user **Anonymous_logon**, select **Local Launch**, **Remote Launch**, **Local Activation**, and **Remote Activation** permissions.
11. Click **OK** and then **OK** to close the **Properties** page.

10-2-4 Optional configuration - Customizing the HP CR Legacy Web User Interface

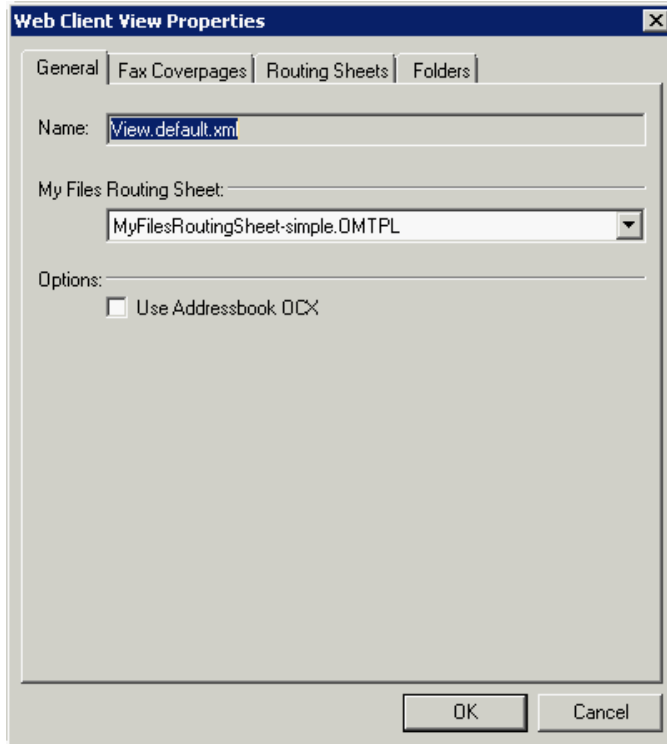
Use the Administrator Legacy Web User Interface Management tool to set up primary customized options. In addition, you can modify the View.default.xml file for secondary customized options. Procedures for both primary and secondary options are provided in the following sections.

10-2-4-1 Using the Administrator Legacy Web User Interface Management tool to set up primary customized options

You can set up primary customized options to define the ways in which features are displayed with the End User Interface.

1. Launch the HP CR Server Administrator.
2. Click **Configuration > Web Client Views**.

- Right-click on View.Default.xml in the results pane. Select **Properties**. The **Web Client View Properties** page is displayed.



Use the Administrator Legacy Web Client User Interface Management tool for:

- [Setting a default Routing Sheet template for use with the Scan to My Files feature](#) (97)
- [Enabling the Address Book lookup functionality](#) (97)
- [Making fax cover page templates available and setting a default template](#) (99)
- [Making Routing Sheet templates available and setting a default template](#) (100)
- [Setting tabs/folders that are enabled and specifying a default display](#) (102)

Setting a default Routing Sheet template for use with the Scan to My Files feature

On the **Web Client View Properties** page (**General** tab), select a template file from the **My Files Routing Sheet** dropdown.

NOTE: Typically, the default Routing Sheet template for Personal and Public Distributions is different from the template used for the Scan to My Files feature. See also [Making Routing Sheet templates available and setting a default template](#) (100).

Enabling the Address Book lookup functionality

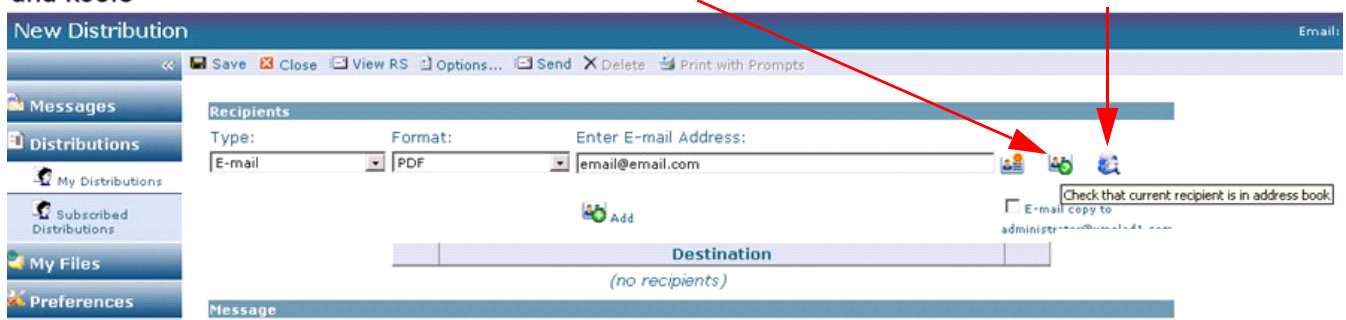
The end user can use the OCX for Address Book browsing. Enabling this feature requires two steps:

- Selecting the **Use Addressbook OCX** option on the **General** tab of the **Web Client View Properties** page
- Enabling ActiveX options on the desktop

After you complete these steps (described below), the End User Interface will have two additional buttons:

One new button checks that the current recipient is in the End User Interface user's LOCAL Address Book.

The other new button browses the End User Interface user's LOCAL Address Book to add recipients.



Step 1: Enabling the Use Addressbook OCX option:

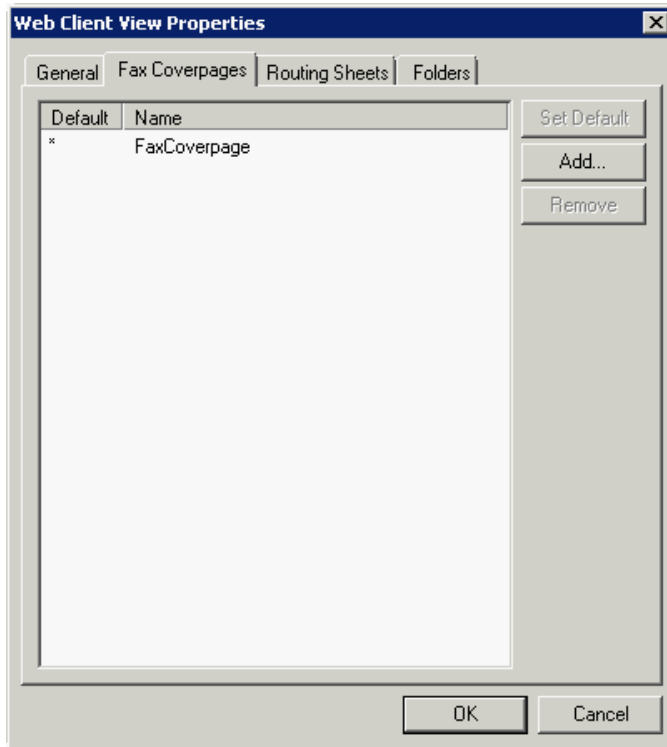
1. On the **Web Client View Properties** page (**General** tab), select the **Use Addressbook OCX** option in the **Options** section.
2. Click **OK** to save your changes.

Step 2: Enabling ActiveX options on the desktop

1. In Internet Explorer, open **Tools** and select **Internet Options**.
2. Click the **Security** tab.
3. Click **Trusted sites** (the green tick mark).
4. Click the **Sites** button.
5. Enter the Web Client URL in the **Add this website to the zone** box. Click the **Add** button to add the Web Client URL to the trusted sites.
6. Click **Close**.
7. Click the **Custom level** button.
8. Scroll down to **ActiveX controls and plug-ins** in the **Security Settings - Trusted Sites Zone** page.
9. Set the following conditions:
 - **Allow previously unused ActiveX controls to run without prompt** — select **Enable**
 - **Allow Scriptlets** — select **Enable**
 - **Automatic prompting for ActiveX controls** — select **Enable**
 - **Binary and script behaviors** — select **Enable**
 - **Download Signed ActiveX controls** — select **Enable**
 - **Download unsigned ActiveX controls** — select **Prompt**
 - **Initialize and script ActiveX controls not marked as safe for scripting** — select **Prompt**
 - **Run ActiveX controls and plug-ins** — select **Enable**
 - **Script ActiveX controls marked safe for scripting** — select **Enable**
10. Click **OK** and **Apply**.
11. Close all the instances of Internet Explorer and relaunch the site.

Making fax cover page templates available and setting a default template

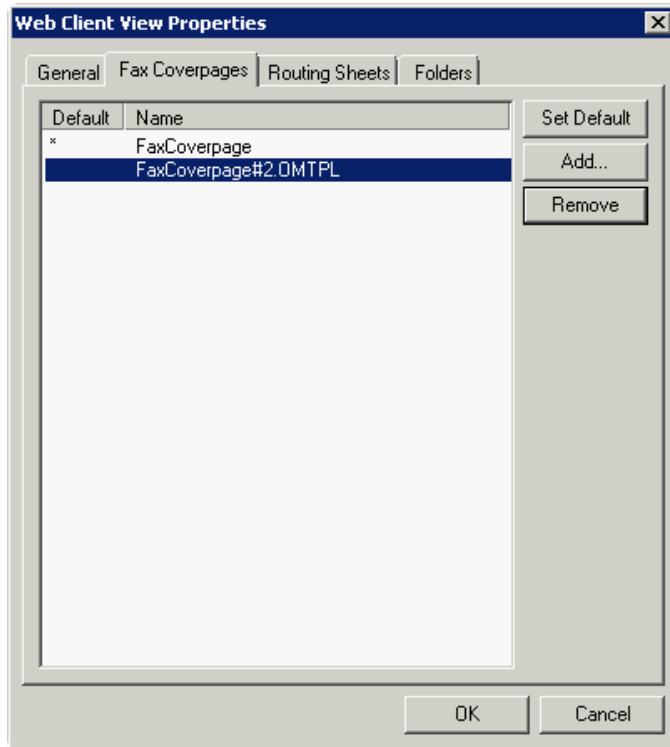
1. On the **Web Client View Properties** page, click the **Fax Coverpages** tab.



2. To add a cover page, click the **Add** button. The **Select Fax Coverpages** dialog is displayed.



3. Select a cover page file. Click **OK**. The file is added to the list. For example:

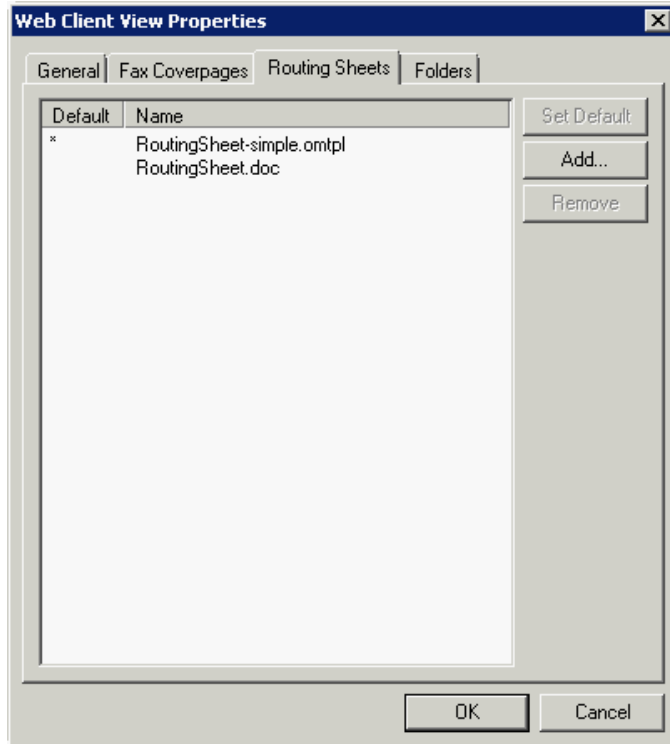


4. If you want to change the default cover page selection, highlight the name and click **Set Default**. An asterisk (*) appears in the **Default** column to the left of the cover page name.
5. Click **OK** to save your changes.

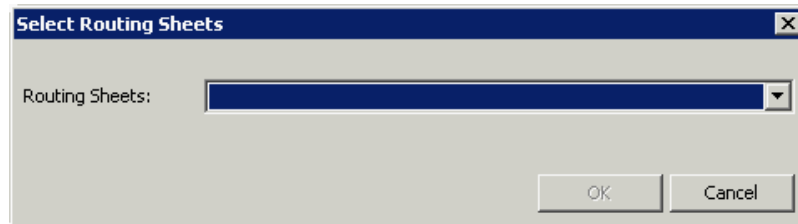
Making Routing Sheet templates available and setting a default template

NOTE: Typically, the default Routing Sheet template for Personal and Public Distributions is different from the template used for the Scan to My Files feature. See also [Setting a default Routing Sheet template for use with the Scan to My Files feature](#) (97).

1. On the **Web Client View Properties** page, click the **Routing Sheets** tab. To add a Routing Sheet, click the **Add** button.



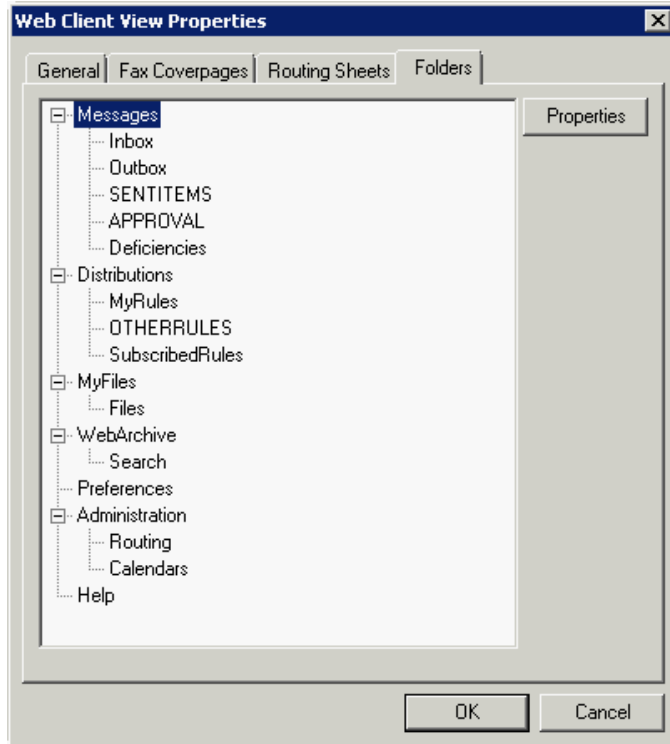
2. The **Select Routing Sheets** dialog is displayed.
Select a Routing Sheet file. Click **OK**. The file is added to the list.



3. If you want to change the default Routing Sheet selection, highlight the name and click the **Set Default** button. An asterisk (*) appears in the **Default** column to the left of the Routing Sheet name.
4. Click **OK** to save your changes.

Setting tabs/folders that are enabled and specifying a default display

1. On the **Web Client View Properties** page, click the **Folders** tab. To set the properties for a folder, click the **Properties** button.

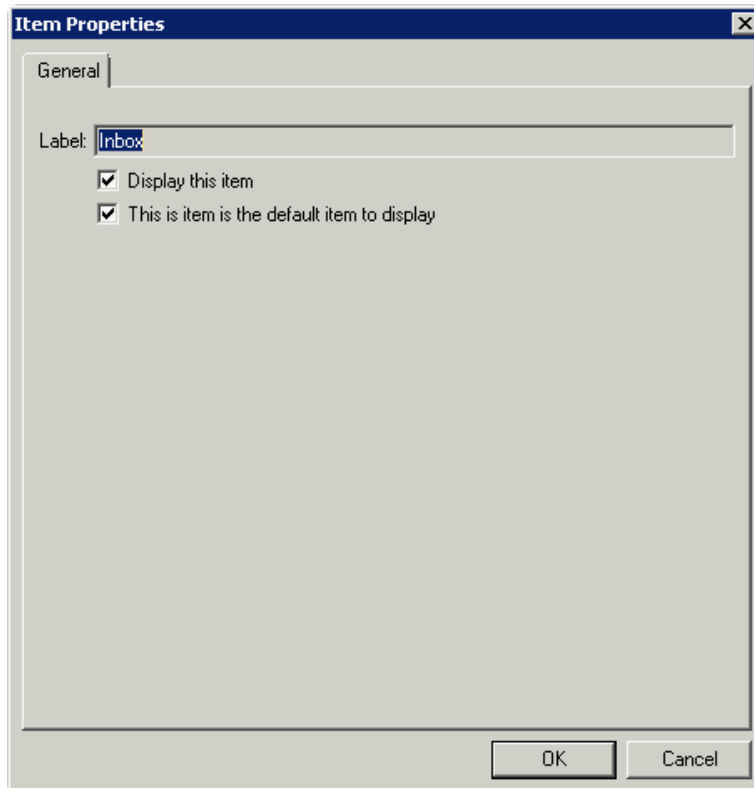


2. The **Item Properties** dialog is displayed.

For each feature (Messages, Distributions, etc.) and related folder (Inbox, Outbox, etc.), select to:

- Display the item for the end user

- Set the item as the default to display when the user starts to use the End User Interface (Only one feature and one related folder within the feature can be set as the default to display. In the example shown above, Inbox (in Messages) will display by default.)



3. Click **OK** twice to save your changes.

10-2-4-2 Modifying the View.default.xml file for secondary customized options

You can modify the **View.default.xml** file for secondary customized options. Two such options are:

- [Displaying multiple email accounts](#) (103)
- [Configuring row count](#) (104)

Displaying multiple email accounts

The HP CR Legacy Web User Interface displays all email accounts associated with a user. However, if you want, you can configure the HP CR End User Interface to display only the primary email address for each user. This is useful if users have multiple email addresses associated with their user records in Active Directory.

For example, if ABC company gets purchased by XYZ company, then some users might have two email addresses—one with the ABC domain name, and the other with the XYZ domain name. In this instance, Active Directory defines the primary email address for users as the address with the XYZ domain name. Therefore when you configure the HP CR End User Interface to display only the primary email address of each user, users see faxes associated with the XYZ address only.

To configure the HP CR Legacy Web User Interface to display only the primary email address of each user:

1. Navigate to `\\HP\WebClient\Configuration` on the system where you installed the client.
2. Open the **view.default.xml** file in Notepad.
3. Locate the `<ShowAllProxies>` node.

4. Set the value to `false`.
If you set the value to `true`, it will show all primary and secondary email addresses.
5. Save and close the file.

Configuring row count

By default, 10 documents are displayed in a page. To configure the row count, configure the folder's item attribute. Generally, there are not a lot of files for a user, as they will have a tight cleanup schedule.

1. Navigate to `\\HP\WebClient\Configuration` on the system where you installed the client.
2. Open the `view.default.xml` file in Notepad.
3. Locate the Folder node for which you want to make the changes. For example:

```
<Folder type="MyFiles" label="My Files" visible="true"
image="Myfiles.gif" default="true"
items="" sortexpression="" sortdirection="" filter="">
```

4. Enter a value for the row count in the item attribute. For example:

```
<Folder type="MyFiles" label="My Files" visible="true"
image="Myfiles.gif" default="true"
items="20" sortexpression="" sortdirection="" filter="">
```

NOTE: If no value is mentioned for the item attribute, the default value is 10.

5. Save your changes and close the file.
6. Perform an `iisreset` for the changes to take effect.

10-2-5 Optional configuration - Configuring the HP CR Server Administrator

The instructions in this section are for the HP CR Server Administrator. All configurations listed are optional and are to be used as needed.

10-2-5-1 Configuring prompts

See the [HP CR administrator online help](#).

10-2-5-2 Configuring additional custom options

See the [HP CR administrator online help](#).

11 HP CR Mobile Client

Using the HP CR Mobile Client, HP CR users can preview and send documents from their mobile device, create Mobile Reservations for future scanning, and configure Personal Distributions. Access Group and Preset Distributions can be configured by the System Administrator and made available on a permission basis. Users can also define alerts and set default preferences.

Server Administrators configure permission to use the Mobile Client in **Group Properties** on the **Configuration** node. For more information on using the Mobile Client, refer to the [HP Capture and Route \(HP CR\) User Guide](#).

When HP CR Mobile Client users make **Mobile Reservations**, they are creating a **Mobile Scan Reservation Code** for later use at an MFP inside or outside their business network. The system uses the Mobile Scan Reservation Code to appropriately distribute the submitted document information.

If you want to include remote systems in your setup or be able to accept Mobile Reservations from an external source, you must properly configure your system ahead of time. This section includes:

[Installing the Mobile Device Application](#) (105)

[Installing the Mobile Client](#) (106)

[Configuring a local IIS system for mobile connectivity](#) (107)

[Installing a remote IIS system for mobile connectivity](#) (107)

[Configuring a remote IIS system for mobile connectivity](#) (108)

[Environment configuration to support HP CR Mobile Clients](#) (108)

11-1 Requirements

- Licenses for both the Mobile Client and the Mobile Server Application
- HP CR Server v1.5.0
- Mobile device running either
 - iOS™ 6.x or higher
 - Android™ v4.4 or higher
- Mobile Client application downloaded directly to your device from either
 - iTunes Store®
 - Google Play™ store

11-2 Installing the Mobile Device Application

The HP CR v1.5.0 installation program includes the **Mobile Client** and the **Mobile Device Application** (API). You need to install the HP CR Mobile Device API prior to setting up the Mobile Client.

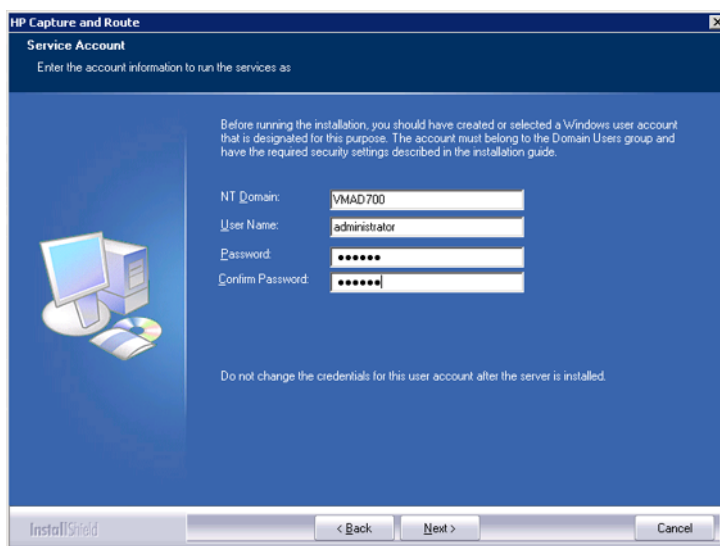
NOTE: You can remotely install the Mobile Device API to a separate server. Depending on the needs of your organization, you may prefer to do so for security purposes.

To install the Mobile Device API:

1. First, you need to change the DCOM login on the installation server to use the Computer Account instead of the Service account.
2. Refer to steps 1 through 8 in [Installing the HP CR server](#) (12) and return here.
3. At Step 8, on the **Setup Type** screen, select **Custom**. All options for the HP CR server installation are selected by default.
4. Clear all options *except* the **Mobile Device API**. To continue the installation, click **Next**.
5. The **Prerequisites** screen appears as the installer compares your configuration with the required setup components and lists the results. Click **Next**.
6. In the **Service Account** screen, the setup requests logon credentials for the HP CR computer account. By default, the **User Name** field is populated with the name of the user logged into Windows.

Provide the HP CR computer account logon credentials:

- a In the **NT Domain** field, enter the Windows domain name.
- b In the **User Name** field, enter the computer name.
- c In the **Password** and **Confirm Password** fields, enter the user password.
- d Click **Next**.



7. The setup validates the user account, and you can review the installation settings on the **Installation Settings** screen. Click **Next** to proceed with the installation.
8. Progress details appear on the **Setup Status** screen.
9. The **InstallShield Wizard Complete** screen appears. Click **Finish**.

11-3 Installing the Mobile Client

To download the **Mobile Client** application to your device, download it directly from either the iTunes Store or Google Play onto your device.

11-4 Configuring a local IIS system for mobile connectivity

The Mobile IIS virtual pages are installed by default with the HP CR Server installation. No configuration is required if this system is local to the HP CR Server.

11-5 Installing a remote IIS system for mobile connectivity

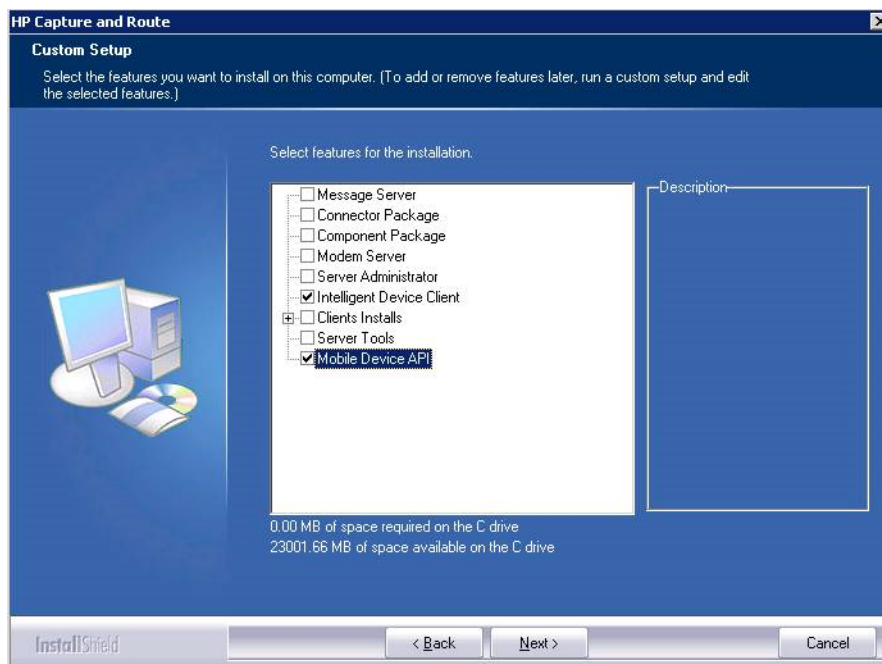
In a process similar to installing the remote Intelligent Device Client, you must first install the Mobile Device client on the remote system, and then complete the configuration below. To set up a remote IIS system for Mobile connectivity:

1. Log in to the system using an account that belongs to the HP CR Administrators group.
2. Navigate to the network where the HP CR server setup files are located.
3. Run:

`\MessageServer\setup.exe`

The **InstallShield** wizard opens, configures your system, and displays the welcome message.

4. Click **Next**. The setup shows the **License Agreement** page.
5. Read the agreement and select **I accept the terms of the license agreement** option.
6. Click **Next**. The setup shows the installation options.
7. Select **Custom** and click **Next**. The setup shows a list of HP CR features.
8. Select the **Intelligent Device Client** and the **Mobile Device API** for installation and install them on the remote IIS server.



9. Click **Next**. The setup checks the system for installation requirements and displays the results.

NOTE: The setup cannot continue until all prerequisite components are installed. (Double-click an item in the list for more information.) If any required components are missing, click **Cancel** and exit the installation setup. Install the components, then install the HP CR Mobile Device API.

10. Click **Next**. The setup shows installation settings.
11. Review the installation settings. Click **Next** to start the installation. The setup installs the selected component and displays a message indicating that the installation is complete.
12. Click **Finish**.
13. Continue to configure remote connectivity, as described below.

11-6 Configuring a remote IIS system for mobile connectivity

To allow connectivity between the Mobile Client and a remote IIS system:

1. Once the installation is complete, go to `C:\Program Files (x86)\HP\HPCR\WebAPI\MobileWebAPI\Scripts`, where you must open and modify the `omISAPIU.xml` file.
2. In the `omISAPIU.xml` file, you need to edit the server name from that of your remote IIS Server, which appears by default, to your HP CR server name.

For example, the default `omISAPIU.xml` file content includes:

```
</Server>
<Server Name="OmtoolServer">
  <ServerName>REMOTE IIS Server name</ServerName>
</Server>
```

Change the text to the following:

```
</Server>
<Server Name="OmtoolServer">
  <ServerName>HPCR Server Name</ServerName>
</Server>
```

3. For user access to the Mobile Device Client, connect to the HP CR server with the following login path: [HTTPS://RemotellSserverName/Mobile](https://RemotellSserverName/Mobile)

11-7 Environment configuration to support HP CR Mobile Clients

Before you begin, you may want to create a secure connection for communications between Mobile Clients and your office environment. To do so, you need to modify the default IIS configuration from using HTTP to using HTTPS. For more information, see [Configuring the Mobile Client environment to support HTTPS](#) below.

To set up your system for incoming Mobile Reservations from an external source, you need to define a recipient for them in your email management system. You also need to be able to forward the messages to the HP CR server for processing.

NOTE: The steps outlined below use Microsoft Exchange as an example for configuring the email management system. Reference your email vendor's documentation for more specific information.

The recipient email address you create needs to be associated with a user group in the HP CR Server Administrator. You also need to create an outbound rule to handle the messages from the Mobile Client.

Once your system is configured, Mobile Client users can send a scanned message to the recipient email address using the Mobile Reservation Code as the subject line text.

To configure your environment, see:

- [Configuring the Mobile Client environment to support HTTPS](#)
- [Configuring the email management system](#)
- [Configuring the HP CR server](#)

11-7-1 Configuring the Mobile Client environment to support HTTPS

To create a secure connection between your office environment and Mobile Clients connecting from outside your LAN, you must modify the default IIS configuration from using HTTP to HTTPS.

Changing your configuration to HTTPS requires you to request, download and install an **SSL certificate** from a trusted Certificate Authority (CA). Refer to the CA you select for specific certificate installation instructions.

NOTE: iOS devices include certificates from several trusted Root Certificate Authorities (CA). For a list of supported CA's, go to <http://support.apple.com/kb/ht5012>.

The basic steps to acquire an SSL certificate are as follows:

1. Request your SSL Certificate from the CA.
2. Once your request is approved by the CA, you can download and install the certificate on your IIS web server. This enables Secure Socket Layer (SSL) for your IIS system.
3. To verify your installation, visit your website using HTTPS.

11-7-2 Configuring the email management system

In your email management system, use the steps below to

- define a recipient email address for Mobile Reservation scan messages, and
- forward those messages to the HP CR server for processing.

NOTE: The steps outlined below use Microsoft Exchange as an example for configuring the email management system. Reference your email vendor's documentation for more product-specific information.

1. Open the **Exchange Management Console**, and create a new **Mail Contact** from the **Recipient Configuration** section.
2. While entering information on the **New Mail Contact** page, be sure that when you enter the new contact's **External email address** you assign it to the internal address of your HP CR server. For example: mobilescan@hpcrsrv.omtool.com

3. After you create the new Mail Contact, return to the contact **Properties** and add your **email domain** as a **secondary email address**. This allows it to be accessed from outside your organization. For example: mobilescaan@omtool.com will now forward to mobilescaan@hpcrsrv.omtool.com (the HP CR server).

11-7-3 Configuring the HP CR server

You can configure the HP CR Server for Mobile Reservations by associating the new recipient email address with specific user groups and creating an outbound rule to handle Mobile Reservation messages.

11-7-3-1 Group properties

To assign the new external email address to specific user groups:

1. Open the **HP CR System Administrator** and select **Groups**.
2. Right-click the group of interest and select **Properties**.
3. In the **Mobile** tab, select **Enable members of this group to use the mobile client**.
4. Enter the external email address (created in step 2 of [Configuring the email management system](#) above) in the **Scans to Email** field and click **OK**.

11-7-3-2 Outbound rule

To create an outbound rule for handling Mobile Reservation messages:

1. Open the **HP CR System Administrator**, expand the **Rules** node and select **Outbound**.
2. Right-click **Outbound** and select **New > Rule**. The **Create New Rule** screen appears.
3. Click **Add**. The **Add Rule Criteria** screen appears.
4. Select **Destination is an e-mail address** and click **Next**.
5. In the **Items to Match** screen, select the **is** radio button and enter the **External email address** in the text box.
6. Click **Add** and then click **Finish**.
7. Returning to the **Specify the Criteria for this Rule** screen, click **Next**.
8. In the **Specify actions to take for this Rule** screen, click **Add**. The **Add Rule Action** screen appears.
9. Select **Route to Embedded Directive Manager** and click **Next**.
10. The **Route to Embedded Directive Manager** screen appears. Select **Scan subject line for Reservation Code** and click **Finish**.
11. Click **Next**, **Next**, and **Finish**.

NOTE: See the [HP CR administrator online help](#) for optional server configuration for use with the HP CR Mobile Client.

12 HP CR for Microsoft SharePoint

HP CR enables Microsoft SharePoint users to import hardcopy documents into SharePoint libraries. The process is driven from the native SharePoint user interface using its screens and menus. HP CR can convert the scanned documents into text-searchable format (PDF or DOC), and then save the resulting document into the proper SharePoint library, fully profiled and stored alongside other electronic content. Once imported, you can browse through the document libraries to locate these documents, or use SharePoint enterprise search capabilities.

12-1 Microsoft SharePoint requirements

HP CR for Microsoft SharePoint can be installed on any of the following supported Microsoft SharePoint environments:

- Microsoft SharePoint Server 2013
- Microsoft SharePoint 2010

12-2 Installing HP CR for SharePoint client on the Microsoft SharePoint server

1. Log in to the Microsoft SharePoint Server system using an account that belongs to the Administrators group.
2. Navigate to the HP CR server system and find the following directory:
`\\HP\Clients\Extensions for MS SharePoint`
3. Run `Setup.Exe`. The setup configures your system and opens the **InstallShield** wizard showing the **Welcome** message.
4. Click **Next**. The **Specify URLs** page opens.
Enter the HP CR Client URL. This is usually:
`http://HP CR Server Name}/WebClient`
Enter the specific SharePoint site URL or sub-site URL. For example:
`http://vmsharepoint201/sales`
5. Click **Next**. The **Ready to Install the Program** page opens.
6. Click **Install** to begin the installation. When installation is complete, you will see the **Installation Completed** message.
7. Click **Finish** to close the **InstallShield** wizard.

12-3 Configuration

12-3-1 Disabling the pop-up blocker in Internet Explorer

This required configuration will allow HP CR to access the SharePoint dialog. This procedure needs to be applied to each user's system.

1. Open Internet Explorer (v7.0 minimum).
2. Select **Tools** from the menu bar.
3. Select the **Turn Off Pop-Up Blocker** option from the **Pop-Up Blocker** node.

12-3-2 Configuring the HP CR connector for Microsoft SharePoint

This required configuration is done from the HP CR server. All documents that are processed by the HP CR server are sent to Microsoft SharePoint via the HP CR Connector for MS SharePoint.

1. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator**.
2. Right-click **Connectors** and select **New HP Capture and Route connector for > MS SharePoint**.
3. The **Server Address** page appears. **Run on the message server** is the default choice. Click **Next**.

Alternately, if you want the connector to run on a remote server, select **Remote Server**, enter the server name and click **Next**.

4. The **Display Name** page appears. In the **Name** text box, enter an appropriate name and click **Next**.
5. The **Congratulations** page appears. Click **Finish**.
6. The **DMS Configuration** page appears.

7. In the **SharePoint Location** text box, enter the location of the Microsoft SharePoint document library (for example: https://server/site/document_library).

NOTE: If you are configuring your system with SharePoint 2013, an incorrect URL appears as the default **SharePoint Location** value. For example: http://omtool1td.sharepoint.com/_layouts/15/start.aspx#/Shared%20Documents.

You must edit the URL creating a pure directory path to, for the same example: <http://omtool1td.sharepoint.com/Shared%20Documents>

In this example, we removed `/_layouts/15/start.aspx#` from the path.

8. Select **Connect using current user**.
9. Click **Finish** to complete the DMS configuration.

12-3-3 Configuring full control permissions for members of the group

This can be run from any system that is logged in with SharePoint Administrator credentials.

1. Launch the SharePoint site in Internet Explorer.
2. Click the **Site Actions** drop-down and select the **Site Settings** option.
3. Select the **People And Groups** option in the **Users and Permissions** column.
4. Select the **Home Owners** option in the **Groups** section.
5. Click on **New** and select the **Add Users** option.
6. In the **Under User/Groups** field, add users and check for the required members.
7. Click **OK** to save your changes.

Full Control permissions are available to the selected members of the group.

12-3-4 Setting PDF documents to append date/time stamp for unique file name

By default, Routing Sheets should be set as single use, to avoid documents being overwritten. In some environments where PDF is used as the final format, the configuration.xml file can be modified to append a date/time stamp to the imported document creating a unique file name that will result in a new file added to the SharePoint.

1. On the SharePoint server, find the Configuration.xml and open it in Notepad:

```
C:\Program Files\Common Files\Microsoft Shared\Web Server  
Extensions\12\14\TEMPLATE\FEATURES\MessageServer
```
2. Locate the `<Recipient Destination>` tag of the configuration.xml file and REMOVE the following:

```
<prDMSDocumentUpdateOptions>1</prDMSDocumentUpdateOptions>
```

3. Find the `<Recipient>` tag of the configuration.xml file and add the following:

```
<prDMSDocumentUpdateOptions>4</prDMSDocumentUpdateOptions>
```

The values equal:

- 4 = create new document
- 1 = overwrite document

NOTE: Only documents that are PDF final formats can have the date and time appended to the file name.

13 HP CR for iManage Extensions

HP CR enables iManage users to import hardcopy documents into iManage libraries. The process is driven from the native iManage user interface using its screens and menus. HP CR can convert the scanned documents into text-searchable format (PDF or DOC), and then save the resulting document into the proper iManage library, fully profiled and stored alongside other electronic content. Once imported, you can browse through the document libraries to locate these documents, or use iManage enterprise search capabilities.

A user within the FileSite or DeskSite client interface can select an **Import Scan** option to specify profile information for the document that will be scanned later. When the document is scanned, it is uploaded to iManage in the target folder with the specified profile information. The scan can be accomplished using an HP MFP or other network-connected scanning device.

The **Send to HP CR** option also is available from FileSite or DeskSite. With this option, a user can extract one or more documents from the iManage repository and have these documents uploaded and attached to a new message composed using the HP CR Web Client.

13-1 iManage requirements

HP CR v1.5.0 support for iManage includes:

- FileSite v8.5 - v9.0
- DeskSite v8.5 - v9.0

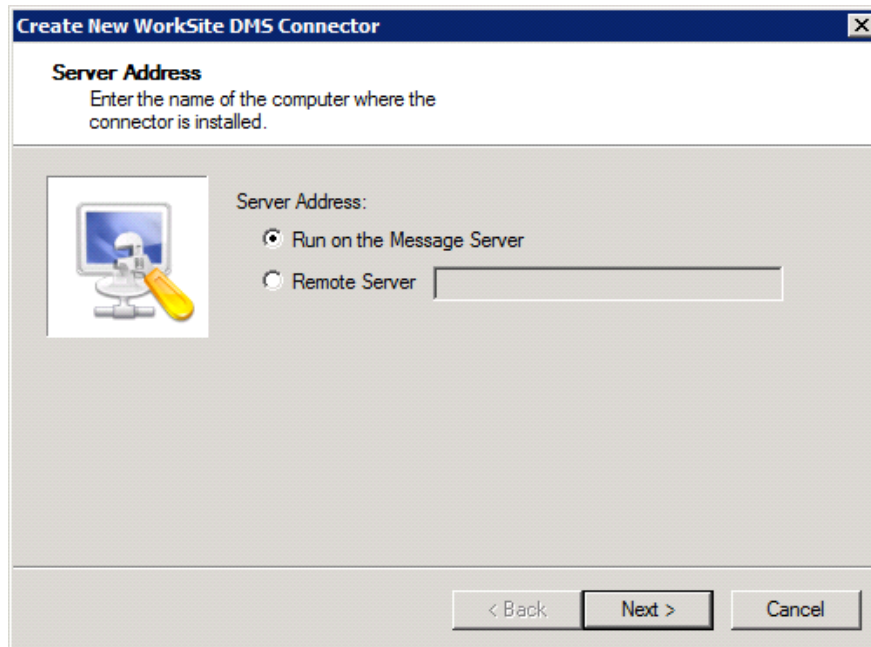
13-2 Installing the iManage Extensions client on the DeskSite or FileSite client system

1. Log in to the system using an account that belongs to the Administrators group.
2. Navigate to the HP CR server system and find the following directory:
`\\HP\HPCR\Clients\Extensions for iManage`
3. Run `Setup.Exe`. The setup configures your system and opens the **InstallShield** wizard to the **Welcome** message.
4. Click **Next**. The **Web Client URL** screen opens.
In the **Enter Web Client URL** field, enter the Server name. For example:
`http://[ServerName]/HPCR`
5. Click **Next**. The **Destination Folder** screen opens. Optionally, you can change the Destination Folder's location.
6. Click **Next**. The **Ready to Install the Program** screen opens.
7. Click **Install** to begin the installation. When installation is complete, the **Installation Completed** message appears.
8. Click **Finish** to close the **InstallShield** wizard.

13-3 Setting up end user extensions

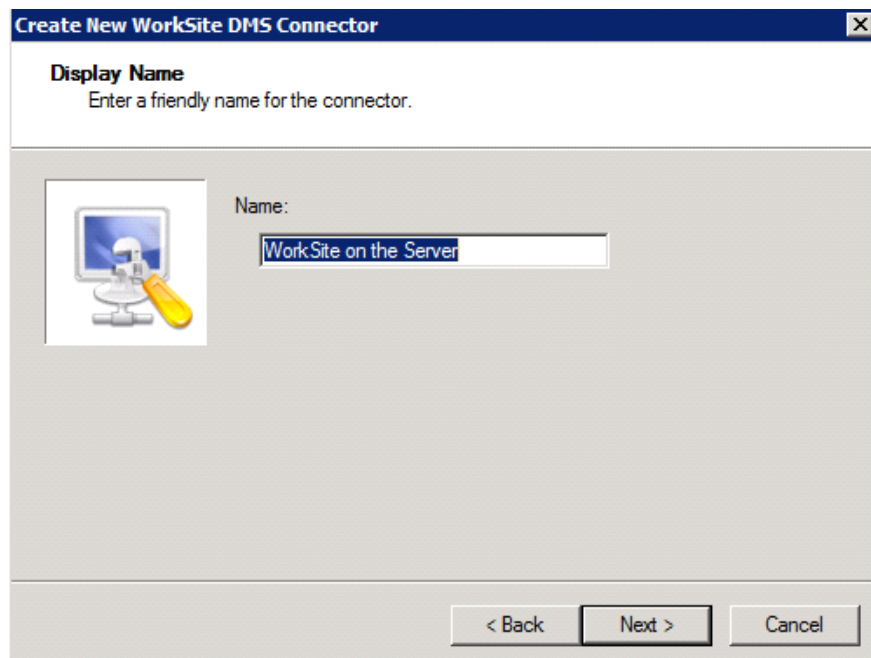
This required configuration is done from the HP CR server. All documents that are processed by the HP CR server are sent to iManage via the iManage (DMS) connector.

1. In the HP CR Server Administrator, right-click on the **Connectors** node and select **New HP Capture and Route connector > WorkSite**. The **Create New WorkSite DMS Connector** screen appears.
2. Select the **Run on the Message Server** option or specify a remote server.



The screenshot shows a dialog box titled "Create New WorkSite DMS Connector". The main heading is "Server Address" with the instruction "Enter the name of the computer where the connector is installed." Below this is a computer icon and a "Server Address:" label. There are two radio button options: "Run on the Message Server" (which is selected) and "Remote Server" (which is unselected). A text input field is present next to the "Remote Server" option, which is currently empty. At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

3. Click **Next**. On the **Display Name** screen, enter a name for the connector and click **Next**.



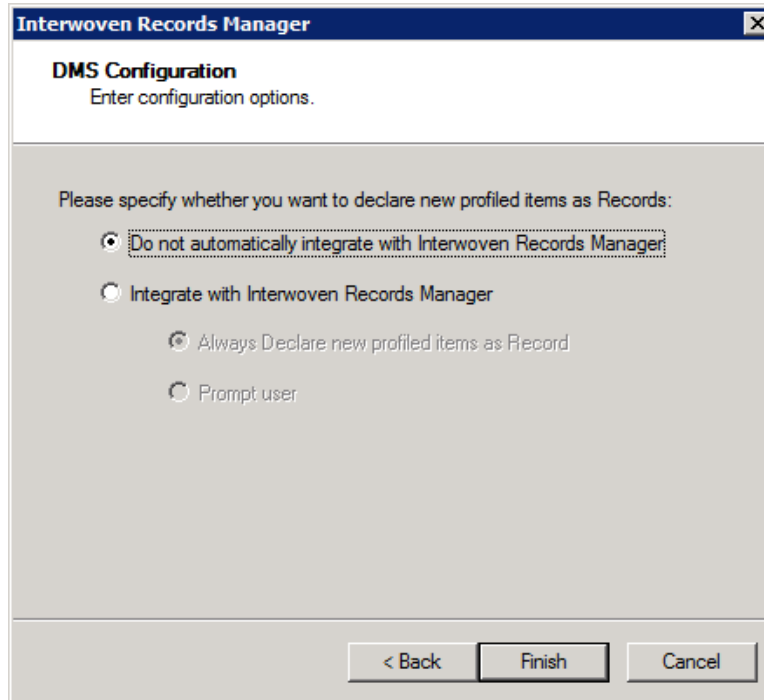
The screenshot shows the same dialog box, now on the "Display Name" screen. The main heading is "Display Name" with the instruction "Enter a friendly name for the connector." Below this is a computer icon and a "Name:" label. A text input field contains the text "WorkSite on the Server". At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

- On the **Congratulations** page, click **Finish** to create the connector. The **WorkSite Login Configuration** screen appears.

- Enter a **WorkSite Server**.
- Enter the user name and password for a **Specific User**.
Or, select the **Use Trusted Login** option.
- Click **Next**. The **WorkSite Configuration** page appears.

- Select options for the **Login configuration** and **Profile type**.

9. Select the **Placeholder** option if you want to retain placeholder profiles in iManage after creating an Embedded Directive.
10. Click **Next**. The **Interwoven Records Manager** screen appears.



11. Select whether or not you want to declare new profiled items as Records and integrate with Interwoven Records Manager.
12. Click **Finish** to complete the configuration.

14 HP CR Server Monitor

HP CR Server Monitor is a stand-alone application that monitors various components of an HP CR server. It executes custom-created tests to detect workflow bottlenecks and system failures.

Conditions that can be monitored include the message database size, available disk space on the HP CR server, Send and Receive folder sizes, HP CR services status, and connectors status. Additionally, with its versatile monitoring capabilities, HP CR Server Monitor runs test in specified frequencies; maintains a suspend schedule; supports custom actions for each test which can include sending e-mail notifications, writing entries to the event log, and changing the status of HP CR services; supports custom email addresses for the source and destination of notification messages; and monitors HP CR server clusters.

HP CR Server Monitor consists of:

- **HP CR Server Monitor Administrator** - A snap-in to the Microsoft Management Console, the Administrator plays two essential roles. First, it serves as the user interface where you create “tests” for each HP CR server you monitor. (Each test consists of criteria and at least one action.) Second, the Administrator connects to the HP CR Server Monitor Service. Because the HP CR Server Monitor Administrator can run on a different system than the HP CR Server Monitor Service, you can manage your server monitoring methods from another Windows system in the local area network, including your desktop.
- **HP CR Server Monitor Service** - This Windows service performs all monitoring activities from a high-availability server. It logs on to the HP CR server using the HP CR server account, which has DCOM access and launch permissions on the HP CR server, and then executes the tests created in the Administrator.

This section provides details on installing and using HP CR Server Monitor, an application that monitors the HP CR server environment. This information is written for an advanced computer user or network administrator with working knowledge of the HP CR server environment.

[Requirements](#) (121)

[Installing HP CR Server Monitor](#) (122)

[Required configuration](#) (123)

For additional information (including optional configuration and troubleshooting), refer to the [HP CR administrator online help](#).

14-1 Requirements

14-1-1 HP CR Server Monitor service requirements

The system where the HP CR Server Monitor Service is installed must meet these minimum requirements:

- Windows NT domain computer that always runs in the same domain as the HP CR server and is not a domain controller, an HP CR server, or a remote server
- Pentium III-compatible processor, 1 GHz, 512 MB RAM, 20 GB available hard disk space, CD-ROM drive, and Microsoft mouse or compatible pointing device
- Windows 2012 (64-bit), Windows 2008 (64-bit)
- IIS configured for SMTP mail delivery

14-1-2 HP CR Server Monitor Administrator requirements

The system where HP CR Server Monitor Administrator is installed must meet the following minimum requirements:

- Windows NT domain computer that belongs to the same domain as the HP CR server
- Pentium III-compatible processor, 1 GHz, 512 MB RAM, 200 MB hard disk space, CD-ROM drive, and Microsoft mouse or compatible pointing device
- Windows 2012, Windows 2008 R2

14-1-3 Additional installation requirements

HP CR Server Monitor also requires the following:

- HP CR service account or another account that belongs to the HP CR Admins group on the HP CR server

14-2 Installing HP CR Server Monitor

HP CR Server Monitor is installed with two components: HP CR Server Monitor Administrator and HP CR Server Monitor service. The HP CR Server Monitor service, a Windows service that monitors the HP CR server environment, is installed on one system only. The HP CR Server Monitor Administrator can be installed multiple systems so that one or more administrators can conveniently manage HP CR Server Monitor.



TIP: HP CR Server Monitor Administrator and HP CR Server Administrator are snap-ins to the Microsoft Management Console. Both snap-ins are supported on the same system so that administrators can manage the HP CR server and the application that monitors it from the same location.

The HP CR Server Monitor setup files are installed on the HP CR server in a folder that is not shared by default. Before installing HP CR Server Monitor, log on to the HP CR server using an account that belongs to the local Administrators group, share

`C:\Program Files (x86)\HP\HPCR\Tools\ServerMonitor`

and give the HP CR Server Monitor installation user read access to the share.

To install HP CR Server Monitor:

1. Log on to the system where HP CR Server Monitor is being installed using an account that belong to the local Administrators group:

`C:\Program Files (x86)\HP\HPCR\Tools\ServerMonitor`

Copy the setup files to the system where HP CR Server Monitor is being installed.

2. Run **setup.exe**. The setup starts and displays a welcome message.
3. Click **Next**. The setup shows the license agreement.
4. Read the license agreement and click **Yes** if you agree to the terms. The setup shows setup options.
5. Click **Next**. The setup requests logon credentials for the HP CR Server Monitor Service.

NOTE: To install only the HP CR Server Monitor Administrator, select **Custom**. Clear **Server Monitor Service** and click **Next**. Go to step 7.

6. Enter the logon credentials of the HP CR service account or another account that belongs to the HP CR Admins group on the HP CR server, and click **Next**. The setup shows installation settings.
7. Review the installation settings and click **Next** to begin the installation. The setup shows a message indicating that the installation is complete.
8. Click **Finish**.

14-3 Required configuration

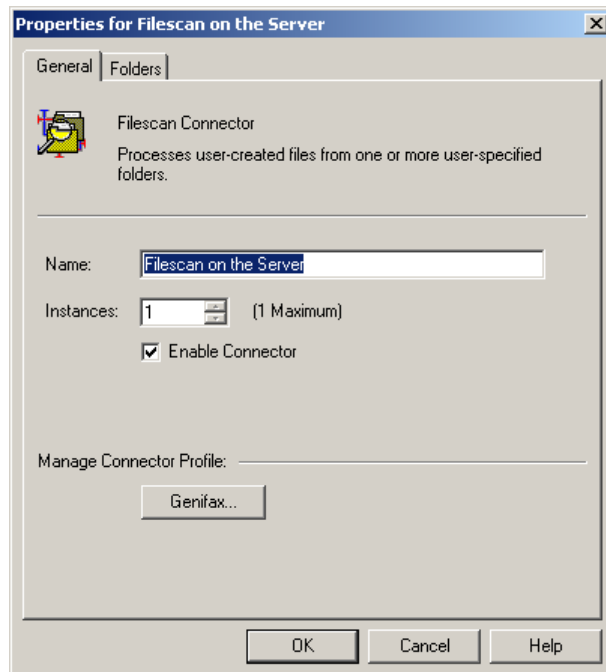
14-3-1 Configuring HP CR connectors for Filescan and Telco

HP CR Server Monitor can run tests on folders associated with HP CR connectors for Filescan and Telco. In order to run tests on these folders, the folders must be configured in UNC format. (UNC uses the format `\\computer\folder`. Drive letter mappings, such as `G:\folder\folder`, are not supported.) If an HP CR server has either of these connectors, complete the required configuration in this section.

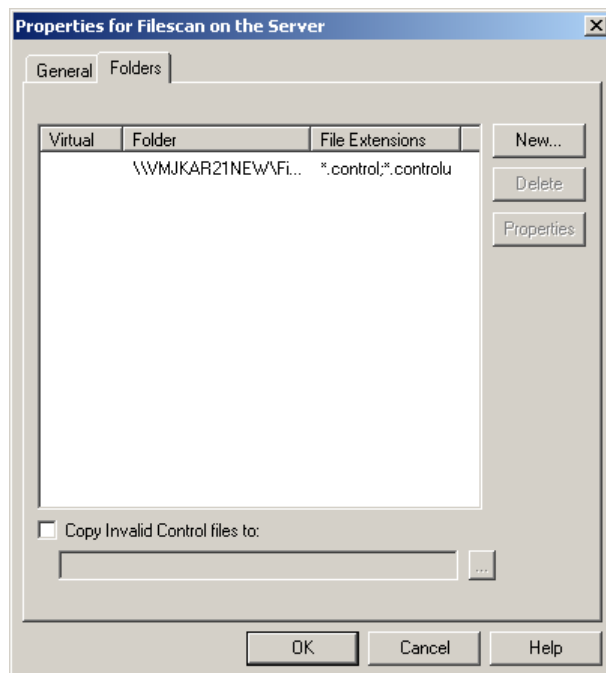
NOTE: If you configure HP CR Server Monitor to run tests on a folder, verify that the Windows user account associated with the HP CR Server Monitor Service has sharing permissions on that folder and security permissions with read access.

14-3-1-1 Configuring the Filescan connector folders with UNC paths

1. Click **Connectors** in the console tree and double-click the **Filescan** connector in the details pane.



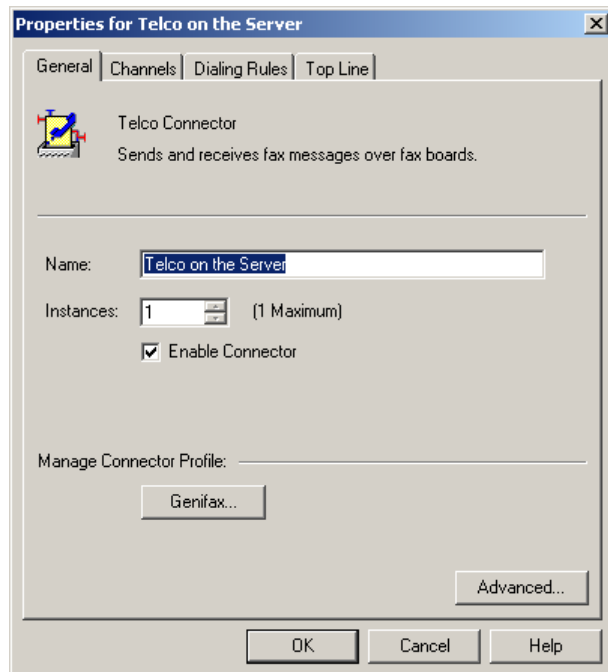
2. Click the **Folders** tab.



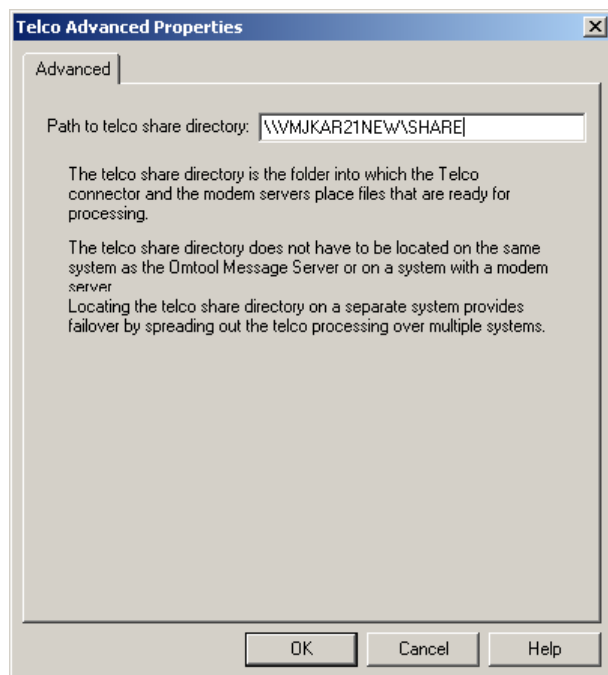
3. Verify that each folder has been configured with a UNC path. (If you need to change a folder configuration, select the folder and click **Properties**. Type the UNC path to the folder in the Folder to scan field and click **OK**.)
4. Click **OK** to save your changes to the connector.

14-3-1-2 Configuring the Telco connector with a UNC path

1. Click **Connectors** in the console tree and double-click the **Telco** connector in the details pane.



2. Click **Advanced** on the **General** tab.



3. Verify that the path to the Telco share directory is in UNC format. Change it if necessary, and then click **OK**.
4. Click **OK** to save your changes to the connector.

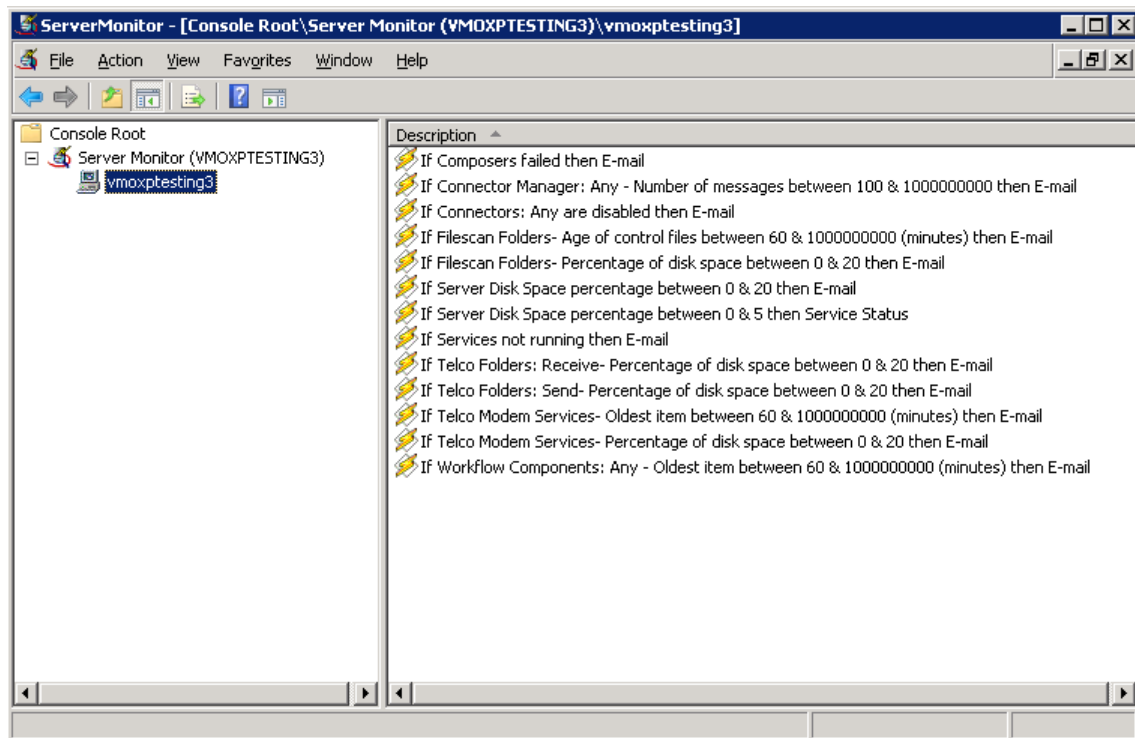
14-3-2 Configuring HP CR server properties

After you add an HP CR server to the HP CR Server Monitor Administrator, right-click the server (or, highlight the server and click **Action** on the toolbar) to open the available options menu.

The available options are:

- **Properties** - Select this menu item to configure options on the General and Suspend Monitor tabs.
- **Remove** - Select this menu item to remove the server from the HP CR Server Monitor Administrator.
- **New** - Select this menu item to create a new test.

Figure 14-1 HP CR Server Monitor Properties



14-3-3 Clustering

When adding a clustered server to the HP CR Server Monitor Administrator, it must be active. The server icon in the HP CR Server Monitor Administrator changes when you add a clustered server.

If you are using a clustered server environment, please consider the following while configuring HP CR Server Monitor:

- You need to cluster a server before you add it to the HP CR Server Monitor Administrator.
- Make sure you add the preferred server in the cluster to the HP CR Server Monitor Administrator.
- If the failover time in a clustered environment exceeds 90 seconds, HP CR Server Monitor performs all actions specified in the Cluster Failover Action option located on the server properties General tab. It also performs all these actions if both the preferred and secondary servers are shut down.
- After control is moved from the preferred server to the secondary server, the test will be performed for the backup server, but the stored configurations are not updated with the backup server name.

14-3-4 Defining sender and recipient email addresses

When you add a server to the HP CR Server Monitor Administrator, you are prompted to enter two email addresses in the Default Test Criteria screen.

Figure 14-2 Default Test Criteria screen

The email address in the **From** field is used as the default sender's email address whenever you add a new email action for your test criteria.

The email address in the **To** field is used as the default recipient's email address whenever you add a new email action for your test criteria.

NOTE: The **From** and **To** email addresses are also used for email notifications of critical errors in a clustered environment.



TIP: You can enter multiple email addresses in the **To** field by separating each email address with a semicolon (;), or you can enter a distribution list address. Distribution list aliases are not supported.

You can update the email addresses in the server properties at any time, as well as override the default email addresses when creating new test criteria.

14-3-5 Defining server properties: The General tab

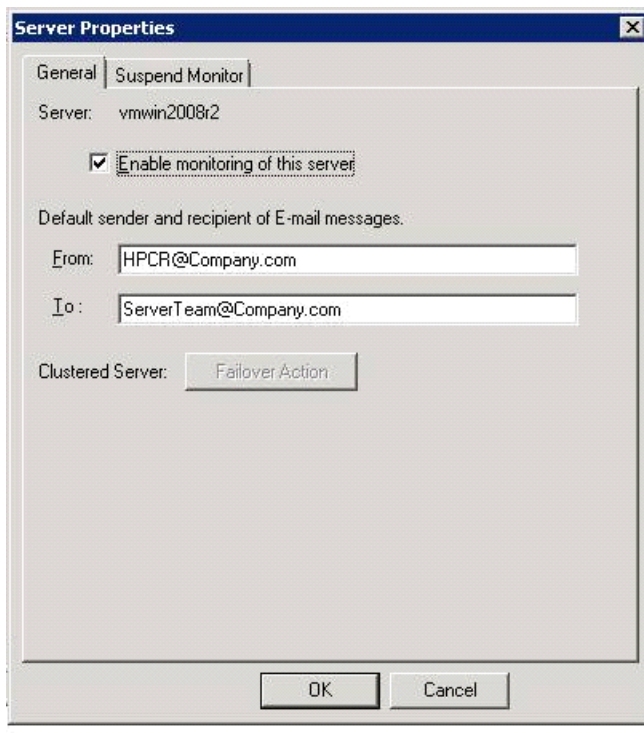
The **General** tab is where you define server properties in the HP CR Server Monitor.

14-3-5-1 Opening the General tab

Right-click the server and select **Properties**. (Or, highlight the server, click **Action** on the toolbar, and select **Properties**.) The General tab is selected by default.

On this tab, you can:

- Enable or disable monitoring of this server by selecting or clearing **Enable monitoring of this server**. The icon displayed in the HP CR Server Monitor Administrator changes based on your selection.
- Change the sender and recipient email addresses. You defined these email addresses when you added the server to the HP CR Server Monitor Administrator.
- Define actions for when a failover occurs.



TIP: You can enter multiple email addresses in the To field by separating each email address with a semicolon (;), or you can enter a distribution list address. Distribution list aliases are not supported.

14-3-5-2 Defining failover actions

In a clustered environment, you can define the actions that happen when a failover event occurs in the cluster. For example, you can define a Failover Action that sends an email if the secondary server takes over from the preferred server.

1. Click **Failover Action** on the Server Properties General tab. The Cluster Failover Action screen appears.
2. Specify the actions to take when a failover occurs.

Complete the wizard for the action you specified.

14-3-6 Optional configuration

For additional, optional configuration procedures, refer to the [HP CR administrator online help](#).

Part III:
Additional information

15 Setting up an HP CR Server Cluster

This section describes the following:

[Introduction to Failover](#) (131)

[Requirements for an HP CR server cluster](#) (133)

[Installing and configuring the cluster server](#) (134)

[Setting up the Database server](#) (134)

[Setting up the Active server](#) (135)

[Applying licenses](#) (138)

[Setting up the Passive server](#) (139)

[Setting up the Telco share](#) (141)

[Creating the Telco share](#) (141)

[Configuring the HP CR connector for Telco to use the Telco share on the Database server](#) (141)

[Testing the failover configuration](#) (142)

[Optional configurations for cluster environments](#) (143)

15-1 Introduction to Failover

Automatic failover, a native HP CR capability, ensures seamless and immediate recovery from a localized system failure on the HP CR server. It requires two redundant HP CR servers that are joined to form an HP CR server cluster, and a third system where critical server resources are stored.

The redundant HP CR servers are referred to as:

- **Active server** - the current HP CR server
- **Passive server** - the standby server

The third system that stores critical resources is called the "Database server" because it hosts the server databases along with server configuration files. If the HP CR server is enabled for faxing, the Database server also hosts the Telco share, which is an intermediary repository for inbound and outbound faxes. (The Database server can also function as a remote server such as remote administrator, remote composer, or remote modem server.)

In some environments, where multi-function devices are used, a fourth system - Remote IIS - can be added to host the HP CR Intelligent Device client and specific HP CR device client installs.

Failover is driven by the HP Cluster Service which is installed on the HP CR server. (This service does not appear in the Services applet because it is not registered by default.) When an HP CR server cluster is created, this service is immediately registered and runs simultaneously on both HP CR servers in the cluster. During regular operation, the active server in the HP CR server cluster continuously writes to the server databases while HP Cluster Service on the passive server polls the Database server in 45-second intervals to verify that the active server remains active.

When a localized system failure occurs on the active server, it loses communication with the Database server and cannot write to the server databases. As soon as the HP Cluster Service on the passive server polls the Database server again and finds no recent activity from the active server, the HP Cluster Service on the passive server starts all its local HP CR services and becomes the active server in the cluster. The transition is complete within 1 to 3 minutes of the failure.

Figure 15-1 HP CR server cluster basic setup

An HP CR server cluster has two redundant HP CR servers referred to as the active server and passive server, and a third system that stores critical HP CR server resources called the database server.

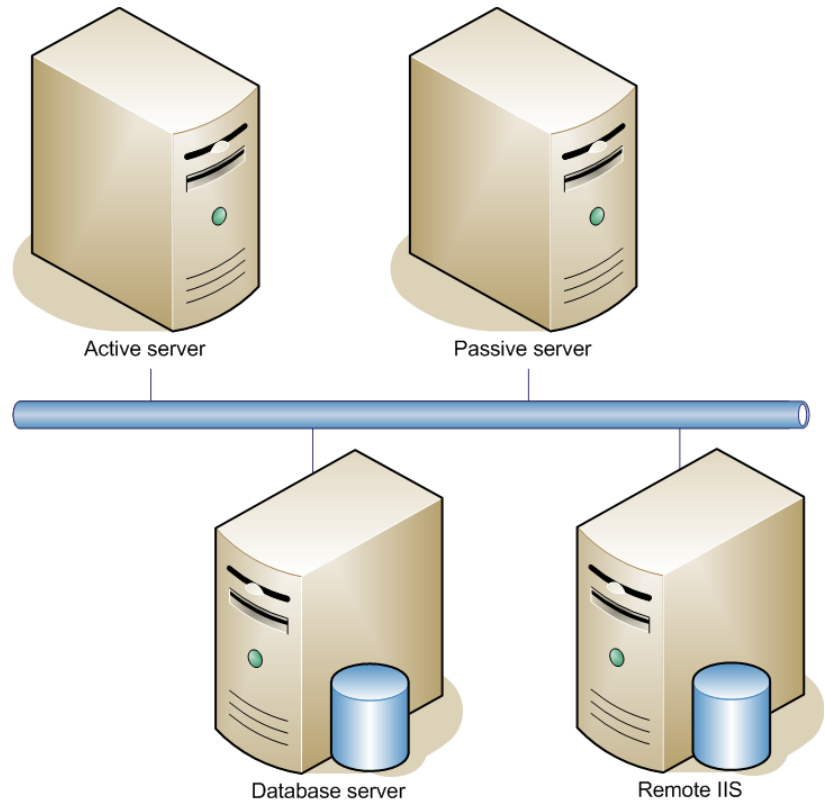
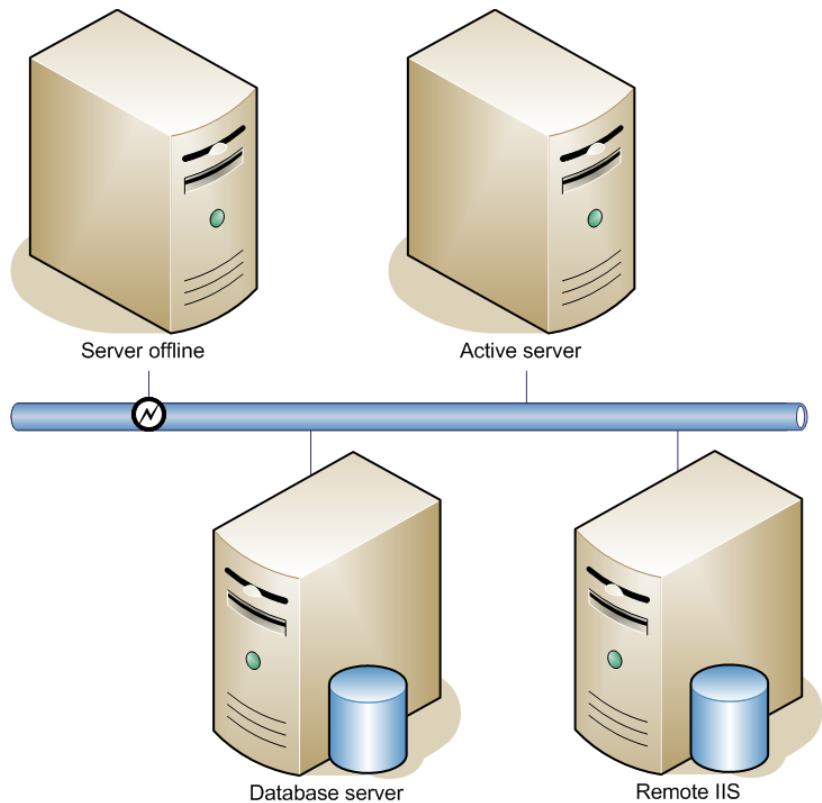


Figure 15-2 HP CR server cluster in failover mode

An HP CR server cluster enters failover mode when a localized system failure causes the current HP CR server to go offline and the other server to become active.



After a failure occurs, an administrator needs to restore the server that is offline.



TIP: HP CR Server Monitor is a monitoring application that detects failures on HP CR servers. It is recommended that HP CR Server Monitor or another monitoring application be used to alert administrators that a failure has occurred so that failures can be corrected in a timely manner.

An HP CR server in the cluster can be designated as the preferred server. If an HP CR server is preferred, it is always the active server whenever it is available. Therefore, if a system failure occurs and the preferred server goes offline, the non-preferred server becomes active, but when the preferred server is online again, it becomes the active server and the non-preferred server returns to a standby state.

15-2 Requirements for an HP CR server cluster

15-2-1 HP CR server requirements

The two HP CR servers must meet the minimum requirements for an HP CR server. For details, see [Hardware and software requirements \(7\)](#).

NOTE: The HP CR servers should have identical and redundant configurations. If resources are shared, for example, a remote Composer, the shared resource should be installed on the database server or another high availability system in the domain.

15-2-2 Database server requirements

The database server must meet the following minimum requirements:

- [Hardware and software requirements](#) (7) for the HP CR server
- Microsoft SQL Server 2008/2012

NOTE: Microsoft SQL Server 2008 Express Edition does not meet this requirement.

- Template files used by the server

15-2-3 Remote device server requirements

The Remote Device server must meet the following minimum requirements:

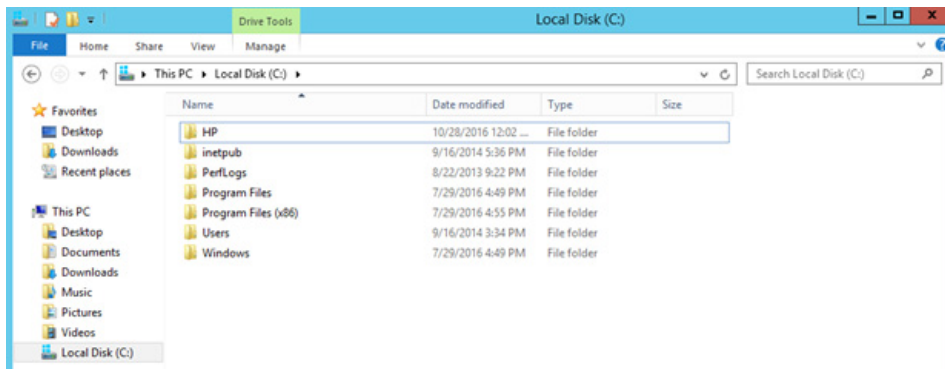
- Requirements for the Remote Device server, as defined in [Installing the Remote HP CR Intelligent Device Client](#) (69)

15-3 Installing and configuring the cluster server

Begin setting up the Server Cluster by creating folders for the HP CR server resources that will be stored on the Database server.

15-3-1 Setting up the Database server

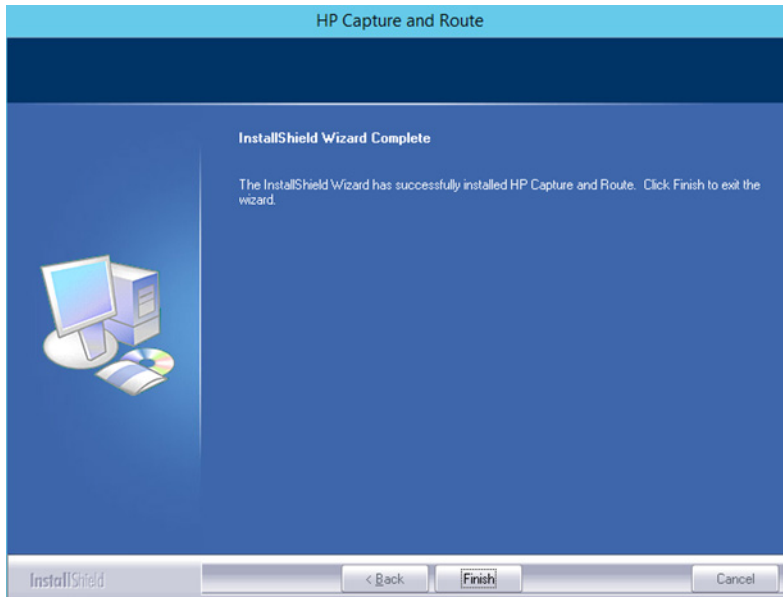
1. Select a location in the Database server.



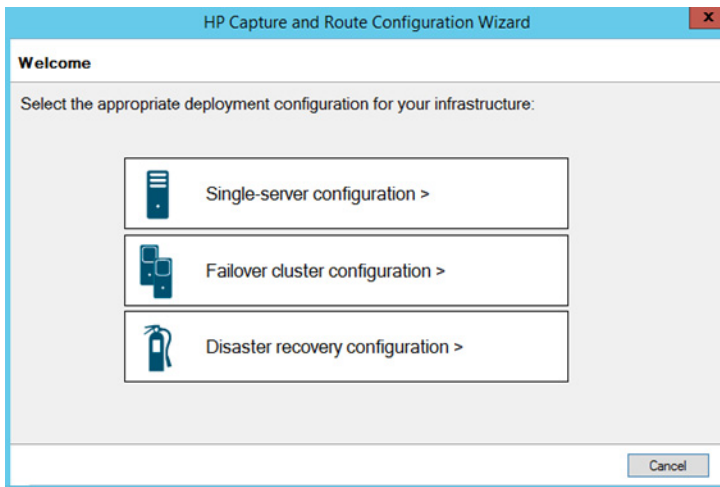
2. Create the following folders:
 - **Messages** - Stores the message database.
 - **Config** - Stores server configuration files.
3. Share each folder.
4. Give the HP CR service account read, write, and delete permissions to each folder. For more information on modifying permissions, consult Windows help.

15-3-2 Setting up the Active server

1. Install HP CR v1.5.0 on the Primary server. For installation steps, see [Installing the HP CR server](#).
2. On the **InstallShield Wizard Complete** screen (the last installation screen), click **Finish** to complete the installation.

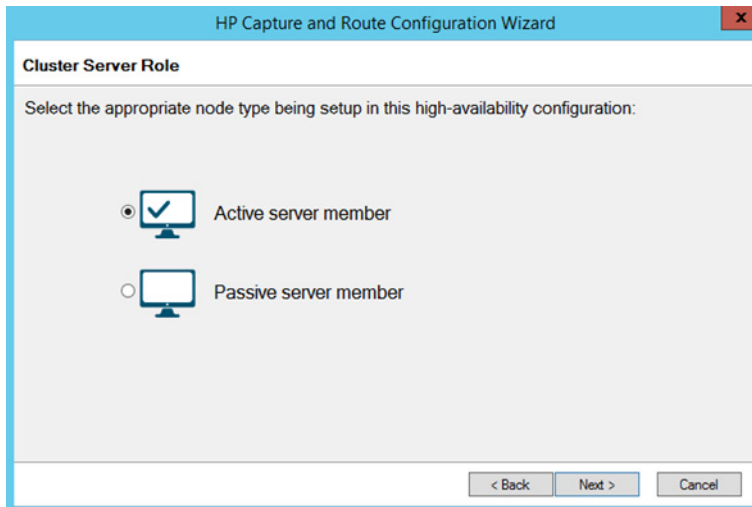


3. The **HP CR Configuration Wizard** automatically launches next.

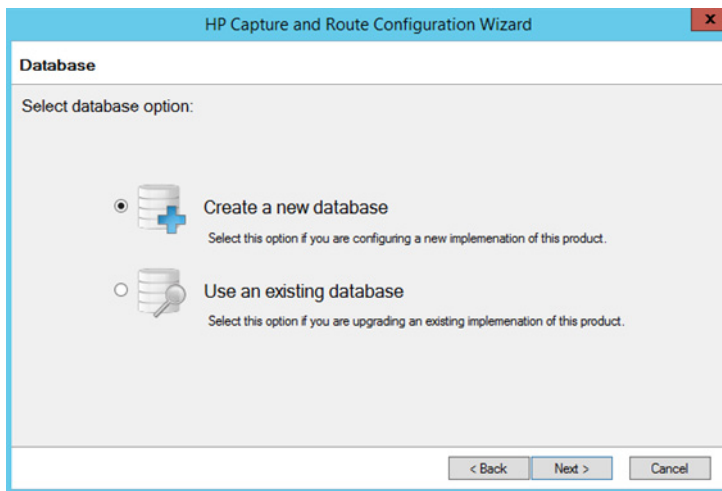


Select **Failover cluster configuration**.

4. On the **Cluster Server Role** screen, select **Active server member** and click **Next**.

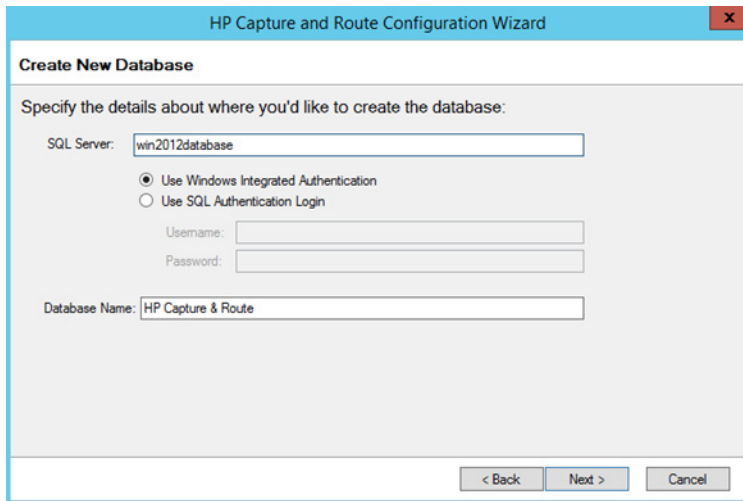


5. On the **Database** screen, select the appropriate database option:



- **Create a new database** – for configuring a new installation of HP CR.
- **Use an existing database** – for upgrading an existing installation of HP CR.

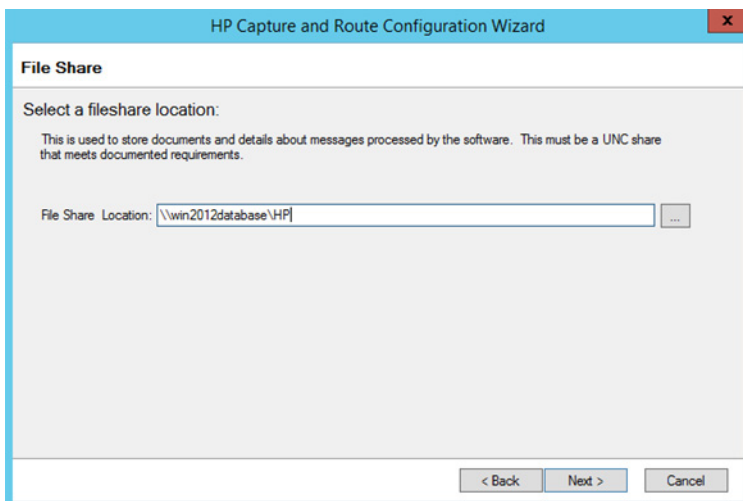
- Click **Next**. The **Create New Database** screen opens.



The screenshot shows the 'Create New Database' screen of the HP Capture and Route Configuration Wizard. The title bar reads 'HP Capture and Route Configuration Wizard'. The main heading is 'Create New Database'. Below it, the instruction says 'Specify the details about where you'd like to create the database:'. There are three input fields: 'SQL Server:' with the value 'win2012database', 'Username:', and 'Password:'. There are two radio buttons: 'Use Windows Integrated Authentication' (selected) and 'Use SQL Authentication Login'. Below these is the 'Database Name:' field with the value 'HP Capture & Route'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

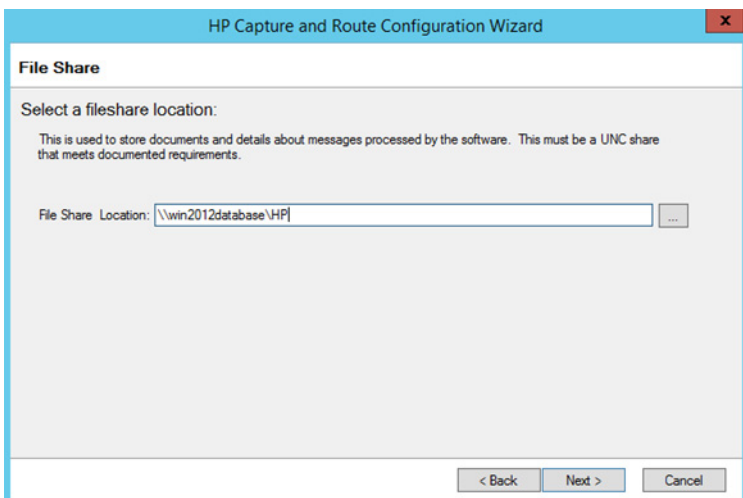
Enter your **SQL Server** and **Database Name** information and click **Next**.

- At the **File Share Location** field on the **File Share** screen, enter or browse to the UNC path you want to use. (This is a path to the folder location you created in Step 1.) Click **Next**.



The screenshot shows the 'File Share' screen of the HP Capture and Route Configuration Wizard. The title bar reads 'HP Capture and Route Configuration Wizard'. The main heading is 'File Share'. Below it, the instruction says 'Select a fileshare location:'. A note reads 'This is used to store documents and details about messages processed by the software. This must be a UNC share that meets documented requirements.' There is a 'File Share Location:' field with the value '\\win2012database\HP' and a browse button (...). At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

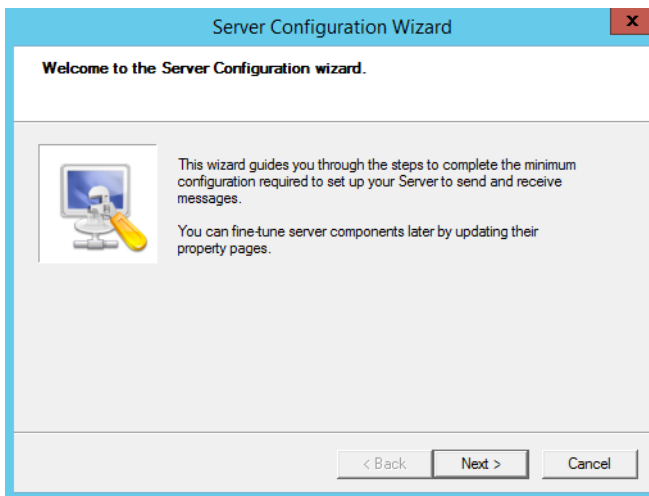
- The **Ready to Configure** screen appears. Click **Next** to configure the system.



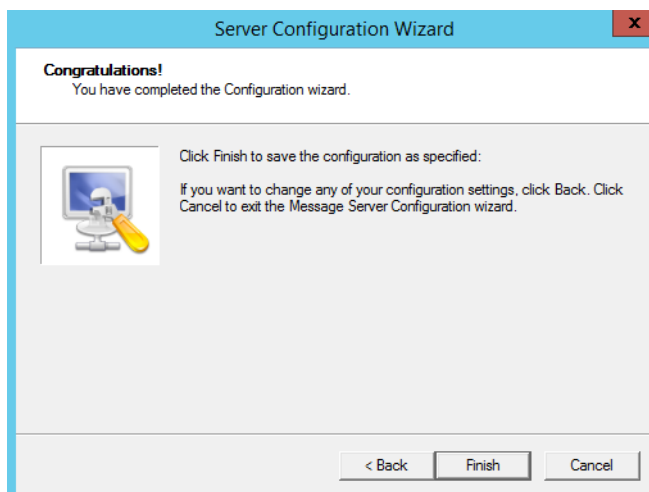
This screenshot is identical to the previous one, showing the 'File Share' screen of the HP Capture and Route Configuration Wizard. The title bar reads 'HP Capture and Route Configuration Wizard'. The main heading is 'File Share'. Below it, the instruction says 'Select a fileshare location:'. A note reads 'This is used to store documents and details about messages processed by the software. This must be a UNC share that meets documented requirements.' There is a 'File Share Location:' field with the value '\\win2012database\HP' and a browse button (...). At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

A **Configuring...** progress screen appears during configuration.

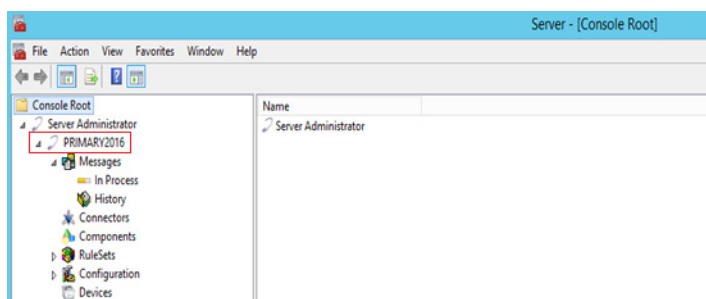
9. The **Server Configuration Wizard Welcome** screen opens. Click **Next**.



10. Click **Finish** on the **Congratulations** screen.



11. The following screen shows how the **Primary** server appears in the HP CR Server Administrator.



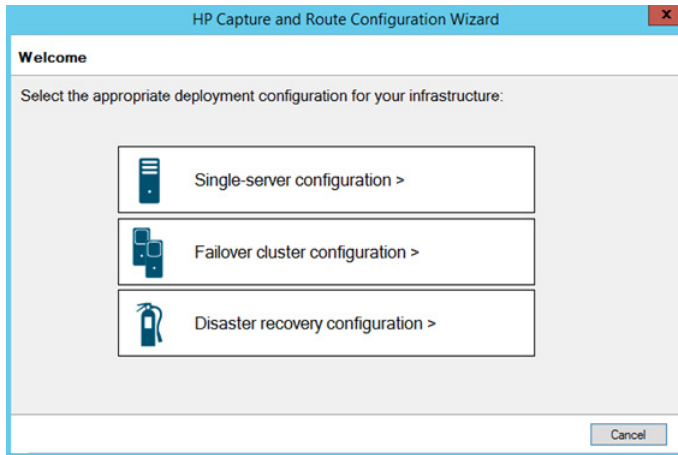
15-3-3 Applying licenses

12. Apply your Base server and Failover licenses. See [Server license activation](#) for more information.

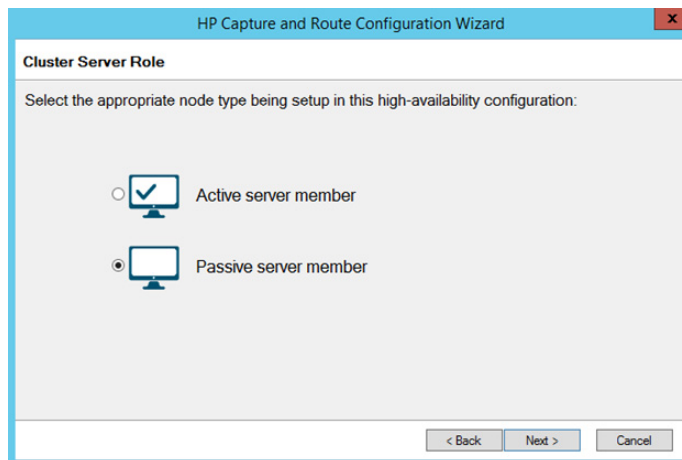
NOTE: The Failover server license is added to the Active (Primary) server in the environment.

15-3-4 Setting up the Passive server

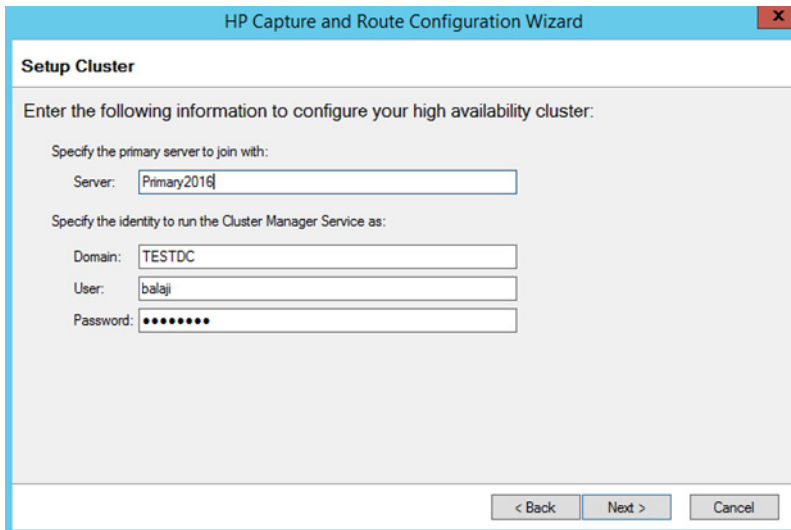
13. Install HP CR v1.5.0 on the Passive (secondary) server. For steps, see [Installing the HP CR server](#).
14. On the **InstallShield Wizard Complete** screen (the last installation screen), click **Finish** to complete the installation.
15. Once again, the **HP CR Configuration Wizard** opens to the **Welcome** screen. Select **Failover cluster configuration**.



16. On the **Cluster Server Role** screen, this time select **Passive server member** and click **Next**.



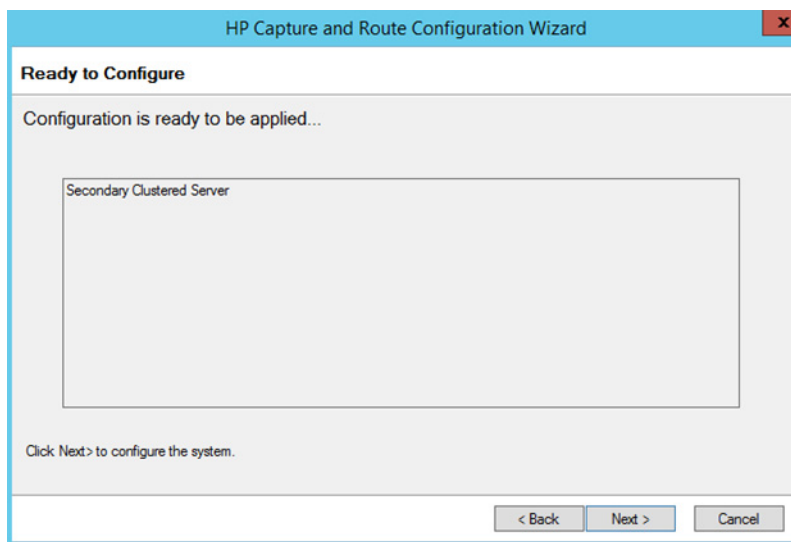
17. The **Setup Cluster** screen appears.



The screenshot shows the 'Setup Cluster' screen of the HP Capture and Route Configuration Wizard. The window title is 'HP Capture and Route Configuration Wizard'. The main heading is 'Setup Cluster'. Below the heading, it says 'Enter the following information to configure your high availability cluster:'. There are two sections: 'Specify the primary server to join with:' with a 'Server:' field containing 'Primary2016'; and 'Specify the identity to run the Cluster Manager Service as:' with 'Domain:' (TESTDC), 'User:' (balaji), and 'Password:' (masked with dots) fields. At the bottom, there are '< Back', 'Next >', and 'Cancel' buttons.

Enter the Primary **Server** name and user information. Click **Next**.

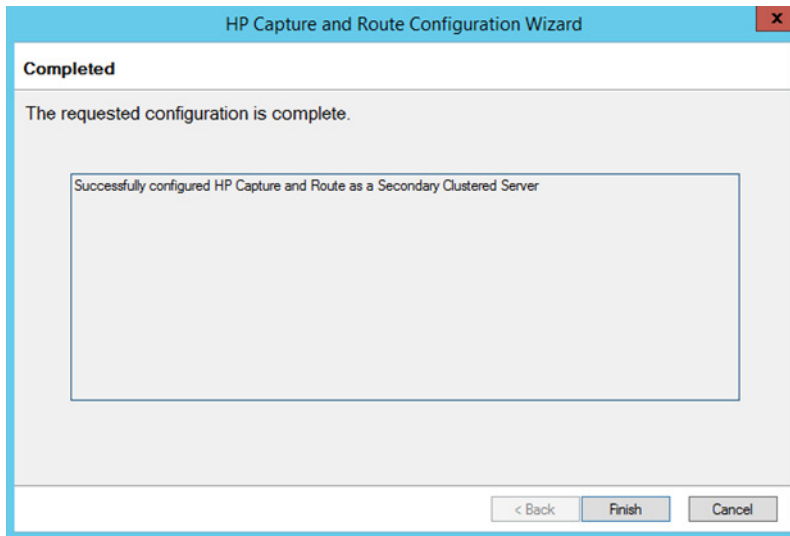
18. The **Ready to configure** screen appears. Click **Next** to configure the system.



The screenshot shows the 'Ready to Configure' screen of the HP Capture and Route Configuration Wizard. The window title is 'HP Capture and Route Configuration Wizard'. The main heading is 'Ready to Configure'. Below the heading, it says 'Configuration is ready to be applied...'. There is a large empty rectangular box labeled 'Secondary Clustered Server'. At the bottom, it says 'Click Next > to configure the system.' and there are '< Back', 'Next >', and 'Cancel' buttons.

A **Configuring...** progress screen appears during configuration.

19. The **HP CR Configuration Wizard Completed** screen appears.



Click **Finish** to close the wizard. Your clustered server environment is now configured.

15-4 Setting up the Telco share

15-4-1 Creating the Telco share

NOTE: Complete the following procedure if the HP CR server cluster supports faxing.

For an HP CR server cluster that supports faxing, create the Telco share. The Telco share is shared by both servers in the cluster. You must create it on any high-availability system, such as the Database server belonging to the same domain as the clustered HP CR servers.

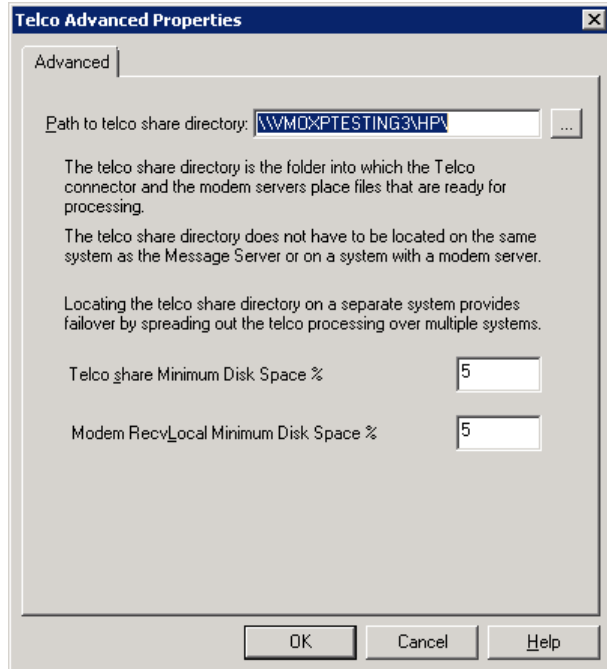
To create the Telco share on the Database server:

1. Choose a location in the local directory structure and create a folder for the Telco share. Use a self-descriptive name such as `HPtelcoshare`.
2. Share the folder.
3. Give the HP CR service account read and write permissions to the folder. For more information on modifying permissions, consult Windows help. (If the environment has HP CR servers that were installed with different HP CR service accounts, give all HP CR service accounts these permissions.)

15-4-2 Configuring the HP CR connector for Telco to use the Telco share on the Database server

1. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator** to open the HP CR Server Administrator.
2. In the console tree, expand the HP CR Server Administrator and click **Connectors**.
3. Double-click **HP CR Connector for Telco** in the details pane to open the **Telco Properties** page.

4. Click **Advanced** to open the **Telco Advanced Properties** page.



5. In the **Path to telco share directory** text box, enter the UNC path (that is the `\\ServerName\ShareName\`) to the Telco share folder. Add a trailing backslash at the end (for example: `\\123.4.5.678\HPtelcoshare\`).
6. Click **OK** twice to save your changes and close the **Properties** page.

15-5 Testing the failover configuration

You can test the Failover configuration by simulating a localized system failure on the Active server:

1. **Simulate a failure** - Shut down the Active server. Wait approximately five minutes and then verify that the HP Cluster Service process (OMSvrClusterMgr) and the connector processes (OmCon*) are running on the other server, which is now the Active server.
2. **Restore the failed server** - Start the server that was shut down and wait for it to boot up. Wait approximately five minutes and then verify that the HP Cluster Service process (OMSvrClusterMgr) and the connector processes (OmCon*) are running.

15-6 Optional configurations for cluster environments

15-6-1 Setting up the remote device server

Refer to the procedure for [Installing the Remote HP CR Intelligent Device Client](#) (69).

15-6-2 Configuring the HP CR Legacy End User Interface for failover

The Legacy End User Interface should be installed on a system remote from the Active and Passive servers and meet all of the installation requirements.

1. Navigate to:

```
\Program Files (X86)\HPCR\WebClient\Configuration
```

Open the `Web.xml` file for editing.

2. In the **<Connection>** section of the xml, add the name of the secondary server in your cluster. For example:

```
<Connection>
<Server>MAGNOLIA</Server>
<FailoverServer>JASMINE</FailoverServer>
<Authentication type="Exchange">
```

NOTE: In this example, the name of the active HP CR server is MAGNOLIA and the passive server is JASMINE.

3. Save your changes and close the xml file.
4. Restart the IIS services.

15-6-3 Configuring the Mobile Client setup to support a cluster

To configure cluster support for a setup with mobile clients:

1. Modify the `OmISAPU.xml` in the `\Omtool\Omtool Server\WebAPI\MobileWebAPI\Scripts` directory as follows:
2. Add another line for the secondary server, changing

```
</Server>
    <Server Name="OmtoolServer">
        <ServerName>VMOXPTESTING</ServerName>
    </Server>
</Servers>
```

to the following:

```
</Server>
    <Server Name="OmtoolServer">
```



```
<ServerName>VMPrimary</ServerName>

<Server Name="OmtoolServer">
<ServerName>VMSecondary</ServerName>

</Server>
</Servers>
```

15-6-4 Clustering and Composer thread awareness

In a typical configuration, you use the local Composer on the Active server while the Passive server is in the waiting state. To improve throughput, an additional compose license can be added to access the compose engines on the passive server. However in the event of a failover, both the local and remote Composers would be on the same physical machine, and using them simultaneously can cause significant performance issues on the passive server. In order to utilize both servers, the Active server compose should be removed and reinstalled with the server name specified. The Passive server then can be added with its server name specified and, in the subsequent event of a failover, the Passive server will not be subject to performance issues due to duplicate composers.

16 Installing and configuring a Dialogic modem driver

This section contains instructions on installing and configuring the following Dialogic modem driver. It is written for system administrators with detailed knowledge of the HP CR server and the following modem driver.

SR140 module (virtual board)

For information on BrookTrout T.38 SR140, go to the BrookTrout [online documentation](#).

Each subsection details the procedure involved in installing and configuring the modem driver. This section also provides information for [Testing](#) (150).

16-1 Requirements for installing and configuring the SR140 module

16-1-1 HP CR software requirements

- HP CR v1.5.0 or higher
- Telco connector (to configure the HP CR message server for faxing messages)

16-1-2 Driver requirement

- Brooktrout v6.7.5 or higher

16-1-3 Gateway requirement

For a list of supported gateways, go to the BrookTrout [online documentation](#).

16-1-4 Additional requirements

In addition to meeting the requirements listed above, you need the following:

- Proper T1 fax card on the gateway
- Enough memory to run the necessary amount of channels

16-2 Installing the BrookTrout SR140 module

16-2-1 Installing Brooktrout v6.7.5 drivers

1. Verify that the HP CR Modem Manager service is not running.
2. Go to the location where you extracted the ZIP file and locate the HP CR directory.

3. Double-click **Boston6.7.5.msi**. The **Welcome** page opens.
4. Click **Next**. The **License Agreement** page opens.
5. Read the license agreement and, if you agree, select **I accept the terms in the license agreement**.
6. Click **Next**. The **Destination Folder** page opens.
7. Change the destination location if necessary and click **Next**.
8. Click **Install**.
9. When installation is complete, click **Finish**.
10. Reboot the server.

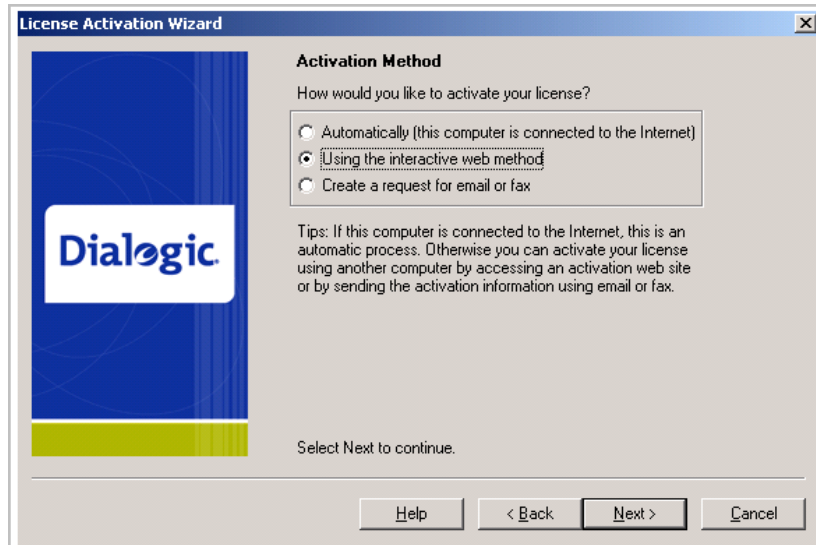
16-2-2 Installing 6.7.5_x64.msi

1. After you finish installing the Brooktrout System Software, install the required add-on, **Brooktrout 6.7.5_x64.msi**.
2. Verify that the Model Manager service is not running.
3. Go to the location where you extracted the ZIP file and locate the HP CR 64 directory.
4. Double-click [Boston6.7.5_x64.msi](#). The **Welcome** page opens.
5. Click **Next**. The **License Agreement** page opens.
6. Read the license agreement and, if you agree, select **I accept the terms in the license agreement**.
7. Click **Next**. The **Destination Folder** page opens.
8. Modify the destination location if necessary and click **Next**.
9. Click **Install**.
10. When installation is complete, click **Finish**.
11. Reboot the server.

16-2-3 Activating the license

1. Click **Start >Program Files > Brooktrout License Manager**.
The **BrookTrout License Manager** opens.
2. In the menu bar click **License >Activate License**. The **License Activation** wizard opens and you see the **Welcome** message.

3. Click **Next**. Select **Using the interactive web method**.



4. Click **Next**. You get the **Node Lock** value.
5. Click the **Save the instructions into a file** option.
6. Click **Next**.
7. Browse and save the file to a known location.
8. Go to the location where you saved the file. Open the file.

The file contains the text similar to what is shown below and gives you the Node Lock value of your system:

```
To request a license, please visit our website:
http://www.dialogic.com/activation
and follow the instructions provided on the website.
Dialogic will email the license to you immediately.
When prompted, supply the following information:
Node Lock: [Node Lock value]
```

9. Open Internet Explorer and go to <http://www.dialogic.com/activation>.



10. In the **License Key** text box, enter the License key and the Node Lock value of your system.



IMPORTANT: For the license key, contact your software representative.

Brooktrout sends you the license for your BrookTrout SR140 module.

NOTE: This license key will enable the Brooktrout SR140 fax feature on the system the node value was retrieved from. It cannot be transferred without assistance from Cantata.

11. Save the license file to the local drive of the system.

16-2-4 Applying the license

1. Launch the **Brooktrout License Manager**.
2. From the file menu option, select **License**.
3. Select the **Install License** drop-down.
4. Browse to the license file you saved to the system.

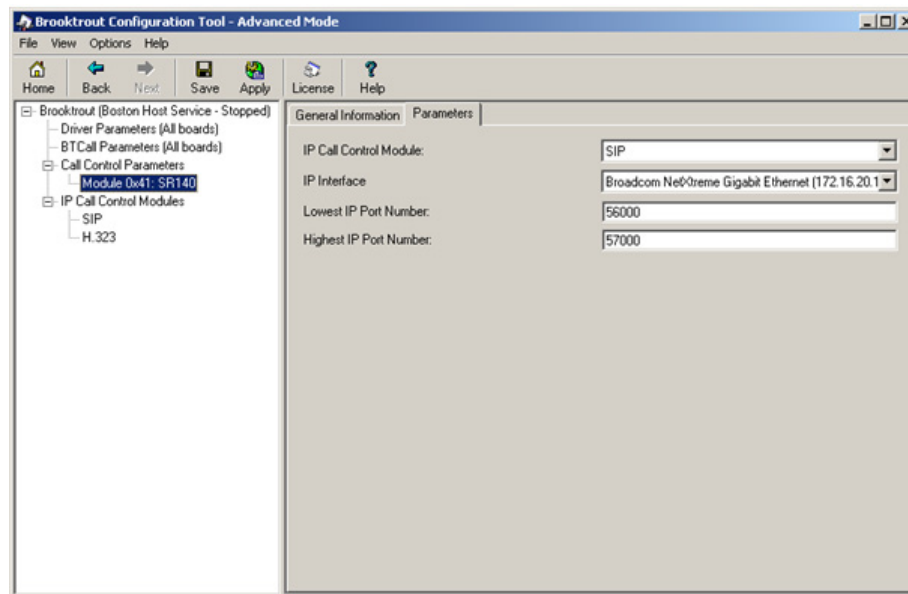
16-3 Configuring Brooktrout SR140

1. Click **Start > Program Files > BrookTrout Configuration Tool**.

The **Configure IP Stack** page opens.

2. Select the protocol appropriate to your environment.

The **BrookTrout Configurations Tool** opens.



3. Expand **Call Control Parameters**.
4. Select **Module0x41:SR140**.
5. In the right pane, click the **Parameters** option.
6. Verify that the **IP Call Control Module** value is **SIP** or **H.323** (depending on which protocol is configured for your company).

- Continue to [Additional SIP configuration](#) (149) or [Additional H.323 configuration](#) (149). You can configure SIP or H.323, but not both.

16-3-1 Additional SIP configuration

- Click **Start > Program Files > BrookTrout Configuration Tool**.

The **BrookTrout Configurations Tool** opens.

- Expand **IP Call Control Modules**.
- Select **SIP**.



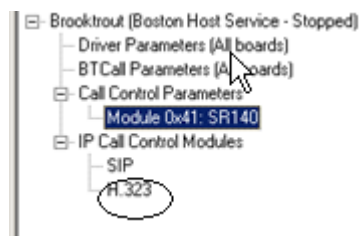
- In the right pane, select the **IP Parameters** option.
- In the **SIP_default_gateway** add the IP address of your Cisco Gate followed by **5060** in the second field.
- Select the **T.38 parameters** option.
- Set **Media Renegotiate Delay Outbound, msec** to **-1**.
- In **Advanced settings**, change the **Maximum T.38 version** from **3** to **0**.
- The prompt **Parameter Maximum Bit Rate, bps** value should not be greater than **14400** when **Maximum T.38 version is 0** is displayed.
- Click **OK** and the **Maximum bit rate, bps** is automatically reset to **14400**.

16-3-2 Additional H.323 configuration

- Click **Start > Program Files > BrookTrout Configuration Tool**.

The **BrookTrout Configurations Tool** opens.

- Expand **IP Call Control Modules**.
- Select **H.323**.



- In the right pane, select **IP Parameters** option.
- Add the IP address of your Cisco Gateway in the **h323_default_gateway** followed by **1720**.
- Add the IP address of your HP CR server in the **h323_local_ip_address** followed by **1720**.
- Expand **Advanced Settings** option.
- Change **Called Party Options** to **2**.
- Change **Calling Party Options** to **2**.

16-3-3 Setting the maximum page size

Brooktrout modems have a known problem with sending document with greater than 30 pages. You must change the `Maximum Number of Pages` property value to `200` in order to send messages greater than 30 pages successfully.

1. Click **Start > All Programs > BrookTrout > Brooktrout Configuration Tool**.
2. Select **BTCall Parameters (All boards)**.
3. In the **Advanced Settings** section, go to the **Maximum Number of pages** option.
4. Set the value to `200`.
5. Save your changes.
6. Click **Apply** to make the Brooktrout server read your changes.

16-4 Testing

After you have installed and configured the modem drivers, test to see that the Dialogic fax board/module are working properly.

1. Stop Modem Manager Service.
2. Login to the system running the modem server.
3. Navigate to:


```
C:\Program Files (x86)\HP\HPCR\Tools\Modem\Tools\BrookTrout\Config
```
4. Copy **fax.exe** and **test.ips**.
5. Paste the copied files to:


```
C:\Program Files\Brooktrout\Config
```
6. To send a test fax:
 - a Open a command prompt window.
 - b Change directory to:


```
C:\Program Files\Brooktrout\Config.
```
 - c Type:


```
..\bin\firmload.bat
```

 Press **Enter**.
 - d Type:


```
fax -u 0 -s PhoneNumber test.ips
```

 where `PhoneNumber` is the destination fax number.

Press **Enter**.

The test fax is delivered to the destination.

Part IV:

Software technology integrations

17 Software integrations

HP CR integrates with software provided by several third-party vendors:

[Multi-vendor device configuration](#) (153)

[HP Access Control](#) (157)

[HP iManage TeleForm](#) (158)

Each is described in this section.

17-1 Multi-vendor device configuration

HP CR features are accessible where the users need them most—on the web, office machines, multifunction devices, and business systems that are an integral part of the communication workflow.

HP CR is an intranet-based application for multifunction devices and business systems. HP CR supports software solutions complementing the hardware solutions offered by Hewlett Packard as well as integrating with other vendor devices such as [Ricoh Corporation](#), [Sharp Electronics Corporation](#), and [Xerox Corporation](#).

Procedures for multi-vendor device testing are provided in this section.

NOTE: For Embedded Device Client for HP OXPd download, installation, and configuration instructions, refer to the [HP Capture and Route \(HP CR\) Embedded Device Client Installation Guide](#).

17-1-1 Ricoh

NOTE: When scanning from Ricoh devices, users must choose **Multi-paged PDF** in the scan options of the device.

17-1-2 Sharp: Address registration with the Sharp MX-C311

1. Set up FTP Role Service on the destination server (HPCR).
2. Once the FTP service is installed, create an FTP site in IIS. Review the information at this link if you are not familiar with creating an FTP site:
<http://learn.iis.net/page.aspx/301/creating-a-new-ftp-site-in-iis-7/>
3. When creating the site, the physical path will be the Filescan directory.
4. Select **No SSL**.
5. Allow **Anonymous** and **Basic Authentication** with Read and Write Permissions.
6. Set up the Filescan directory in virtual mode and add a virtual control file.
7. Open the Embedded Web Server on the Sharp device.
8. Log in and click **Address Book**.

9. Click **Add**.

SHARP
MX-C311

Address Book

Update(R)

Index: /
Display Items: 1

Address Name ▲ ▾	Type ▲ ▾
<input type="checkbox"/> BillF Folder	Network Folder
<input type="checkbox"/> Prashant Email	E-mail
<input type="checkbox"/> Prashant FTP	FTP
<input type="checkbox"/> Rob Folder	Network Folder
<input type="checkbox"/> Rob FTP	FTP
<input type="checkbox"/> TerastationScans	Network Folder
<input type="checkbox"/> 195 network folder	Network Folder
<input type="checkbox"/> Prashant FTPS	FTP
<input type="checkbox"/> vmpd2k3vs2008	Network Folder

Total Address: 9
Previous(M) 1 / 1 Next(N)
Select All(S) Clear Checked(Z)

Delete(O) **Add(Y)**

Update(R)

- Top Page
- Status
- Address Book**
- Custom Index
- Document Operations
- Job Programs
- User Control
- System Settings
- Network Settings
- Application Settings
- E-mail Alert and Status
- Storage Backup
- Device Cloning
- Job Log
- Security Settings
- Custom Links
- Operation Manual Download

10. Select **FTP** as the **Address Type**.

Address Registration

Address Type: FTP ▾

Search Number: (1-999)

Address Name (Required): (Up to 36 characters)

Initial (Optional): (Up to 10 characters)

Key Name: (Up to 18 characters)

Custom Index: User 1 ▾

Register this Address to be added to the [Frequent Use] index.

Hostname or IP Address (Required): (Up to 127 characters)

File Format: File Type: PDF ▾

Black & White: Compression Mode: None ▾

Color/Grayscale: Compression Ratio: Low ▾

Directory: (Up to 200 characters)

User Name: (Up to 32 characters)

Password: (1-32 digits)

Change Password

Enable SSL

Enable Hyperlink to FTP server to be e-mailed

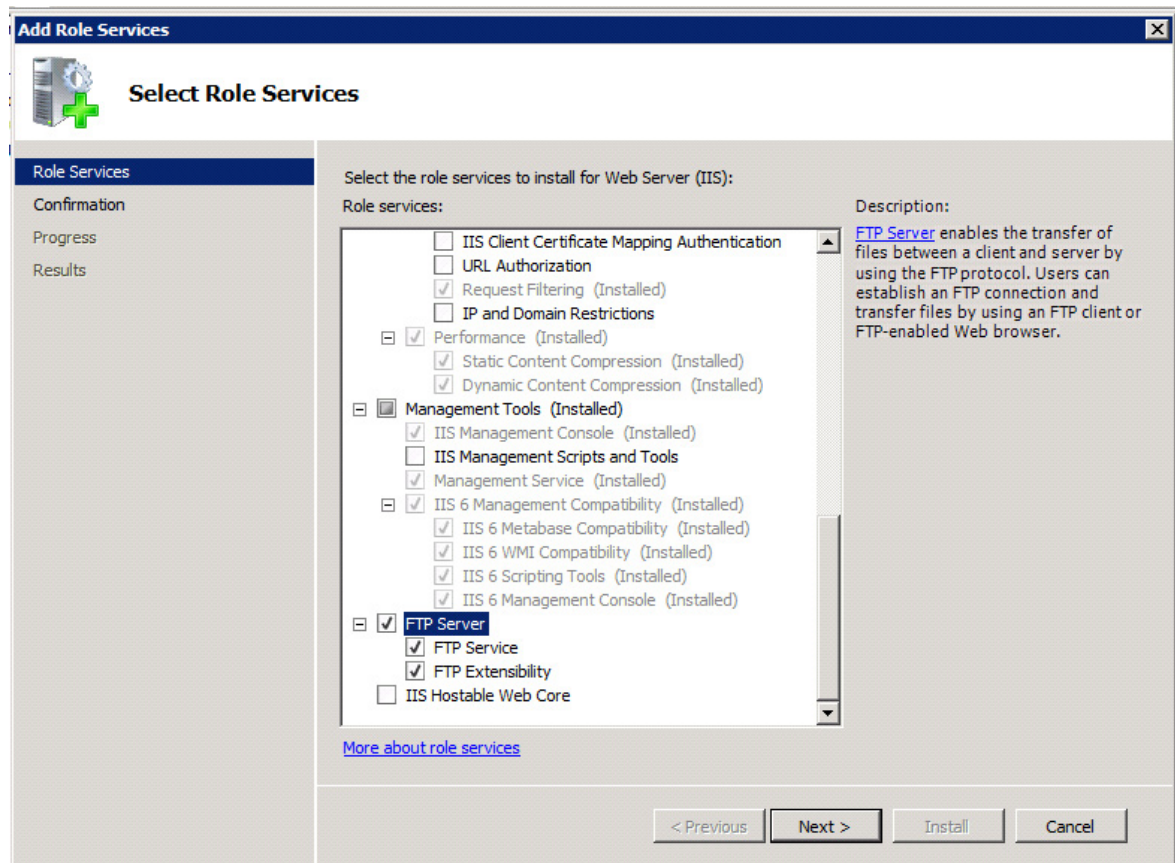
E-mail Destination:

Prashant Email ▾

11. Enter an address name in the **Address Name (Required)** field.
12. Enter the IP address of the HPCR server in the **Hostname or IP Address (Required)** field.
13. Enter the FTP root (\) for the **Directory**.
14. Add the **User Name** credentials and **Password**.
15. Click **Submit**.
16. On the device, select **Image Send\Address Book**.
17. Locate the address and scan a job.
18. The file will be scanned to the Filescan folder on the HPCR server.

17-1-3 Xerox: Creating a new workflow template with the Xerox WorkCentre 6400

1. Set up FTP Role Service on the destination server (HP CR).



2. Once the FTP service is installed, create an FTP site in IIS. Review the information at this link if you are not familiar with creating an FTP site:
<http://learn.iis.net/page.aspx/301/creating-a-new-ftp-site-in-iis-7/>
3. When creating the site, the physical path will be the Filescan directory.
4. Select **No SSL**.
5. Allow **Anonymous** and **Basic Authentication** with Read and Write Permissions.
6. Set up the Filescan directory in virtual mode and add a virtual control file.
7. Open the Embedded Web Server for the device and log in.
8. Click the **Scan** tab.
9. Click **Templates** in the **Display** section.
10. Enter a name in **Template Name**.
11. Select the **Enter a Scan Destination** radio button.
12. Enter a friendly **Name**.
13. Select **FTP** for the **Protocol**.
14. Select **IPv4 Address** for the **Name or IP Address**.

15. Enter the IP address and port.

The following is an example:

Distribution: RobTest

Filing Destination

Friendly Name:
Example: Purchasing Department

Protocol:

Name or IP Address:
 IPv4 Address
 IPv6 Address
 Host Name

IP Address:Port: . . . :

Document Path:

Filing Policy:

Login Credentials to Access the Destination

Authenticated User and Domain
 Authenticated User
 Prompt at User Interface
 Stored in Template

Login Name:

Password:

Retype password:

Select to save new password

Note

It is recommended that User Data Encryption be enabled by the System Administrator because passwords are saved within the template files.

17-2 HP Access Control

The integrated HP CR and HP Access Control (HP AC) solution provides for:

- “Advanced” single-sign between HP AC and HP CR. This includes the ability for HP AC to capture a user’s network password and then securely transfer that password to HP CR. From that point, HP CR could use the name and password of the logged in user to upload documents to SharePoint or store documents in a network folder as that user.
- Transfer of job accounting details from HP CR to HP AC. The following job accounting details on each job processed through HP CR are captured and made available for import into the HP AC system:
 - Master Job ID
 - Source scanning device or fax channel, if known
 - Source originating user, if known

- Date/time of submission for processing
- Date/time of completion of processing
- Final delivery status (success, failure, reason for failure if applicable)
- Size of documents submitted, delivered, expressed in pages
- Size of documents submitted, delivered, expressed in bytes
- Delivery destination type (for example, fax, email, folder, SharePoint, etc.), delivery address (such as 1-800-555-1212, user@company.com, etc.)

Any individual job may be delivered to multiple individual recipients. A separate job tracking record is captured and transferred for each recipient. All deliveries for a single, submitted job share a common master job ID.

It is not necessary for the HP CR and HP AC servers to install and run together on the same Windows server.

17-3 HP iManage TeleForm

HP iManage TeleForm is a software-based solution for document capture used to extract and validate information from complex, forms-related documents. HP CR integrates with TeleForm so that documents captured through HP CR can be transferred to TeleForm for processing. HP CR also has the ability to receive documents and metadata sent to HP CR from TeleForm so that HP CR can deliver the content to one or more intended destinations.

17-3-1 Configuring the HP CR server

The Universal Input and Universal Output connectors enable HP CR to support integration with HP iManage TeleForm. HP CR integrates with TeleForm so that documents captured through HP CR can be transferred to TeleForm for processing. HP CR can also receive documents and metadata sent from TeleForm and deliver the content to one or more intended destinations.

HP CR and TeleForm integration use:

- HP CR's Universal Input connector to receive documents and metadata which have been exported from TeleForm. An XSLT translation parses the XML sent back from TeleForm and maps this information to appropriate Job Properties created on the HP CR server. HP CR then processes the returned job based on these properties and routes it to its intended destination(s).
- HP CR's Universal Output connector to output scanned documents and metadata to a target network folder, which is monitored by TeleForm as a source for incoming documents to process. The Universal Output connector stores a scanned document as well as an XML file, which may include metadata regarding the scanned document. The Universal Output connector is configured to use an XSLT, which formats the output metadata from the HP CR server in a documented format that can be parsed and imported to TeleForm.

The remainder of this section describes:

[Enabling HP CR Universal Output](#) (159)

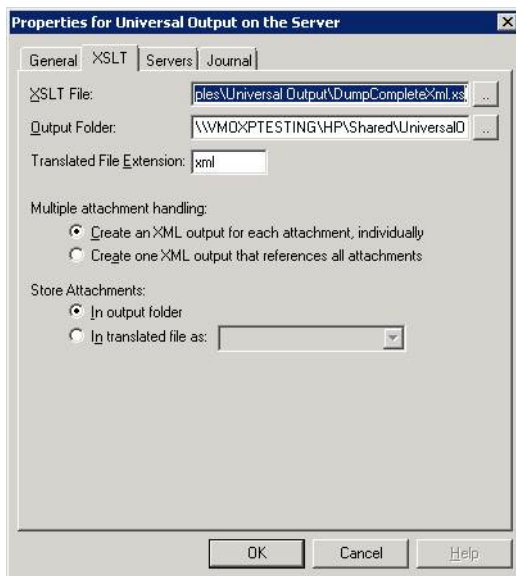
[Enabling HP CR Universal Input](#) (169)

17-3-2 Enabling HP CR Universal Output

17-3-2-1 Configuring the Universal Output connector

The HP CR server installation includes a Universal Output connector (**Universal Output on the Server**) by default. This connector is automatically configured during installation. However, some connector properties can be changed as needed. To access and configure the connector:

1. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator**.
2. In the console tree, expand the HP CR server.
3. Select **Connectors**. The results node lists the connectors that are licensed with your server.
4. Double-click the **Universal Output** connector to view its properties. Click the **XSLT** tab.



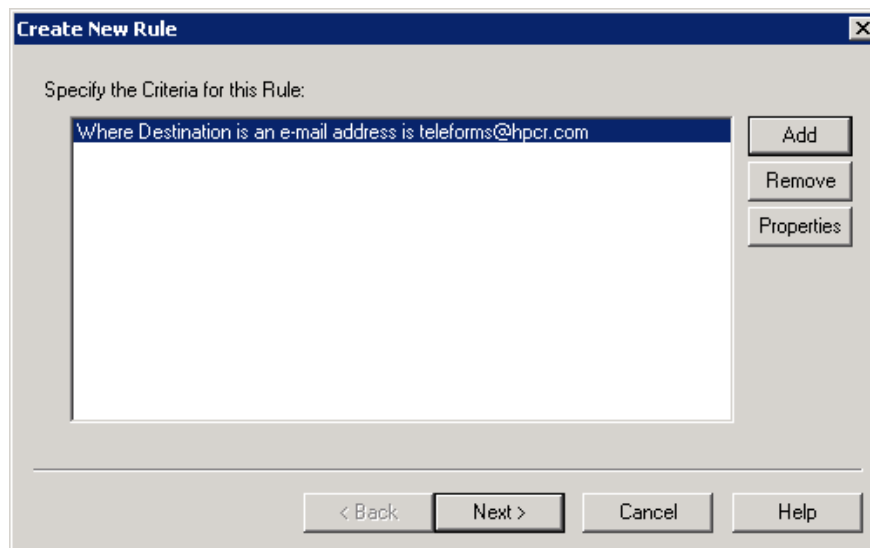
The following fields contain default values. These values can be changed as needed.

- a **XSLT file** – the XSL translation file used to format XML files
 - b **Output Folder** – the monitored folder for images and XML files
 - c **Translated File Extension** – the default value is `xml`
5. At **Multiple attachment handling**, select either:
 - **Create an XML output for each attachment, individually**
 - **Create an XML output that references all attachments**
 6. At **Store Attachments**, select either
 - **In output folder**
 - **In translated file as**, and select a file type from the dropdown menu.
 7. Click **OK** to save the settings and close the **Properties for Universal Output on the Server** page.

17-3-2-2 Creating a rule for HP CR

HP CR can pass a job to TeleForm based on certain criteria. This can be the sender's email address, the destination, or various other options. For this example, assume that anything going to the email address destination `TeleForm@hpcr.com` should be forwarded to the TeleForm server. You would follow these steps:

1. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator** to open the HP CR Server Administrator.
2. In the console tree, expand the HP CR server.
3. Expand **Rules > Outbound**.
4. Right-click to choose a new rule.
5. Click **Add**.
6. Select **Destination is an e-mail address**.
7. Click **is**.
8. Enter:
`TeleForm@hpcr.com`
9. Click **Add**.
10. Click **Finish**.



11. Click **Next**.
12. Click **Add**.
13. Select **Route to Connector**.

- Click **Next**. The **Route to Connector** page is displayed.

- From the **Route to Connector**, select **Universal Output on the Server**.
- Set the **Document Delivery Format** to **PDF**.
- Be sure **Include Template** is *not* selected.
- Click **Advanced**.
- Click **Set Additional Job Properties...**
- In **Set Job Properties**, click **Add...** and select a **User Property** from the dropdown menu, for example, `prDMSUseDefaultProfile`.
- For the **Value**, enter `1`.
- Click **OK** to close the **Set Job Property** window.
- Click **OK** to close the **Set Job Properties** window.
- Click **OK** to close the **Advanced Routing Options** page.
- Click **Finish**.
- Click **Next** on the **Specify the Actions to take for this Rule** page.
- Click **Finish**.

17-3-2-3 Configuring TeleForm to work with Universal Output

- Navigate to the directory where the ScriptAPI.cfg file is located:

Windows 7:

`C:\ProgramData\Cardiff\TeleForm\scripts\AddIns`

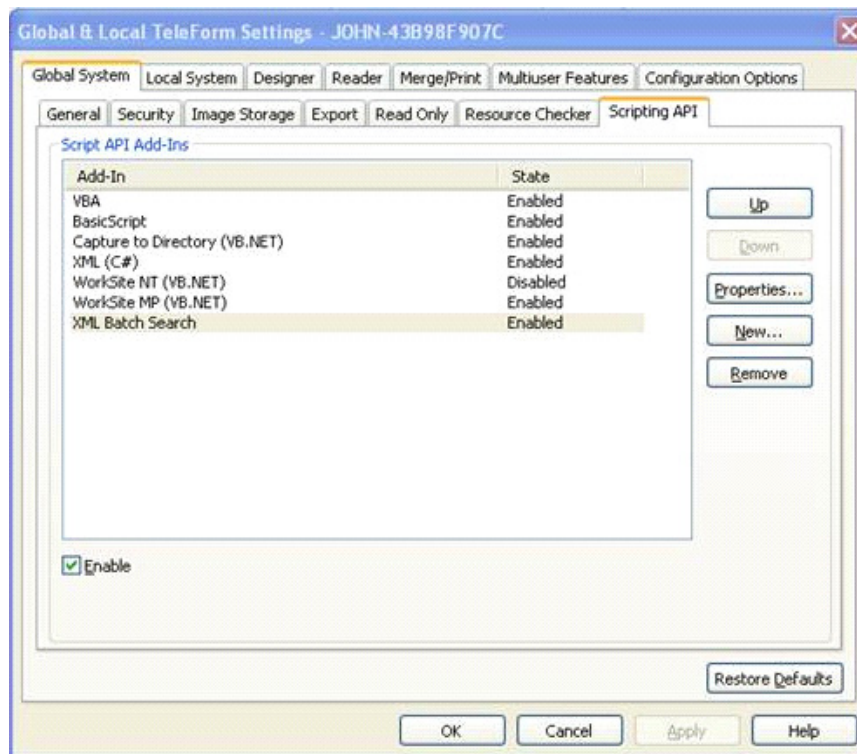
- Modify the ScriptAPI.cfg file. The "X" in "AddIn_X" needs to be changed to the next number in the sequence after the highest existing number in the ScriptAPI.cfg file. In most cases for new installs, this will be "7" as shown in the example below.

```
AddIn_7.GUID={044CD12D-6426-4C25-8874-5DF94C559BBB}
AddIn_7.Name=XML Batch Search
AddIn_7.DLL=
AddIn_7.RegCmd=
AddIn_7.Enabled=1
AddIn_7.InstallType=0
```

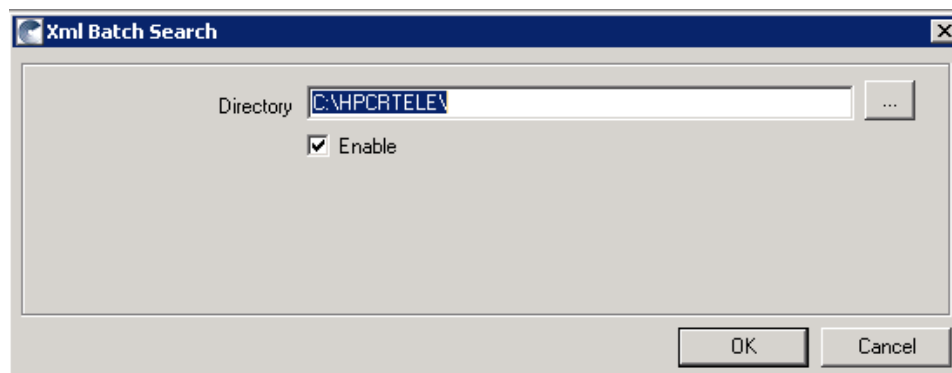
For example:

```
AddIn_7.GUID={044CD12D-6426-4C25-8874-5DF94C559BBB}
AddIn_7.Name=XML Batch Search
AddIn_7.DLL=
AddIn_7.RegCmd=
AddIn_7.Enabled=1
AddIn_7.InstallType=0
```

3. Once the above changes are made, start TeleForm Designer and go to the **ScriptingAPI** tab on the **Utilities > Configuration** dialog.
4. Confirm that **XML Batch Search** is listed and enabled:



5. To configure the input method, go to **Utilities > Connect Agent Setup > 7. Xml Batch Search**.
6. Enter a path to a directory matching the one in the **Universal Output Properties**.

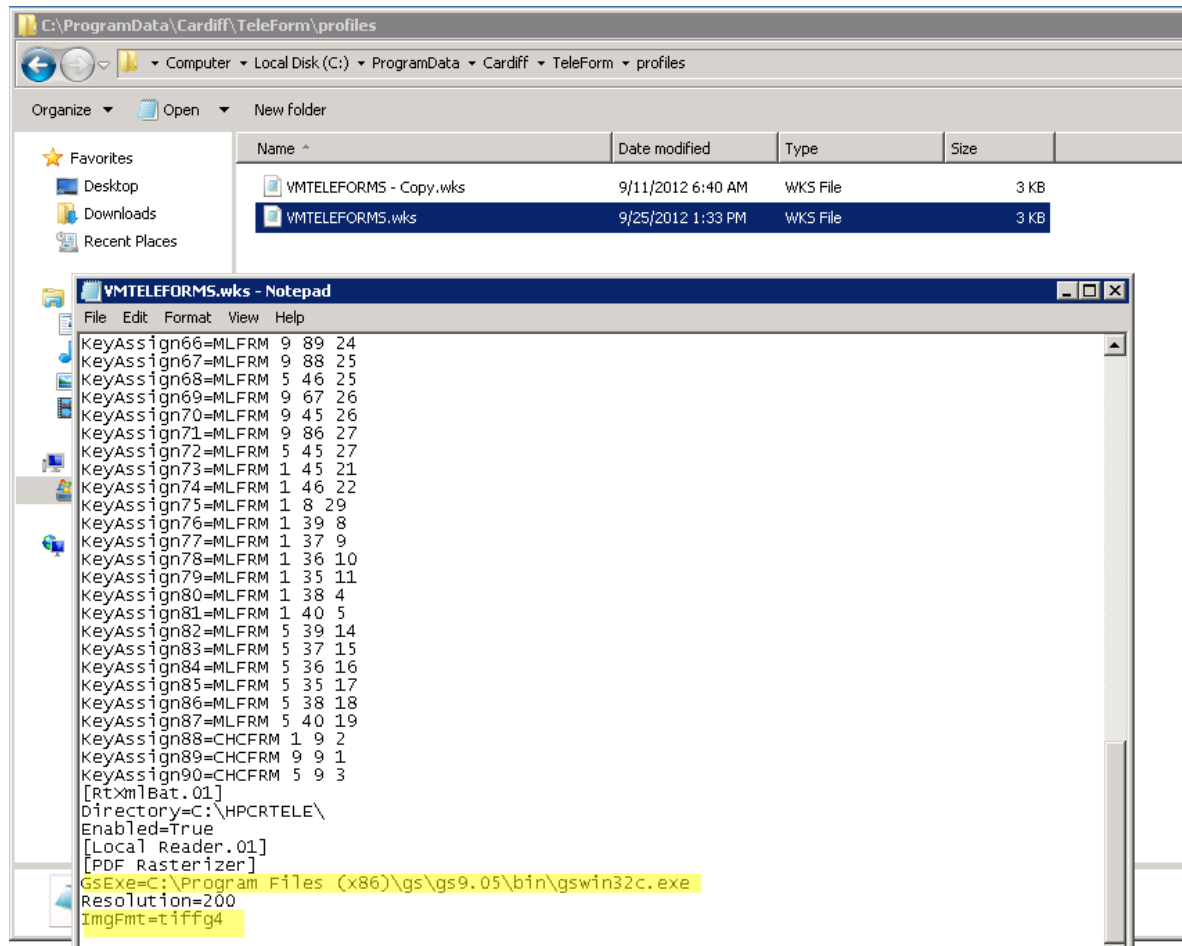


7. Continue with the following procedures ([Configuring Ghostscript with TeleForm](#) through [Configuring the form](#)).

Configuring Ghostscript with TeleForm

1. Download [gs905w32.exe](#) and install it.
2. Once installed, configure TeleForm to use Ghostscript by editing the WKS file in this folder:

<c:\program data\cardiff\Teleform\profiles>



NOTE: For more information on configuring TeleForm for Ghostscript, contact TeleForm Support.

Outputting a job to TeleForm

To output a job to TeleForm, you will first create a TeleForm job that matches the HP CR JobID, as described in the procedure below.

NOTE: The JobID in HP CR should be hard coded to = HPCR. This is based on the Teleforms.xml file in the samples directory. The batchID must = "".

1. Open the TeleForm Scan Station.
2. Select **File > Job Configuration**.
3. On the **Job Configuration** page, select **New**. The **Job Properties** page is displayed.

4. Enter **HPCR** as the **Job name**.

The screenshot shows a dialog box titled "Job Properties - New Job 01" with a close button (X) in the top right corner. The dialog has several tabs: "General", "Review/Export", "Preprocessing", "Form ID/Capture", "Custom Fields", and "Page Handling". The "General" tab is active. Inside the dialog, there are several input fields and controls:

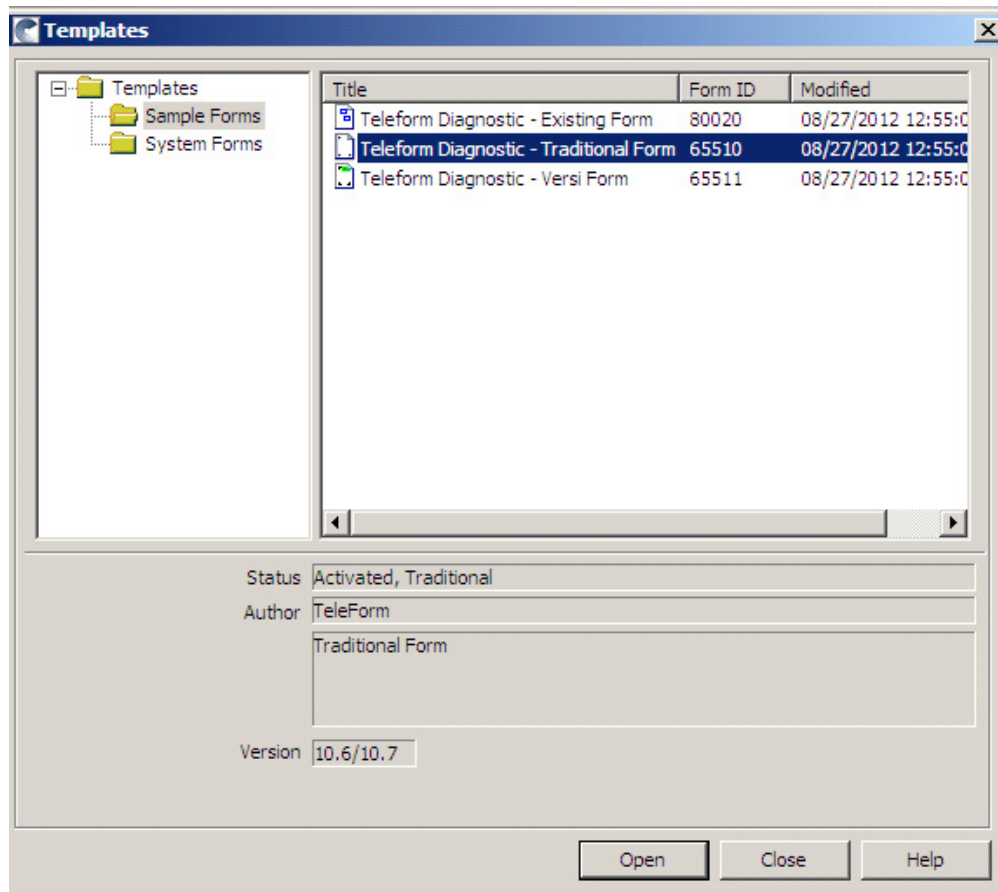
- Job name:** A text box containing "HPCR".
- Tracking ID:** An empty text box.
- Date:** An empty text box.
- Operator:** An empty text box.
- Priority:** A spin box set to "100". To its right, text reads "0 High, 255 Low, 100 Normal".
- Forms/Documents:** A spin box set to "0". To its right, text reads "0 = Don't care".
- Total pages in batch:** A spin box set to "0".
- Error handling:** A dropdown menu currently showing "Prompt for rejecting or accepting".
- Event logging:** An unchecked checkbox.
- Comment:** A large text area with scrollbars, currently empty.

At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

If you have custom fields, click the **Custom Fields** tab and enter information, as applicable, in the custom fields. (This is not required by default.)

Creating a sample form

1. Open the TeleForm Designer.
2. Select **File > Templates**.
3. Under **Sample Forms**, select a form.



4. From the **Forms** menu, select **Activate**.

NOTE: Activating a form locks the image in place for zonal OCR and structured forms recognition.

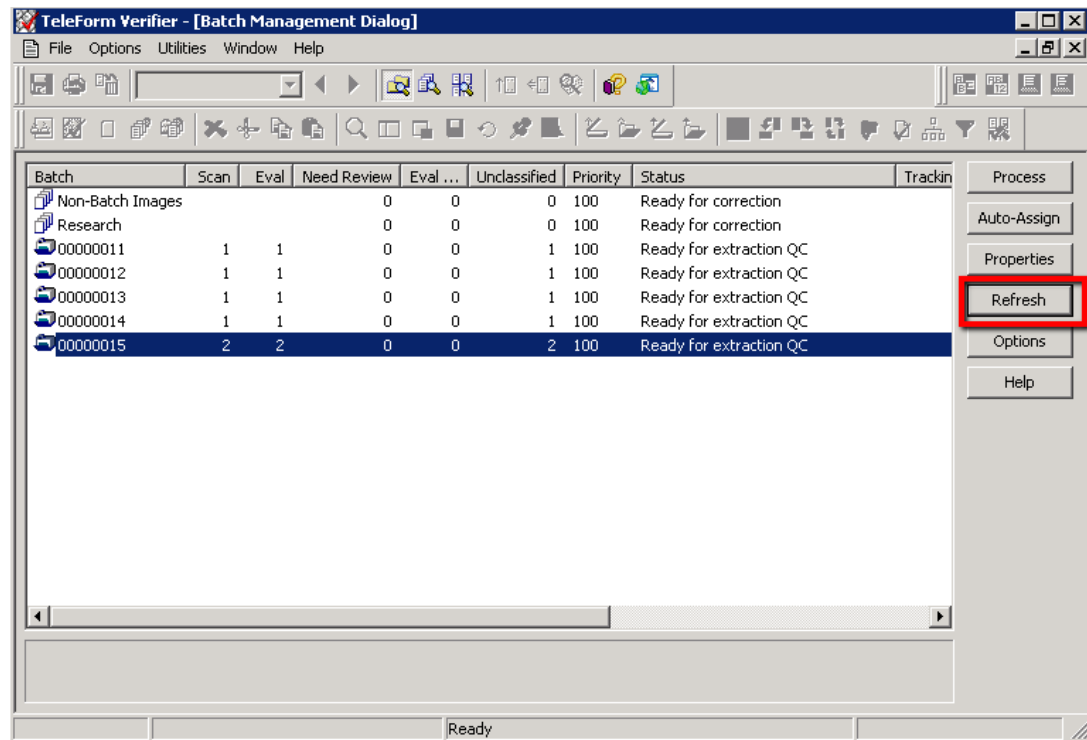
Testing

1. Scan a job to the destination that matches the rule that was created.
2. The message should arrive on the shared directory with the XML file and the scanned image in PDF format.
3. Open the XML and verify that the format is correct.

Enabling TeleForm

1. Open the TeleForm Reader. This is the software that picks up the files and reads the forms.
2. Verify that the files were picked up from the directory specified.
3. Open the TeleForm Verifier.

If you do not see the new job, click the **Refresh** button.



NOTE: There is no time or date field by default. The only way to know this is your job is to look for any custom fields that may have been passed over with the job.

4. Highlight the job and click **Process**. This will open the job and display the scan.

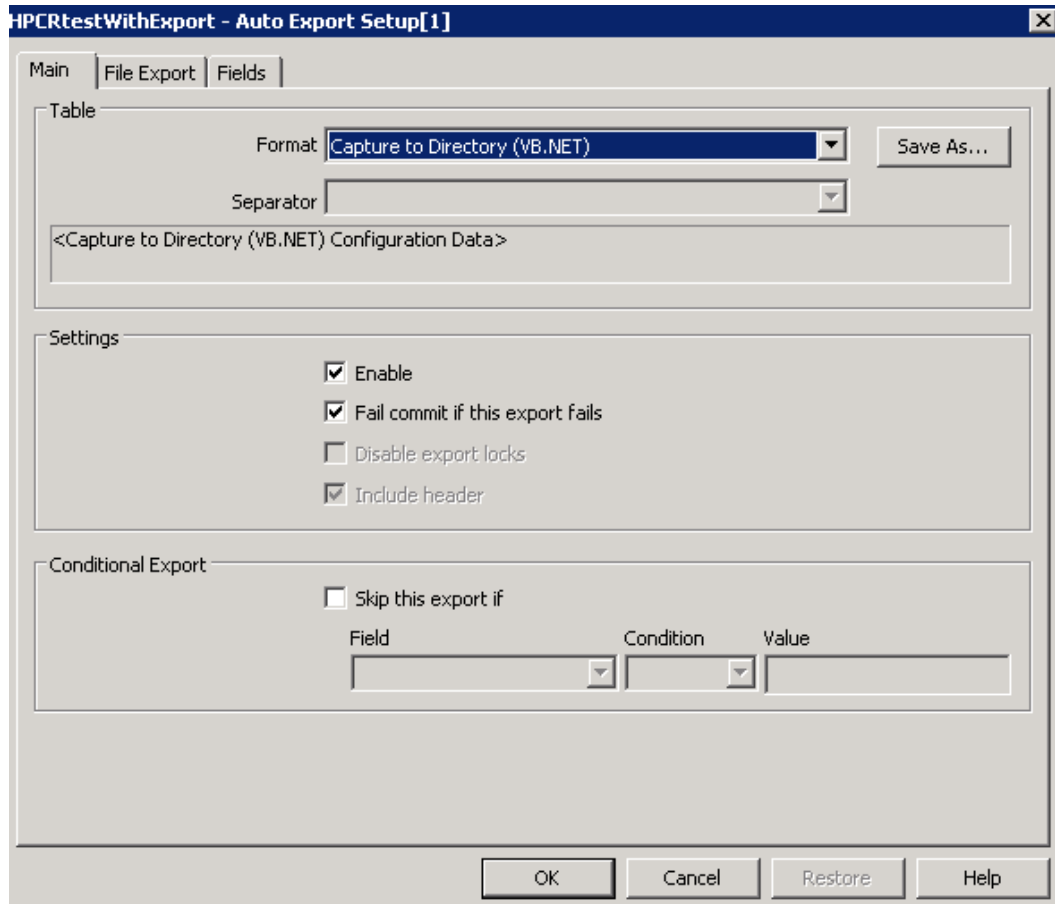
Sending a form from TeleForm back to HPCR

You can set a form to feed back to a directory that the HPCR server is monitoring.

Configuring the form

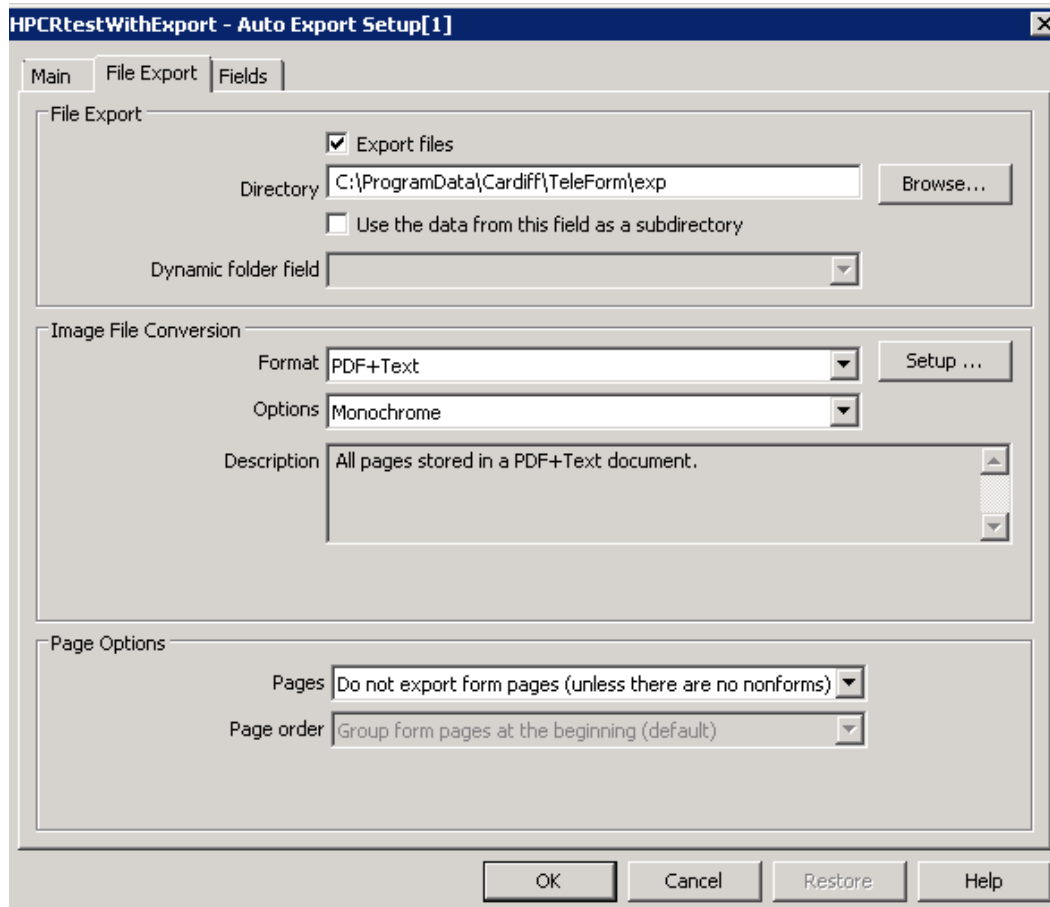
1. Using the TeleForm Designer, open the form that will be used for scans:
 - a Select **File > Templates > Sample Forms**.
 - b Open the form you plan to use.
2. With the form open, select **Form > Auto Export Setup**.

3. Click the **New** button and select **Capture to Directory (VB.NET)** from the drop-down in the **Table Format** field. This will capture an image file.



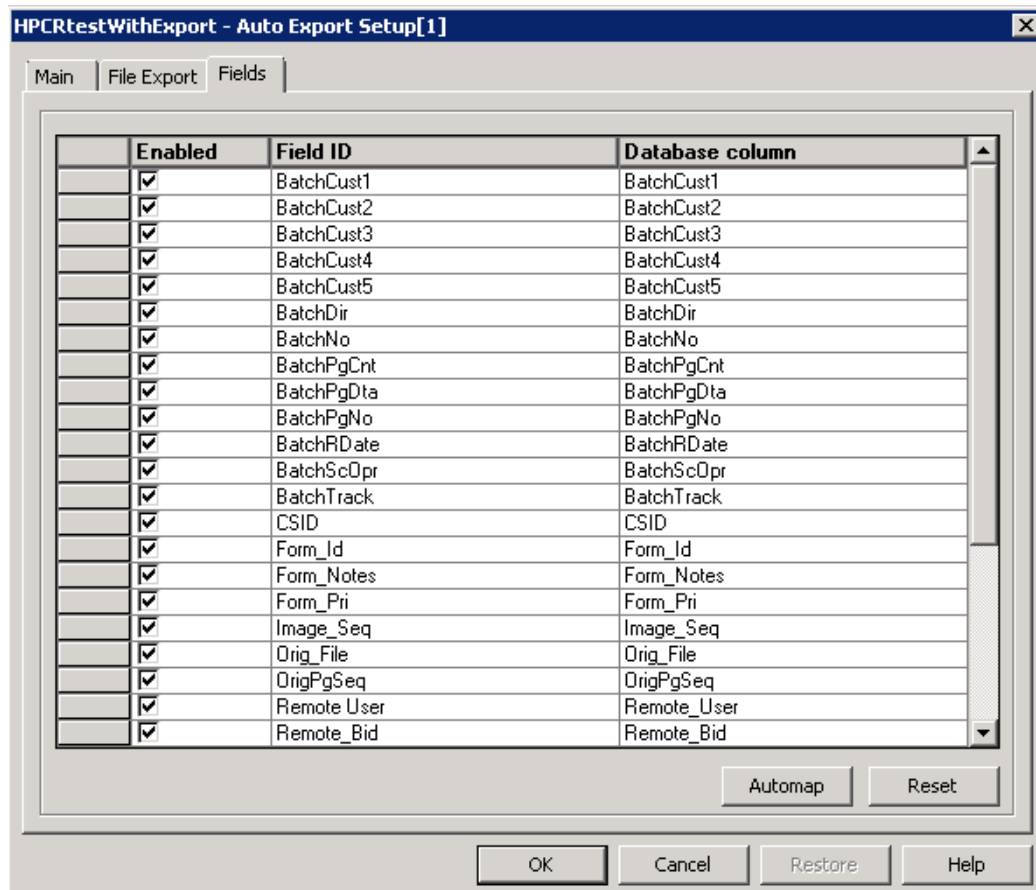
4. Click the **File Export** tab.

5. Enable **Export files** and enter a directory that the HP CR Universal Input connector can access.



6. Repeat Steps 3 through 5 and select XML (C#) as the format. This will create an XML file.

- On the **Fields** tab, select the fields to export in the XML file.



- Save the form when complete.

17-3-3 Enabling HP CR Universal Input

17-3-3-1 Creating a Universal Input connector

- Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator** to open the HP CR Server Administrator.
- In the console tree, click **Connectors > New HP Capture and Route Connector for > Universal Input**. The **Server Address** page opens.
- Click **Next**. Alternately, if you want the connector to run on a remote server, click **Remote Server** and enter the server name. Click **Next**. The **Display Name** page opens.
- Enter a descriptive name and click **Next**. You are prompted to specify the folder to scan.
- Click **Browse** and select the folder to scan.
- Click **Next**. The connector is configured and added. The **Congratulations** page opens.
- Click **Finish**.

The new Universal Input connector appears in the details pane.

17-3-3-2 Enabling XML translation

1. Click **Start > All Programs > HP Capture and Route > HP Capture & Route Server Administrator** to open the HP CR Server Administrator.
2. In the console tree, click **Connectors**. All connectors in the environment are listed in the details pane.
3. Double-click the **Universal Input** connector to open the **Properties** page.
4. Click **Folders**.
5. Select the folder that is listed and click **Properties**. The **New Folder** page opens.
6. Select the **Enable XML Translation** option and click **Add**. The **Enter Extension** page opens.
7. Enter:
`*.xml`
8. Click **OK** to close the page.
9. Click **OK** to save your changes and close the **New Folder** page.

Now you can copy the TeleformsIn.XSL file to the Universal Input folder:

1. Browse to:
`C:\Program Files (x86)\HP\HPCR\Samples\Universal Input`
2. Copy the file **TeleformsIn.xsl** to the folder specified for the Universal Input connector.

Part V:
Appendices

A Upgrading HP CR v1.4.0 to HP CR v1.5.0

Upgrading your current version of HP CR involves several steps, as detailed in this appendix:

[Backing up the database](#) (175)

[Cancelling messages in the In Process queue](#) (176)

[Backing up the templates](#) (176)

[Uninstalling clients](#) (176)

[Uninstalling device clients from HP CR Server Administrator](#) (177)

[Deleting device clients and the Default group from the HP CR Server Administrator](#) (177)

[Running the server installation on the HP CR v1.4.0 system](#) (177)

[Installing clients](#) (178)

Complete all of the procedures in this appendix in the order in which they are presented.

A-1 Backing up the database

Before you upgrade your current version of HP CR, you must back up the database. To back up and shrink the database:

1. Log in to the system that has the HP CR Server database.
2. Click **Start > All Programs > Administrative Tools > Services**.
3. Locate all HP Capture and Route services.
4. Right-click each service and click **Properties** from the drop-down menu.
5. On the **Properties** page, go to the **Startup Type** section and select **Disabled** from the drop-down menu.
6. Stop all HP Capture and Route services.
7. Using the Task manager, verify that all HP CR processes (beginning with Om*) are stopped.
8. Click **Start > Run** to open a Windows command prompt.
9. Back up the database using instructions provided by Microsoft in:
[http://msdn.microsoft.com/en-us/library/ms130214\(SQL.90\).aspx](http://msdn.microsoft.com/en-us/library/ms130214(SQL.90).aspx)
If necessary, change the name of the database while backing it up. You can also change the name of the backup file and the file path.
10. Locate the HP CR services and set the **Startup Type** to **Automatic**.
11. Start all HP CR services.

A-2 Cancelling messages in the In Process queue

When preparing for the upgrade, you must wait for all messages to complete or cancel all messages in the **In Process** queue.

NOTE: Any message located in the **In Process** queue at the time of the upgrade fails to compose. This is indicated in the message journal.

You must also notify HP CR users that they cannot send documents and faxes until the server upgrade and configuration is complete. It is recommended that you upgrade the server during off hours or when the volume of documents traffic is low.

A-3 Backing up the templates

The setup program for the server upgrade overwrites all the files in these directories. Before you upgrade, you must back them up prior to running the server upgrade.

To backup your templates:

1. Make a backup copy of the Templates directory. The Templates directory is located in:

`C:\Program Files (x86)\HP\HPCR\Languages\ENU\Notifications`

where C: is the drive where the HP CR Server is installed.

NOTE: "ENU" in the path above is an example of a default language used by the system. Other supported languages are in separate directories. When navigating to the Templates directory, go to the Languages folder, select the language you use, and create a backup of the templates for that language.

2. Make a backup copy of the Embedded Directives directory. This directory is located in:

`C:\Program Files (x86)\HP\HPCR\Languages\ENU\EmbeddedDirectives`

where C: is the drive where the HP CR Server is installed.

NOTE: These directories contain cover page templates, Routing Sheet templates, and notification templates for your server.

A-4 Uninstalling clients

HP CR v1.5.0 requires that all previously installed client programs are uninstalled. To do so:

1. From **Control Panel > Programs and Features**, select **Uninstall a program**.
2. Continue to uninstall specific clients as described below.

Uninstalling Embedded Device Client for HP OXPd v1.4

1. Select the Embedded Device Client for HP OXPd v1.4.
2. Select **Uninstall** from the menu bar.
3. After uninstall is complete, verify that the OXP1.4 directory has been removed from:

`C:\Program Files (x86)\HP location`

4. Delete any folder that remains.

Uninstalling Embedded Device Client for HP OXPd v1.6

1. Select the Embedded Device Client for HP OXPd v1.6.
2. Select **Uninstall** from the menu bar.
3. After uninstall is complete, verify that the OXP1.6 directory has been removed from:
`C:\Program Files (x86)\HP location`
4. Delete any folder that remains.

Uninstalling HP Capture and Route Web Client

1. Select the HP Capture and Route Web Client.
2. Select **Uninstall** from the menu bar.
3. After uninstall is complete, verify that the Web Client directory has been removed from:
`C:\Program Files (x86)\HP location`
4. Delete any folder that remains.

NOTE: In order to access new features for the HP CR End User Interface, the client should be upgraded immediately after upgrading the server.

A-5 Uninstalling device clients from HP CR Server Administrator

1. Launch the **HP CR Server Administrator > Select Devices > Default**. The list of installed devices appears in the results pane.
2. Right-click on the device and select **Uninstall**.
3. Repeat these steps for all installed device clients.

A-6 Deleting device clients and the Default group from the HP CR Server Administrator

1. Launch the **HP CR Server Administrator > Select Devices > Default**. The list of installed devices appears in the results pane.
2. Right-click on the device and select **Delete**.
3. Right-click on the **Default** group and select **Delete**.

A-7 Running the server installation on the HP CR v1.4.0 system

To upgrade the server:

1. Close all applications on the server.

NOTE: If you are upgrading an HP CR Server Cluster, you must manually stop the Cluster Services prior to the upgrade, and then manually restart them after the upgrade completes.

2. Navigate to the directory where you saved the download.
3. Run **Setup.exe**.
4. Click **Next**. The **License Agreement** page opens.
5. Read the license agreement. After scrolling to the bottom of the agreement, click the button beside the **I Accept The Terms Of The License Agreement** option.
6. Click **Next**. The setup checks the system for installation requirements and displays the results.
7. Review the results and click **Next**.
8. The setup requests logon credentials for the HP CR service account. Provide the logon credentials:
 - a In the **NT Domain** text box, enter the domain name.
 - b In the **User Name** text box, enter the user name.
 - c In the **Password** and **Confirm Password** text boxes, enter the password for the user.
9. Click **Next**. The **Ready to Install** page opens listing all the installation settings.
10. Review the installation settings. Click **Next** to begin the server upgrade.
The InstallShield Wizard upgrades the server. When upgrade is complete, you will see the **InstallShield Wizard Complete** page.
11. Click **Finish** to close the InstallShield wizard. The Server Configuration Wizard launches and shows the **Welcome** page.
12. Click **Next**. You are prompted to save the changes you made to the server configuration.
13. Click **Finish**.

The server configuration wizard saves your changes to the server configuration. The HP CR Server Administrator starts automatically.

NOTE: If you are upgrading an HP CR Server Cluster, you must manually restart Cluster Services after the upgrade completes.

NOTE: The HP CR v1.3.0 version of the **Universal Output** connector (previously called the **XML Output** connector) is neither supported nor updated by this release. If you were previously using the XML Output connector, you will need to manually enable the **Universal Output** connector and update any existing rules after installing the upgrade to HP CR v1.5.0.

A-8 Installing clients

Refer to [Section 17](#) (153), the [HP Capture and Route \(HP CR\) Embedded Device Client for HP OXPd Installation Guide](#), and the [Online help for the administrator](#) for installation and troubleshooting procedures.

B Installing HP CR in a Non-English Environment

HP CR End User clients (devices, HP CR End User Interface, HP CR Embedded Device Client, HP CR for HP OXPd 1.4 Client, HP CR for HP OXPd 1.6 Client, HP CR for Microsoft SharePoint, and iManage) have been localized for Simplified Chinese, French, German, Italian, Brazilian Portuguese, and Spanish. Installing HP CR in a non-English environment involves several steps, as detailed in this appendix:

[Installing HP CR](#) (179)

[Troubleshooting](#) (180)

Standard device buttons have been localized. Note, however, that the Administrator can modify the text as it appears on a device button. These buttons will not appear as localized unless the Administrator enters the text in the applicable language.

B-1 Installing HP CR

Complete the installation procedures in [Section 3: Installing the HP CR server](#) (11). Then, complete the configuration procedures in [Section 4: HP CR Server Administrator overview and post-installation configuration](#) (23).

B-1-1 Note about Routing Sheet templates

After installation, the HP CR server includes templates to allow for localization of each language that the server uses to process messages. The templates are located in the HPCR\Languages folder:

```
...\Program Files\HP\HPCR\Languages\ENU\Coverpages
```

When a Desktop Client (such as the End User Interface) contacts the server, it passes the local language to the HP CR server, which then uses the appropriate template based on the Client's language code. If the language code does not exist, it defaults to US English.

In the case of English (Ireland), for example, the language code ENI may be found in the language directory because it was manually created. But, HP CR does not automatically include a matching template in the HPCR\Languages folder. If you are setting up the HP CR server for English (Ireland), copy Routing Sheet templates from the ENU (US English) folder into the ENI folder.

B-1-2 Application pool for the End User Interface must be changed when installing on a non-US operating system

1. Open Internet Information Services (IIS) Manager on the server where the End User Interface was installed.
2. Browse to **Application Pools**.
3. Select **WebClient_Pool**.
4. Select **Advanced Settings** on the Actions Pane.
5. Locate the **Identity** property under **Process Model**.
6. Click the ellipsis (...) next to **NetworkService**.

7. Select **Custom account**.
8. Click **Set**.
9. Enter the domain and user name of the HP CR Service Account (domain\username).
10. Enter the password.
11. Click **OK** on the **Set Credentials** page.
12. Click **OK** on the **Application Pool Identity** page.
13. Click **OK** to close the **Advance Settings** page.
14. Open the HP CR End User Interface to the test settings.

B-2 Troubleshooting

B-2-1 “Failed to save new object (0x80040e14)” message

This message may display when installing HP CR v1.2 to a Windows operating system that is set to non-US/UK regional settings.

After the HP CR installation, a first-time wizard runs and attempts to create the default configuration, including implementing the default connectors. When the operating system that is set to non-US/UK regional settings, the numbering system often is altered to use commas as decimal points rather than periods. For example, in US regional settings, 100.00 is used to signify 100 with two decimal places. Throughout continental Europe, the value 100,00 (with a comma rather than a period).

Use of the comma conflicts with HP CR saving certain data to the database (including while creating a connector). A resolution is in development.

To work around this issue, set regional settings to US/UK on the HP CR server. These settings have been tested and confirmed to work.

B-2-2 Installing in an environment without Microsoft Exchange or Lotus Notes causes logon issues for the End User Interface

After installing the HP CR End User Interface to an environment without Microsoft Exchange, the user may not be able to log in to the End User Interface. An LDAP warning is displayed. The End User Interface is attempting to look up attributes from Active Directory that are not available since the Active Directory Scheme was not modified (as it would be by installing Microsoft Exchange). This is addressable through a configuration change.

1. On the HP CR server, open Windows Explorer and browse to:
[HP\HP CR\Config\AttributeMaps](#)
2. Open the [Exchange.default.xml](#) file in Notepad (or an xml editor).

NOTE: Make a copy of [Exchange.default.xml](#) prior to changes.

3. The [Exchange.default.xml](#) file is set to read only. This option must be removed before any changes can be made.
4. In [Exchange.default.xml](#), find the Exchange 2000 attributes section.

```
<!--  
  Exchange 2000 attributes  
-->  
<Attribute>
```

5. Remove (cut) the trailing -->

The section should appear as:

```
<!--  
  Exchange 2000 attributes  
<Attribute>
```

6. Paste the --> after the </Attribute> line in the file so that it looks like this:

```
<!--  
  Exchange 2000 attributes  
<Attribute>  
-->
```

