Kofax eCopy ShareScan
6.2
Installation Guide for Olivetti Devices

KOFAX

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Contents

Contents iii
ShareScan Installation Guide 1
ShareScan Documentation 2
Typical Installation Workflow 3
Pre-install Considerations 4
System Requirements for the ShareScan Manager PC 5
Operating Systems 5
Database 6
Virtual Environments 6
Memory Configuration 6
Checklist for the ShareScan Manager PC 6
Ports to be left open 8
Database Permissions 8
Network 8
Support Information 10
Languages 10
Supported Devices 10
Supported Backend Services 10
Installing ShareScan 11
Basic Workflow 11
Installing ShareScan 11
Custom Installation 13
Creating a ShareScan configuration database 14

User rights necessary for ShareScan database creation 15
Installing only the ShareScan Server 16
Maintenance 16
Client-side Installation 18
Configuring the Olivetti device 18
Adding Devices with Installed ShareScan Client 18
Batch Adding Devices 19
eCopy Connectors 21
eCopy Connector for Microsoft Exchange (Mail and/or Fax) 21
Supported Versions 21
Installation Prerequisites and Suggestions 21
eCopy Connector for IBM Lotus Notes (Mail and/or Fax) 21
Supported Versions 21
Installation Prerequisites and Suggestions 22
eCopy Connector for LDAP/SMTP (Mail and/or Fax) 22
Supported Versions 22
Installation Prerequisites and Suggestions 22
eCopy Scan to Desktop 22
Installation Prerequisites and Suggestions 22
eCopy Quick Connect 24
Supported Versions 24
Installation Prerequisites and Suggestions 24
eCopy Connector for OpenText Fax Server (RightFax Edition) 24
Supported Versions 24
Installation Prerequisites and Suggestions 24
eCopy Scan to Printer 25
Installation Prerequisites and Suggestions 25
eCopy Connector for Microsoft SharePoint 25

Supported Versions 25
Installation Prerequisites and Suggestions 25
eCopy Connector for EMC Documentum 25
Supported Versions 25
Installation Prerequisites and Suggestions 26
eCopy Connector for Autonomy iManage WorkSite 26
Supported Versions 26
Installation Prerequisites and Suggestions 27
eCopy Connector for Open Text Content Server - eDOCS Edition 27
Supported Versions 27
Installation Prerequisites and Suggestions 27
eCopy Connector for Open Text Content Server 28
Supported Versions 28
Installation Prerequisites and Suggestions 28
Licensing Devices 30
Loading Licenses 30
Activating Licenses 31
Loading Activated Licenses 31
Removing Licenses 31
Generating a license report 32
ShareScan Post-install 33
Configuring ShareScan (examples) 33
To Configure a Service (example – Activity Tracking) 33
To Configure an Extender (example – Forms Processing Extender) 34
To Configure a Quick Connect Connector Profile to Use Forms Processing Extender data 34
To Test the Configuration of a Profile 35
Creating Self Signed Server Certificates 35
Creating the certificate 36

How to Change ShareScan Webclient Certificate to SHA256 37
Certificate Manager 39
Next Steps 40
Best Practices 40
Technical Support 41
Troubleshooting Tips 42
Re-enable SSLv3 in Tomcat and Java 43

ShareScan Installation Guide

The eCopy ShareScan software extends the capabilities of digital copiers and scanners. When installing and setting up a ShareScan system, you must be familiar with the scanning devices that you will use with ShareScan, the ShareScan software components, and the basic installation and configuration workflow.

This guide is intended for administrators responsible for the initial installation, configuration, and licensing of ShareScan. For information pertaining to the ShareScan (pre)install, see this guide. For configuration and Administration Console usage, refer to the Administration Console Help (accessible via pressing **F1** on the Administration Console).

This document is written under the assumption that readers are familiar with working in a server-client architecture and environment.

ShareScan Documentation

The following documentation is available for your perusal with ShareScan:

– **eCopy ShareScan Installation Guide** (this document) - contains information on installing eCopy ShareScan, including hardware and software prerequisites

– **eCopy ShareScan Administration Console Help** – the integrated help of the application, covering the use of ShareScan beyond installation, and provides configuration information. The help is accessible by pressing F1 on the ShareScan Administration Console

– **eCopy ShareScan Troubleshooter User Guide** (PDF) – contains information on how to use the ShareScan Troubleshooter, a built-in diagnostic tool of the product

– **eCopy ShareScan Release Notes** (PDF) – contains an overview of the changes for the given ShareScan release

– **eCopy ShareScan High Availability and Load Balancing Deployment Guide** (PDF) - provides guidance on how to deploy ShareScan to function in high availability mode

– **eCopy ShareScan Glossary Editor Recommendations** (PDF) - contains information on how to handle Glossary Editor Tool properly

Typical Installation Workflow

ShareScan 6.2 installation has three typical scenarios, which are briefly outlined below. For a more detailed description, read the Installing ShareScan section of this document.

Installing ShareScan 6.2 to a clean system

1. Ensure that the ShareScan prerequisites (listed in the following chapter) are installed.
2. Start the ShareScan 6.2 installer, and click through the Installation Wizard.

Upgrading from ShareScan 5.x to 6.2

Important!
ShareScan v5.0, v5.1 and v5.2 are not supported in an 5.x to 6.2 upgrade scenario.

Before you start the upgrade process, ensure that your current ShareScan installation is working properly. The easiest way to do this is starting the Administration Console and verifying that it launches error-free.

Upgrading from versions pre-dating v5.4

If you are upgrading from a software version earlier than v5.4 - that is from v5.0, v5.1 or from v5.2 - first you need to upgrade to 5.4. Once you have a verified working installation of ShareScan v5.4 you are ready to proceed to upgrade to v6.2.

Upgrading from v5.4 or higher to 6.2

1. Exit ShareScan 5.x Administration Console.
2. Ensure that the ShareScan prerequisites (listed in the following chapter) are installed.
3. Run eCopy ShareScan 6.2 installer.
4. Choose **Upgrade ShareScan 5.x to 6.2** or **Custom upgrade from previous version to 6.2** after the **Welcome** screen and click through the upgrade workflow.

Pre-install Considerations

The following chapter contains information on the various tasks to be performed prior to installing ShareScan, as well as the requirements that must be met before product installation.

System Requirements for the ShareScan Manager PC

The ShareScan 6.2 install media contains all the required dependency installer files under **Install\ShareScan\SetupPrerequisites** in separate folders that must be installed to ensure ShareScan functions properly. These are the following:

– Java SE Runtime Environment 8 Update 192 (x86)

– Microsoft .NET Framework 4.6.2

– Microsoft Visual C++ 2012 Redistributable (x86) – version 11.0.61030

– Microsoft Visual C++ 2015 Redistributable (x86) – version 14.0.24123

– Microsoft Visual C++ 2015 Redistributable (x64) – version 14.0.24123

– Microsoft Visual J# 2.0 Redistributable

Important!
If Windows security update KB3000483 is not installed on the target system, Microsoft Visual C++ 2015 runtime installer might freeze without completing installation, unable to function properly. Follow the steps below to resolve the issue:

1. Uninstall Microsoft Visual C++ 2015 runtime redistributable (x86 / x64).
2. Install KB3000483 Windows security update (https://www.microsoft.com/en-us/download/details.aspx?id=45570) on the target system
3. Choose **Restart** from the dialog that appears.
4. Re-run the Microsoft Visual C++ 2015 runtime redistributable (x86 / x64) installer.

The installer skips any of the above listed dependencies if they are already installed on the target system, with this considerably shortening install time.

Note:
Microsoft Visual J# 2.0 Redistributable must be manually installed from the installation media. Before installing this dependency, Microsoft .NET Framework 3.5 SP1 must also be manually installed.

Operating Systems

– Windows 7 SP1 Home Premium, Professional and Ultimate Editions

– Windows 8.1

– Windows 10 Anniversary Update or later

– Windows Server 2008 R2 SP1*

– Windows Server 2012 R2*

– Windows Server 2016*
*64 bit support as a 32 bit application

– The ShareScan Administration Console and the ShareScan Manager cannot be installed on Linux, Solaris or Macintosh operating systems.

Note:
The ShareScan 6.2 installer cannot be launched unless Microsoft .NET Framework 4.6.2 or a later 4.x version is installed on the target system. When trying to launch the installer with no .NET Framework or any version older than v4.6.2 installed, an error message pops up detailing the dependency and the install media path for the offline .NET Framework installer. This warning message must be closed by clicking **OK** and the installer quits. For more information on .NET Framework versions and their operating system related dependencies click here.

Database

– SQL server 2008 or above, express and non-express editions

Virtual Environments

Important!
Installing eCopy ShareScan on a virtual machine with a Microsoft operating system has always been supported but Kofax does not certify virtual platforms. As long as adequate resources are allocated to the virtual machine, eCopy ShareScan should function as expected. Ultimately, it is the customer's responsibility to ensure their virtual environment is configured correctly. Avoid desktop class machines, since they do not have enough resources to support heavy processing.

– VMware ESX Server 4.x and 5.x or higher

– VMware Workstation 7.x, 8.x, 9.x, 10.x, 11.x and 12.x or higher

– Microsoft Hyper Visor (Hyper-V) Server 2012 or higher

Memory Configuration

– 4 GB physical memory (minimum); 6 GB recommended (8 GB recommended for systems using 100+ MFPs)

– 5 GB disk space (including SQL server and prerequisites)

For more details on recommended memory configuration, see the **Sizing recommendations for embedded configurations** section of the **Pre-Installation Checklist and Sizing Guide** document.

Checklist for the ShareScan Manager PC

– Ensure you are about to install the ShareScan Manager to a dedicated PC (that is, a PC exclusively tasked with the running of the ShareScan Manager).

– Run the Automatic Updates before you start installing ShareScan. **Pay extra attention that you have Automatic Updates of the operating system TURNED OFF during the installation.**

– ShareScan 6.2 installs a customized Apache Tomcat web service. Already existing Tomcat installations are not

supported.

Note:
The original version of the Apache Tomcat web service is 8.5.42. This is a 32-bit installer.

– When designing the network architecture, note that Windows 7 can handle a maximum number of 20 concurrent network connections. If you plan to have more than 10 devices, you need Windows Server as an operating system.

– If you have multiple NIC cards, you need to select an IP address for ShareScan that will be used for device-server communication.

– Check if your file system format is NTFS.

– Ensure that Microsoft IIS is not installed or is not listening to the ports used by ShareScan (listed below).

– ShareScan 6.x licenses are installed to a SQL Server to allow easy management of devices. Prior to installing ShareScan 6.x, it is important to determine if licenses will be managed individually from each ShareScan Manager, or if you would like to manage all licenses from a single SQL Server.
The ShareScan installer can install a local copy of SQL Server 2014 Express for managing licenses (in addition to storing configuration data). It can also create the appropriate database structure on an existing SQL server for consolidated key management.

– ShareScan license keys must be activated against an Activation Server. License keys can only be activated once, so inspect the setup carefully prior to activation. All license keys provide a 30-day grace period before activation to ensure the license setup is as intended. Manual activation is available for servers that are unable to communicate directly with the Activation Server.
As licenses are tied to the ShareScan database, it is not recommended tochange databases after ShareScan installation.

– If you plan to use the **Single Sign-On** feature of the **Session Logon** service, ensure that the ShareScan Manager PC is a member of the domain for which Session Logon is configured. The logged in user running and configuring the Session Logon must be an Active Directory user with the necessary rights to read properties in Active Directory (this is a default value). Ensure that you use the Active Directory user account to log in into this domain (and not into the local system). This Active Directory user must have the necessary rights to read Active Directory properties (generally this is a default behavior; however this can be modified in Active Directory).

Ports to be left open

If you are planning to have firewalls enabled, leave the following ports open (between ShareScan Manager and the multifunctional device) for both inbound and outbound network traffic:

Inbound traffic:

– TCP: 443, 8080, 9600, 9650, 9700, 9610, 50002

– UDP: 9650

Outbound traffic:

– TCP: 1433 (SQL server default port, custom port can also be used instead), 9650, 50001, 50003

– UDP: 161 (SNMP), 8899, 9650

If any of these ports are in use, ShareScan displays a warning. Ports in use do not block installation, but must be opened later for proper functionality.

Database Permissions

– For working with the ShareScan databases in case of upgrading, you must use an account that has **db_owner** Database-Level Role permissions for the eCopy ShareScan database. An account with sysadmin Server-Level Role can be used, but it is not mandatory. For clean installation scenario related database permissions, see the **User rights necessary for ShareScan database creation** section in your eCopy ShareScan Installation Guide.

– Do not use an **sa** account as a ShareScan runtime account for database connection, it does not work. Use only the eCopy account created by the ShareScan database installer, or a user having the same user rights as the eCopy account. If you use Integrated Windows Authentication for database connection, the user accounts specifed during installation should have the proper rights.

Note:
If Integrated Windows Authentication is used to connect to the database, and FPE (Form Processing Extender) or SFE (SmartForms Extender) profile is edited in the Administration Console (by using the template editor of the extenders), Profile Export/Import is used in the Administration Console, then the database administrator must add the user (or users) to the allowed users of the ShareScan database. These users should have **db_owner** rights and must have their default schema set to 'ShareScan'.

Network

– **Domains and Workgroups:** ShareScan can be configured to run in either domain-based networks or workgroup environments. Windows 2008 or later domain environments are supported.
It is recommended to use a domain environment.

– **Subnets and VLANs:** The ShareScan Manager PC can be on different subnets or VLANs from the multifunction devices, provided that the multifunction devices can communicate with the Manager PC using an IP address. If

your multifunction devices span multiple subnets or VLANs, a router is required to pass packets back and forth. However, in these situations the UDP and the SNMP based device discovery mechanisms may not be functional. Also, consider that duplex communication is required between the ShareScan Manager and the MFPs (meaning both the devices shall be able to send TCP messages to the Manager and vice versa), on the ports listed in section Checklist for the ShareScan Manager PC.

– **IP Addresses:** Use static IP addresses for both the ShareScan Manager PC and the MFPs. To change the IP address of the Manager PC:

a. remove all devices from the Manager

b. stop all ShareScan related services

c. change the IP address of the NIC and make sure the network adapters use the new IP (`ipconfig` command)

d. start the services stopped in (b)

e. re-add the devices

If your devices require a certificate to work, the workflow changes slightly when changing the Manager IP address:

a. remove all devices from the Manager

b. change the IP address

c. reboot the Manager PC

d. start the ShareScan Administration Console, and confirm the IP address change on the dialog that automatically opens

e. recreate the certificate(s)

f. re-add the devices to the Manager

– **Gateway Address:** ShareScan does not require a gateway address.

– **Host Name:** The host name must not exceed 60 characters. Device host names are resolved using DNS. This happens once you have added a device and confirmed it. If the device is not registered in the DNS, then its name in the **Devices** tab (Administration Console) may change after confirmation.
Note that changing the host name after installation can cause licensing and database issues, and is therefore **not supported**. If you must change the host name, you must do a full reinstallation of ShareScan.

– **Network Attached Storage Devices (NAS):** ShareScan 6.2 supports NAS drives and folders that are fully compatible with NTFS file system and Windows access control mechanisms.

– **Novell:** ShareScan does not support direct communication between a ShareScan Manager PC and a multifunction device on Novell networks. However, when Novell client software is installed on the Manager PC some Connectors (eCopy Quick Connect, and the eCopy Scan to Desktop) can bridge to a Novell server. A Novell client must be installed on the ShareScan Manager PC if Novell authentication of Scan Inboxes is required.
The eCopy Connector for LDAP/SMTP requires a Novell client to work properly with Session Logon.

– **Local Security Policy:** In order to use the Administration Console on the ShareScan Manager PC, you require local administrator-level credentials. ShareScan Manager cannot be installed on a Domain Controller.

Support Information

This section contains information on the various languages and third-party software supported by ShareScan.

Languages

ShareScan 6.2 supports the following languages:

– English

– Brazilian Portuguese

– Dutch

– French

– German

– Italian

– Spanish

– Catalan (client only)

– Simplified Chinese (client only)

– Japanese (client only)

Note:
This list only refers to the languages available for the user interface. For the OCR process, the language support is much wider, comprising over 100 languages.

Supported Devices

For the most current information on supported devices, go to the Support Website.

Supported Backend Services

For a detailed list of connector-specific backend version, see section eCopy connectors in this Installation Guide.

Installing ShareScan

The following chapter contains information on the various tasks associated with installing ShareScan.

Basic Workflow

To install, configure, and license ShareScan:

1. Install the ShareScan software on a network computer. You have the option to customize the database installation. For more information, see the Custom installation chapter of this guide.
2. Install ShareScan Client, if needed (for more information on installing the client, see the chapter of this guide).
3. Start the Administration Console.
4. Add licenses, add devices (if they do not appear automatically on the **Devices** tab), and/or set up scanners. The Model name (in the dialog that appears as part of device addition procedure) differs from the name of the Device (displayed in the tree control on the **Device** tab). The tree control on the **Device** tab contains the network (host) name of the devices (or the IP address of the devices, if the host name cannot be resolved). This ID is used as a unique identifier for the devices in the ShareScan system. This cannot be changed in the Administration Console, only via the Device administration user interface and / or in the network DNS (Domain name server).

   Note:
   The Model name specified during device addition can be changed anytime via the **Modify Model Name** menu item in the Administration Console: **Devices tab > <<right click device name>> > Modify Model Name**).
5. Install and configure Services, Connectors, and Devices.

When you open the Administration Console, the **Welcome** page displays a list of the main feature highlights of the current version.

For in-depth information about configuring and managing the Services, Connectors, and Devices that ShareScan uses, refer to the ShareScan Help. To access the Help, click **F1** or click the **Help** button that is located in the upper-right corner of the ShareScan Administration Console.

Installing ShareScan

Use the ShareScan installation program to install the software components on a network computer.

Notes:

When running Windows 7, Windows Server 2008 R2 or Windows Server 2008, ensure that the .NET Framework 3.5 core feature is set to **Enabled**. You can do this via **Control Panel > Turn Windows features on and off**.
ShareScan is only compatible with the Apache Tomcat version included in the installation program. If you have Apache Tomcat

already installed, remove it prior to installing ShareScan.
If you have Skype installed, it can conflict with the Apache Tomcat installed by ShareScan. To avoid this, ensure that the **Use port 80 and 443 as alternatives for incoming connections** option is unchecked in Skype.

Ports to be left open

Ensure that the following ports are left open:

– TCP: 23, 80, 443, 2121, 7627, 8005, 8009, 8080, 9030, 9600, 9601, 50001, 50002, 9602, 9998, 9999

– UDP: 161, 8125, 8888, 8899, 9988, 9999

To install ShareScan

Follow these instructions when installing ShareScan.

Notes:

Installing ShareScan to folders specific to an individual user's profile (My Documents, for example, or Documents and Settings on older systems) is NOT advised.

1. Ensure that you have the latest system updates on your machine and that Automatic Windows Updates are turned off.
2. Insert the ShareScan installation medium in the drive, and browse to the folder where the **ShareScan5.2.exe** is located.
3. Run **ShareScan5.2.exe**.
4. Choose a language for your installation via the dropdown menu.
5. Click **Next**. The Welcome screen is displayed.
6. Click **Next**. The System Check screen is displayed.
   This screen provides information on any possible issues related to ShareScan prerequisites, and a brief description on how to solve those issues. If you encounter any, you must exit the installer, solve the issue and then restart the ShareScan installation.
7. Click **Next** and enter the Product License Key (22 characters with dashes, or 18 without dashes; the system accepts either).
8. Click **Next**, and select your geographic region.
9. Click **Next**. The End-User License Agreement (EULA) is displayed.
10. Accept the EULA, and click **Next**.
11. Select either **Complete** or **Custom** as the installation type.
    If you select **Complete**, the automatic full installation is performed with the following features and settings:
    – ShareScan server 5.2 is installed
    – SQL Server is installed
    - On Windows Server 2008 or later, the SQL Server 2012 Express Local DB is installed (faster install)
    Note: As you cannot connect to this type of database engine from another PC on the network, this

option is not recommended if you plan to share the database installed between multiple Managers. In that case, select the **Custom** installation option.

- On Windows Server 2003 or Windows XP SP3, the SQL Server 2008 Express R2 is installed

– ShareScan configuration database is created on the installed SQL Server

– WebClient is installed (including the Apache Tomcat server)

If you are installing in a multi-Manager environment, using a single, common database, you have to run the Complete install only once, for the first Manager, as doing so will create the ShareScan database. For the rest of the Managers, simply run a **Custom** installation, installing only the ShareScan server, and you can set them to connect to the newly created ShareScan database.

12. Click **Finish** when the ShareScan components are installed.
13. After ShareScan 5.2 is successfully installed, install ShareScan 5.2 SP1: run **SS52_SP1.exe** and click through the installation wizard.

You are now ready to configure a connector profile.

Custom Installation

This section outlines the process available when selecting the **Custom** installation option.The installation process diverges from the Complete installation outlined above after accepting the EULA.

Notes:

The eCopy ShareScan 5.2 Server is a required component, and is always installed.

If you install the web client, the Simulator function of the ShareScan Administration Console defaults to using the web client for the Simulator.

1. The Custom Setup screen is displayed. Select the program features you want to install, and click **Next**.
   – **Microsoft SQL Server database engine** – check this component if you want a local installation of Microsoft SQL Server Express. This deployment option is recommended for small-scale deployments with a single Manager. If you do not select this component, the Installer assumes you have an existing SQL Server installation either locally or on another server on the network, and you are planning to connect to that.

   – **ShareScan configuration database** – check this component if you want to create a ShareScan configuration database. It is necessary to select this component if you install a single ShareScan Manager or if you plan to install multiple Managers and you do not want to share the same database across them, or if you plan to have multiple Managers and you are installing the first ShareScan Manager.

   – **ShareScan Web client** – enable this component if you plan to use scanner devices with web browser enabled user interface.
2. Select the Destination folder for the ShareScan server and Apache Tomcat web server installation (the Apache Tomcat web server is required for ShareScan Web client).
3. Click **Next**.
4. Select the SQL server database engine. In Windows Server 2008 or later operating systems, the SQL Server 2012 Express LocalDB option is selected by default.
   On operating systems older than Windows Server 2008, the SQL Server 2008 R2 Express is installed.

Regardless of the operating system and the selected SQL Server type, you can override the password of the SQL Server system administrator (that is, the **sa** password), by unchecking the checkbox at the bottom of the screen. If you do so, you must provide a password that complies with the password policy in effect.

5. The Database Server and Runtime Account Information screen is displayed.
   On this screen, the hostname or IP (and optionally, the instance name) of the SQL Server must be specified. Also, you can specify a runtime account for the configuration database.
6. Click **Next**. A summary of the set options is displayed.
7. Check the information, and click **Install** to proceed.
8. Click **Finish** when the ShareScan components are installed.

Creating a ShareScan configuration database

If you opted to create a ShareScan configuration database, you need to specify a user account that is used for database creation. You can do so on the Administrative Credentials for Database Creation screen. The screen is displayed after the Database Server and Runtime Account Information screen.

1. The Custom Setup screen is displayed. Select the program features you want to install, and click **Next**. For a detailed description of the options, see above.
2. Select the Destination folder for the ShareScan server and Apache Tomcat web server installation (the Apache Tomcat web server is required for ShareScan Web client).
3. Click **Next**.
4. Select the SQL server database engine. In Windows Server 2008 or later operating systems, the SQL Server 2012 Express LocalDB option is selected by default.
   On operating systems older than Windows Server 2008, the SQL Server 2008 R2 Express is installed.
   Regardless of the operating system and the selected SQL Server type, you can override the password of the SQL Server system administrator (that is, the **sa** password), by unchecking the checkbox at the bottom of the screen. If you do so, you must provide a password that complies with the password policy in effect.
5. The Database Server and Runtime Account Information screen is displayed.
   On this screen, the hostname or IP (and optionally, the instance name) of the SQL Server must be specified. Also, you can specify a runtime account for the configuration database.
6. The Administrative Credentials for Database Creation screen is displayed.
   The credentials entered on this screen are required when installing or upgrading the database. The information is not stored, it is only required during the installation or upgrade process, for the database connection. The following options are displayed:
   – The default **sa** account and the default password used by ShareScan

   – The Windows identity of the user running the ShareScan installer

   – Specifying a user ID and the corresponding password (use SQL Server authentication). This can be an **sa** account with the corresponding password, or it can be a completely different user ID that is valid on the SQL Server having the proper rights for the ShareScan database creation.
7. Click **Next**. A summary of the set options is displayed.

8. Check the information, and click **Install** to proceed.
9. Click **Finish** when the ShareScan components are installed.

User rights necessary for ShareScan database creation

This section lists the supported scenarios, from the least restrictive to the most restrictive:

The provided administrative account has SysAdmin SQL Server role, like sa

Note:
In ShareScan 5.2 SP1, **sa** rights are not required anymore for database installation, allowing the cases below. Having **sa** rights simplifies the process, as in that case, you do not need to set anything on the SQL server.

The provided administrative account has 'dbcreator' and 'securityadmin' roles on the SQL Server

These rights are enough to create both the ShareScan database and the login ID of the runtime account. If you are connecting to a corporate database server, and your database administrator is not providing you the credentials of the **sa** account, then the database administrator needs to provide another account for the ShareScan database installation (practically with lower privileges), having the **dbcreator** and the **securityadmin** roles.

This administrative user will be a **db_owner** on the created **eCopyShareScan** database.

If security policy is stricter, and the administrative account only with 'dbcreator' role is possible to use

In this case, the login ID in SQL Server for the ShareScan runtime account must be created by the database administrator manually. This manually created SQL Server login ID must be used on the **Database Server and Runtime Account Information** screen of the ShareScan Installation Wizard. This manually created SQL login ID needs to have a **public** server role and it is not required to have it mapped to any database (it will be mapped to the eCopyShareScan database with a minimal set of user rights necessary for the proper operation of the ShareScan server).

This administrative user will be a **db_owner** on the created **eCopyShareScan** database.

The most restrictive environment

The most restrictive scenario (from the point of view of database access) ShareScan installer supports is similar to the one directly above, with the following additional restrictions:

– The database administrator must create the empty ShareScan database named as **eCopyShareScan**

– An account must be provided (on the **Administrative Credentials for Database Creation** screen) to enable the creation of the ShareScan database content – for this, the account needs to be a **db_owner** on the empty **eCopyShareScan** database

– The account is not needed to have neither **dbcreator** nor **securityadmin** permissions.

In any of the above cases, the Installer Wizard checks the server connection and the provided credentials, and it also checks if the accounts or users provided have the necessary rights granted. If the user rights are not set properly, the corresponding error message is displayed.

On the **Administrative Credentials for Database Creation** screen you can select an option when the database creation is performed in the name of the Windows user currently running the ShareScan installer. In case of a centralized corporate database server, this option allows the database administrator to use a Windows (domain) account as the database creator, using any of the above options according to the security policy in place.

Note:
The runtime account ShareScan uses still needs to be a SQL Server login ID.

Installing only the ShareScan Server

This is the case when someone installs a Manager into a system which already has an 5.2 database, or a multi-Manager clean installation, where the database is already installed.

Or, in case of an update, one of the Managers has been updated already, and the database installation / update option was selected during that installation. In this case, it is not necessary to update the shared database again; though performing the database update more than once causes no issues.

1. The Custom Setup screen is displayed. Deselect all options. The eCopy ShareScan server is always enabled.
2. Select the Destination folder for eCopy ShareScan.
3. Click **Next**. The Database Server and Runtime Account Information screen is displayed.
   On this screen, the hostname or IP (and optionally, the instance name) of the SQL Server must be specified. Also, you can specify a runtime account for the configuration database, by selecting the **Use the following credentials** option, and entering the relevant username and password.
   You need to specify user name and password only when the ShareScan configuration database was created with a custom runtime account and password.
4. Click **Next**. A summary of the set options is displayed.
5. Check the information, and click **Install** to proceed.
6. Click **Finish** when the ShareScan components are installed.

Maintenance

After the successful installation of ShareScan 5.2 SP1, relaunching the ShareScan 5.2 installer (**ShareScan5.2.exe**) displays the Maintenance screen, where the following options are available:

– Export ShareScan 5.2 profiles
Selecting this option starts the profile tool in Export mode; you can export your existing ShareScan 5.2 SP1 profiles.

– Import ShareScan 4 configuration data
Selecting this option starts the Data Upgrade Tool, which allows you to migrate ShareScan 4.x information (profiles, system data) to your ShareScan 5.2 SP1 installation. This option is relevant only if you have an existing ShareScan 4 installation with configuration data.

– Import ShareScan 5.x profiles
Selecting this option starts the profile tool in Import mode; you can import ShareScan 5.x profiles to your installation. This option is relevant only if you have an existing ShareScan 5.0 or 5.1 installation with configuration data.

– Modify
Allows you to install or uninstall the ShareScan Web client (and the Apache Tomcat server).

– Remove
Removes all ShareScan features (Server, WebClient). The so-called dependency packages (SQL Server, .NET runtimes, and so forth) can be removed from the **Programs / Features** manager of Windows.
Note that if you installed ShareScan 5.2 SP1 over an existing ShareScan version, removing ShareScan 5.2 SP1 DOES NOT bring back the previously existing ShareScan version!
Removing the WebClient feature of ShareScan also removes the Apache Tomcat server.

Client-side Installation

Configuring the Olivetti device

This section contains information on installing and configuring the Olivetti device.

To configure the device to work with ShareScan, you set several options in the Internet Explorer browser and on the device.

– **Internet Explorer:** If you are using Internet Explorer, make sure that you set the "Check for newer versions of stored pages" option for Temporary Internet Files to "Every time I visit the webpage".

– **Cookies:** It is recommended that you configure the device to accept all cookies so that the device does not prompt users to accept cookies each time they use ShareScan. For instructions, refer to the device documentation.

– **Focus rectangle:** You may want to change the color of the focus rectangle. For instructions, refer to the device documentation.

Time-outs: It is recommended that you set the following time-out settings on the device. For instructions, refer to the device documentation.

To make ShareScan time out after nine minutes of inactivity, set the "System Auto Reset Time" setting to nine minutes. This keeps the screen from timing out while a document is being scanned or processed.

In certain scanning environmentsit is recommended that you increase the "WebDAV" Client time-out setting on the device. With the default setting of 60 seconds, scanning large documents or scanning concurrently from multiple devices may cause the device to time out. You can increase the time-out setting up to 300 seconds. For instructions, refer to the device documentation.

If you need complete security, it is recommended that you enable SSL (Secure Sockets Layers) on devices running ShareScan 6.2 . For information about configuring SSL on the device, refer to the Olivetti documentation.

Adding Devices with Installed ShareScan Client

After adding a license file to the ShareScan system, you can add one or more embedded or integrated devices.

1. Start ShareScan Administration Console.
2. Click **Add Device** on the toolbar. You can also select **Devices** on the **Welcome** page and then right-click in the **Device Configuration** window and select **Add Device**. The **Add Devices** window opens.
3. If your device does not appear in the list, select the **SNMP** instead of the option from the **Discovery** list. If the autodiscovery does not succeed, use TCP/IP to add it manually.
4. Select the device you want to add.
5. Click **OK**.

6. The **Register ShareScan** dialog box opens.
7. Enter the Administrator password for the device and then click **Register**. (For default Administrator password, contact Konica Minolta product support.) The system creates Apache Tomcat folders and installs the Web application on the device. Before adding an Olivetti device, consult section **Configuring the Olivetti** device.
   If the ShareScan client is already registered on an MFP and the SSL settings need to be changed on the device - either from Non-SSL to SSL, or from SSL to Non SSL -, you need to follow these steps:
   – Remove the device from the Administration Console.
   – Change the SSL settings on the device.
   – Re-add the device through the Administration Console.
8. When the system prompts you to confirm the device that you want to add to the device list, click **OK**.

Troubleshooting tip: If your device(s) cannot be discovered and are not shown in the list on the **Add device** dialog with any of the protocols, then make sure that:

- The device is up and running.
- It is connected to the network (use the `ping <IP-address>` command in a command window).
- The required ports are open on the firewalls/routers.

Note:
The automatic device discovery is supported via and SNMP. If the autodiscovery does not succeed, use TCP/IP to add the device manually. If the device model cannot be detected due to firewall/network restriction, a pre-populated dropdown list pops up the user can select from.

Batch Adding Devices

If you want to add multiple devices in a batch, follow the instructions below:

1. Start the ShareScan Administration Console.
2. Click **Add Device**, or select **Add device** from the context menu (by right-clicking in the **Device Configuration** window).
3. Select **Import...** from the **Discovery** dropdown list; a standard **Open file** dialog is displayed and you need to select a file that describes the devices to add. The file must be a `.csv` file, containing data in the following format:

```
IP/host, Olivetti, model, password(string)
```

Example: `10.140.202.89,Olivetti,Olivetti,1234567812345678`

– `IP/host`: device IP address (or host name)

– `Olivetti`: must be Olivetti

– `model (or *)`: specific device model name (or * to get the model name automatically from the device)

– `password(string)`:

Note:
It is recommended to manually add a device to the Administration Console for a proper understanding of the `.csv` file content describing the devices.

Note:
For instructions about removing devices, refer to the ShareScan Help.

eCopy Connectors

It is recommended that application credentials (for Lotus Notes, Microsoft Outlook, SMTP, LDAP, and so forth) should be matched with the PC login credentials. Creating a generic, email-enabled “ShareScan” account for use by ShareScan is a recommended practice.

The backend applications listed in this section belong to their respective owners, and as such, any further, in-depth information you may need on the workings of these applications can be found in the application's own documentation, NOT in the ShareScan documentation.

eCopy Connector for Microsoft Exchange (Mail and/or Fax)

Supported Versions

– **Microsoft Exchange 2007 / 2010 / 2013 / 2016 / Exchange Online for Office 365**

– For information on supported Microsoft Exchange versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Installation Prerequisites and Suggestions

– If configuring the Exchange connector using EWS or WebDAV protocols, the Exchange server SSL certificate must be installed on the PC running ShareScan Manager. Certificates should be installed to the **Trusted Root Certification Authorities** on the Local Computer.

– To configure and use EWS/EWS protocol, the user's logon name and alias must correspond, due to limitations of the Exchange web services. For this reason, using LDAP/EWS protocol is recommended.

eCopy Connector for IBM Lotus Notes (Mail and/or Fax)

Supported Versions

– **IBM® Lotus Notes® 8.0 / 8.5 / 9.0.1**

– **Lotus Domino 8.0 / 8.5**

– For information on supported Lotus Notes versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Installation Prerequisites and Suggestions

– The connector requires a Lotus Notes client to be installed on the PC running the ShareScan Manager.

– At the time of configuration, the end user should be prepared to provide an Active ID File, user name, password, and Domino server name.

– When the installer of the Lotus Notes client prompts you to choose between the **Multi-User Install** option and the **Single User Install** option, make sure that you select the **Single User Install** option.

Note:
If **Send messages from personal mail account** is not enabled, all emails will be sent from the user name and password supplied for configuration purposes. Before sending email from a personal Lotus Notes account, the eCopy Mail pass-through database on a Domino HTTP server must be configured.

eCopy Connector for LDAP/SMTP (Mail and/or Fax)

Supported Versions

– **Microsoft LDAP v3**

– **Open LDAP v2.4**

– For information on supported LDAP versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Installation Prerequisites and Suggestions

– You will be prompted to enter the following information when configuring the eCopy connector for LDAP: User name, password and IP address, DNS name or URL for the directory being used, search criteria for users and recipients, LDAP Attributes, LDAP port number, and Base DN of the base or root directory in which to search.

– For configuring the eCopy connector for SMTP, you will need to enter the SMTP server IP address or DNS name that will be used for outgoing messages, user name and password, and the SMTP port number.

eCopy Scan to Desktop

Installation Prerequisites and Suggestions

– Scan to Desktop involves several different components to enable users to scan and send documents to a designated network folder location for modification and storage. A “Scan Inbox” subfolder may be added to existing network home directories or the ShareScan software can create Scan Inbox folder locations. The Inbox Root (Inbox Management directory) stores the user list (`userdirs.txt`) that indicates which users have scan inboxes using Scan to Desktop and whether ShareScan has created Inbox folders; these folders would also reside under this directory.

– For detailed information on configuring Scan to Desktop, see the ShareScan Help, accessible via pressing **F1** on the Administration Console.

Note:
The Inbox **Alternate path for folder root - DO NOT set it to the user's HOME folder: (see documentation)** path pointing to the existing Network Home Directory Root Folder is NOT supported, since ShareScan modifies the permissions on the root folder.

Inbox Root Directory

The Inbox Root Directory can reside on the ShareScan Services Manager PC or on a network server. If the directory resides locally, it must be configured as a share on an NTFS drive. If the directory resides on a network server, it must be configured as a share on an NTFS drive or on a NetWare drive.

The Inbox Root Directory should not be pointing to a user's home directory. Choose the Scan to Desktop **Home Directory** option in the connector instead.

Note:
Network home directories configured through a login script are not supported.

ShareScanAdmin Group

An Administrative Group must be used to implement the required security. In previous versions of ShareScan, this group required the name "ShareScanAdmin". This Administrative Group can now be given any name; however, if multiple Services Managers are pointing to the same `userdirs.txt` file in the Inbox Root Directory, the group to which the service account belongs must be identical on all those Services Managers.

The group used must be created on the domain controller for domain-based networks, on NDS for Novell networks, or on the local machine if the customer is in a workgroup environment. ShareScan uses this group when assigning permissions to the inbox Root Directory and scan inboxes and requires Full Control. Permissions assigned to the directory are as follows:

Windows (NTFS)

– Administrators – Full Control

– Domain Administrators – Full Control (not used in workgroup configurations) ShareScanAdmin – Full Control

– Inbox Owner – Read or Delete

Novell (Netware)

– Administrators – Full Control

– ShareScanAdmin – Full Control

– Inbox Owner – Read or Delete

An account for an administrative user should also be created and added to the Administrative Group to be used as the Service Account. This user should have a standard user profile with a user name and password. If running in a workgroup environment, a local account should be created for each Scan to Desktop user on the PC where the Inbox location resides.

eCopy Quick Connect

Supported Versions

– Quick Connect supports Oracle® Database 10g and 11g. When you install Oracle Client 10g/11g, select the Custom Installation option and then make sure that you select the Oracle Provider for OLE DB component. This enables Quick Connect to connect to the Oracle database and store scanned documents and other information.

– Databases: for more information about supported databases, see the eCopyShareScan 6.2 Software Compatibility Matrix available at the Kofax Navigator website.

– For additional information on supported configurations of eCopy Quick Connect to Database, reference the *Quick Connect Database Recommended Usage* document available for download from eSPN.

Installation Prerequisites and Suggestions

– When selecting a network location as a Quick Connect destination, make sure that the future users have access to the folder or folders being used as storage options. Alternatively, the administrator can use the **Logon As** function to supply login credentials.

– To deliver scanned documents to an Access database, you must disable User Account Control (UAC) on Windows 7, Windows Server 2008 or later. To disable UAC, type `c:\windows\System32\UserAccountControlSettings.exe` to the command line, and select the appropriate slider setting.

eCopy Connector for OpenText Fax Server (RightFax Edition)

Supported Versions

– **OpenText Fax Server 9.0/9.3/9.4/10/10.5/10.6/16 EP2 / 16 EP4**

– For information on supported RightFax versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Installation Prerequisites and Suggestions

– The administrator will be prompted to enter a valid RightFax or NT Authentication user name and password. The RightFax server name will also need to be entered.

– The RightFax client software must **NOT** be installed on the system where the ShareScan Manager is installed.

– Delegation privileges, phone books, cover sheets, and billing codes must be configured on the RightFax server in order to be utilized by the eCopy connector for RightFax.

Note:
If “Send from personal account” is not enabled, all faxes will be sent from the user name and password supplied for configuration purposes.

eCopy Scan to Printer

Installation Prerequisites and Suggestions

– In order for a printer to be configured for use with Scan to Print, the appropriate print driver must be installed where ShareScan is installed.

eCopy Connector for Microsoft SharePoint

Supported Versions

Microsoft SharePoint 2007, 2010, 2013, 2016, SharePoint Online for Office 365 / Microsoft SharePoint Server 2007, 2010, 2013, 2016, (includes support for SharePoint BDC/BCS)

– For more information on supported Microsoft SharePoint versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Installation Prerequisites and Suggestions

– The administrator should enter a user name and password that will enable browsing to all destination locations, display all index fields, and store documents if “Login As” authentication is used.

– If you are using SharePoint 2007: Microsoft Office SharePoint Server (MOSS) 2007 or Windows SharePoint 2007 Services.

– If you are using SharePoint 2010: Microsoft SharePoint Server 2010.

– If your company uses a secure SharePoint site, you must install an SSL certificate on the ShareScan server.

– Dates are validated by the client regional settings; invalid date formats are not accepted.

– The connector does not fully support storing to workspaces. Storing to an Attendees location is inconsistent and may result in failure to store the scanned document.

– The All Day Event, Recurrence, and Workspace checkboxes will not appear in the calendar list.

eCopy Connector for EMC Documentum

Supported Versions

– **EMC® Documentum® 6.6, 6.7, 7.0, 7.1, 7.2**

– For more information on supported EMC Documentum versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Installation Prerequisites and Suggestions

– The eCopy connector for EMC Documentum uses the Documentum Foundation Classes (DFC) to connect to the Documentum Server. While all of the necessary DFC files are included with the connector, DFC needs to be configured as part of the installation process.

– For Configuring DFC the following information is required:

- The Primary *Connection Broker* Host Name: Broker Server Name

- Port number: Default = 1489

- Repository Name

- Login Name and Password to that Repository

- The DFC should be in the same domain as Documentum server

– The eCopy connector for EMC Documentum will then need the Repository chosen from the drop-down menu, as well as a user name and password. In the connector Administration, all Repositories available through that Connection Broker will now be available. The administrator should then enter a user name and password that enables browsing to all desired destination locations within the selected repository and store documents if “Login As” authentication is used.

– If you are using a firewall, you must add `SQLSERVER.exe` and UDP port 1434 to the exceptions list.

– It is strongly recommended that you store documents using the doctype named `dm_document` or a customized doctype that is based on `dm_document`.

– **Connection Broker** – Named DocBroker in previous versions of Documentum. Connection Broker is a service that runs on a Documentum server; it is a connection point from the client.

– **Repository** - Named Docbase in previous versions of Documentum. It is a document database on the Documentum server. The Connection Broker establishes the connection between the connector and the Repository.

eCopy Connector for Autonomy iManage WorkSite

Supported Versions

– **Autonomy (Interwoven) iManage (WorkSite) 8.0-9.0, 9.0SP1, 9.1, 9.2, 9.3, 9.5, 10, 10.1, 10.2**

– For more information on supported Worksite versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Note:
If the Worksite server version is 8.5 or higher, the old `iManage.dll` file (provided by Kofax) must be replaced by a new one to avoid unsuccessful document storing related error message.

Installation Prerequisites and Suggestions

– The administrator should enter a user name and password that enables browsing to all destination locations, display all index fields, and store documents if **Login As** authentication is used.

– For more information on Impersonation passwords, the administrator should refer to the WorkSite documentation. Note that Impersonation is only available when using Trusted Login and authenticating against Novell.

– When you use Novell Trusted Login, make sure that the Novell Client configuration on the computer running the ShareScan Manager includes a value for the **Preferred Server** option. If you leave this field blank or you enter an incorrect value, users will not be able to store scanned documents.

eCopy Connector for Open Text Content Server - eDOCS Edition

Supported Versions

– **Open Text Document Management, eDOCS Edition/(Hummingbird) 5.1.05, 5.2, 5.3, 6.0.5, 10, 16.1**

– For more information on supported eDOCS versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Installation Prerequisites and Suggestions

– Before installing the eCopy connector for Open Text Content Server, the Administrator must install and configure the Windows Explorer DM Extension software for Open Text Document Management, eDOCS Edition 5.1, 5.2 SP1, 6.0 or later or Hummingbird DM 5.1, 5.2 SP1, and 6.0 on the same PC as the eCopyShareScan Manager. After that, run the DM Connection Wizard.
All versions of the DM Extension software include the required DM API and the DM Connection Wizard.

– Install the Windows Explorer DM Extension component only (under 'Optional Components').

– You must select 'Intranet Mode' (the default mode). Do not select 'Internet Mode'.

– After installation, launch the DM Connection Wizard and enter the name of your DM server.

– The eCopy ShareScan Services Manager must be on the same domain as the DM server, for the DM Connection Wizard to establish a connection with the server.

– The Administrator will need to enter a valid eDOCS DM user name and password that has the ability to store documents if 'Login As' authentication is used.

– It is recommended that you add the eCopy Document Type and Application ID to your eDOCS (Hummingbird) server. See your server documentation for details.

– When the eDOCS DM Extension Client v 5.1.0.5 SR6 or later is installed on the same computer as the ShareScan Manager (not in the same domain as the DM server), you cannot configure the eCopy connector.

– Default values that are assigned by the eDOCS DM server appear in the Client. To use a different value, you must remove the default value and then use the Search feature or the 'Search while typing' option to specify the new value.

– If a profile for an application does not appear, contact your administrator. The application may be disabled from within the eDOCS DM software.

– For instructions about installing the DM Extension software, refer to your eDOCS documentation.

eCopy Connector for Open Text Content Server

Supported Versions

– Livelink (Enterprise Server) 9.7, 10.0, 10.5, 16, 16.2

– For more information on supported Open Text Content Server versions, consult the Compatibility Matrix available at the Kofax Navigator website.

Installation Prerequisites and Suggestions

– The administrator must enter a user name and password that enables browsing to all destination locations, display all index fields, and store documents if 'Login As' authentication is used.

– The eCopy connector for Livelink ECM uses the Web services protocol and / or Livelink API (LAPI) for communication with Open Text Content Server.

– LAPI supports TCP/IP direct connections with native Livelink authentication. It does not support HTTP or HTTPS connections or non-native authentication methods. Native authentication using LAPI supports Livelink authentication, NTLM authentication, and LDAP authentication. The Livelink server is responsible for managing the authentication settings and the connector works transparently with the selected authentication mode.

– In **Protocol** section of **Database & authentication settings** in the Connector configuration window, the Administrator will need to provide the following information to properly configure the connector:

– If **Web services** is selected:

– **Root URL**: The root URL of the web service granting access to the Livelink server. E.g.:
`https://TestContentServer:443/cws`

Note:
Web services protocol supports Table Key Lookup attributes only in case of an OpenText Content Server (Livelink) 16.2 or later.

– If **LAPI** is selected:

– **Livelink server**: The Open Text Content Server-Enterprise Server name. The server entered in the **Livelink Server** field must be on the same network (LAN) or connected via a VPN (WAN) as the Services Manager. It cannot be a web-only connected server. The Livelink connector does not communication over HTTP or HTTPS; instead it uses TCP/IP and LAPI over the specified port. Even if port 80 is entered in the port field, it will not force the connector tocommunicate over HTTP or HTTPS.

– **Database**: The Livelink database name. The Livelink Database information can be found on the Livelink Administrative Site under the Database Administration section.

– **Port**: The port used by the server. The default is 2099.

Note:
LAPI protocol is not supported by OpenText Content Server (Livelink) version 16 or higher.

– If **Web services and LAPI** is selected:
– All the options can be configured that are listed in **Web services** and **LAPI** protocol sections above.

Note:
If **Web services and LAPI** protocol is selected, LAPI is used only for supporting Table Key Lookup attributes. Since **Web services** protocol supports Table Key Lookup attributes only in case of an OpenText Content Server (Livelink) 16.2 or later, LAPI is used only for supporting Table Key Lookup attributes if **Web services and LAPI** protocol is selected in **Protocol** section of **Database & authentication settings** in the Connector configuration window.
The eCopy Connector for Open Text Content Server does not support Table Key Lookup attributes for OpenText Content Server (Livelink) version 16 or higher since LAPI protocol itself is not supported by this server.

– If the Open Text Content Server environment requires a user to change password at the next logon to the system, the user must change the password at the workstation before using ShareScan. If the user does not do this, the system will display a message that the password has expired and that the user will not be able to store the scanned documents.

– For authentication methods outside of these constraints, refer to your eCopy Technical Consultant.

Note:
.NET Framework 3.5 SP1 and Microsoft Visual J# 2.0 Redistributable must be installed for proper functioning of this connector. The connector main screen in the Administration Console displays a warning message if .NET Framework 3.5 SP1 and Microsoft Visual J# 2.0 Redistributable are not installed.

Licensing Devices

ShareScan 6.2 includes a Licensing Wizard, which handles the following license-related tasks.

Every device that you use with Kofax software requires a valid license. ShareScan 6.2 uses a digitally signed license file, which contains a unique license key generated by Manufacturing. The license key is a unique ID that is associated with the hardware ID (HID) of the PC where the ShareScan database is installed.

Site licenses, valid for activation with a predefined number of devices, are also available. After a license file is created for the specified number of devices, it cannot be modified to increase the number of devices; if you purchase additional devices, you need to purchase additional license(s), and those license(s) will be delivered as separate license files. When you load the new license file, the Administration Console can merge the original license file with the new file.

After adding a license, you can add one or more embedded or integrated devices to the Manager. (You can add these devices at any time. However, if you add them before activating the license, a 30-day grace period starts for the license.)

ShareScan includes a Licensing Wizard, which handles the following license-related tasks:

– loading licenses,

– activating licenses,

– loading activated licenses,

– reactivating licenses,

– removing licenses.

Loading Licenses

You can use the automatic license download function, or import the license file(s). If no internet connection can be detected, only the second option is available.

1. Click the **Load license** button of the License Wizard. The Welcome screen is displayed.
2. Click **Next** to continue.
3. Select **Download license automatically** when specifying the source. The **Automatic license download** screen is displayed.
4. Copy the license keys of the licenses to download in the text box. Click **Add** after each. When the list below is complete, click **Next**. The **Select license files to load** screen is displayed.
5. Click the **Browse** button to add new files to the list of files to be imported. When finished, click **Start import**.

6. Click **Start** to begin loading licenses.
7. Click **Finish** to close the License Wizard.

Activating Licenses

You need to activate a license only once; thereafter, it is associated with the PC where the ShareScan database is installed.

1. Click the **Activate** button of the License Wizard. The Welcome screen is displayed.
2. Click **Next** to continue.
3. Specify the hardware ID. Click **Next** to continue.
4. Select **Automatic activation** on the **Select activation mode** screen.
5. Click **Next** to continue. The **Output file creation / Activation** screen is displayed.
6. Click **Start** to begin activation. The **Specify file output** screen is displayed.
7. Click **Next** to continue.
8. Click **Finish** to close the License Wizard.

Loading Activated Licenses

Use this option when importing already activated licenses to ShareScan.

1. Click the **Load activated** button of the License Wizard. The Welcome screen is displayed.
2. Click **Next** to continue. The **Select license files to load** screen is displayed.
3. Click the **Browse** button to add new files to the list of files to be imported. When finished, click **Start import**.
4. Click **Start** to begin loading licenses.
5. Click **Finish** to close the License Wizard.

Removing Licenses

Use this option when transferring licenses from the current ShareScan installation. After the removal is complete, the licenses can be safely transferred and reactivated.

1. Click the **Remove** button of the License Wizard. The Welcome screen is displayed.
2. Click **Next** to continue. The **Select licenses** screen is displayed.
3. Select the license(s) you want to remove and then click **Next**.
4. Click **Start** to remove the selected license(s).
5. Click **Finish** to close the License Wizard.

Generating a license report

The license report helps you create a report of the installed licenses. It is recommended to generate a license report whenever you activate your licenses. Keep the report in a safe place in case you need to restore the license information or for troubleshooting purposes.

1. Click the **License report** button of the License Wizard. A **Save As** dialog box is displayed.
2. Browse to a preferred location where you want store license report file (optional).
3. Specify the name of the license report file in the **File name** field.
4. Click **Save** to save the license report file.

ShareScan Post-install

Now that you have completed the basic installation, configuration, and licensing steps, you are ready to perform other tasks, including:

– Configuring system settings.

– Installing and configuring additional connectors, services, and extenders.

– Licensing additional devices and monitoring activity between devices and the Manager.

– Accessing and configuring other Managers.

– Configuring, backing up, and restoring the ShareScan database.

Configuring ShareScan (examples)

This section outlines the basic process to

– Configure a service (Activity Tracking)

– Configure an Extender (Forms Processing Extender)

– Configure a connector profile (QuickConnect) using the already configured service and extender

– Test your saved profile in the built-in simulator

When a user presses a connector button, the connector uses the settings specified in the connector profile that is associated with the button, such as the button label and image, encryption of scanned documents, and the services to use with the connector.

The recommended workflow is to configure services and extenders first, so that they are available when you configure a connector profile, and then configure connector profiles.

You have the option to set up any connector with the **Bypass redirect screen** option. Using this option navigates the user back to the Main Form at the end of the session or logout automatically if **Session Logon** is enabled.

The procedure in this section provides you with enough information to complete the basic configuration process. For in-depth information, refer to the ShareScan Help.

To Configure a Service (example – Activity Tracking)

1. Start the ShareScan Administration Console by clicking **Start > Programs > eCopy Applications > ShareScan 6.2 > ShareScan Administration Console**.
   The system initializes the .NET framework, retrieves configuration information from the ShareScan database, and then

displays the ShareScan Administration Console.

2. Select the **Services** tab.
   The **Configure Services** pane displays a list of the installed services, including connector services, device services, and common services.
3. In the **Device Services** list, select **Activity Tracking**. The **Configure Activity Tracking Service** pane opens.
4. Select **Yes** for the **Configured** setting and then click **Save**. For more information about configuring the Activity Tracking service, search for the **Activity Tracking service** topic in the Help.

To Configure an Extender (example – Forms Processing Extender)

In this example, this Extender is used to process scanned forms, extract form data, and make it available for Quick Connect via data publishing (using batching).

1. Configure the Extender. Then create a template library, and a template. Make sure your template contains at least one uniquely named zone from which content can be passed to Quick Connect.
2. Test your template.
3. After you have finished designing and testing your template, make sure you enable batching in the Extender by marking the **Batch on Matched Templates** checkbox.
4. Save your configuration.

To Configure a Quick Connect Connector Profile to Use Forms Processing Extender data

1. Select the **Connectors** tab.
   The **Configure Connectors** pane displays a list of the available connectors.
2. Select **QuickConnect**.
3. The **Configure Connector (Quick Connect)** pane and the **Settings** pane open.
4. Select the **Destinations** tab and then click **New**. Name the destination, set its **Type**, **Location** and specify **Authentication** options.
5. Select the **File name** tab, and set the file naming convention for the connector.
6. Optionally, select the **Index file** tab, and set the index file attributes.
7. Use the **Settings** pane to configure the following:
   – display settings,
   – document settings,
   – service to be associated,
   – extender to be associated,
   – scanner settings, and
   – background processing settings.

8. Click the **Save Current Profile** button. For more information about configuring the settings for a connector, open the relevant Help topic.

To Test the Configuration of a Profile

1. In the Administration Console, select the **Devices** tab.
   The **Device Configuration** pane displays the simulator and any installed devices.
2. Select the device simulator.
   The **Configure Connectors for Device - Simulator** pane lists the available profiles.
3. In the **Select Profile(s)** column, select the profile that you created for the Quick Connect connector, and then click **Save**.
4. On the **Ribbon**, click the **Simulator** button. The simulated Client screen displays the button for the connector you configured.
5. Click the Quick Connect icon on the simulated client screen. The **Preview** screen is displayed.
6. Click **Next** to continue. The Forms Processing Extender screen is displayed.
7. Check the field values and then click **Next** to continue.
8. Select a **Destination** and then click **Send** to continue.
9. Select the post-processing option you want to use.

Creating Self Signed Server Certificates

As ShareScan is using a Self Signed Server Certificate based on the IP address of the server and this certificate is of an unknown Certification Authority, the MFP starts to display warning messages after an OpenAPI SSL Communication is initiated. To avoid these messages, create a self-signed certificate based on the Fully Qualified Domain Name (FQDN) of the server and install it on the browser running on the device as a root certificate.

Note:
The described procedure is working only on devices which have installed a Firmware that supports the OpenAPI Setup Function Version 3.7 or higher.

To check whether your device supports the OpenAPI Setup Function 3.7, enter the **http://<deviceIP>/OpenAPI/DeviceDescription/** URL in a browser, and search for the **Setup** string in the document. If the device supports it, there is a correspondig **FunctionInfo** node in it:

```
<FunctionInfo>
…
    <FunctionName>Setup</FunctionName>
     <FunctionVersion>
                  <Major>3</Major>
                  <Minor>7</Minor>
…
```

```
        </FunctionVersion>
…
</FunctionInfo>
```

Creating the certificate

1. Stop the Tomcat service.
2. Generate the public and private key pair and export of the public key to a ***.der** file (the following description refers to the installation folder of Tomcat as TOMCAT_DIR; for example, **%programfiles(x86)%\Kofax\Tomcat 8.5**).
    1. Backup your current key files
        – Back up **%TOMCAT_DIR%\conf\ecopy.key**

        – Delete **%TOMCAT_DIR%\conf\ecopy.key**

        – Back up **%TOMCAT_DIR%\webapps\ROOT\ecopy.pem**

        – Delete **%TOMCAT_DIR%\webapps\ROOT\ecopy.pem**

        – Back up **%TOMCAT_DIR%\webapps\ROOT\ecopy.cer**

        – Delete **%TOMCAT_DIR%\webapps\ROOT\ecopy.cer**
    2. Modify **%TOMCAT_DIR%\conf\createEcopyKey.bat**:
        – Change the
        SET CERTIFICATE_COMMON_NAME= < ShareScan host IP address> row
        to
        SET CERTIFICATE_COMMON_NAME= < ShareScan host fully qualified domain name>

        – Insert the
        %KEYTOOL% -export %TOMCAT_ALIAS% -file "..\webapps\ROOT\ecopy.der" row above the **%KEYTOOL% -export %TOMCAT_ALIAS% -file "..\webapps\ROOT\ecopy.cer"** row.
    3. Save and run **%TOMCAT_DIR%\conf\createEcopyKey.bat**
    4. Restart the Tomcat service.
3. Install the certificate to the NetFront browser on the MFP you run ShareScan.
    1. Start the browser (press the Application Menu button, click on the Web Browser icon)
    2. Select **Address** on the browser toolbar, and enter: **http://<ShareScan host IPaddress>:8080/ecopy.der**
    3. Enter the device password, then select **Root Certificate**
4. Start ShareScan on the device to verify the results. No more error messages pop up (except the **This page is protected ...**, but you can disable that with the checkbox under the message if you wish).

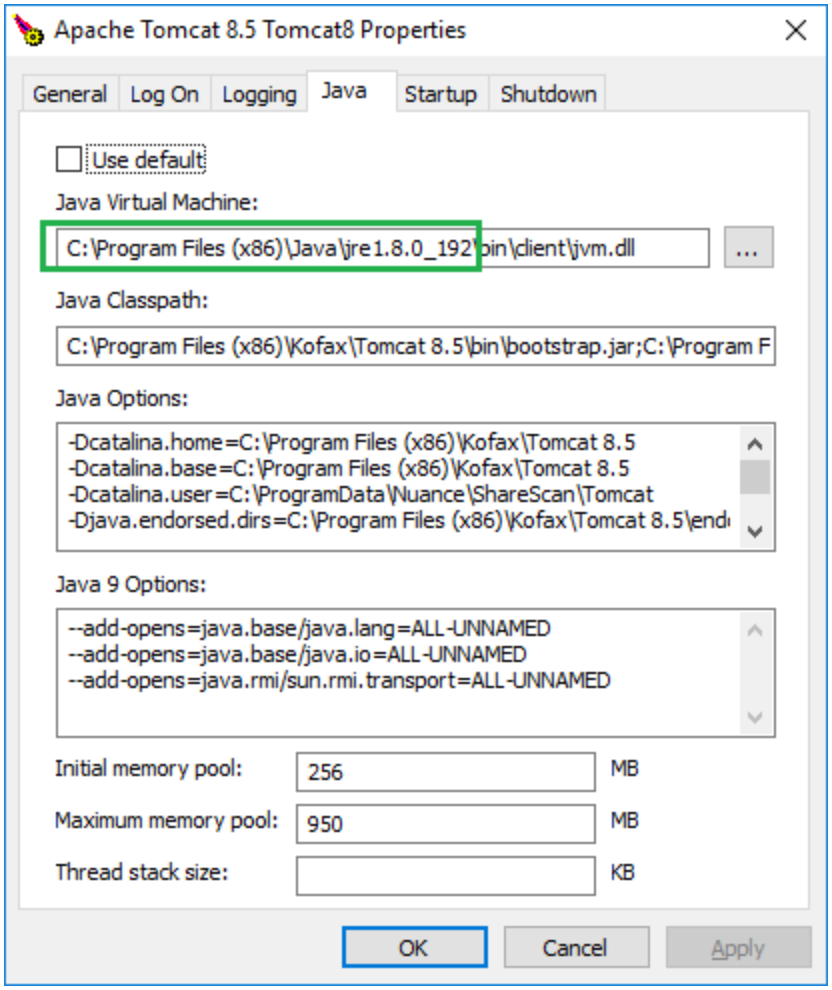
How to Change ShareScan Webclient Certificate to SHA256

On some Konica Minolta MFPs a warning message is displayed because eCopy ShareScan 6.0 uses SHA1 certificates by default. To avoid this error, administrators should generate SHA256 certificates the following way:

1. Locate the ShareScan Tomcat configuration folder. It is under **<KOFAX_INSTALL_FOLDER>\Tomcat 8.5\conf**. **<KOFAX_INSTALL_FOLDER>** is the folder in which ShareScan is installed. Its default value for this release is **c:\%programfiles%\Kofax**, but it can be changed when ShareScan is installed. (Therefore the default Tomcat configuration folder for this release is **c:\%programfiles%\Kofax\Tomcat 8.5**)
2. Create a backup of the `createEcopyKey.bat` file found in this folder. The `eCopy.key` file contains the original SHA1 certificate. The `createEcopyKey.bat` script can be used to create a new one.
3. Optional: create a backup of the original SHA1 certificate and private keys should you wish to restore the original certificates later. Backup the `eCopy.key` file located in the Tomcat configuration folder. Also back up the `eCopy.cer`, `eCopy.der` and `eCopy.pem` files in the **<KOFAX_INSTALL_FOLDER>\Tomcat 8.5\webapps\ROOT** (Default location is **c:\%-programfiles%\Kofax\Tomcat 8.5\webapps\ROOT**\)
4. Edit the `createEcopyKey.bat`. Replace line `SET SIGALG=SHA1withRSA` with `SET SIGALG=SHA256withRSA`. Save the changed file (probably administrator rights are needed to do this).
5. Stop ShareScan Tomcat service. Open Windows Services and stop Apache Tomcat 8.5 Tomcat8 service.
6. Delete the `eCopy.key` file.
7. Create the new certificate with `createEcopyKey.bat` file. This script needs 3 parameters, in this order:

i. The IP address of the host running the Tomcat service. (You may also specify the FQDN instead of the IP address, but ShareScan was tested with IP-based certificates.)

ii. The location of the Java key tool. ShareScan installs a Java Runtime Environment (JRE) for itself, which contains a keytool that can be used. If you are not sure where the JRE is located run the **<KOFAX_INSTALL_FOLDER>\Tomcat 8.5\bin\Tom-cat8w.exe** and check the **Java** tab in the opened application window.



The keytool is in the **<JRE_FOLDER>\bin** folder (e.g. '**%programfiles(x86)%\Java\jre1.8.0_192\bin\keytool.exe**')

iii. The time period in days until the certificate is valid. 3650 days (10 years) is sufficient in most cases. An example running the script with correct parameters:

```
c:\%programfiles%\Kofax\Tomcat 8.5\conf>createEcopyKey.bat
10.140.25.107 '%programfiles(x86)%\Java\jre1.8.0_192\bin\keytool.exe'
3650
tomcat, Sep 25, 2017, PrivateKeyEntry,
Certificate fingerprint (SHA1):
30:C1:A3:2C:AC:18:27:A5:DE:DD:AE:B6:DB:0F:DF:47:80:FA:E2:6A
Certificate stored in file <..\webapps\ROOT\eCopy.der>
Certificate stored in file <..\webapps\ROOT\eCopy.cer>
Certificate stored in file <..\webapps\ROOT\eCopy.pem>
```

Optional: you can verify the signature algorithm name with the keytool running:
`keytool -list -storepass changeit -v -keystore ./ecopy.key`

8. Start ShareScan Tomcat service (from Windows Services).

Certificate Manager

The Certificate Manager is an addon tool for eCopy ShareScan, which allows you to manage the certificates required by some devices.

The tool is separate from the eCopy ShareScan installation, and can be launched by starting **CertificateManager.exe**.

When started, the Certificate Manager displays the following buttons in its window; depending on your configuration, the first option (**Configure Tomcat server.xml** may not be available):

– **Configure Tomcat server.xml**: this option allows you to customize the cryptographic protocols and ciphers used by ShareScan on a port-by-port basis via editing the `server.xml` file used by the Tomcat component of eCopy ShareScan. Clicking this button displays a new window, listing all ports currently used by eCopy ShareScan, and the cryptographic protocols assigned for the specific port, if that port uses SSL or TLS.
You can use the **server.xml** dropdown item in the top-left corner to create a backup of the `server.xml` file you are using, or you can load a previously saved `server.xml`.
To modify the protocols and ciphers assigned to a port, do the following:

1. Click on the port whose properties you want to modify.
2. Click the **Edit** button on the upper-right part of the window. A new screen is displayed, showing the currently used protocols and ciphers.
3. Under **Enabled protocols**, select the cryptographic protocols you want to use (for example, **TLSv1** or **SSLv3**).
4. Under **Enabled Ciphers**, select the ciphers you want to use. For ease of use, a number of filter options are included with the tool, and can be accessed via button push (for example, **Remove weak ciphers**, **Select Java 6 ciphers**, **Remove ciphers using CBC encoding**, and so forth).
5. Click **OK** to save the changes.

– **Re-generate certificate**: this option allows you to recreate your digital certificate. To create the certificate, you have to enter either the IP address (**Discover IP** button) or Fully Qualified Domain Name (**Discover FQDN** button) to the displayed field under Certificate Common Name, then click the **Generate** button on the lower-right part of the window.

– **Backup certificate**: click this button to create a backup of your existing certificate. A **Browse** window is displayed, where you can select the location and filename of the certificate to be saved.

– **Restore certificate**: click this button to restore a certificate. A **Browse** window is displayed, where you can locate the certificate to be restored.

Next Steps

After finishing the basic installation and configuration tasks, you can start using and customizing ShareScan via the Administration Console.

In the Administration Console, all system functions are available on the Ribbon and there are separate tabs for configuring services, connectors and devices.

System functions are available on the **Home** tab and the **Advanced** tab. The **Home** tab contains the most frequently used functions, such as managing the ShareScan Manager; the **Advanced** tab contains less frequently used functions and several new functions, such as managing the ShareScan database.

When you open the Administration Console, the **Welcome** page lists the main functions in the recommended order for performing each function:

– Configure one or more installed services, so that they will be available when you configure connectors and devices. There are three types of services: services that you apply to a connector, services that you apply to devices or device groups, and services that you apply to connectors and devices.

– Configure one or more profiles for the installed connectors that will be used on the scanning devices. You can create multiple profiles for each connector and you can activate each connector profile on multiple devices.

– Register ShareScan online.

When you click the Services, Connectors, or Devices links, a pane lists the items that you can configure. After you select an item, such as Session Logon, ShareScan opens one or more panes where you specify the appropriate settings.

Best Practices

– Ensure that the `%temp%` environment variable is set.

– Ensure that all critical automatic updates are applied to target systems and that automatic updates are turned off for the time of installation.

– Do not wait too long to click the **Install** button; otherwise, the increased storage usage in the temp folder can trigger a cleanup process that causes installation failure.

– After installation you may check to see whether the following services are running:

- Apache Tomcat 8.5

- ShareScan Agent

- ShareScan Manager

- ShareScan WatcherService

- ShareScan Web Admin Host

- PushKeyService

– There are other services which may not run by default, only if the respective functionality demands it:

- Kofax Documentum API

- Kofax Printer API

- S2D Inbox Agent

– Tomcat service settings can be viewed/modified via:
`%programfiles%\Kofax\Tomcat 8.5\bin\tomcat8w.exe`

– During the entire installation process, do not remove the original installation media from your optical drive, even though the installer has already extracted and decompressed the required components to a temporary location. This action can cause multiple failures depending on the stage of the installation during which the removal happens.

– To configure the Lotus Notes connectors (both Mail and Fax), you have to install the Lotus Notes Client on the PC. After installing, quit the client before running the ShareScan Administration Console, as the client locks the ID file, and a running client may cause issues with ShareScan.

– Ensure that there is no Apache Tomcat on the PC you want to install ShareScan on.

– Ensure that no ports used by ShareScan (listed in the Installation Guide) are used by other web services, as that may cause connectivity issues.

– Deploying the RightFax FaxUtil on the same machine on which ShareScan is running may cause issues, therefore it is not advised.

– If you are planning to use SharePoint Online with Windows Server 2012 as the operating system, ensure that you set the **Windows Identity Foundation 3.5** feature to **ON**.

– If the Apache Tomcat component does not start after a Java update, a PC reboot solves the issue.

– If you have multiple ShareScan Manager PCs in your deployment, it is recommended that you always use the same instance of the Administration Console to add, modify or remove connector profiles regardless of whether you are working in a cluster environment or not.

Technical Support

This chapter contains guidelines on what information to provide to technical support if you encounter issues when using eCopy ShareScan.

When contacting Technical Support (if a reseller) or your eCopy dealer (if an end-user), provide the following information to facilitate better and quicker interworking with Kofax Technical Support

– eCopy system details:

- ShareScan version number

- Service Pack number (if applicable)

- Product key and serial number

- Approximate daily scanning load (pages/day)
- Backend versions for all used connectors (for example, Exchange, Lotus Notes, or SharePoint)

– System specifications:

- Server OS
- Machine types
- Jar versions
- NIC speed settings
- IP Addresses

– The exact workflow performed when the issue happens

– Does it happen to all users or just specific user accounts? (if specific only, please specify in details)

– A detailed description of the workflow which helps reproducing the issue

– The following files:

- `msinfo32.nfo`
- license dump (for license-related issues)
- Logs from the ShareScan Troubleshooter Tool
- Verbose trace file for the workflow
- Client logs
- If possible, the Wireshark logs

The Tracing service gives you the option to collect a variety of system data. On trace export, you can specify which sources to include in the output zip file (Troubleshooter log, configuration profiles and several other sources), which processes to dump and which device logs to pick.

Troubleshooting Tips

Note:
Should you experience any of the following issues, consult the eCopy ShareScan Troubleshooter User Guide document for a solution:

– devices cannot be added in the Administration Console after upgrading to eCopy ShareScan 6.2

– Administration Console does not work with devices added before the upgrade to 6.2

– Administration Console simulator does not work

Below, you can find a number of known possible problem sources and solution tips:

– Ensure that there is no Apache Tomcat on the PC you want to install ShareScan on.

– Ensure that no ports used by ShareScan (listed in the Installation Guide) are used by other web services, as that may cause connectivity issues.

– Deploying the RightFax FaxUtil on the same machine on which ShareScan is running may cause issues, therefore it is not advised.

– If the Apache Tomcat component does not start after a Java update, a PC reboot solves the issue.

– Restoring database backups created via the ShareScan Troubleshooter is not possible via the ShareScan Administration Console. Use the relevant scripts for restoring such databases.

– When upgrading an existing ShareScan 5 installation that has CAC configured, you must disable and re-enable CAC via the Administration Console after the upgrade process to ShareScan 6.2 has finished.

– If you experience an infinite rebooting loop on your target machine, look for and delete the following registry keys:

- `HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\Session ManagerValue: PendingFileRenameOperations`

- `HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\WindowsUpdate\Auto UpdateValue: RebootRequired`

– When you are installing ShareScan in a Windows Server 2008 R2 environment, and the process fails due to the password being too short, do the following:

1. Download SQL Server 2012 Express from Microsoft.
2. Install it, and specify mixed mode authentication (this way, both SQL server authentication and Integrated Windows Authentication are enabled), and specify an sa-level password that complies with your password policy.
3. Install ShareScan by selection **Custom installation**, with no SQL server installation (uncheck the **Microsoft SQL Server database engine** option), and install the ShareScan database. For more information, see section Custom Installation.
4. During the ShareScan installation process, specify the SQL Server Express you installed, and provide the sa account and password you selected for your SQL Server Express.
5. When the Installer Wizard asks for the runtime user credentials (the ecopy user), you can provide credentials that comply with your password policy.

Re-enable SSLv3 in Tomcat and Java

Certain web-based MFP devices do not support TLSv1 or higher security protocols when communicating with the ShareScan Manager via HTTPS.

There are two approaches to work around this problem. Both require expert configuration skills.

1. Upgrade your device's firmware to the latest available version and verify if the desired security protocols are available.

If not, proceed as follows:

1. In Tomcat:

a. Launch the `Tomcat8w.exe` from **%PROGRAMFILES%\Kofax\Tomcat 8.5\bin**

b. Select the **Java** tab

c. Add the `-Djdk.tls.client.protocols=SSLv3,SSLv2Hello,TLSv1` line to **Java Options**

d. Click **OK**

e. Go to **%PROGRAMFILES%\Kofax\Tomcat 8.5\conf** folder

f. Open the `sharescan.java.security` file for editing

g. Change the `jdk.tls.disabledAlgorithms=SSLv3, RC4, DH keySize < 768` line to `jdk.tls.disabledAlgorithms=`

h. Save the file

i. Restart services in the Administration Console.

Check if ShareScan works properly on the device after registration.

If not, then proceed to the following step:

You need to re-activate SSLv3 in Java (deactivated by default in Java Runtime Environment from ver. 1.7upd75) and in ShareScan/Tomcat as well. Exercise caution when doing these modifications.

2. In Java:

a. Go to the **<JRE_HOME>** folder and open the `java.security` file for editing under **\lib\security**

b. Remove **SSLv3** from the `"jdk.tls.disabledAlgorithms"` property. For example, change `"jdk.tls.disabledAlgorithms=SSLv3"` to `"jdk.tls.disabledAlgorithms="`

3. In Tomcat:

a. Go to the **<TOMCAT_HOME>** folder and open the `server.xml` file for editing under **\conf**

b. Locate `"<Connector port=443"`

c. Insert **SSLv3** into `sslEnabledProtocols`. For example, change `"sslEnabledProtocols="TLSv1, TLSv1.1, TLSv1.2, SSLv2Hello""` to `"sslEnabledProtocols="SSLv3, TLSv1, TLSv1.1, TLSv1.2, SSLv2Hello"`

4. Restart your system.