

myQ X



MyQ X Ultimate Setup Guide 8.2

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1 About

The manual describes how to install and configure MyQ Smart Workflows with ScannerVision in MyQ.

ScannerVision is a solution to automate document workflows, by capturing, processing and storing scanned documents. This may include bar code reading, recognizing texts with the help of Optical Character Recognition (OCR), or converting documents to another format. Storage possibilities include a network folder, a database, cloud storage or storing as an e-mail attachment.

ScannerVision extends the features of MyQ by allowing the user to perform a customized and personalized scan workflow, and can utilize the user's credentials to access the storage where the scanned document will be placed, making not only secure printing possible, but also secure scanning.

2 Requirements

In order to create a ScannerVision workflow, you need to install and configure the ScannerVision server to work with the MyQ server.

Minimum requirements prior to the installation

- MyQ Ultimate license required (license for the MyQ server + license for ScannerVision)
- Two servers setup (one for the MyQ server, one for the ScannerVision server). In case of a MyQ Central Server setup, one server can be used.
- MyQ Server 8.1+
- ScannerVision server 9.1+
- EMB Kyocera 7.5.9
- EMB Kyocera 8.1.1+
- EMB HP Enterprise 8.1.1+ (supported in exploded mode as well)

2.1 Additional Information

Additional information about MyQ products can be found in the [MyQ Docs¹](http://docs.myq-solution.com) portal:.

For advanced ScannerVision user information, check the ScannerVision User Manual:



1. <http://docs.myq-solution.com>

3 ScannerVision Server Installation

3.1 Installation

.NET Framework 4.8 has to be installed on the server before installing ScannerVision. If it is not installed, open Server Manager and install it.

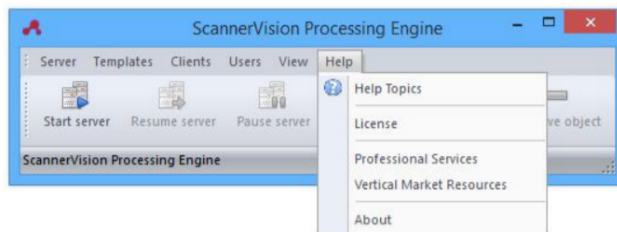
To install the ScannerVision server:

1. Run the ScannerVision installer.
2. Follow the installation wizard's instructions and install the server.
3. Activate the product.

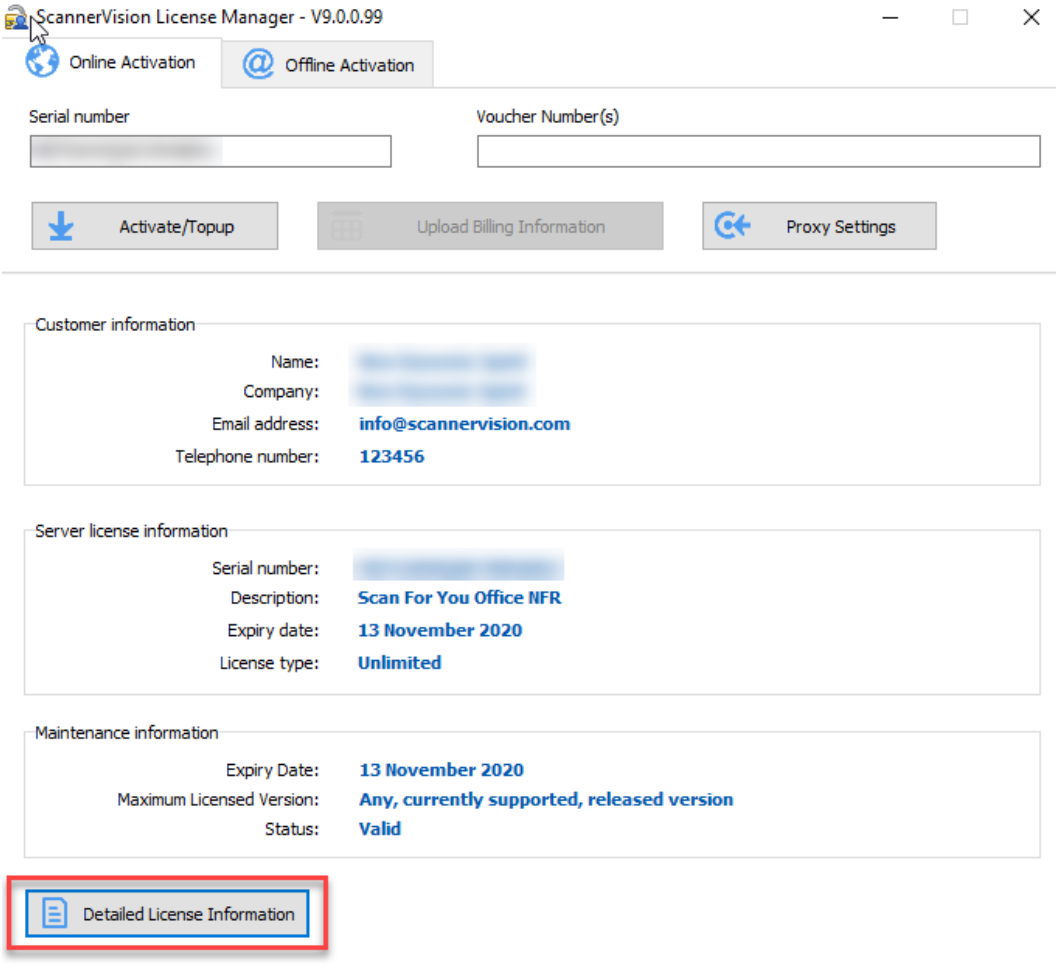
3.2 License check

Once the ScannerVision server is installed and activated, verify the license information:

1. Open the ScannerVision Processing Engine user interface application.
2. On the top menu, click **Help, License**.



3. ScannerVision License Manager opens. Click **Detailed License Information**.



4. Check if the number corresponds to the MyQ device licenses number.

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4 Configuration

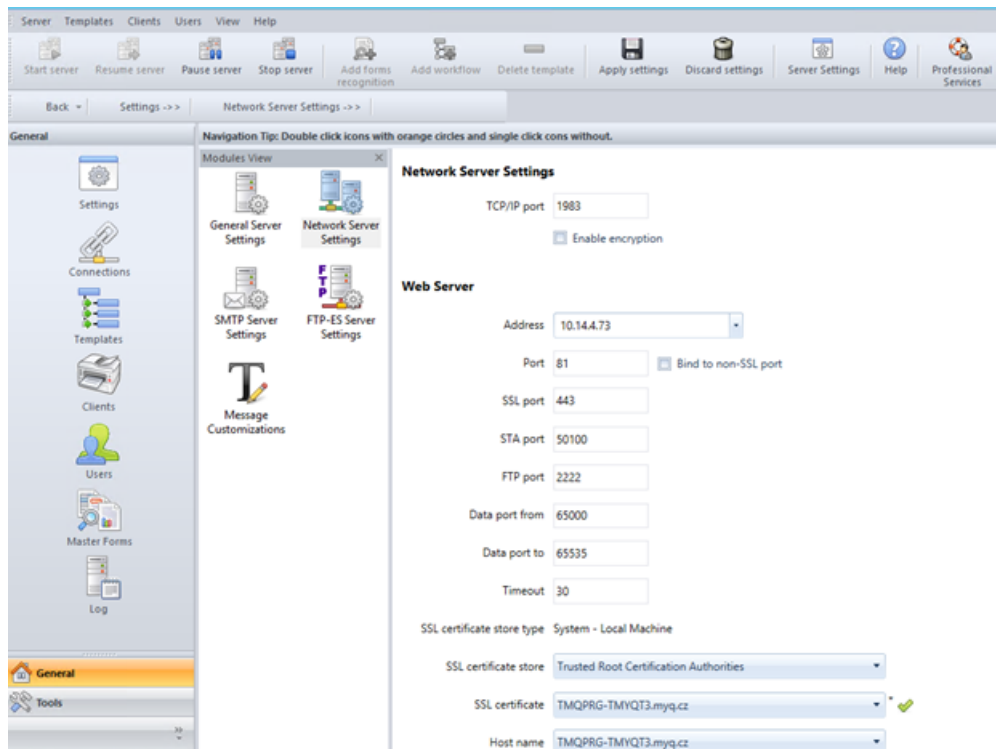
Once the ScannerVision server is installed, there are configuration steps to be done, both in MyQ and in ScannerVision.

4.1 Configuring ScannerVision

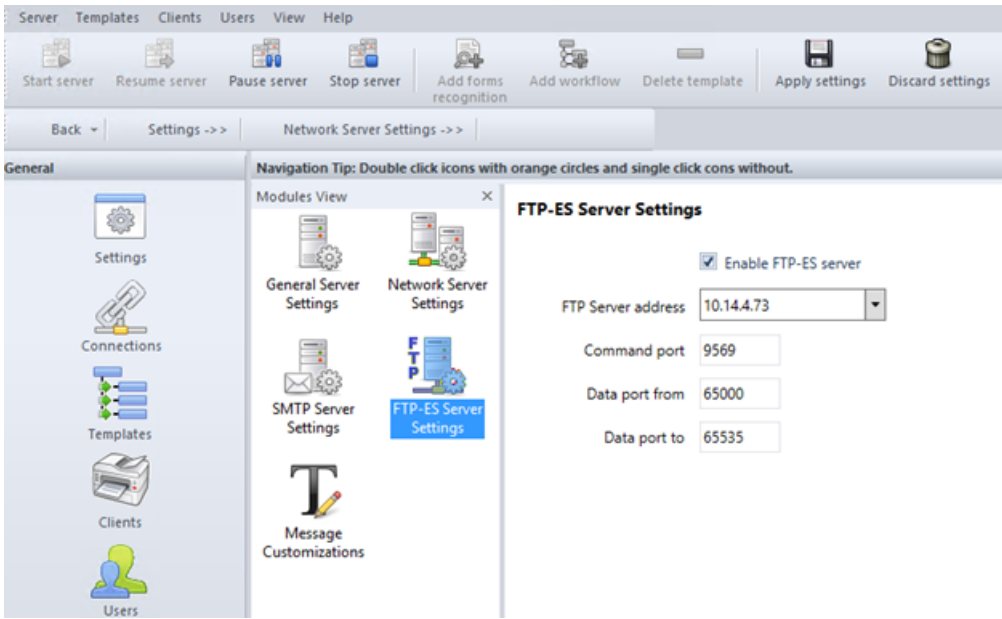
In order to set ScannerVision properly, you need to configure Network settings, Templates, Clients, and Users.

4.1.1 Network Settings

1. Open ScannerVision. **Settings** is shown by default.
2. Click **Network Server Settings** in the **Module View**.



3. Add the IP address or hostname of the ScannerVision Web Server in the **Address** field.
4. Change the preset ports if necessary.
5. Enable/disable non SSL.
6. Configure the FTP-ES server settings:



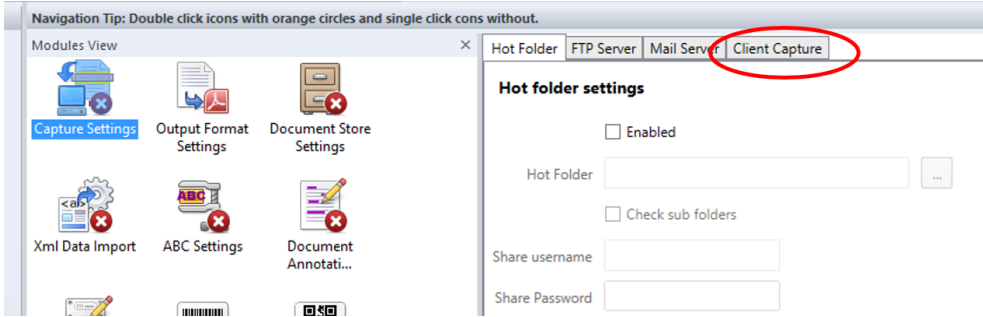
7. **Save** your settings.

4.1.2 Templates Setup

Templates control what actions ScannerVision performs. They determine where documents come from, what processing is done on them and where they ultimately end up. Multiple templates can be defined and assigned to users and groups.

To add a new template:

1. Open ScannerVision Processing Engine and click **Templates** in the **Navigation Pane**.
2. Click **Add Workflow** on the top menu.
3. Name the new template and mark it as **Enabled**.
4. Click **Apply Settings** on the top menu.
5. Once saved, double-click on the new template. In the right tab of the window, select **Client Capture**.
6. In the Client Capture tab, mark the **Enabled** checkbox. Now the template's settings are editable.

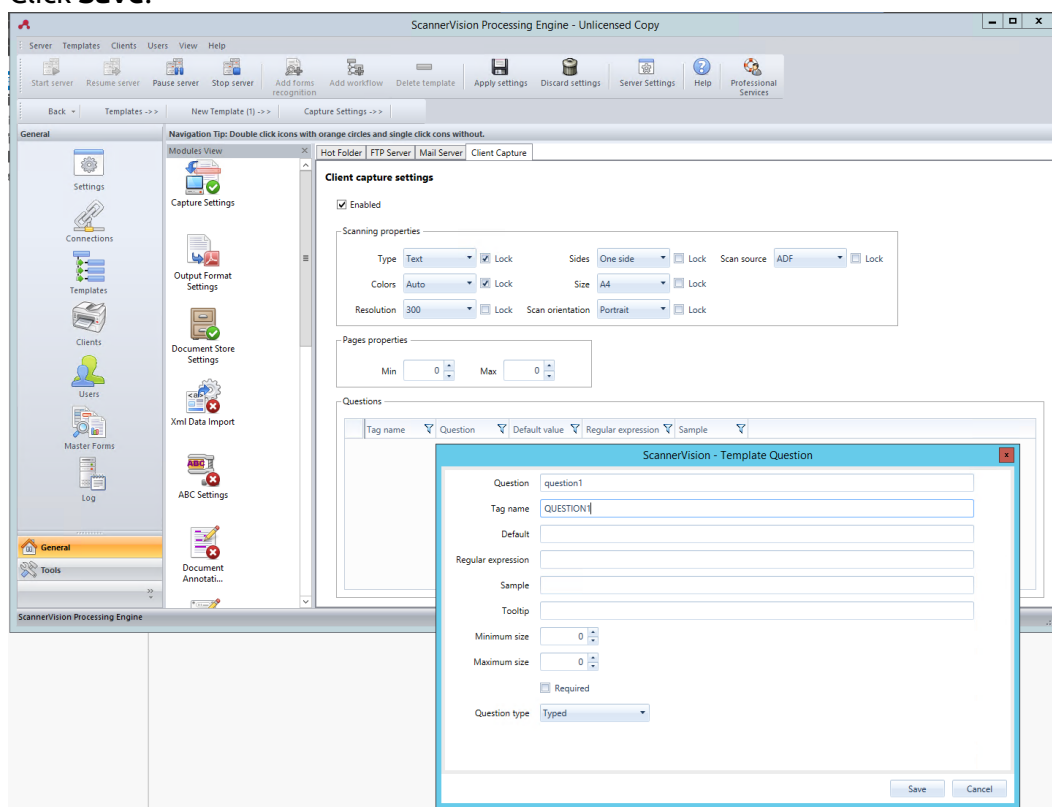


Adding Questions on a Template

Questions are used to capture necessary document information.

To add a new Question to a template, in the Client Capture tab:

- Right click on the **Questions** area.
- Select **Add question**.
- In the new Template Question window, fill in the **Question**, **Tag name**, and **Default text** fields, and any other of the optional fields.
- In **Question Type** select *Typed*.
- Click **Save**.



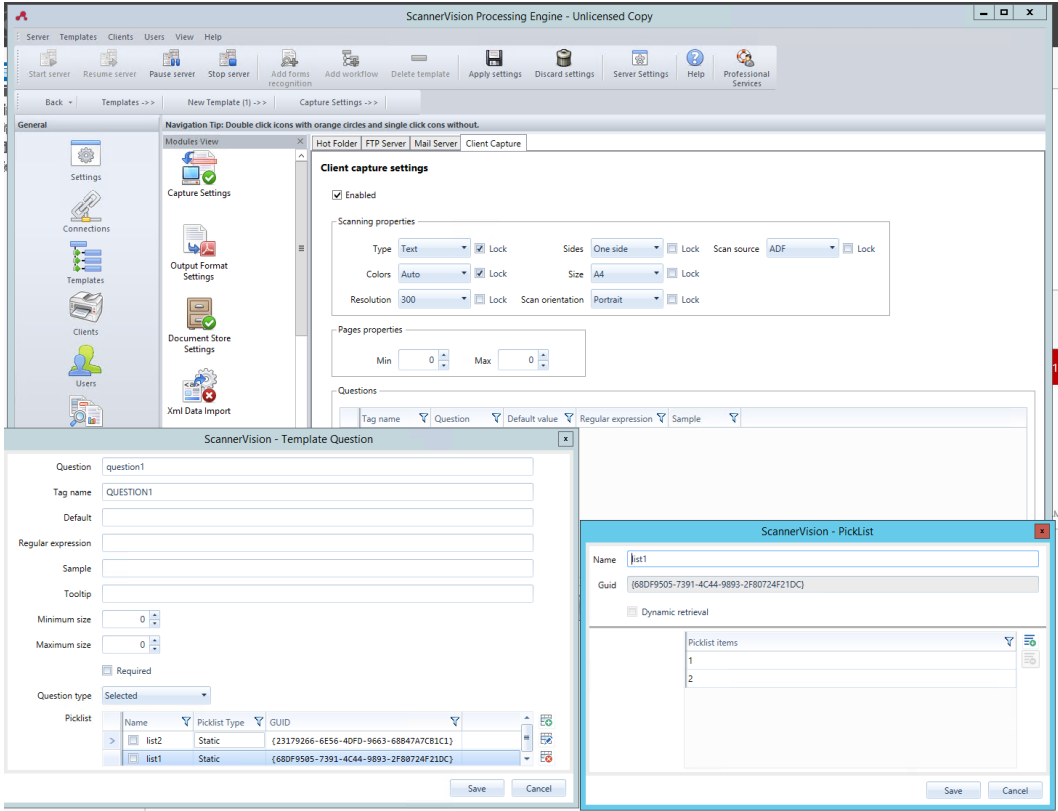
Adding a Picklist to a Question

A Picklist can be added to a Question within a template, if the Question Type selected is Typed.

To add a Picklist:

- Click on the **Add Picklist** button on the right.
- Once there, select *Static* as the *Picklist Type*.
- In the Picklist window, enter a **Name** for the picklist.
- Add picklist items by pressing the plus (+) button on the right.
- Click **Save**.

- Once saved, select the picklist(s) to be displayed for this question, and click **Save**.



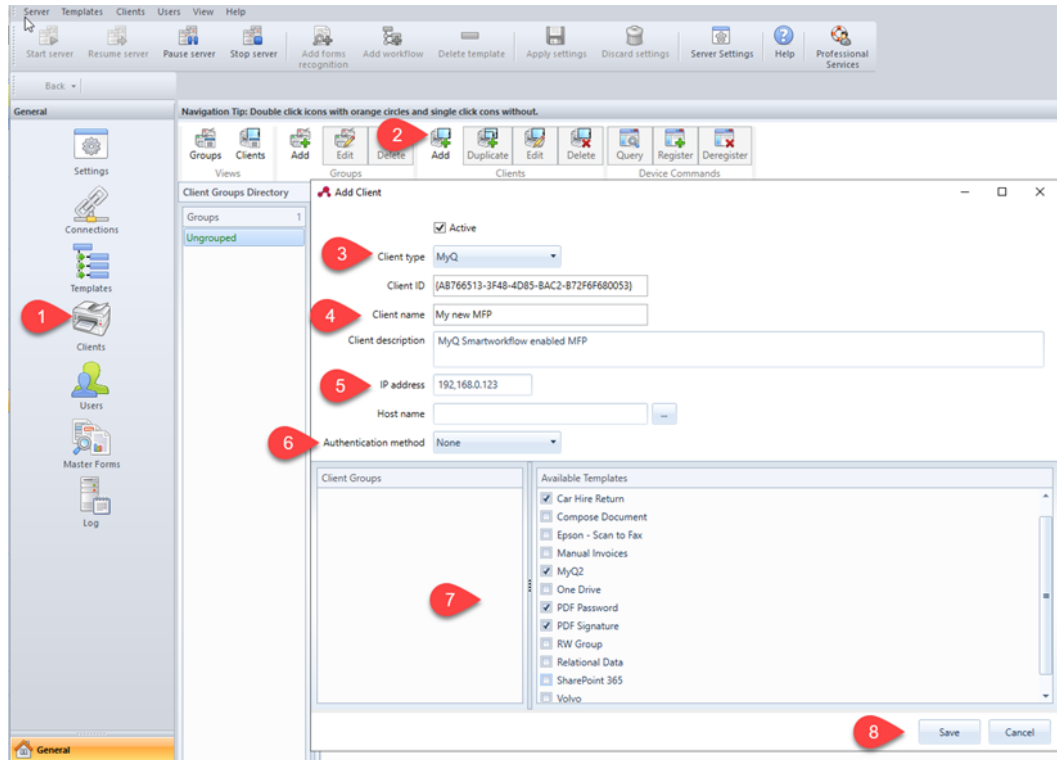
4.1.3 Configuring Clients

The clients you configure here represent the MyQ terminals connected to ScannerVision.

To add a client, go to ScannerVision Processing Engine and:

1. Click **Client** on the **Navigation Pane**.
2. Click **Add** under the Clients view.
3. Choose *MyQ* as the **Client type**.
4. Optionally add a **Client name**, and **Client description**.
5. Add the printing device's **IP address** (make sure to use the device's IP address and not the MyQ server one).
6. Choose an **Authentication method** from:
 - a. *None* - everyone can access the same templates.
 - b. *ScannerVision* - Used for Single Sign On; Users have customized template lists.
7. Choose the templates to be accessed by everyone, in case *None* was the authentication method of choice.

8. Click **Save**.



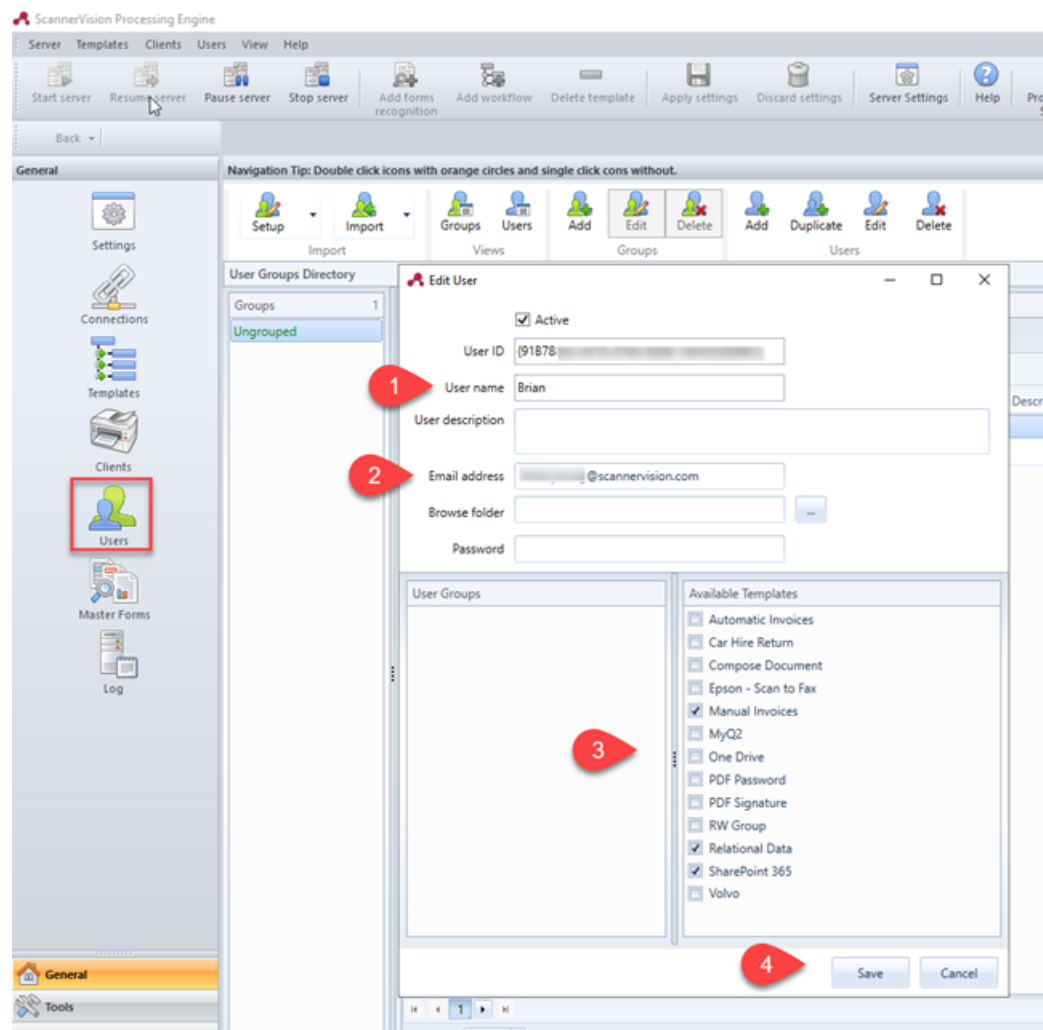
4.1.4 Configuring Users

Users can be imported from a Windows Server, LDAP, AD or they can be manually added. For further instructions, please check the ScannerVision User Manual.

Users also need to have templates assigned to them.

Whichever method is chosen, the users in ScannerVision have to match MyQ Users. To check and make necessary modifications, go to ScannerVision Processing Engine, click **Users** on the **Navigation Pane** and:

1. Make sure that the **User name** matches the MyQ user name (if users were manually added).
2. Make sure that the **Email address** matches the MyQ user's email address (if users were manually added).
3. Select templates for the user from the **Available Templates**.
4. Click **Save**.



i If users are imported, their properties such as names and email addresses will match, however **Templates** will still need to be assigned to them.

4.2 (8.1) Adding ScannerVision as a Terminal Action in MyQ

Finally, you should create a MyQ Smart Workflow in Terminal Actions, in the MyQ Web Administrator Interface.

1. Go to **MyQ, Settings, Terminal Actions**.
2. Add the **External Workflow** action node by right-clicking on **Home screen**. The node is added to the list and the terminal preview. Double-click on it to modify its settings. The node's properties pane opens on the right side.
3. Fill out the External workflow as follows:
 - a. Enter a **Title**. After saving, this will be shown as the name of the External workflow

action in the **Home screen** pane and on the terminal preview.

b. Enter the **URL** of the ScannerVision server;

ScannerVisionServer:port

http or *https* depends on the ScannerVision server settings.

The port number is not required if the default settings (*80* for non SSL and *443* for SSL) are used on the ScannerVision server. If the port was changed, the port number is required.

For example: *https://10.14.5.125* for SSL only with the default port used and

http://10.14.5.125:81 for non SSL and the port was changed from *80* to *81*.

c. Change the **Printers** and/or **Rights** if you want to create a specific MyQ Smart Workflow.

d. Click **Save**.



5 Guides in PDF

File	Size
MyQ X Ultimate Setup Guide.pdf	2.4 MB
ScannerVision User Manual V9.pdf	19.8 MB

6 Business Contacts

MyQ® Manufacturer	MyQ® spol. s r.o. Harfa Business Center, Ceskomoravska 2532/19b, 190 00 Prague 9, Czech Republic ID no. 615 06 133 MyQ® spol. s r.o. is registered in the Commercial Register at the Municipal Court in Prague, file no. C 29842 (hereinafter as "MyQ®")
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Technical support	support@myq-solution.com ³
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2. <mailto:info@myq-solution.com>

3. <mailto:support@myq-solution.com>

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myQ X

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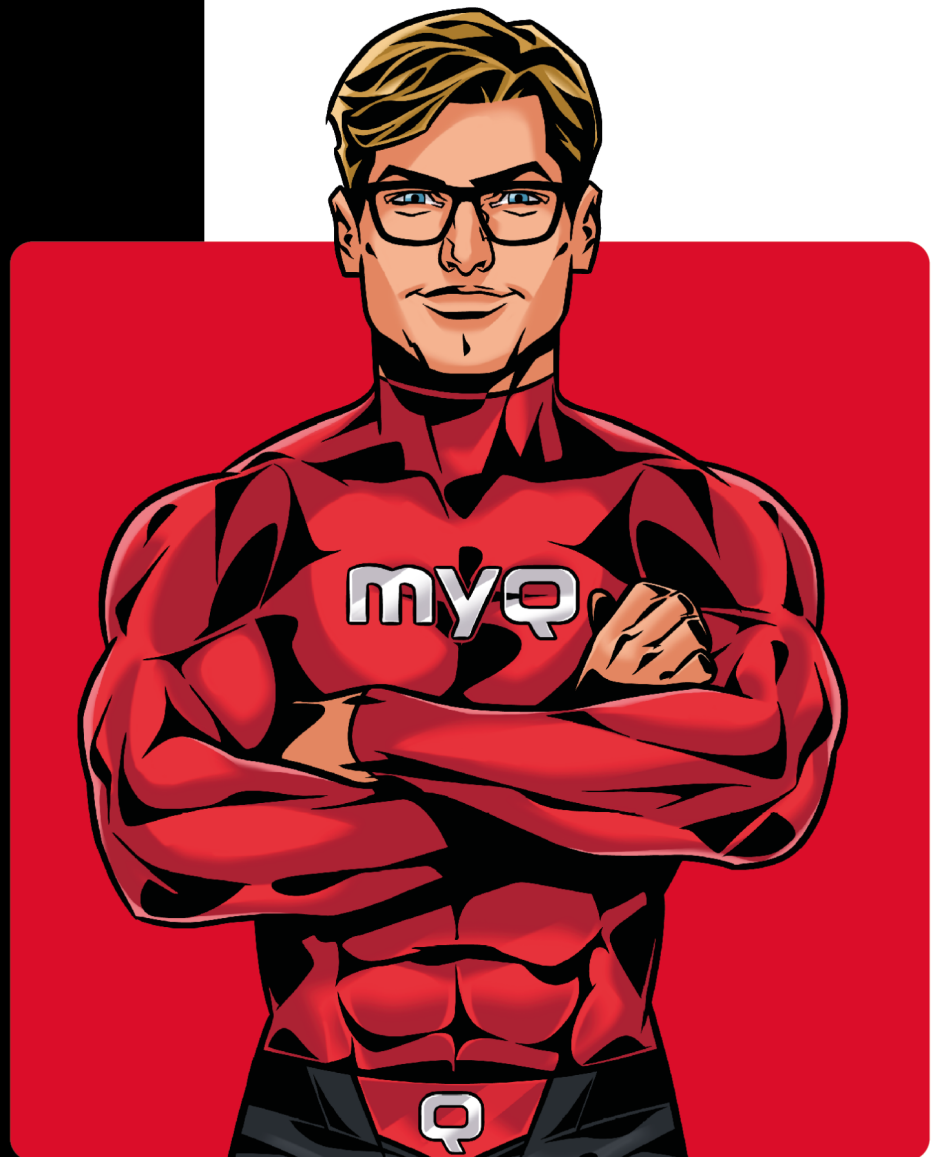
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