

# PaperStream Integration for EtherFax

## Installation and Usage Instructions

### Summary

This document describes how to install and use PaperStream Integration for EtherFax.

### Installation

Download the PaperStreamIntegrationForEtherFaxWinSeutp.exe from the link shared with you through an email message.

Right click on the above exe file and Run as an administrator.

Follow the installation by clicking on the Next buttons until the installation is complete. Choose the default settings during the installation process.

Note: It is possible for the installer window to hide behind the Explorer window from where you launch the installer. In this case, the task bar will show the installer window's icon flashing. Select it to bring the installer window to the foreground.

When the installation is complete, run the **PaperStream Integration for EtherFax** configuration application by selecting the shortcut with the same name from either the Desktop or the Start → All Programs menu.

### Configuration

Launch the **PaperStream Integration for EtherFax** configuration application from the Desktop or the start menu.

The main screen of the configuration application shows the authentication options. For now, only the device-based authentication is supported for the EtherFax integration.

To use the integration, a scanner device must be registered and authenticated first. Also, any fax numbers used must be registered within EtherFax as valid destinations.

### Scanner Registration

Select the Scanner Registration link on the top left of the PaperStream Integration Configuration application.

If a device was already registered, the name of the device(s) registered will show on the next screen in a tabular format.

To register a new device, click on 'Register New Scanner...'

If a scanner can be detected automatically, the serial number of the scanner preceded with the prefix "RCH" will be shown on the next screen.

If automatic detection does not work, the next screen will have empty rows.

Identify your scanner serial number (from the back of the scanner), prefix it with the characters "RCH" and enter next to "Scanner Serial No."

Enter the name of the scanner on the next row.

Click on Register Scanner.

Note: This scanner must be preconfigured for your account within the EtherFax portal. Verify that it is preconfigured by logging into your EtherFax portal account under Endpoints → Devices.

If the scanner is correctly preconfigured, the scanner registration will succeed. Close the current window.

Once the scanner is registered, it will show in the registered scanner list in the table on the previous screen.

## Address Book

Select **Address Book** next.

Add fax numbers and fax recipient names to the address book.

You can import such numbers from a csv file or an Excel spreadsheet. Make sure the first column is the recipient name and the second column contains the fax numbers.

Note: The first row is treated as a header row and ignored. Rows starting with the second row are imported. Also, if a row contains less than two columns, it is ignored. If the row contains more than 2 columns, only the first two columns are considered. The importer does not pay attention to the syntax of the column content.

If a wrong row content is imported, it can be deleted from the Address Book.

# Creating PaperStream Scan Profiles

There are two ways to create scan profiles for PaperStream applications to work with EtherFax – automated and manual.

## Automated Profile Creation

Click on Map Profiles link in the Configuration application to create scan profiles for PaperStream Capture (Basic or Pro) and PaperStream ClickScan.

A new window will pop up showing steps to be performed to create PaperStream Capture or PaperStream ClickScan profiles. The steps are as follows:

1. Select the PaperStream application for which the scan profile is created
2. Select the registered device to be used. If this can change, do not select it here. The device can be selected at run time. However, if selected here, the system will not ask for a device at runtime.
3. Identify the fax destination (fax number) to be included in the profile. You can use the address book to (using the address book icon) to list the fax numbers (and names associated with those numbers) or import a list of fax numbers (and names) from a csv or xls file.  
The 'Targets to Map' list will get populated based on the selection.
4. Select a PaperStream job/profile already created to be used as a 'template' that can be cloned to create the new job/profile. All settings other than the fax number and device settings will be used from the selected 'template' job/profile.
5. Click on Create Profile.

A new scan job/profile will be created and displayed in the job/profile list.

Repeat the process for each destination and each PaperStream application combination for which a job/profile needs to be created.

## Manual Profile Creation

Scan Jobs/Profiles can be created manually within the PaperStream applications as follows.

### PaperStream ClickScan

Launch PaperStream ClickScan

On the top right click on the ellipsis (three dots) and select Manage Destinations.

Click on Create (top left)

## Select Application

Under Application Path, browse and select the following or enter the following:

C:\ProgramData\PFU\EasyNXConnectForEtherFax\Connector\PaperStreamIntegration.  
EtherFaxConnector.exe

Note: Make sure the 'Application' file is selected and not the Config file

Under Parameters, after the %f, add the following:

-t="<faxnumber>" -sno="<deviceserialnumber>"

The fax number should be entered without any special characters, just the digits.

Note: International fax numbers are currently not supported.

The Device Serial Number should be of the form "RCH<actual serial number>".

Make sure the device has been preconfigured on the EtherFax site.

Modify the file name and quality check settings per your need.

Save the job/profile.

Now you should be able to use this for scanning to EtherFax using ClickScan.

If you create a job/profile with no destination fax number specified (but with the %f parameter and the device), you can use that job/profile to perform ad-hoc scans where you choose the destination fax number at run time.

## PaperStream Capture

Launch PaperStream Capture

Select Configure Jobs/Profiles (with older versions, select the three bars on the top left to launch the configuration screen)

Select an existing job to clone (recommend using a default job)

Right click on the job and clone the job

Assign a name per your need. This name will show on the scanner

In the Destination panel, select Other App. Click on Options to set the application settings.

Set the application path to the following by browsing to this location:

C:\ProgramData\PFU\EasyNXConnectForEtherFax\Connector\PaperStreamIntegration.  
EtherFaxConnector.exe

Note: Make sure the 'Application' file is selected and not the Config file

Under Parameters, remove any existing setting, add the following:

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%i -t="<faxnumber>" -sno="<deviceserialnumber>"
```

The %i refers to an index file.

The fax number should be entered without any special characters, just the digits.

Note: International fax numbers are currently not supported.

The Device Serial Number should be of the form "RCH<actual serial number>".

Make sure the device has been preconfigured on the EtherFax site.

If the work folder is already filled in, leave as is; or else, browse to select a folder where the scanned documents will be temporarily stored before getting sent to EtherFax.

Click OK to close the Options dialog.

Back in the Destination panel, select the file format. Individual image files for a document are not supported. Each document must be scanned as a single file.

Check the Output Index Information box.

Select XML to be the output file format and choose the one file per batch option.

Check the Overwrite if file exists box.

All other settings can be left as is or modified per your need.

Click on Save to save this profile.

Now you should be able to use this for scanning to EtherFax using PaperStream Capture (Basic or Pro).

If you create a job/profile with no destination fax number specified (but with the %f parameter and the device), you can use that job/profile to perform ad-hoc scans where you choose the destination fax number at run time.

## Scanning from PaperStream ClickScan

Note: A PaperStream Capture Pro license may be required to scan and transmit faxes using PaperStream ClickScan with any fi Ricoh Document Scanner. For fi-8170, fi-800R, fi-8040 and fi-7300NX scanners, no license is required. For other scanners, a valid PaperStream Capture Pro license is required.

Once one or more EtherFax destinations are mapped to PaperStream ClickScan jobs/profiles, you can scan documents to those EtherFax numbers.

If you created an ad-hoc job/profile, you can scan documents and select the destination fax number at run time.

If the job/profile is assigned to the scan operation from the scanner, if a document is scanned, the EtherFax integration for that particular job/profile will be initiated after scanning. Otherwise, you have to select the job/profile from the menu of jobs shown after scanning.

After scanning and reviewing the document (based on options set in the job/profile), the following steps need to be performed:

- If the fax number and the scanner serial number are both in the profile, the scanned document will be sent to EtherFax directly. No further runtime interaction is required.
- If the device serial number is not specified in the profile, a window will be shown where the user is asked to select from a list of registered devices or register a new device.
- If the fax number is not specified in the profile, a window will show where the user can either enter a fax number or select one from an address book.

Once all the required information (registered device, fax number) is specified, the fax can be sent to the selected fax number.

A pop-up from the bottom right portion of the screen will indicate if the document transmission succeeded or not.

## Scanning from PaperStream Capture

This section applies to all flavors of PaperStream Capture.

Note: A PaperStream Capture Pro license may be required to scan and transmit faxes using PaperStream Capture Basic with any fi Ricoh Document Scanner. For fi-8170, fi-800R, fi-8040 and fi-7300NX scanners, no license is required. For other scanners, a valid PaperStream Capture Pro license is required.

Once one or more EtherFax destinations are mapped to PaperStream Capture jobs/profiles, you can scan documents to those EtherFax numbers.

If you created an ad-hoc job/profile, you could scan documents and select the destination fax number at runtime.

If the job/profile is configured to show on the scanner panel and that job/profile is selected from the scanner, if a document is scanned, the EtherFax integration for that particular job/profile will be initiated after scanning. Otherwise, you have to initiate the scan from the PaperStream Capture application by selecting the job/profile from the menu of jobs shown.

After scanning and reviewing the document (based on options set in the job/profile), the following steps need to be performed:

- If the fax number and the scanner serial number are both in the profile, the scanned document will be sent to EtherFax directly. No further runtime interaction is required.
- If the device serial number is not specified in the profile, a window will be shown where the user is asked to select from a list of registered devices or register a new device.
- If the fax number is not specified in the profile, a window will show where the user can either enter a fax number or select one from an address book.

Once all the required information (registered device, fax number) is specified, the fax can be sent to the selected fax number.

A pop-up from the bottom right portion of the screen will indicate if the document transmission succeeded or not.

## Exception Handling

A transmission may fail for various reasons – bad fax number, bad device registration, network problems, etc.

When an exception occurs, the current scan job is sent to an exception handling system.

To view the exceptions, launch the Configuration application from the Start Menu or the Desktop (by launching PaperStream Integration for EtherFax).

Select the Exceptions link on the left.

All exceptions that have occurred are shown.

Click on View Details to see additional information about why the exception occurred. A retry may be performed from this window to re-attempt the transmission after any known issues are resolved.

Log files are created and stored under:

C:\ProgramData\PFU\EasyNXConnectForEtherFax\ConnectorLogs\EtherFaxConnector

Each log file here is based on the date of operation. Information about each EtherFax transmission operation is stored in the log file for that day.

The log file is a text file. Open it in a text file viewer to see if there is additional information about why a fax transmission may have failed.

## Known Issues

- The fax transmission may succeed but the integration may report a failure because the 'success' status may not have been received within a reasonable amount of time. This can happen due to network issues or high fax traffic conditions. In this case, wait for some time to see if the fax was actually received and then take appropriate action. You can verify the fax status on the EtherFax portal. If the fax document was received from the scan device and sent to the appropriate destination, then that transmission succeeded.
- Some windows (installer, uninstaller, device selection, fax number entry, etc.) can show up behind other windows. When this happens, an icon on the taskbar will flash to indicate that that window has focus but is showing up behind other windows. Click on that icon to bring the window with focus forward.