

Installing the ECM Client Service Application

Introduction

The Client Service Application, also known as The Client, is an essential tool that keeps your ECM system at optimal functionality.

Objectives

In this course, we'll discuss what the client service does, how to install it, and how to configure it for scanning and processing.

Select a topic to get started.

What is the ECM Client Service Application?

Because Epicor ECM is a web application, certain necessary functions require the installation and configuration of the Client Service Application, often simply referred to as "The Client."

The Client Service Application grants the web app access to your workstation's local services, enabling it to reach desktop scanners which use ISIS drivers, create image renderings of imported content, generate searchable text via Optical Character Recognition, or "OCR", and more.

The client also provides enhancements to the system's capability to print, email, and save copies of items from the repository.

Power users can perform additional tasks through the client, such as creating batch import jobs--to import larger volumes of content from shared folders or email inboxes--, enabling licenses like Print Import and Microsoft Office integration, establishing Datalink connections, LDAP proxy functions, managing import jobs, and using the log viewer.

You can connect your browser session to your local workstation or any other workstation, should your team use a dedicated scanning station.

The client can be configured to check in with Epicor ECM's distributed queue system as often as every 15 seconds, but by default the system checks for new requests every 10 minutes.

Select the right arrow icon to continue to the next topic.

Installing the Client Service Application

To install the client service application, hover over the ECM Menu, and tap User Preferences.

Select Environment, then tap the button to install or update the Client Service.

Depending on your browser, the download indication may appear in a different location.

We're using Google Chrome, and the file download appears in the lower left.

Regardless, the installer should be saved to your workstation's Downloads folder.

Open Client Service Setup.

Depending on your company's information technology policies, you may need a team member with administrative privileges to complete the process.

Follow the onscreen instructions, and if prompted, restart your computer.

Once the installation has successfully completed, the Client Service should automatically start when you start your workstation.

The application can be found in your computer's system tray and can be identified by its green and blue color scheme.

Click the icon to open it.

If the client isn't running, you can launch it simply by searching your programs for "Client."

You can also install the client from the Capture screen by clicking the status message in the header of the scan panel...

...or in EpicWeb.

Hover over Products, then Epicor ECM.

Click Downloads.

If you've experienced issues with attempting the typical install process, use the Client Offline installer located [here](#).

Now that the client is installed, you'll need to configure it. Click the right arrow to move to the next topic.

Configuring the Client Service Application for Scanning

The Client Service Application provides two components that require login credentials: The login tab and the Configure Service tab.

Log in to the Login tab to enable scanning from a desktop scanner using Isis drivers.

With an internet browser open and logged in to Epicor ECM, open the client service application.

From your browser's address bar, copy everything in the address without `/#home`.

Paste this address in the Epicor ECM URL field.

Next, click the Username field and enter your Epicor ECM username.

Click Log In.

An authenticator window pops appears. Enter your password, then click Log in.

The client confirms your successful login with checkmarks and the Connection Status indicator displays green.

You can confirm the connection by navigating to the Capture page.

You should see a message that displays Epicor ECM client connected.

If you don't see this, check the URL and username fields in the client.

Alternatively, you can click this message to connect the browser to a client installed on another machine using this dropdown.

Select the desired workstation from the dropdown and click Ok.

Tap the right arrow to test your knowledge on configuring the client service application for scanning.

Configuring the Client Service Application for Processing

Let's look at how to configure the Client Service application to perform processing jobs.

Use the Configure Service tab to enable your workstation to become a Client Processor. This volunteers your workstation's processing power to help the ECM server perform key tasks.

Using the URL from your ECM system, enter the address of your ECM system in the Epicor ECM URL field.

Next, we recommend having a system administrator supply their credentials in the Username field.

Click login, and in the popup window, enter the account's password.

Using a system administrator's credentials ensures that the client can do everything it needs to do without being restricted by another user's account limitations.

Successfully logging in, you'll see a confirmation and a notice that your settings have been saved.

Click Ok.

Next, let's enable processing.

Check the Image checkbox.

This enables the use of your workstation's processing power to create image renderings of PDF documents and other image files.

Let's also lower the request window.

By a default, the client will check in with the ECM server once every 10 minutes.

You can set this as low as 15 seconds if you'd like.

Next, if your team will be importing Microsoft Office content like Word documents, Excel Spreadsheets, Outlook emails or PowerPoint files, check the Office box to allow your client to create those image renderings.

Note that your client processor must have Office installed on the workstation in order for this feature to function.

The Workflow checkbox should be enabled if you'd like this Client Processor to be able to perform workflow-related tasks like generating OCR text, reading barcode data, splitting documents, or perform image cleanup.

The Run Scheduled Tasks box should be checked if you plan on using the Batch Import functionality to routinely scan folders or email inboxes for content to import.

Finally, you may want to enable Automatic Updates to the Client to keep it up to date with the latest enhancements and optimizations.

Check the Enable Automatic Updates box and click Save.

Tap the right arrow to continue to the knowledge check.

Course Recap

The Client Service application expands the web capabilities of Epicor ECM by granting access to your workstation's processes and services.

You learned what the client service is, how to install it, configure it for scanning, and how to grant it the specific rights as a Client Processor to create image renderings of PDFs, Microsoft Office Content, and more.

Refer to additional courses in Epicor Learning Center, guided learning, and Knowledge on Demand videos to learn how to create batch import jobs, configure your system to extract text from PDF documents, and more.

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