

IMAGE ARCHITECTS, INC.

INSTALLATION GUIDE

OpenDOX Version 5.0

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1. Contents of This Guide

This *Installation Guide* has been prepared to assist integrators in the installation of OpenDOX. It covers such issues as the amount of memory required for different combinations of image resolutions, dual display, and local printers.

1.1. OpenDOX Installation

The guide includes a series of installation verification tests that cover basic scan, store, retrieve, and print functionalities. If all the tests yield expected results, you can proceed to install or test all the workstations in the system.

2. Installing the OpenDOX Software

2.1. Hardware/Software Requirements

OpenDOX requires a properly installed image server and network. Your System Administrator should have set this up before you received the OpenDOX software and this guide.

Under the client-server architecture the PC is the client. At a minimum, the PC must have:

- 486 DX66 processor or higher
- 16 MB RAM (*32 MB recommended for workstation*)
- 20 MB Free Disk Space
- Ethernet Card
- TCP/IP
- Windows 3.11 or Windows 95/NT
- Super VGA Video Card
- Hi-Resolution Monitor (*21" monitor recommended*)
- DOS 6.0 or higher

3. OpenDOX Installation Instructions

Please note that these instructions assume the appropriate underlying connectivity software has been installed on the personal computers (PCs) and on the server. If you are using optical storage, the Plexus Object/Storage Management utilities should have been installed and the platter family names also should have been created using the Plexus utilities.

3.1. OpenDOX for MS Access

Note: Please refer to the OpenDOX Installation Roadmap for details on order of installation.

3.1.1. Client DBMS

The MS Access DBMS is automatically installed with OpenDOX.

3.1.2. Client OpenDOX Installation

1. If you are using Windows 3.x or Win NT 3.5x, then select the **File...Run** command from Program Manager. If you are using Win95 or Win NT 4.x, click the Start button and select Run from the Start Menu. Type the following:

a:\setup

Click OK and follow the instructional prompts as they are displayed.

2. To build the OpenDOX database, select the NoNet database option on the OpenDOX Build screen.

3.1.3. Client Hardware Drivers

Follow the manufacturer's instructions for hardware driver installation.

3.1.4. ODBC

The MS Access ODBC drivers are automatically installed with OpenDOX.

3.2. OpenDOX for Informix

Note: Please refer to the OpenDOX Installation Roadmap for details on order of installation.

3.2.1. Client Network Connection

1. You must be able to Ping in both directions (from the database server to the workstation and vice-versa).
2. The SERVICES file must contain an entry indicating the Informix service port.
3. If platform doesn't include its own winsock.dll, make sure the one that you choose is Winsock compliant (File date >Jan 1994).

3.2.2. Client DBMS

1. Install Informix I-Net (16 bit) or Connect (32 bit).
2. Verify that the following statement appears in your Autoexec.bat file:

```
SET INFORMIXDIR=[Directory where Informix was installed; e.g.
C:\INFORMIX]
```

Also verify that the PATH statement includes the same directory mentioned above but with \BIN appended to it; e.g. C:\INFORMIX\BIN.

3. In the Informix program group, double-click the **SetNet** icon. Enter the Host name, User name, Service name, Protocol name and Password. An example of this would be:

Host name	img_server
User name	informix
Service name	sqlxec
Protocol name	TCP/IP
Password	dbpass

4. Click the **Save** button.

3.2.3. Client OpenDOX

1. If you are using Windows 3.x or Win NT 3.5x, select the **File...Run** command from Program Manager. If you are using Win95 or Win NT 4.x, click the Start button and select **Run** from the Start Menu. Type the following:

```
a:\setup
```

Click OK and follow the instructional prompts as they are displayed.

2. To build the OpenDOX database, select the Informix database option on the OpenDOX Build screen. Verify that the server name and destination directories displayed match those you checked in the autoexec.bat file.

3. You must create a database called “OPENDOX” on the server.
 - a) On the Informix server start dbAccess. Create a shell database called “OpenDOX”. This database will be used for initial OpenDOX connections.

3.2.4. Hardware Drivers

Follow the manufacturer’s instructions for hardware driver installation.

3.2.5. ODBC

1. Unzip the ODBC database driver for Informix contained in the file 'DOXINF.ZIP'. You must contact Image Architects for the password for this archive. Be sure to unzip this file into the OpenDOX directory so that the ODBC Administrator program can find the driver.
2. The setup program will have created a sample ODBC datasource for Informix called DOXINF. You will need to open the control panel and double-click the ODBC icon, then edit the settings for DOXINF to match your existing Informix configuration.

3.3. OpenDOX with Oracle

Note: Please refer to the OpenDOX Installation Roadmap for details on order of installation.

3.3.1. Windows

1. If you are running Microsoft Windows for Workgroups, then install Microsoft TCP/IP for Windows for Workgroups and make this the default protocol. If you are running Win95/NT, make sure TCP/IP is installed and that it is the default protocol.

3.3.2. Client DBMS

1. Using the Oracle Products for Windows Version 7.0 CDRROM, install SQL*Plus 3.1.2.2.6.
2. Using the Oracle 7 Server Version 7.1.3.3.6 for Windows NT CD-ROM, install SQL*Net Version 1.1.9. Do this because the other CD contains an earlier version of SQL*Net, which does not allow you to use the Microsoft Windows for Workgroups TCP/IP. Install only this component, using the Custom install option. You also can try installing the version of SQL*Plus on this CD; SQL* Plus is not essential to the running of OpenDOX, but is the Oracle equivalent of dbAccess in Informix.
3. Verify that the file **tnsnames.ora** appears in the c:\orawin\network\admin directory. The following information should be in the file (the names are examples; yours may differ):

```
(protocol=TCP)
(host=orbit)
(port=1521)
```

```
(connect_data=(SID=sid))
```

4. Enter the socket information in the services directory of your network. For example:

```
In c:\windows\services, enter orasrv=1525/tcp
```

3.3.3. XDP Object Server (if present)

1. Install the XDP Object Server Client Library software.
2. Check the AUTOEXEC.BAT file for the following entries (the names are examples; yours may differ):

```
SET XDPOS_PAS=ONLINE1
SET XDPOS_FAMILY=DOXOPT
SET ODBC DIR=C:\WINDOWS\SYSTEM
SET ORA_HOST=ORBIT
SET ORA_USER=SCOTT
SET ORA_PASS=TIGER
SET XDPOS_HOST=NOMAD
SET XDPOS_USER=INFORMIX
```

3.3.4. Client OpenDOX

1. If you are using Windows 3.x or Win NT 3.5x, select the **File...Run** command from Program Manager. If you are using Win95 or Win NT 4.x, click the Start button and select **Run** from the Start Menu. Type the following:

```
a:\setup
```

Click OK and follow the instructional prompts as they are displayed.

2. You **cannot** build an Oracle/UNIX OpenDOX database from the client (using DOXBuild). Instead, you must build it on the UNIX server. Therefore, you must edit OPENDOX.INI manually. Do the following:
 - Create a section that follows this pattern:

```
[database_name]
CONNECT=DSN=DOXORA;SRVR=t:servername:dox;UID=user_id;PWD=user_pass
DSN=DOXORA
IMAGE_DIR=
XDPOS=0
```

Replace *database_name* with the name of the database created.
Replace *servername* with the name of the server—for example, “orbit” or “nomad” (without the quotes).
 - Find the section called [dox_database], if this section doesn't exist, then create one and type in an entry that follows the pattern:

```
database(n)=database_name
```

Where **n** is the next higher number in the sequence and database_name is the same as the name of the database.

e.g. If given the entry:

database1=doxinf

Then the next entry would be:

database2=doxsql

- Save and close the file.

3.3.5. Hardware Drivers

Follow the manufacturer's instructions for hardware driver installation.

3.3.6. ODBC

1. Unzip the ODBC database driver for Oracle contained in the file 'DOXORA.ZIP'. You must contact Image Architects for the password for this archive. Be sure to unzip this file into the OpenDOX directory so that the ODBC Administrator program can find the driver.
2. The setup program will create a sample ODBC datasource for Oracle called DOXORA. You will need to open control panel and double-click the ODBC icon, then edit the settings for DOXORA to match your existing Oracle configuration.

3.4. OpenDOX for SQL Server NT

Note: Please refer to the OpenDOX Installation Roadmap for details on order of installation.

3.4.1. Windows

1. Create a persistent network connection to the DBMS network drive, such as:

S:\SQL

(*Note:* How you do this will depend on what operating system you are using. Ask your system administrator for assistance.)

3.4.2. Client DBMS

1. Install and configure SQL Server Client software.

3.4.3. Client OpenDOX

1. If you are using Windows 3.x or Win NT 3.5x, select the **File...Run** command from Program Manager. If you are using Win95 or Win NT 4.x, click the Start button and select **Run** from the Start Menu. Type the following:

a:\setup

Click OK and follow the instructional prompts as they are displayed.

2. To build the OpenDOX database, select the SQL Server database option at the OpenDOX Build screen. Verify that the server name and destination directories displayed are correct.

3.4.4. ODBC

1. Unzip the ODBC database driver for SQL Server contained in the file 'DOXSQL.ZIP'. You must contact Image Architects for the password for this archive. Be sure to unzip this file into the OpenDOX directory so that the ODBC Administrator program can find the driver.
2. The setup program will have created a sample ODBC datasource for SQL Server called DOXSQL. You will need to open control panel and double-click the ODBC icon, then edit the settings for DOXSQL to match your existing SQL Server configuration.

3.5. Installing Multiple Seats On The Same Network

If you need to give multiple seats access to the same OpenDOX database, you will need to edit the OPENDOX.INI file on each additional workstation. Be sure to do this after installation of the OpenDOX product is completed for each machine. (*Note: The MS Access database format is **not** designed for multi-user usage. This type of setup has not been tested and will not be supported.*)

1. Open the OpenDOX.INI file on the workstation that the DoxBuild process has already been run and is correctly configured to access the new OpenDOX database.
2. Find the section that has the same name as the database whose configuration information you need to move to a new workstation.
3. Copy down the section name and all entries under that section.
4. Open the OpenDOX.INI file on the new workstation.
5. Find the end of the file and enter the section and all entries copied from the other workstation's INI file into the new INI file.
6. Find the section called [dox_database] in the new INI file or, if this section doesn't exist, create one and type in an entry that follows the pattern:

database(n)=database_name

Where **n** is the next higher number in the sequence and database_name is the same as the name of the section you just copied to the end of the INI file.

For example if there is an entry:

database1=doxinf

Then the next entry would be:

database2=doxsql

7. Save the new OpenDOX.INI file and close it.

3.6. Server Installation (Optical Storage Systems Only)

The only program that needs to be directly installed on the server is the optical migration program (optmag). This optional program should be copied to the server and then compiled. The program migrates images from magnetic to optical storage. Please customize this program or, if necessary, write your own migration program to better meet the requirements of your installation.

Please note that you must have installed ESQL-C on the server.

1. Make a directory on the server, e.g., /home/dox
2. Copy OPTMAG.EC to /home/dox
3. Compile the program:

```
%esql -e optmag.ec -o optmag
```

4. Create a UNIX cron job that runs the optical migration program when appropriate for this installation (generally after regular office hours).

4. Determining Database Extent Sizes

4.1. Read this Section

YOU MUST COMPLETE THIS SECTION. PROPER EXTENT SIZING IS CRITICAL TO THE PERFORMANCE OF YOUR DATABASE. WITH IMPROPER EXTENT SIZING, AS MORE DOCUMENTS ARE STORED IN THE DATABASE, PERFORMANCE WILL DIMINISH AND EVENTUALLY THE DATABASE WILL CEASE TO ACCEPT MORE DATA.

IF YOU ARE NOT SURE HOW TO CALCULATE EXTENTS, YOU MAY NEED TO CONTACT INFORMIX FOR TECHNICAL TRAINING.

Image Architects provides a spreadsheet that performs these calculations for you. It also estimates magnetic and optical storage requirements for your system. The sample below shows extent calculations for 2 years, 5,000 documents per month, 5 documents per folder, 3 pages per document and 25 users.

	Folderinfo	Docinfo	Image Pages	Annotations	Non-Image Files	Sessionlog	Auditlog
Sum Indexes	12	136	10	8	8	12	12
25% increase	15	170	12.5	10	10	15	15
Rows in Table	100000	120000	240000	340000	6000	13200	1320000
Bytes used by indexes	1500000	20400000	3000000	3400000	60000	198000	19800000
KiloBytes used by indexes (KB)	1465	19922	2930	3321	59	194	19336
Length of system page	2020	2020	2020	2020	2020	2020	2020
Bytes per row used by data	22	211	246	82	112	32	50
Rows contained per data page	91	9	8	24	18	63	40
Pages used by data	1099	13334	30001	14167	334	210	33001
Bytes used by data	2250752	27308032	61442048	29014016	684032	430080	67586048
KiloBytes used by data	2198	26668	60002	28334	668	420	66002
Total index and data space (KB)	3663	46590	62932	31655	727	614	85338
Avg. Extent Size (Kb)	457.875	5823.75	7866.5	3956.875	90.875	76.75	10667.25
Online=1, Turbo=2	1					Total Extents (MB)	226.092773
Years of Storage	1					Avg Extent (MB)	28.2615967
Users on the System	50						
Number of folders, cases, etc.	100000					Storage of 100 dpi images (MB)	3600
Number of documents per folder	5					Storage of 200 dpi images (MB)	6000
Number of scanned pages per document	2					Storage of 300 dpi images (MB)	14400
Number of scanned documents per month	10000						
Number of non-image documents per month	500						
Logins per day per user	2						
Audits per login per user	100						

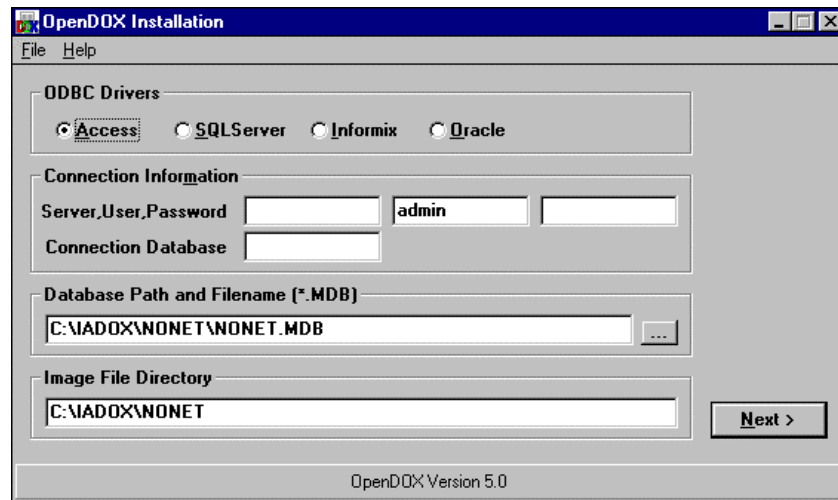
Months/year of online audit trails	6						
Annotations per Document	2						
Annotations per Folder	1						
Image Size (100 dpi)	15000						
Image Size (200 dpi)	25000						
Image Size (300 dpi)	60000						

There are many ways to calculate extents based on backfile conversion, optical migration and archiving strategies. This spreadsheet is an example. You should plan your database sizing individually.

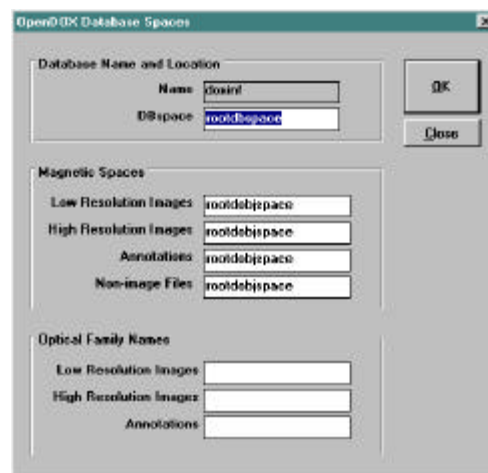
5. Building the OpenDOX Database

Run the DoxBuild program by clicking on the DoxBuild icon in the OpenDOX group.

1. After starting the program, the following window will appear. Enter the proper values:



2. After entering all appropriate information in the main screen, click the Next button. This will display the Document Data Structure configuration screen. This screen allows you to customize the Document Indexing capabilities of an OpenDOX database. For our testing purposes, we will simply accept the default Index configuration. If your DBMS is Informix, clicking the Next button will display the Database Spaces and Extents screens. If your DBMS is not Informix, then clicking the Finish button will begin the database build process. (Skip to step #5)
3. If you are installing an Informix database, you will need to enter the Database Spaces names and Extents sizes to continue.



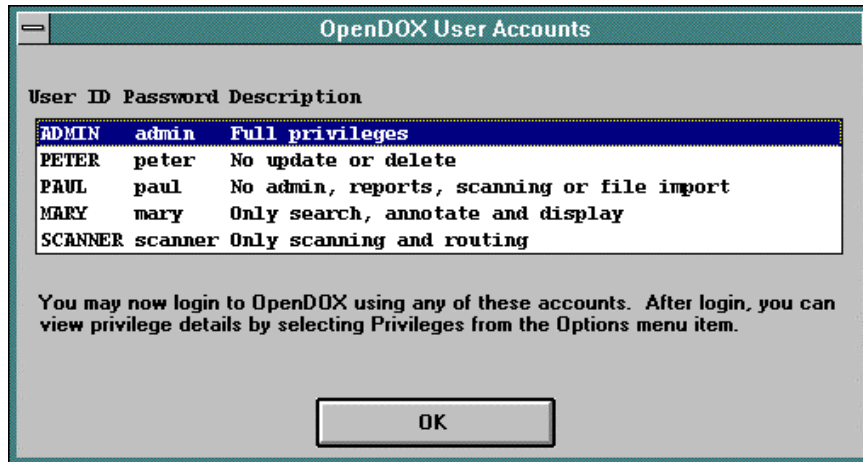
You will be asked to enter database and data object space names. These spaces and names must have already been created using tbmonitor. If you are unsure about this, please check with your System Administrator or go back into tbmonitor and double-check it.

You must enter valid data object spaces for the Optical Family Names. These may be the same as the Magnetic Data Object names but can be different if you wish. However, if you are using optical families, you must enter family names that have already been created using the Storage Manager Utilities.

If you are not presently using optical storage but plan to later on, enter the Optical Family Names now. They cannot be altered in the future.

If you are not using optical storage and do not plan to in the future, you may leave the Optical Family Names blank. This will conserve disk space.

4. After completing this form, click Next and the Extents screen will be displayed. You will be asked to enter extent sizes for the system. When you have entered all needed information you should click Finish. This will start the database build process.
5. You will be asked if you want to insert sample documents into the new database, answer Yes. Any other message prompts should be self-explanatory. If you need help, please refer to the DoxBuild section in the System Administration Guide.
6. If all went well, you will be presented with the following screen. This screen will show the sample users that are created by default.



After completion of the DoxBuild process you are ready to run the OpenDOX program. From Windows, double-click on the OpenDOX icon in the OpenDOX work group.

6. OpenDOX Installation Verification

This test should take no more than 30 minutes. If any test does not yield the expected results, you should not proceed until you have resolved the problem. The following troubleshooting sections may be helpful. After every configuration or hardware change, run the tests from the start (after deleting or accounting for previously scanned documents).

6.1. Summary of Test Conditions

AREA	HARDWARE & SOFTWARE TESTED
Login	Database, network, installation environment
Scan	Scanner board installation, scan daughter card installation
Retrieve	Indexing
View Images	Memory, display drivers, notes
Print	Memory, daughter card installation, routing
Admin	Security, configuration
Reports	Local printing, audit trails
Print Server	Memory, routing, daughter card installation

6.2. Login

6.2.1. Procedure

- Select the proper database from the combo box, if more than one has been created.
- Login as ADMIN, password is admin.

6.2.2. Troubleshooting

Cannot connect to database

- Is the database entry in OPENDOX.INI correct?
- Example: for Informix, DSN=DOXINF

Cannot Login

- Is SQLHOST=image_server named correctly in your Autoexec.bat?
- Are DBUSER & DBPASSWORD set correctly in your Autoexec.bat?
- Is SERVERPORT set correctly in your Services file?
- Has the DoxBuild program been run successfully?

6.3. Scanning

6.3.1. Procedure

Scan a 3 page document.

- For Folder Key, type in "TEST1"
- For Title 1, type in "OPENDOX Verification Document"
- For Index 1, choose "LIST SAMPLE 1"
- For Index 2, choose "LIST SAMPLE 2"
- For Index 3, choose "LIST SAMPLE 3"

Scan the same document again but change the indexing values as indicated.

- For Folder Key, type in "TEST2"
- For Title 1, type in "OPENDOX Verification Document 2"
- For Index 1, choose "LIST SAMPLE 1"
- For Index 2, choose "LIST SAMPLE 2"
- For Index 3, choose "LIST SAMPLE 3"

6.3.2. Troubleshooting

Scan menu item does not appear.

- Does ADMIN have Scan privileges?
- Has the Scanner been initialized via Xionics demo2?

Scan menu item is disabled.

- Is the scanner properly attached?
- Has the Scanner been initialized via Xionics demo2?

Scanner jams.

- Check feeder mechanism.

Other errors during scanning.

- Is there enough database space on the server?
Run `tbstat -d` on the server and examine the free space.
- Is the display setting correct?
Enter `DISPLAY=1` in the PowerTools section of the win.ini file.

6.4. Retrieval

6.4.1. Procedure

Click the Search button on the toolbar to display the Search screen.

- Type TEST* in the Folder Key field. (If you are using MS Access, type % instead of *. Not all DBMS' support the same wildcard characters.)
- Click Documents in the Search Type section. Click the OK button.
Expect to see both documents shown in the Matchlist grid. Close the Matchlist.
- Type *1 in the Folder Key field. Click the OK button.
Expect to see only the TEST1 document shown in the Matchlist grid. Close the Matchlist.
- Move to the tab containing the List Indexes. Select LIST SAMPLE 4 from the Index 1 listbox. Click the OK button.
Expect the message “No matching documents.” to be displayed. Close the message box.
- Select LIST SAMPLE 1 from the Index 1 listbox. Click the OK button.
Expect to see only the TEST1 document shown in the Matchlist grid.
Select TEST1 and click the Get button on the Matchlist.

6.4.2. Troubleshooting

Documents do not appear in Matchlist

- Were the documents properly indexed during scanning?

6.5. Local Printing

6.5.1. Procedure

The Folder screen for TEST1 should be now be displayed.

- Click Output.
- Select Printer from the Output choices.
- Select the document in the grid on the right. Pages 1 to 3 should be indicated in the Pages fields.
- Select Local Printer from the list of available printers. Click OK.

6.5.2. Troubleshooting

- **Cannot see Output button or button is disabled**
Does ADMIN have Output privileges?

- **“Cannot Open Printer” error message**

Is the printer properly connected and powered on?

6.6. Remote Printing

6.6.1. Procedure

The Folder screen for TEST1 should be now be displayed

- Click Output
- Select Printer from the Output choices.
- Select the document in the grid on the right. Pages 1 to 3 should be indicated in the Pages fields.
- Select PRINTER 1 from the list of available printers. Click OK.

6.6.2. Troubleshooting

Cannot find Output button or button is disabled

- Does ADMIN have Output privileges?

6.7. System Administration

Access to the System Administration Utility requires a User ID and Password. You may use the same ones you used to login to DOX. Launch DoxAdmin from the Admin menu item on the OpenDOX main menu. Login as ADMIN.

6.7.1. Procedure

1. Modify Company Title and Index Labels.
 - From the Main menu, click Company, then Options.
 - Replace existing Application Title with "OpenDOX Verification Test". Click OK.
 - From the Main menu, click Company, then Labels.
 - Change folder_key label to "Folder Name".
 - Change title label to "Doc Key". Click OK.
2. Add a User.
 - From the Main menu, click Users, then Accounts. Click the Add button on the Users list.
 - Fill in all personal information. It is not important what you type; make up fictitious information if you wish.

- Select the Security tab and check these privileges: Search, Image. Make sure File I/O, Print, and Fax Out are **NOT** checked. Select the Defaults tab. Check the Doc Search, Show Indexes, and Show Stats check boxes. Click OK.
- 3. Exit the Admin program and Re-Login to OpenDOX via the Exit Menu. Re-Login as the user you just created. The main window's title bar should say "OpenDOX Verification Test".
- 4. Click the Search button on the toolbar. The folder_key label should now say "Folder Name" and the title label should now say "Doc Key".
- 5. Perform a search where Folder Name is equal to TEST1. The Matchlist should be displayed with TEST1 as the only record. The Output button should be either disabled or not visible depending on the Hidden flag set in Admin/Options.
- 6. Get the folder TEST1. The Output button on the folder screen should also be disabled or invisible. Close the folder.

6.7.2. Troubleshooting

- **Admin is not on the main menu**
Does ADMIN have Admin privileges?
- **“Cannot Run Doxadmin.exe” error message**
Is DOXADMIN.EXE in the path or current directory?

6.8. Reports

Display the reports screen by clicking the Reports menu item from the main OpenDOX menu.

6.8.1. Procedure

- Select Folder as the report type. Type "TEST1" in the Folder Name field. Click OK. A report showing actions taken on this folder should be displayed. Close the report.
- Select User Activity as the report type. Select ADMIN from the list of users. Click OK. A report showing actions taken by this user should be displayed. Close the report.
- Select Event as the report type. Select OPEN FOLDERS from the list of events. Click OK. A report showing information about folders that were opened should be displayed. Click the Print button on the report window. When the report is done printing close the report.
- Close the Reports screen and exit OpenDOX.

6.8.2. Troubleshooting

- **Reports item is not on the main menu.**
Does ADMIN have Reports privileges?
- **“Cannot Open Printer” error message.**
Is the printer properly connected and powered on?
Has a default printer been set?

6.9. Print Server Program

6.9.1. Procedure

- Start the OpenDOX PrintServer program. Select the database you are testing. Login as the Printer name that you selected from the Output screen. Do not enter a password. (The default printers don't have passwords).
- Expect the 3 page document that we previously chose in the Output screen to print with notes and banner page.

6.9.2. Troubleshooting

- **“Cannot Open Printer” error message**
Is the printer properly connected and powered on?