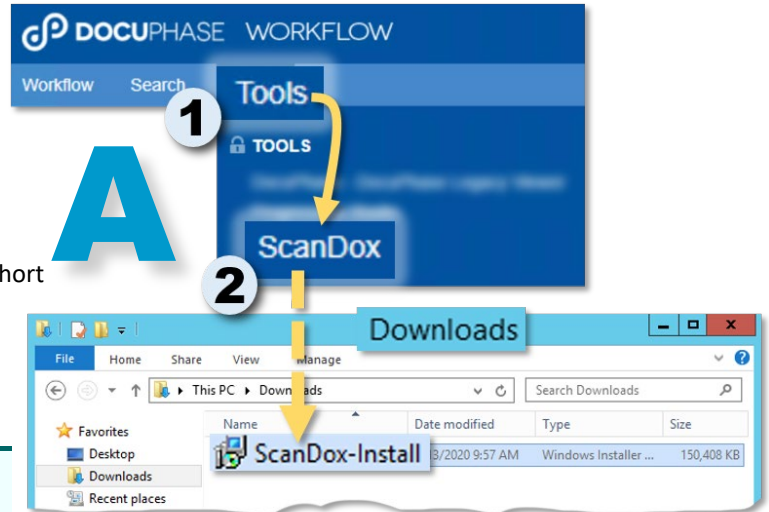# Overview

This document provides instructions for the 2 processes needed to add ScanDox to your local device: A) Download, and B) Installation

A) Download the Install File

You need to download the ScanDox Install (msi - MS Installer file) onto your device before you can install it. The installer (msi) file can be quickly downloaded from the main header in DocuPhase (as shown here).

From the main header anywhere within the DocuPhase:

1) Hover your mouse over the Tools menu to display a short list of options.

2) Select the ScanDox option to download the associated install file to your local device.

> **NOTES**
> - *When using the Tools menu, the install file is generally downloaded to the "Downloads" folder.*
> - *Otherwise, the installer file may already be located and downloaded from the DocuPhase server in a folder named "DocuPhase Installers". If you don't find it there, it may be located on a different folder on the same (DocuPhase) server.*

B) Install ScanDox

Once the install file has been downloaded, you can begin the installation process, as described below:

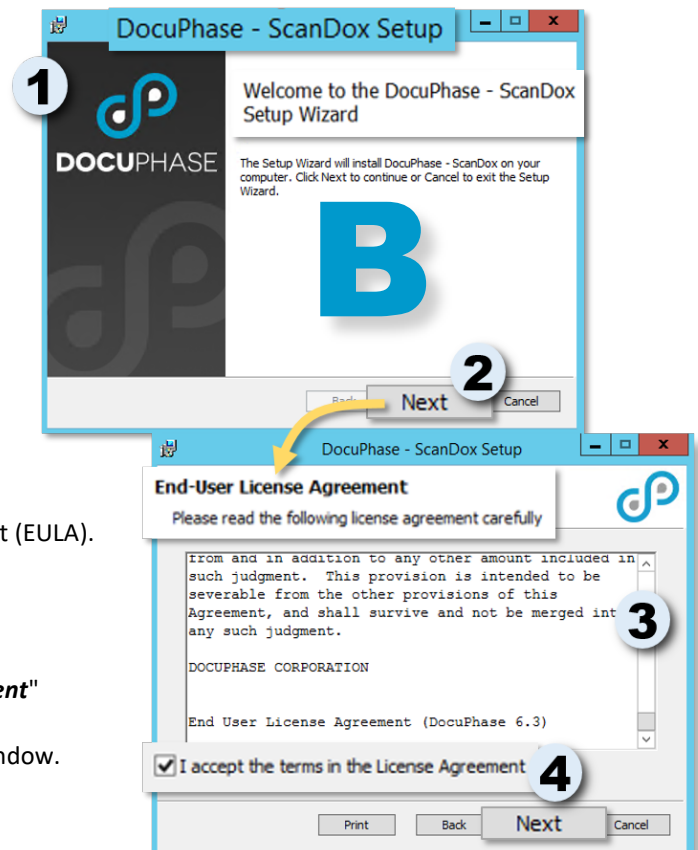*From the location at which the msi was downloaded:*

1) Find (see *NOTE* above) and double-click on the ScanDox install file to display the first window of the ScanDox Setup Wizard.

In the Wizard:

2) Click [Next] to display the End User License Agreement (EULA).

On the EULA:

3) Read the agreement.

4) Enable (☑) the "*I accept the terms in the License Agreement*" option,
then click [Next] to display the *Destination Folder* window.

(continued)

In the Destination Folder path field:

5) Make sure that the folder shown is where you want to install ScanDox, then click [Next] to display the Authentication Servicer window.
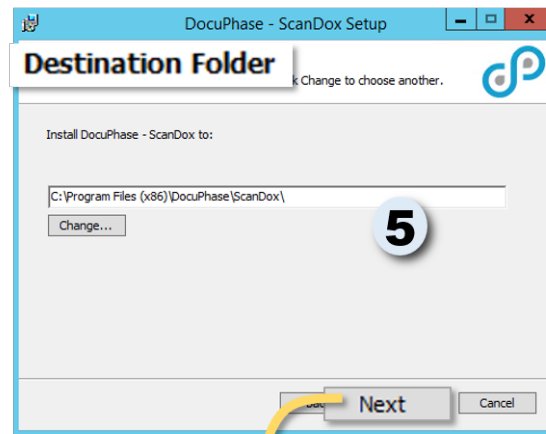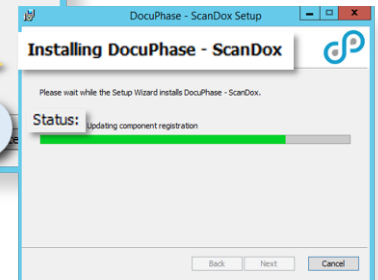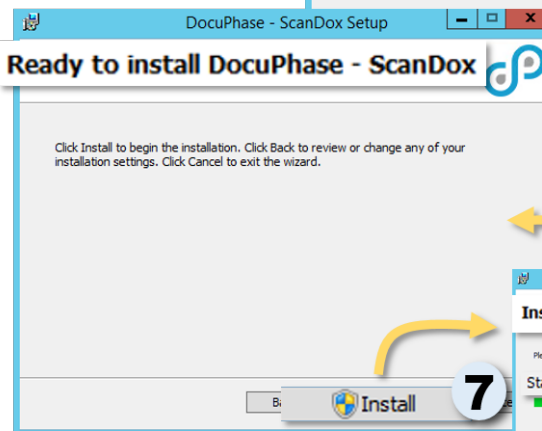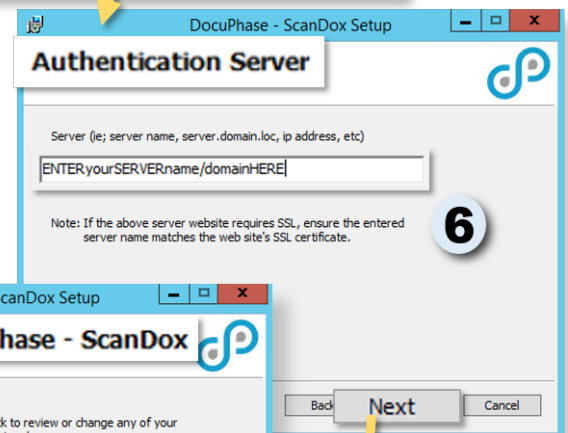
> **NOTE**
>
> *Typically the folder is C:\Program Files (x86)\DocuPhase\ScanDox\. However, this can be changed as needed.*

On the Authentication Server screen:

6) Enter the name of the appropriate DocuPhase server, then click [Next] to display the Ready to Install

> **NOTES**
>
> - *If the DocuPhase website is __NOT__ secure, type in the name of the DocuPhase server found in the DocuPhase url (e.g., http://__DocuphaseServerName__/DocuPhase, where the text here in __bold__ represents the DocuPhase server name).*
> - *If the DocuPhase website __IS__ secure, type in the name of the DocuPhase server found in the DocuPhase url. You also need to include the fully qualified domain name (e.g., https://__DocuphaseServerName.FullyQualifiedDomainName__/DocuPhase or https://__DocuphaseServerName.Docuphase.com__/Docuphase, where the text here in bold represents the DocuPhase server, then domain names).*
> - *Once you click [Next], a confirmation prompt may appear asking you to verify the protocol; if you see this prompt, select __HTTPS__.*

On the Ready to install DocuPhase - ScanDox screen

7) Click [Install] to display the *Installation* progress screen, and begin installing ScanDox.

> **NOTE**
>
> *Once you click [Next] a confirmation prompt may appear asking you if you are authorized to make changes to the device (e.g., "Are you an administrator of this machine?"; if you see this prompt, click [Yes].*
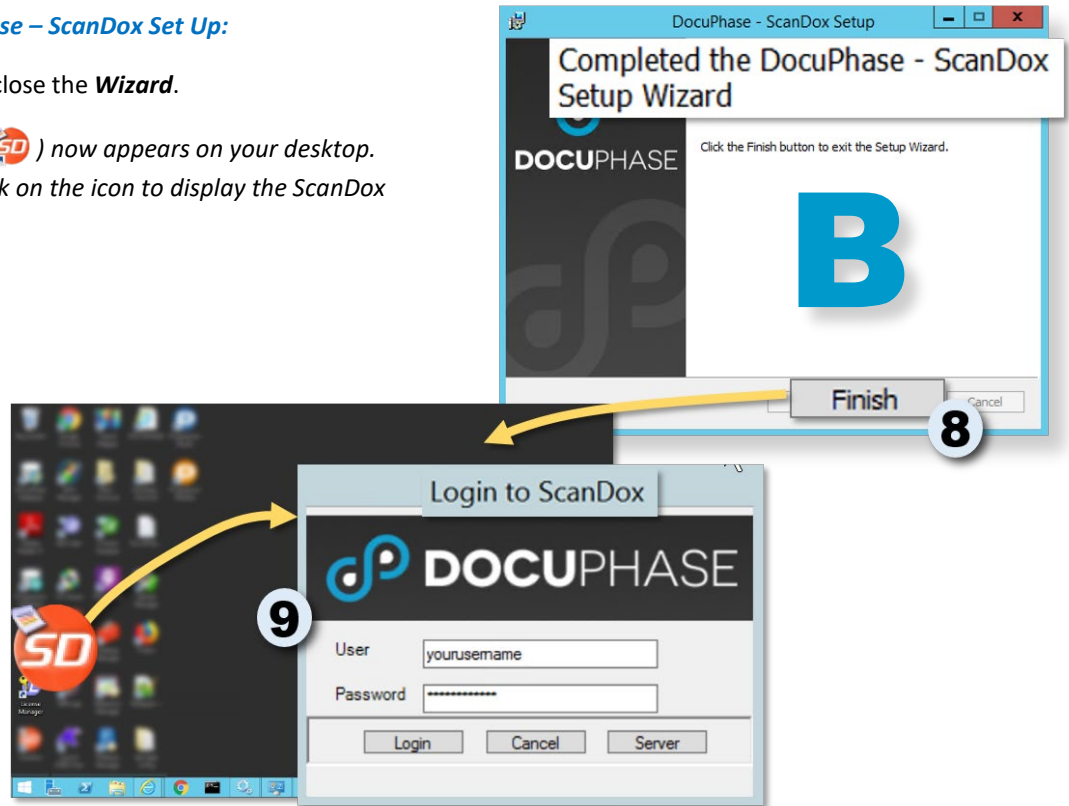
(continued)

When the installation is complete, the Completed the DocuPhase - ScanDox Setup Wizard screen appears:
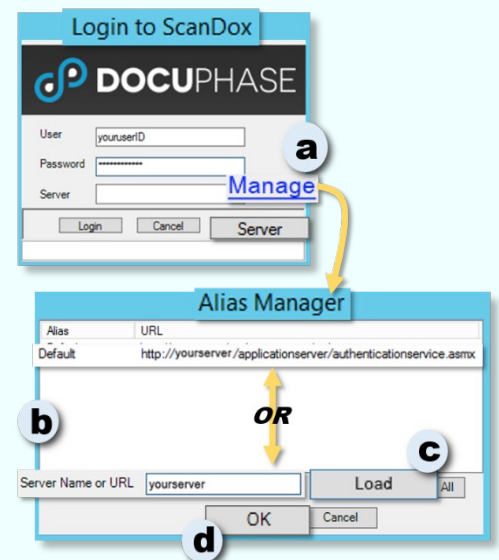
On the Completed – DocuPhase – ScanDox Set Up:

8) Click [Finish] to close the **Wizard**.

- The ScanDox icon ( ) now appears on your desktop. You can double-click on the icon to display the ScanDox login screen.

9) Log into ScanDox.

NOTES

- *Depending upon the security policies of your organization (i.e., if Single Sign-On capabilities), you may not be required to log into ScanDox each time.*

- *In certain situations (such as the first time you log in, you may need to designate the server the first time you login; If the Server field is empty:*

  a) *Click **Manage** to display the **Alias Manager** window.*

  b) *Enter or select the name of the server on which ScanDox was just installed.*

  c) *Click [Load] to add it to the list of Servers in the list.*

  d) *Click [OK] to return to the login screen.*

Questions?

If you have specific questions or need more information about the instructions included in this document, please contact DocuPhase using any of the following methods: **Email:** support@docuphase.com / **Phone:** (727) 441-8228 /
Website: https://www.docuphase.com/contact-us.