FlowPort™

Paper that knows where it's going.

User Guide

2.1.1 SP3 Update

Notice

Specifications described in this publication are subject to change without notice. Use of some features may be limited by your hardware or software configuration. Contact your dealer or Xerox for details.

April 2003

FlowPort 2.1.1 SP3 Update

This Update provides an overview of changes to FlowPort since the FlowPort Release 2.1 User Guide was released in November 2000. The User Guide is included at the end of this document.

This update contains the following updated information. The number in parentheses following the feature indicates the page number(s) in the User Guide that are affected.

New Features and Updated Information

- Updated list of supported browsers
- New User Account Parameter to enable/disable creation of document tokens
- Updated list of supported repositories (1-2, 5-8, 5-15, 5-18, 5-19, 5-25, 5-37, 5-43, 5-46)
- Updated FlowPort support web site (1-6)
- Available Internet Fax file formats (5-50, 7-50)
- Login Credentials feature for repository login

Clarification

- Clarification about the availability of a stored document's URL (5-7)
- Clarification of username and password required when supplying "other repository information" (5-9, 5-39)
- Clarification of "remote printer" capability (5-12)
- File Format for Scanned Documents (Chapter 5)
- Ignore all references to the iManage Repository
- Clarification of Public, Shared, and Private forms. (8-4)

Updated or New Features in FlowPort

Since the FlowPort User Guide was released, Xerox has issued two maintenance releases of FlowPort. Each of these releases have added performance and functionality to FlowPort.

Updated Browser Requirements for FlowPort 2.1.1 SP3

FlowPort 2.1.1 SP3 is best used with one of the following browsers. Using an unsupported browser may give you unpredictable results.

- Microsoft Internet Explorer 4.0, version 4.72 to 5.5, or
- Microsoft Internet Explorer 6.0

Note: With this version of Netscape, you may need to refresh the screen occasionally.

- Netscape Navigator, version 4.5.1 to 4.77.

Create Document Tokens User Account Parameter

You can now select whether or not a Document Token is created when you store a document to a repository. Note that this feature is only available to you if the FlowPort administrator has set the "Enable Document Tokens" system parameter.

Updated list of supported repositories

The list of repositories that are supported by FlowPort has changed. The following repositories are supported by FlowPort 2.1.1 SP3:

- Xerox DocuShare® Release 2.2 or DocuShare® Release 3.0.01 (store and retrieve)
- FTP Directory (store and retrieve)
- Documentum Version EDMS98, 4i (store and retrieve)
- Domino.Doc™ Version 2.5 (store and retrieve)
- Domino™ Version 5.0 (store and retrieve)
- Lotus Notes® Version 4.6 (store via email)
- Lotus Notes® Version 5.0 (store and retrieve)
- Microsoft Exchange™ Public Folder (store via email)
- Microsoft Exchange™ 2000 Web Folder (store and retrieve)
- Microsoft Windows Shared Folder (store and retrieve)

Please ignore any reference to the iManage repository in the User Guide.

Updated FlowPort support web site

For additional information, visit the FlowPort Support web site at:

http://www.xerox.com/flowport/support

Internet Fax file format and OCR

Previously, Internet Faxes could only be stored as TIFF files, and were not subject to OCR. With this release of FlowPort, Internet Faxes may be read and stored in one of more than 30 file formats. Please see your FlowPort Administrator for details about the format configured for your site.

Login Credentials for Document Repositories

FlowPort 2.1.1 SP3 has a new security feature called "Login Credentials" that allows you to change a repository username and password, but still use existing forms that require a login.

For example, to access a Docushare Collection, you must supply your DocuShare User Name and Password. In FlowPort 2.1.1 SP3, each user maintains a list of uniquely named login credentials, where each login credential contains credential information such as:

- the name of the credential
- the repository user name
- the user's password for the repository

A DocuShare login credential would appear as the following:

Name: joesmith Purchasing Server

DocuShare User Name: joesmith

DocuShare Password: *******

When you create a PaperWare form that requires repository information (such as a Document Token), you must specify the login credential you wish to use. You select a named credential (if you have created one), or you create a new login credential. In the example above, Joe Smith created a logon credential named "joesmith Purchasing Server."

For any new forms that Joe creates that require access to the repository on the Purchasing Server, Joe simply needs to specify that credential by name, and not worry about the user name or password. In the future, if Joe's DocuShare password changes, only the credential must be edited - not any of the forms using that credential. All existing forms could still be used without modification.

Managing Login Credentials

Login credentials can be created in a user's profile (either by the Admin or the FlowPort user). Click "Credentials" under "Application Options."
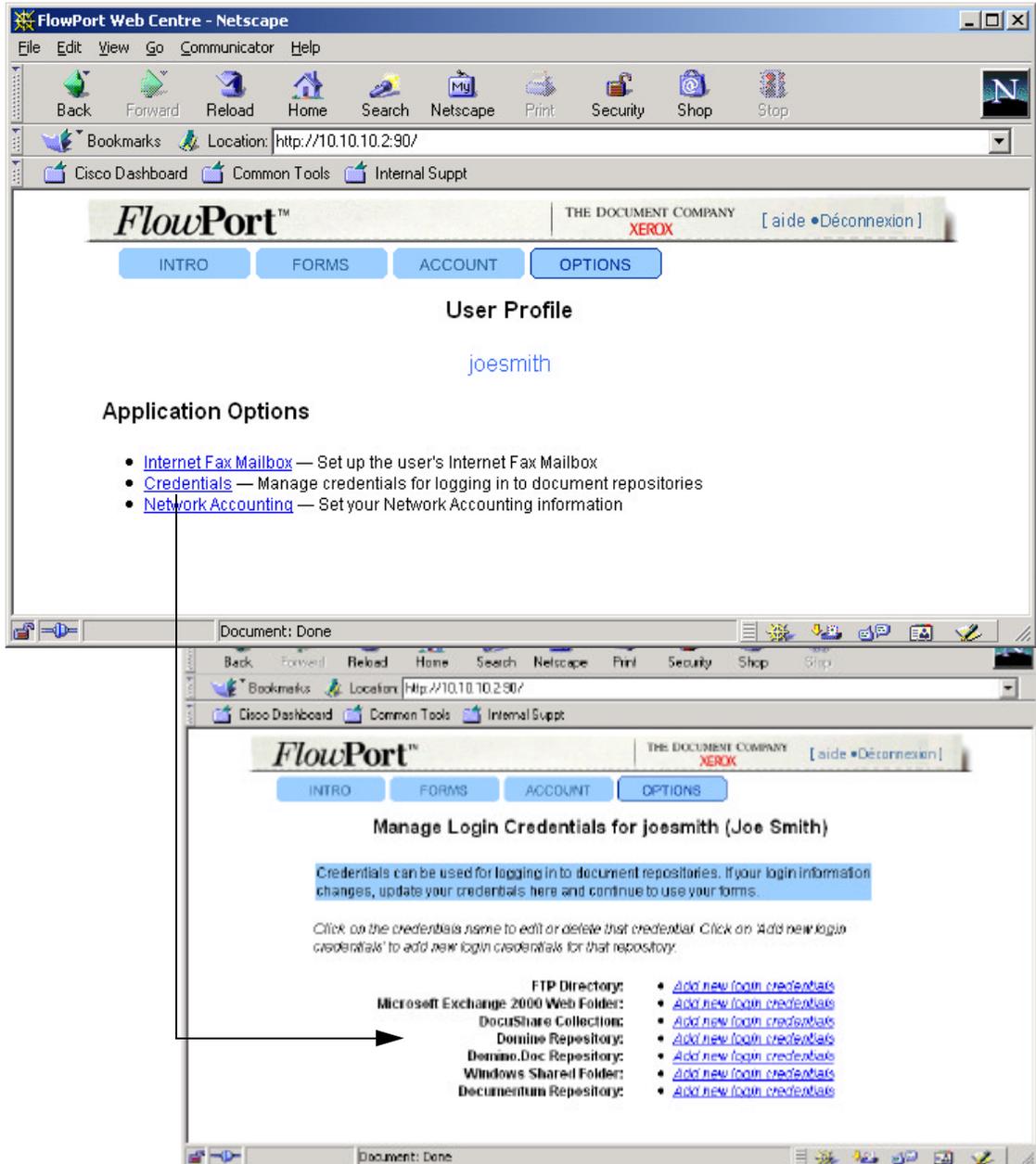
You also use the Application Option "Credentials" to edit existing login credentials.
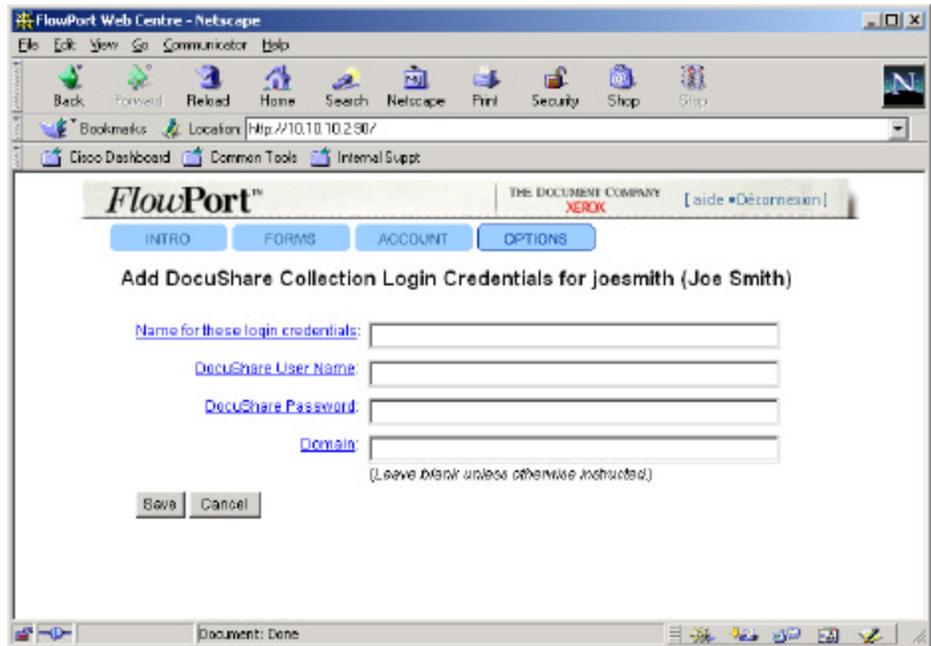
Name for these login credentials: the name you create should help you easily identify the DocuShare server and username.

DocuShare User Name: a valid DocuShare user name for the server.

DocuShare Password: the password for the user name entered above.

Server Domain: leave this field blank unless instructed otherwise by your FlowPort administrator.

Online help is available if you require additional assistance.

Or, users can create a login credential at the same time a form is created:

Clarification of Various Sections of the User Guide

Availability of a stored document's URL

One of the options you can choose when scanning a document to an email recipient is to "Send URL if available" (page 5-7 and 5-39). You must ensure that the recipient has sufficient privileges to access the URL in order to retrieve the document. This feature is only available for URLs for DocuShare, Exchange 2000 and Domino repositories.

Username and password required when supplying "other repository information"

When you are requested to enter "other repository information (for example, see step 16 of the procedure to email a stored document URL on page 5-8), make sure the username and password you enter are for the repository, and not FlowPort.

"Remote printer" information

Remote printers on which you will print FlowPort forms must be lpr enabled. See page 5-12.

When you send a document to a remote printer, you can specify the fully qualified name of the remote printer, or the printer's IP address. See page 5-15, Step 5.

File Format For Scanned Documents (correction)

Throughout Section 5 of the User Guide, there are several areas that describe "File Format for Scanned Documents." See Step 8 on page 5-4 as an example. The Note under the bullet "Other" is incorrect, and should read:

Note: OCR is NOT performed if you select "TIFF" or "PDF Image Only." OCR is performed if you select "PDF (searchable text)" or any of the other available file formats.

Public, Shared, and Private forms

In order to help clarify the differences between Public, Shared, and Private forms and how they relate to host (portal) authentication, please reference the text on page 8-4 and see the figure on the following page.
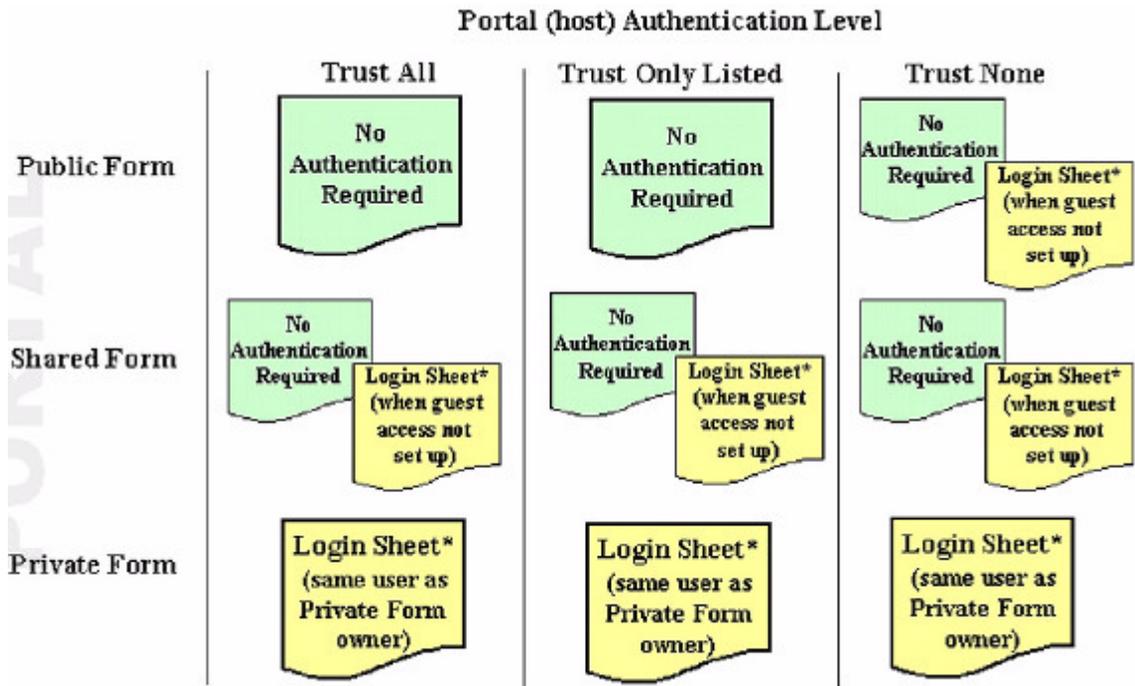
This figures shows the authentication required for public, shared and private forms for trusted/untrusted portals.

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User Guide

Version 2.1

Notice

Contents

Welcome

Welcome to Xerox FlowPort. FlowPort enables you to transform your paper documents easily into electronic documents, so that you can share and access them in your digital workplace. It uses an innovative *paper user interface* called PaperWare®.

This chapter provides an overview of FlowPort, contents of this guide, and where to find additional information about FlowPort.

This chapter contains the following:

About FlowPort and PaperWare®

FlowPort provides an innovative paper user interface called PaperWare. Using FlowPort PaperWare forms with a Xerox Document Centre or an Internet Fax device, you instruct your FlowPort server to distribute, store, and retrieve your paper and electronic documents.

Benefits of FlowPort

FlowPort brings you an intelligent and powerful way to integrate your paper documents into electronic workflow, with benefits that include:

- one touch distribution of a document to email recipients

- one touch storage of documents to a repository (such as Xerox DocuShare, Microsoft Exchange Folder, and Lotus Notes)

- easy retrieval of stored documents using Document Tokens and Document Catalogs

- output to a wide variety of recipients simultaneously (by email, Internet Fax, remote printing, and storage)

Applications included in this release

FlowPort currently provides you with the following applications.

Distribute Document—Scans paper documents and distributes the resulting electronic documents through email, Internet Fax, remote printing, or storage to a document repository. The application features a FlowPort form called a Distribute Document Cover Sheet that you scan with your printed document to provide distribution instructions to a Xerox Document Centre or an Internet Fax machine.

Document Token—Accesses a document stored in a repository using a Document Token form that represents the stored document. When you want to retrieve the stored document, you scan the one-page Document Token to print the original document, or scan a Document Token with a Distribute Document Cover Sheet to retrieve and distribute the stored document.

Document Catalog—Accesses the documents stored in a repository using a Document Catalog form, which is a printed list of the repository's contents with a checkbox for each stored object. To retrieve stored documents, mark the checkboxes for the documents you want and scan the form to print the original documents. When using a Document Catalog form with a Distribute Document Cover Sheet, you can distribute the retrieved documents, regardless of their original format.

Internet Fax Mailbox—Receives Internet Faxes so that you can print, store, and access the faxes. When storing received faxes, the FlowPort server prints a one-page Document Token of the fax and emails the URL where the fax is stored.

Login Sheet—Specifies your personal identification number (PIN) on a Login Sheet form when submitting jobs that require authentication. You can use a Login Sheet at a Xerox Document Centre as an alternative to logging in at the device's control panel, or when submitting jobs to the FlowPort server from an Internet Fax machine.

PaperWare Copy—Prints copies of documents. As the default application, it makes a copy of your document when you scan a Document Token, Document Catalog, or document at a Xerox Document Centre without a Cover Sheet.

Document Options—Adds document management fields to a document when you store it to a repository, and charges print jobs to your account on a Document Centre network accounting system. The application uses a Document Options Sheet that you place after a Distribute Document Cover Sheet to add fields or account information to the document.

Network Accounting—Charges each printing job to an Account ID set up on a Document Centre network accounting system.

What's in this guide

This guide describes how you can use the basic FlowPort applications to simplify your work with paper.

Using FlowPort you can:

• Share your paper documents with others through email, Internet Fax, remote printing, or storage to a repository.

• Access your stored documents and print them on a network printer or distribute the documents.

• Store a document and receive a Document Token, a piece of paper that represents the stored document, that you can later use to copy, Internet Fax, or email the actual document.

• Receive and access Internet Faxes by printing the entire fax, storing the fax and retrieving it later using a Document Token, or viewing the fax on the Web.

In addition to this chapter, this guide includes these chapters:

Chapter 2   *Getting Started*

Describes how to log on to the FlowPort Web Centre, use features of the Web Centre, open the online Quickstart tutorial, and logout.

Chapter 3   *Quick look at using FlowPort*

Introduces you to FlowPort, presents a number of quick scenarios for using FlowPort to scan, store, and distribute paper documents, and to access stored documents seamlessly.

Chapter 4   *Using FlowPort forms*

Provides procedures to scan forms by a Xerox Document Centre or submit them by Internet Fax. Also describes how to get fresh copies of a form or get printed help.

Where to find more information

You can get more information in several places.

Online help

You can access online help in the FlowPort Web Centre by clicking the help link in the upper right corner of the window. Refer to the "Getting started" chapter on page 2-2 for information about how to use the Web Centre window.

Contacting your FlowPort administrator

Your FlowPort administrator can provide you with information about your local FlowPort system.

For example, your administrator can assist you with using your Xerox Document Centre with FlowPort. Your administrator can also help you if you forget your FlowPort password, or tell you how to locate document repositories on your network such as Xerox DocuShare, Microsoft Exchange, or Lotus Notes/Domino, for scanning and storing documents.

Contact your FlowPort administrator with questions about using your local version of FlowPort.

To obtain your FlowPort administrator's e-mail address:

1   In your Web browser, go to the FlowPort Login/Welcome page.

2   In the Login box, click the link "Contact your administrator...." A help window is opened, displaying the email address for your FlowPort administrator.

Going to the FlowPort web site

To get more information about FlowPort, visit the following web site:

http://www.xerox.com/flowport

Getting started

This chapter describes how to login to the FlowPort Web Centre, use features of the Web Centre, open the online Quickstart Tutorial, and logout.

This chapter contains the following:

Login to the FlowPort Web Centre

As a FlowPort user, you use paper forms to distribute, store, and retrieve your documents directly from a digital copier or Internet Fax device. In the FlowPort Web Centre, you can customize and print your own forms to carry out these tasks.

To login to the FlowPort Web Centre:

1 You are sent a 'Welcome to FlowPort' email message when your FlowPort administrator adds you as a user. The email message contains the FlowPort Welcome page URL, your user name and password to login, and if required, your personal identification number (PIN, see page 8-6 for information about using the PIN).

The URL consists of "http://" followed by the name of the FlowPort server. For example, if the server's name is *fish*, the URL will be *http://fish*.

2 Enter the FlowPort URL in the Location or Address line of your Web browser.

The FlowPort Welcome page is displayed.

> *Note: Create a bookmark for the FlowPort Welcome page. In Netscape, click Bookmarks and select Add Bookmark. In Internet Explorer, open the Favorites menu and select Add to Favorites. The bookmark 'Welcome to FlowPort' is added to your Bookmarks or Favorites list. You can select it any time to access the FlowPort page.*

3 In the Login box, enter your user name and password.

```
Please login
username:
austin
password:
* * * * *          Login

Contact your administrator if you forget your
username or password.
```

4 Click **Login**.

The Web Centre opens to your user page.

About the Web Centre

The FlowPort Web Centre window is shown in the following diagram.

Click to open help window

Click the **Forms** button to view, print, and create forms

Links to the Web Centre pages

Click to logout

Click to start QuickStart tutorial
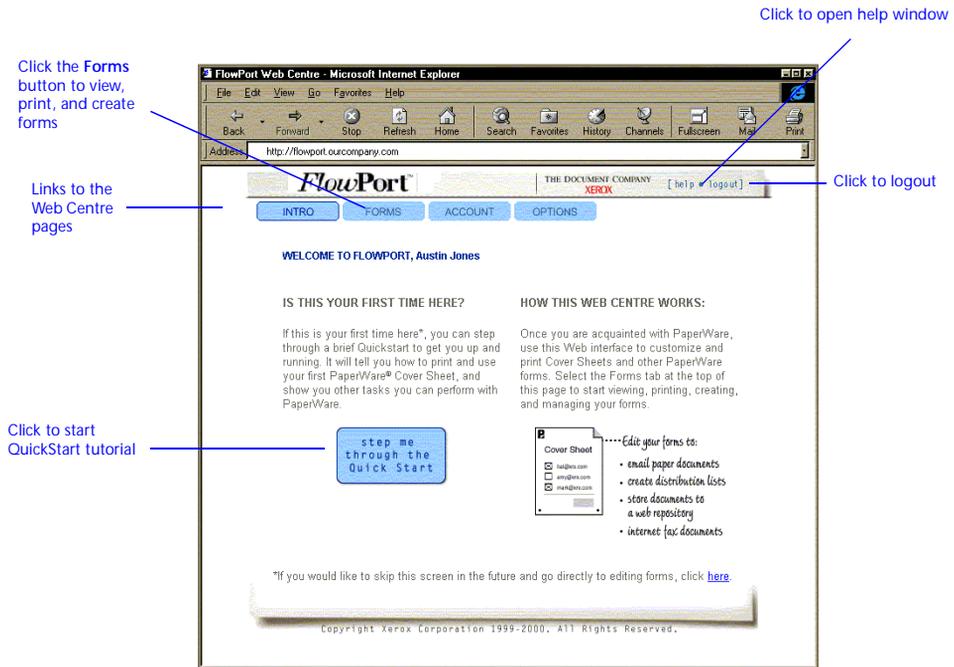
The links to the Web Centre pages allow you to do the following:

• **Intro**—See an introduction to the Web Centre and open a Quickstart tutorial. Click the link at the bottom of the page if you do not want this page displayed each time you login.

• **Forms**—Create new forms, and view, print, edit, or delete your existing forms.

• **Account**—Change your account information, including user name, password, email address, personal identification number (PIN) used by your Login Sheet, and default printer.

• **Options**—Specify application options, including options for receiving Internet faxes.

Taking the Quickstart tutorial

A brief "Quickstart" online tutorial introduces you to FlowPort and gets you started with printing and using a FlowPort PaperWare form.

The Quickstart instructs you to do the following:

• Print your first Cover Sheet.

• Process the Cover Sheet in a Xerox Document Centre, to scan and email a document to yourself in just one step.

• Receive and view the scanned document on your desktop.

• Look at other tasks you can perform with FlowPort forms.

To open the Quickstart tutorial:

1 Click the blue graphic that says **step me through the Quick Start**.

```
step me
through the
Quick Start
```
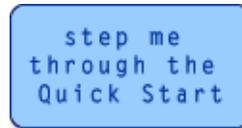
The Quickstart online help window opens. Use the green back and forward arrows to navigate through the pages.

2 When you are finished, click the upper right corner of the window to close it.

Logout from FlowPort

To logout from the FlowPort Web Centre:

1 Click the **logout** link in the upper right corner of the Web Centre interface. You are returned to the Welcome page

> *Note: Closing your Web browser or going to another Web site does not log you out of FlowPort. You should always click the logout link to logout.*

Quick look at using FlowPort

This chapter introduces you to FlowPort, and demonstrates a number of ways you can use FlowPort's PaperWare forms to simplify scanning, distributing, and storing your hard copy documents for later access.

Use this chapter as a companion to Chapter 5, "FlowPort capabilities." Each scenario described in this chapter refers to detailed steps in Chapter 5 that you can follow to perform that task.

This chapter contains the following:

Introduction to FlowPort

FlowPort enables you to easily transform your paper documents into electronic form, so that you can distribute and access them within the digital world of your office.

For instance, FlowPort lets you scan and:

- store documents

- email documents

- Internet Fax documents

- remotely print your documents

- later print and route your stored documents for emailing, storage, Internet Fax, or remote printing.

To help you with these tasks, FlowPort provides you with PaperWare forms. Using DataGlyph® technology, PaperWare forms contain machine-readable instructions.

The DataGlyph is located in the lower right quandrant of each example form shown in this chapter.

To process your documents, you typically use a Cover Sheet to give instructions to the FlowPort server. The Cover Sheet information is scanned in with a digital device, such as a Document Centre or Internet Fax machine.

Figure 3.1 illustrates how you can enter FlowPort PaperWare forms in a digital device like the Xerox Document Centre to perform various tasks.

Figure 3.1   Xerox Document Center

PaperWare makes scanning as easy as copying!
Just put a Cover Sheet on your document
and check a box to send it on its way...
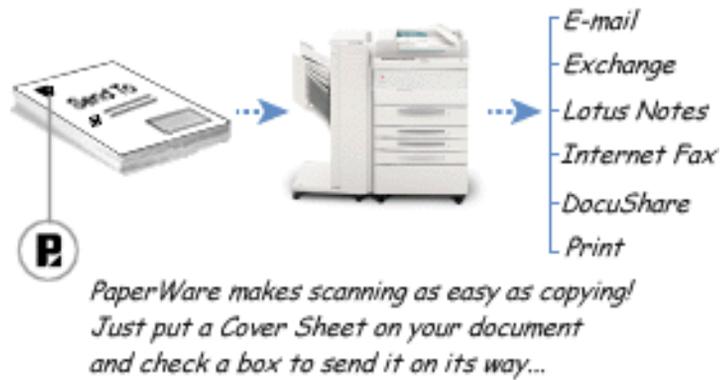
In the same way, you can submit forms by Internet Fax.

You can use an Access Sheet, such as a Document Token or Document Catalog, to access and retrieve a stored document for printing or distributing.

Document management scenarios

A list of document management scenarios is provided in Table 3.1. Each scenario is explained in more detail in the following sections.

Table 3.1   Document management scenarios

Scenario	Description
Scan to email; page 3-5	If you email documents frequently to an important recipient—just create a Cover Sheet for this task and use it repeatedly.
Distributing documents multiple ways; page 3-6	Email, Internet Fax, remotely print, and store a paper document all in one step
Storing a document with special information; page 3-8	Use a workflow Cover Sheet to store a document with a title, summary, keywords, and other information, to help make sharing your documents easy.
Accessing documents with Document Tokens; page 3-10	Carry a single Document Token in place of a 50-page (or more) stored document.
Retrieving documents with Document Catalogs; page 3-11	Use a Document Catalog to select and print the exact combination of documents you need.
Distributing previously stored documents; page 3-12	Distribute a stored document by email, Internet fax, or remote printing.
Copying a stored document to another repository; page 3-17	Copy a stored document to another repository.
Retrieving your documents when traveling; page 3-18	When traveling, retrieve and print documents that are stored at your workplace
Getting a form at anytime; page 3-19	Re-fetch a fresh version of any form directly from the digital device— no need to go to the desktop.
Getting Help about a form; page 3-20	Get printed help about a PaperWare form any time.

Scan to email

With FlowPort, scanning to email is as easy as copying. For example, if you email documents frequently to an important recipient, you can create a Document Distribution Cover Sheet with one email recipient, as follows:

Figure 3.2   Document Distribution Cover Sheet to one recipient

Checkbox for emailing to John Friend

TIP: This Cover sheet is specially created with a checkbox pre-checked, so the email address is always selected

1   When you have a hardcopy document to send to a single person, mark the checkbox for **JohnFriend@company.com.**

2   Put this Cover Sheet in front of the document.

3 Put both in the Xerox Document Centre; select the **Scan** tab/FlowPort scan template, and press the **Start** button (or fax them from an Internet fax device to **flowport@***your-FlowPort-addressname*. See "Sending the Internet Fax job" section on page 4-5).

The document is emailed as a PDF or TIFF image attachment.

> *Note: The example form above was created with the email checkbox pre-checked. When you create a form, you can make a checkbox pre-checked if you want that option always to be selected.*

For detailed steps, refer to the "Emailing a document with FlowPort" section on page 5-3.

Distributing documents multiple ways

You can email, Internet Fax, store, and remotely print a document.

In the FlowPort Web Centre, you create a Cover Sheet with checkboxes for emailing, storing to a repository, submitting an Internet Fax, printing to a remote location, or any combination of these tasks. Figure 3.3 illustrates an example of a Cover Sheet.

Figure 3.3   Cover Sheet with Checkboxes

For example, to email a document to two recipients and then Internet Fax the document, perform the following steps:

1 Mark the appropriate **Email to** and **Internet Fax to** checkboxes.

2 Place this Cover Sheet and the document into a Xerox Document Centre or an Internet Fax machine.

3 Select the **Scan** tab/FlowPort scan template on a Document Centre (or an Internet Fax machne sending to flowport@FlowPort-InternetFaxAddress) and press **Start**.

The document is emailed and faxed, all in one step.

For detailed steps, refer to the "Distributing a document in multiple ways" section on page 5-14.

Storing a document with special information

You can store a document to a document repository with identifying information—Title, Summary, Keywords, and other document management fields that help you organize and share your documents.

For example, the workflow Cover Sheet (Figures 3.4) lets a member of the marketing group store a document by product name such as tagging it as an article, brochure, or press release. At the same time, the marketing member can send the sales team a message with a URL pointer to the stored document, print it at a group printer, or both.

Figure 3.4   Cover Sheet with Special Information

Marketing checkbox stores to a repository

Product checkboxes store the document with a "Title" that is the product name.

Type of Document checkboxes store the document with a "Summary" describing the type of document.

Notify checkboxes send email with the URL of the stored document to the Sales Group, print the document at a remote printer, or both.

For more information, refer to the following sections:

- **"Storing documents to a repository" section on page 5-18** to store to a repository (example: Marketing checkbox).

- **"Storing a document with document management fields" section on page 5-25** to associate a Title, Summary, and other fields with the stored document (for example, Type of Document and Product checkboxes).

- **"Emailing a stored document URL" section on page 5-7** to email a URL (example: Sales Group checkbox).

• "Sending a document to a remote printer" section on page 5-12 to send to a remote printer (example: Palo Alto Printer checkbox)

Accessing documents with Document Tokens

When you store a document to a repository that supports access from FlowPort, you receive a PaperWare Document Token® which is a piece of paper that represents the document you stored. Figure 3.5 illustrates an example of a Document Token.

Figure 3.5   Document Token

Document Token has a thumbnail image of the document that this Token represents

You can use a Document Token to retrieve, print, re-route, or re-fax the original document by scanning this one page, even if that document is a large file.

For more information, refer to the following sections:

- "Storing documents to a repository" section on page 5-18

- "Retrieving and printing with a Document Token" section on page 5-37 and "Emailing a stored document URL" section on page 5-7.

Retrieving documents with Document Catalogs

You can get direct access to the documents in an electronic document repository with a paper Document Catalog.

In the FlowPort Web Centre, you can create a Document Catalog, which is a PaperWare form, that lists the contents of a repository. Figure 3.6 illustrates an example of a Document Catalog.

Figure 3.6   Document Catalog
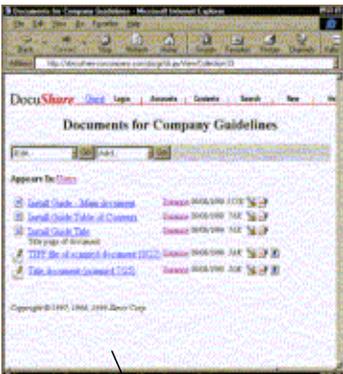
DocuShare collection in a Web Browser

Document Catalog form
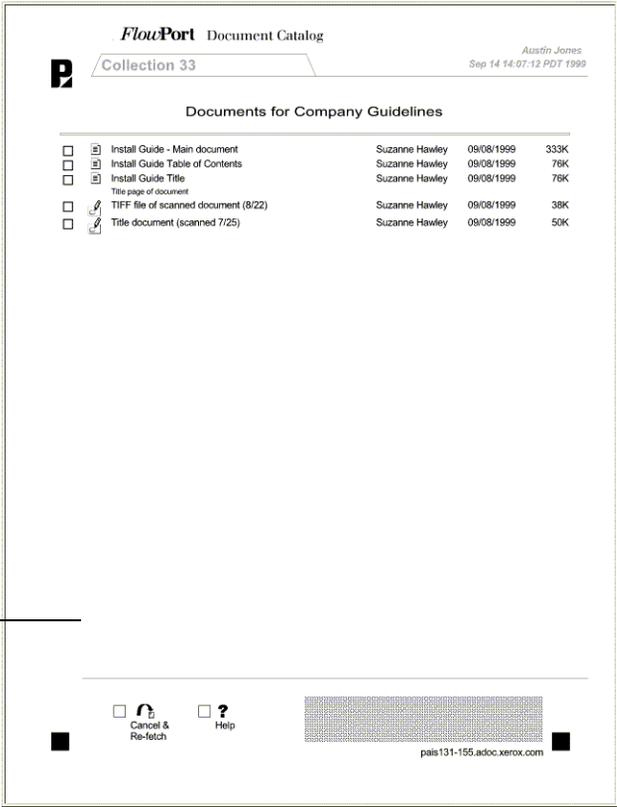
Use the Document Catalog to select and retrieve documents at the Document Centre or Internet Fax device. For example, to get a printed copy of one or more documents, just mark their checkboxes and scan in the Document Catalog.

> **Note:** *Document Catalogs can be created for repositories that support access by FlowPort, such as an FTP directory or a Xerox DocuShare collection.*

For more information, refer to the following sections:

- "Creating a Document Catalog" section on page 5-46.
- "Using a Document Catalog" section on page 5-47.

Distributing previously stored documents

You can email, Internet Fax, or remotely print a document that you have stored to a repository without having to retrieve and print it.

Create a Document Distribution Cover Sheet in the FlowPort Web Centre, with checkboxes for email, Internet Fax, remote printing, or storing, as shown in Figure 3.7.

Figure 3.7   Document Distribution Cover Sheet

Distributing single stored documents

There are two methods to distributing a single stored document.

• Mark checkboxes on the Cover Sheet and place it in front of a Document Token that represents one stored document, as shown in Figure 3.8

Figure 3.8   Cover Sheet in front of a Document Token that represents one stored document
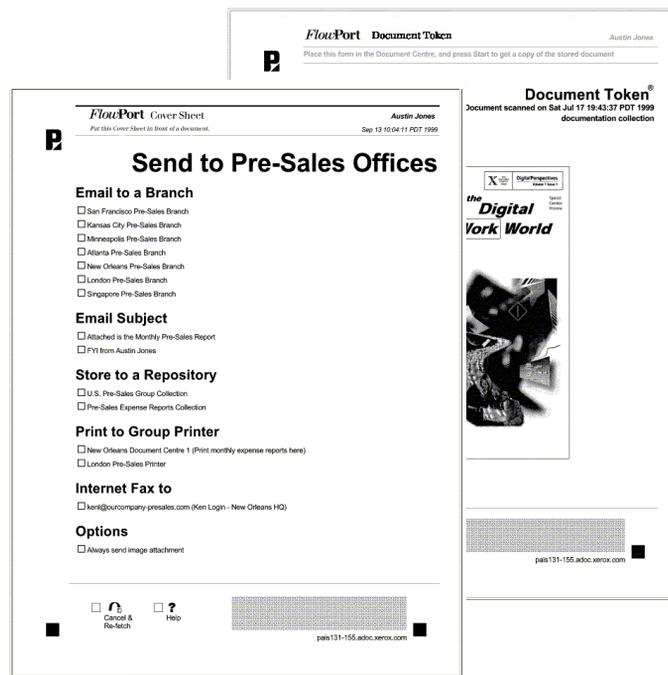
- Place the Cover Sheet in front of a Document Catalog, with a checkbox marked, to select the stored document you want to distribute, as shown in Figure 3.9.

Figure 3.9   Cover Sheet in front of a Document Catalog with one stored document selected
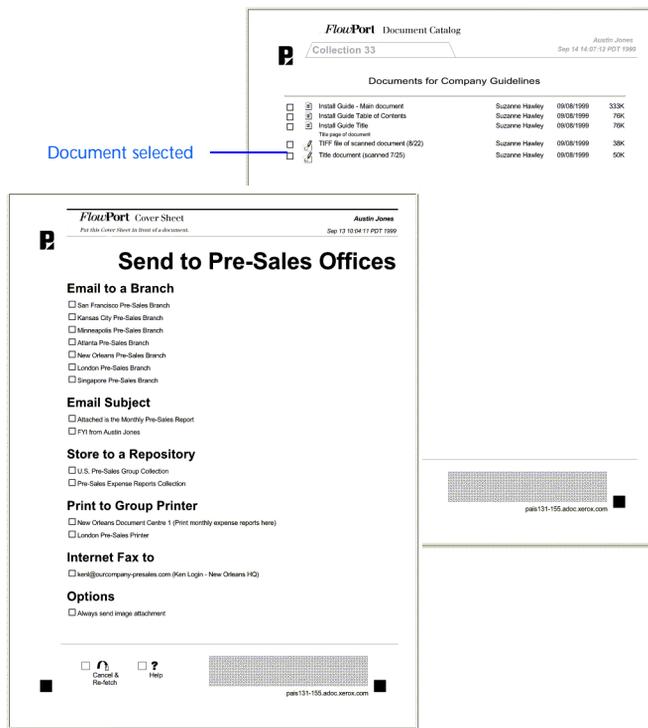
Distributing multi-stored documents

There are two methods for distributing multi-stored documents.

• Place the Cover Sheet in front of a Document Catalog that can represent more than one stored document.

— Mark checkboxes on the Document Catalog to select the documents that you would like to distribute, as shown in Figure 3.10.

— Place both sheets into a Xerox Document Centre or Internet Fax device (selecting the **Scan** tab and FlowPort scan template on a Document Centre) and scan the documents.

Figure 3.10 A Cover Sheet in front of a Document Catalog that represents more than one stored document

• Place the Cover Sheet in front of two or more Document Tokens, or a Document Token and a Document Catalog, or any combination of Document Tokens and Document Catalogs (also called Access Sheets), as shown in Figure 3.11.

Place all the sheets in the digital device and scan the documents.

> *Note: You can place any number and combination of Document Tokens and Document Catalogs after a Cover Sheet.*

Figure 3.11 A Cover Sheet combined with Document Tokens and Document Catalogs

For more information, refer to the following sections:

• "Emailing a document with FlowPort" section on page 5-3

• "Distributing a document in multiple ways" section on page 5-14.

Copying a stored document to another repository

Once you store a document to a repository that supports access by FlowPort and received a Document Token, you can use the Document Token to copy the document to another repository. For example, you can copy the stored document to a DocuShare Collection, Lotus Notes database repository a Microsoft Exchange Folder or another repository.

To copy a stored document to another repository:

1   Create a Document Distribution Cover Sheet that has checkboxes for any repository you want, as shown in Figure 3.12.

Figure 3.12 Document Cover Sheet that shows a new repository

2   Place the Cover Sheet (with checkboxes marked) in front of the Document Token.

3   Put both forms in a Xerox Document Centre (select the **Scan** tab and FlowPort scan template) or an Internet Fax machine (send to flowport@FlowPort-InternetfaxAddress, your server's Internet Fax address), and press **Start**.

The document is stored in the selected repository.

For more information, refer to the following sections:

• "Creating a Document Token" section on page 5-43

• "Storing documents to a repository" section on page 5-18.

Retrieving your documents when traveling

When traveling, you do not have to take all your hardcopies with you. You can carry Document Tokens or Document Catalogs that represent documents stored in a repository on your company intranet.

Figure 3.13 Document Token and Document Catalog
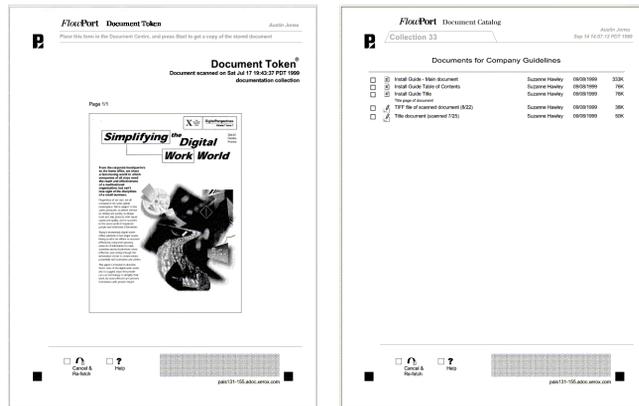
Follow these guidelines to use these forms when you are away from your office:

• If you are at a location inside your company (within your company's firewall), you can use Document Tokens and Document Catalogs in any Document Centre with a template that points to a FlowPort server; or you can use them in an Internet Fax device. Fax the documents from an Internet Fax device to **flowport@***your-FlowPort-addressname (see* "Scanning forms in the Xerox Document Centre" section on page 4-2) to determine if a Document Centre points to a FlowPort server).

• If you are outside your company (at a hotel or other office location), you can Internet Fax your Document Tokens and Document Catalogs to the FlowPort server. The stored documents will be retrieved and faxed back to the Internet Fax device.

For more information, refer to the following sections:

• "Retrieving and printing with a Document Token" section on page 5-37

• "Using a Document Catalog" section on page 5-47.

Getting a form at anytime

You can copy a version of any form directly on a copier. There is no need to go back to your PC to print a new form.

You can also print a new form by marking the checkbox at the bottom of the form that says **Cancel & Re-fetch**, as shown in Figure 3.14.

Figure 3.14 PaperWare form with the Cancel & Re-fetch box

Put an 'X' in the Cancel & Re-fetch box
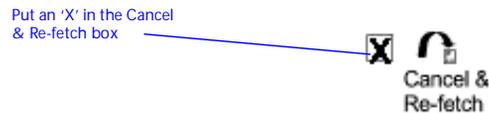
Cancel & Re-fetch

Scan the form in a digital device (a Xerox Document Centre with the **Scan** tab and FlowPort scan template selected). A new version is printed out for you. If you check **Cancel & Re-fetch**, any other checkbox you mark on the form is not processed, unless you also marked the Help box at the bottom of the form.

> *Note: The **Cancel & Re-fetch** checkbox is normally not available on Internet faxable forms.*

For more information, refer to the "Getting a new copy of a FlowPort form" section on page 4-8.

Getting Help about a form

You can get printed help about a form when using the Document Centre. Mark the **Help** checkbox on any form, as shown in figure 3-12.

Figure 3.15 PaperWare form with the Help box checked

Scan the form to get a printed sheet about how to use the form. If you check **Help**, any other checkbox you mark on the form is not processed unless you also marked the **Cancel & Re-fetch** box at the bottom of the form.

> *Note: Internet-faxable forms generally do not have a Help box, due to the size of the DataGlyph on the form.*

For more information, refer to the "Printing Help for a FlowPort form" section on page 4-9.

4 *Using FlowPort forms*

This chapter describes the four kinds of FlowPort's PaperWare forms and how to submit them. You can scan forms in a Xerox Document Centre, or enter them in an Internet Fax device and fax them to the FlowPort server. Also included are steps to get a copy of a form when you need one, and to print help about a form.

This chapter contains the following:

Scanning in FlowPort forms

There are currently two *input portals* from which you can scan in FlowPort forms. These portals are:

- Xerox Document Centre
- Internet Fax device

The following sections describe how to process your forms in each of these devices.

Scanning forms in the Xerox Document Centre

You can scan FlowPort forms in a Xerox Document Centre that is scan enabled.

> *Note: The Xerox Document Centre must be enabled to send jobs to the FlowPort server.*

If a Document Centre is FlowPort enabled, you can press the Scan or Network Scanning tab on the Touch Screen to view the list of scan templates such as "FlowPort.xst" or the default template (default.xst), which may be set to scan your forms to FlowPort. Check with your FlowPort administrator if you do not know if a Xerox Document Centre is enabled for FlowPort or do not know the name of the FlowPort scan template.

Refer to *Chapter 1: Welcome*, to get the email address of your FlowPort administrator.

To scan a FlowPort form in the Xerox Document Centre:

1 Mark the appropriate checkboxes on the form.

Depending on whether the form is a Cover Sheet or an Access Sheet, it can be placed in the device alone or with accompanying pages.

2 At a Xerox Document Centre, perform the following:

A Place the form (and any accompanying documents) in the document feeder. A single form such as a Document Token or Document Catalog can be placed on the scanner platen.

B On the control panel, press the **Scan** or **Network Scanning** tab.

> ⚠ Caution: You cannot scan forms to FlowPort if Image Quality is set to Photo.

C Select a FlowPort scan template. (In a FlowPort-enabled Xerox Document Centre, this is generally **default.xst**; or a FlowPort scan template such as **FlowPort.xst** is auto-highlighted. Check with your FlowPort administrator.)

D Press the **Start** button.

> *Note: You may need to login at the Document Centre or use a Login Sheet; for example, if you use a private FlowPort form or your administrator has defined special security policies.*
>
> *See the "Security and your FlowPort system" section on page 8-2.*

Scanning forms by Internet Fax

If you are traveling and have access to an Internet Fax device, you can submit your PaperWare forms to the FlowPort server via Internet Fax.

When you Internet Fax a PaperWare form to the FlowPort server, the results are sent back to the sender of the fax. If you send jobs from an Internet Fax device, the results are sent back by FlowPort and printed to that device. If the Internet Fax machine is not able to print, you can specify your own email address as the sender and the results will be emailed to you.

Printing forms with fax-size DataGlyphs

A DataGlyph is the region of small characters in the lower right of a PaperWare form that encodes information for processing the form. If you intend to send a form by Internet Fax, it is recommended that you print it with larger size DataGlyph characters, suitable to typical Internet Fax resolution.

Note: If the DataGlyph is ripped, marked, or too light, FlowPort may have trouble processing your form.

To print a form with Internet Fax-size DataGlyphs:

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, create the form you want to use, or if the form already exists, locate it on the page. (Refer to the "Creating a new form" section on page 6-5.)

4 Click the selection box to the left of the form. For example:
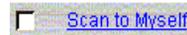
5 Click **Print**.

6 In the **Print Chooser** window, make sure that the default Printer Name and Printer Type are correct.

7 For **DataGlyph size**, select the size according to the resolution of the Internet fax device on which you will process the form.

Regular fine mode—use for forms to be scanned using superfine resolution.

Small standard mode—use for forms to be scanned using fine resolution.

Large standard mode—use for forms to be scanned using standard resolution. When using **Large standard mode**, the DataGlyph region is significantly larger, and the printed form does not have the **Help** and **Cancel & Re-fetch** checkboxes.

8 Click **OK**.

Sending the Internet Fax job

To Internet Fax your forms to the FlowPort server:

1 Place the form and any accompanying documents into the Internet Fax device.

Refer to the "Using Cover Sheets and other types of forms" section on page 4-6 for more about the order in which you place PaperWare forms.

2 Make sure the Internet Fax device is set to Text Mode.

3 Use an Internet Fax address like the following:

flowport@*FlowPort-InternetFaxAddress*

flowport is a default Internet Fax address for submitting PaperWare forms to the FlowPort server.

FlowPort-InternetFaxAddress is the address designated by your administrator for the FlowPort server to receive Internet Faxes.

You can see the Internet Fax address for your FlowPort server by opening up your Internet Fax application options page. Click the **Options** button, and then the **Internet Fax Mailbox** link. At the top of the screen, your personal Internet Fax address is displayed in quotes. The text that appears after the "@" is your FlowPort Internet Fax address name. When you Internet Fax forms to the FlowPort server, replace the user name (which appears before the "@") with **flowport**.

Note: Unless specified, a Login Sheet is not required when submitting jobs by Internet Fax. However, you are required to use a Login Sheet if using a shared or private form, or if your FlowPort administrator has specified that all jobs have user names and passwords.

See the "Security and your FlowPort system" section on page 8-2.

Using Cover Sheets and other types of forms

PaperWare provides you with four kinds of forms. They are used differently, and if combined in a job, are placed in a particular order according to the type of form. Table 4.1 summarizes the four types of forms and how they are used.

Table 4.1   PaperWare form types

Form	Example	Summary of where to place in a job
Cover Sheet	Distribute Document	Place in front of document pages to start a new job.
Access Sheet	Document Token Document Catalog	Place by itself, with other Access Sheets or after a Cover Sheet.
Options Sheet	Document Options	Place after a Cover Sheet (cannot be used without a Cover Sheet).
Login Sheet	Login Sheet	Place in front of an entire PaperWare job, to provide login authentication.

Cover Sheets

A Cover Sheet is placed first in a job, and can be followed by a document. It starts a FlowPort job.

Example   **Distribute Document Cover Sheet**

A Cover Sheet gives instructions about what to do with the document that follows it.

You can place more than one Cover Sheet in a stack, if you want to batch your PaperWare forms. The jobs are run in the sequence in which they are entered. Each time the FlowPort server detects a new Cover Sheet, it ends the previous job and starts a new job.

Access Sheets

An Access Sheet represents a document. It can be used as if it were the original document.

Examples   **Document Token, Document Catalog**

An Access Sheet can be used (placed in a device) alone to retrieve and copy the stored document.

You can also place an Access Sheet with other Access Sheets, or after a Cover Sheet. If placed after a Cover Sheet, the Access Sheet is used as if it were the original document. For example, a Distribute Document Cover Sheet can be used with a Document Token to email a stored document.

Options Sheet

An Options Sheet is placed after a Cover Sheet to add instructions about processing.

Examples   **Document Options Sheet**

An Options Sheet is used with a Cover or Access Sheet; the Options Sheet is placed just after the Cover Sheet or before the Access Sheet.

> *Note: You can use an Option Sheet without a Cover Sheet or Access Sheet only if document management information is not required for document processing. For example, if Network Accounting data is only required, a Cover or Access Sheet is not needed to process the job.*

Login Sheet

The Login Sheet, placed on top of the paper stack, provides authentication for a FlowPort job. The Login Sheet is typically used for private PaperWare forms. In some instances, the FlowPort administrator may require FlowPort users to login before submitting a job to the FlowPort server. The Login Sheet is used to satisfy this requirement.

> *Note: You can only use one Login Sheet for each PaperWare job.*

See the for more information about the Login Sheet.

Tips about using forms

This section provides helpful tips for using PaperWare forms.

Marking a checkbox

When you mark checkboxes on a PaperWare form, follow these guidelines for the best processing results:

- Mark checkbox with an 'X,' or fill in the entire box.

- Use a dark pen if possible (faint pencil marks may not be detected)

For example:

Send To

☒ Louisiana Sales Office

☐ Minneapolis Sales Office

Getting a new copy of a FlowPort form

If you have a form that has been used and wish to obtain a new form with checkboxes unmarked, you can get a fresh printout of any PaperWare form without going to the FlowPort Web Centre by doing the following steps.

1 Mark an 'X' in the **Cancel & Re-fetch** checkbox at the bottom of the PaperWare form.

☒ ⤴
Cancel &
Re-fetch

*Note: When you mark the **Cancel & Re-fetch** box, it cancels out all other checkboxes on the form (except for the **Help** box, which you can check to print help on using the form). If you mark any other checkbox options, they are not processed.*

*Forms printed using **Large Standard Mode** DataGlyphs do not have the **Cancel & Re-fetch** box.*

2 Place the form in the input device.

Refer to the "Scanning forms in the Xerox Document Centre" section on page 4-2 to process the form.

A clean unmarked version of the form is printed.

Printing Help for a FlowPort form

You can print a Help page about using a PaperWare form by checking the Help box and scanning in the form.

The Help sheet provides general information about using that type of form.

To get PaperWare form information:

1 Mark an 'X' in the **Help** checkbox at the bottom of the form.

X ?
Help

> *Note: When you mark the **Help** box, it cancels out all other checkboxes on the form (except for the **Cancel & Re-fetch** box, which you can check to re-print the form at the same time you are retrieving help). If you mark any other checkbox options, they are not processed.*
>
> *Forms printed using **Small Standard Mode** or **Large Standard Mode** DataGlyphs do not have the **Help** box.*

2 Place the form in the input device.

Refer to the "Scanning forms in the Xerox Document Centre" section on page 4-2 to process the form.

A Help page about using this FlowPort form is printed.

FlowPort capabilities

This chapter provides a task-oriented approach to using your FlowPort applications. Choose a task and follow the specific steps required to create a form and use it for that task.

Tasks are divided into the following:

- Distributing your paper documents to the digital world
- Storing documents to a repository
- Retrieving stored documents from a repository
- Receiving Internet Faxes through FlowPort

This chapter contains the following:

Distributing your documents to the digital world

Emailing a document with FlowPort

You can email a document by creating a Distribute Document Cover Sheet, and then scanning it to FlowPort with the document.

To create a Distribute Document Cover Sheet for emailing a document:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **Create New Cover Sheet** link.

4 In the Cover Sheet Creator page, click ***title goes here*** and enter a title in the **Title** box.

5 From the menu, click **Email Recipient**.

6 On the form, click the blue arrow icon (below the **Send To** heading).

7 In the **Email Recipient** window, enter the following:

- **Email address**—the address for an individual or group. You can enter more than one address, separated by commas.

- In the **Checkbox label—**enter a label to appear on the form beside the checkbox.

- **Send URL if available**—click the checkbox to email the URL of the repository that contains the document, instead of emailing the actual document. To use this option, you must add a checkbox for the URL of a document repository on the form. See "Emailing a stored document URL" section on page 5-7.

8 For **File Format for Scanned Documents** (optional), you can select one of the following formats for scanned documents:

- **TIFF**—creates a TIFF image.

- **PDF Image Only**—creates a simple PDF file.

- **PDF (searchable text)**—creates a PDF file with page-by-page search capability.

- **Other**—creates a file format you choose from the menu.

    Note: TIFF allow users to perform OCR (optical character recognition) on the document. For all other formats, except PDF Image Only, FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.

9 Click **OK**.

The checkbox and label display on the form.

    Note: You may want a checkbox option to be always selected—for example, if it is the only checkbox on the form. To make the checkbox pre-selected, click the checkbox on the form.

You can repeat steps 5 to 9 for additional email checkboxes.

10 To add an Email Subject:

A *From the menu, click* **Email Subject***.*

B *On the form, click a blue arrow.*

C *In the* **Subject** *box, enter the text you want and click OK.*

    Note: By adding one or more Email Subjects, you can select a message subject when emailing a document.

11 For **Limit Form Access To**, click one of the following to specify who can use the form:

- **Public Use**—allows anyone to use the form. You need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

  Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below. Refer to Chapter 8: Using shared and private forms.

12 Click the **Save & Print** button.

13 Click the **Continue** button.

The form appears on the **Forms and Applications** page and is printed at your default printer.

To scan the Cover Sheet and document to FlowPort:

1 Place your Cover Sheet on top of a document that you want to email.

If the Cover Sheet is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of the Cover Sheet or login at the Document Centre. See "Login at the Document Centre" section on page 8-9.

2 Mark checkboxes to all email recipients you want to send the document.

3 Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and document in a Xerox Document Centre or a Internet Fax device.

Confirming your document was sent or received

When you email a document using a Distribute Document Cover Sheet, you receive one of the following:

- If your Cover Sheet was successfully processed, a confirmation sheet is printed with a list of the email recipients.

- If there was a problem processing the Cover Sheet, an error message is printed. It may show a picture of the Cover Sheet, indicating any problems such as checkboxes that must be marked in order to process the form.

> *Note: If your Job Confirmation Method is not set to Printer, then confirmations and errors are issued using the method you selected. To select a job confirmation method, click the Account button.*

What if the email address was wrong?

If you entered an incorrect email address when creating the Cover Sheet, the document will not be emailed successfully. An "unable to deliver mail" message is sent by the mail server back to the owner of the Cover Sheet.

What about other mail server problems?

If the mail server that receives the email is not operating, does not recognize the email recipient address, or is unable to deliver the email for other reasons, any "unable to deliver mail" message is sent back to the owner of the Cover Sheet.

Authentication problems

If you have problems processing the Distribute Document Cover Sheet, check to see whether it is 'Private' or 'Shared' (indicated in the upper right corner). If checked 'Private' or your Administrator has placed special security restrictions on your Xerox Document Centre, you may need to authenticate the job; for example, a Login Sheet is required. See the "Providing authentication when you use FlowPort forms" section on page 8-6.

Emailing a stored document URL

If you prefer not to email a document as an image attachment, which uses space in the mailbox of the email recipients, you can store a document in a repository and email the URL to recipients.

The Distribute Document Cover Sheet must include two types of checkboxes: a checkbox for the repository and checkboxes for email recipients.

First, create a Distribute Document Cover Sheet, and then scan it to FlowPort with the document.

To create a Distribute Document Cover Sheet for storing a document and emailing the URL:

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **Create New Cover Sheet** link.

4 In the Cover Sheet Creator page, click *title goes here* and enter a title in the **Title** box.

5 From the menu, click **Email Recipient**.

6 On the form, click the lower blue arrow icon (below the **Send To** heading).

7 In the **Email Recipient** window, enter the following:

Email address—the address for an individual or group. You can enter more than one address, separated by commas.

Checkbox label—the text that appears on the form (usually the name of the email recipient).

Send URL if available—click to email the URL of the repository that contains the document, instead of emailing the actual document. To use this option, you must add on the form, a checkbox for the URL of the specified repository.

This feature allows you to scan the document to a repository at the same time it emails to recipients the URL to the document.

Note: Although you can select an option for File Format for Scanned Documents, if you are emailing the URL of a stored document, the document is stored in the format you select for the Repository checkbox. Refer to Step 19 on page 5-9

8 Click **OK**.

The checkbox and label display on the form. You can repeat steps 5 to 8 to add any other email checkboxes.

9 To add an Email Subject:

A *From the menu, click **Email Subject**.*

B *On the form, click a blue arrow.*

C *In the **Subject** box, enter the text you want and click OK.*

Note: By adding one or more Email Subjects, you can select a message subject when emailing a document.

10 From the menu, select **Heading**.

11 Click the lowest blue arrow icon.

12 In the **Heading** box, type in a heading for a repository checkbox or checkboxes (for example, **Store To**).

13 Click **OK**.

14 From the menu, click one of the repository menu items. For storing a document and emailing the URL, you can select an item for one of these repositories:

- Documentum Repository
- DocuShare Collection
- Domino Repository
- Domino.Doc Repository
- FTP Directory
- iManage Repository
- Microsoft Exchange 2000 Web Folder

15 Click the lowest blue arrow icon.

16 In the window, enter the following:

Checkbox Label—displays text you want to appear on the form (usually the repository name).

Other repository information—the repository address, user name, password, or other information. (To view help, click a link for an option.).

> *Note: If you change your repository user name or password afterward, the Cover Sheet is invalid.*

17 Click **OK**.

18 The checkbox and label display on the form. You can repeat steps 15 to 17 to add other repository checkboxes.

> *Note: When you store a document to a repository that supports access, a Document Token is printed if your job confirmation method (in the Account page) is set to Printer.*

19 For **File Format for Scanned Documents**, select one of the following:

- **TIFF**—creates a TIFF image.

- **PDF Image Only**—creates a simple PDF file.

- **PDF (searchable text)**—creates a PDF file with page-by-page search capability.

- **Other**—creates a file format you choose from the menu.

> *Note: TIFF allow users to perform OCR (optical character recognition) on the document. For all other formats, except PDF Image Only, FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.*

20 Click **OK**.

21 For **Limit Form Access To**, click one of the following to specify who can use the form:

- **Public Use**—allows anyone to use the form. You will need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

> *Note: If you select Public Use or Shared Use, any Document Token that is printed as a result of storing a document to DocuShare with this Cover Sheet will also be public or shared.*

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

  > *Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below. Refer to Chapter 8: Using shared and private forms.*

22 Click the **Save&Print** button.

23 Click the **Continue** button.

The form appears on your **Forms and Applications** pageand is printed at your default printer.

To scan the Cover Sheet and document to FlowPort

1 Place your Cover Sheet on top of the document you want to distribute.

If the Cover Sheet is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of the Cover Sheet or login at the Document Centre. Refer to *Chapter 8: Using shared and private forms.*

> *Note: When you store a document to a repository, the stored document inherits the permissions of that repository.*

2 Mark the repository checkbox, and a checkbox for each email recipient to receive the URL.

3 Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and document.

> *Note: When you store a document to a repository that supports access by Flowport, a Document Token is printed as a confirmation if your Job Confirmation Method is Printer. The Document Token represents the stored document, and can be used to retrieve and print it. To select a confirmation method, click the Account button.*

Distributing a document by Internet Fax

You can Internet Fax a document by creating a Distribute Document Cover Sheet, and then scanning it to FlowPort with the document.

To create a Distribute Document Cover Sheet to Internet fax a document:

1 Login to the FlowPort Web Centre (refer to the "Logging in to the FlowPort Web Centre" section in chapter 1).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **Create New Cover Sheet** link.

4 In the Cover Sheet Creator tool, click *title goes here* and enter a title in the **Title** box.

5 From the menu, click **Internet Fax Recipient**.

6 On the form, click the lower blue arrow icon (below the **Send To** heading).

7 In the **Internet Fax** window, enter the following:

Internet Fax address—address of the Internet fax machine.

Checkbox label—text to appear on the form (usually the Internet fax machine name or address).

Send in Internet fax base mode format—keep this box checked if you are sending the document to an Internet fax machine.

> *Note: Uncheck this box only if you are sending the document to another user's FlowPort Internet Fax mailbox and wish to send it in finer mode.*

8 Click **OK**.

The checkbox and label display on the form. You can repeat steps 5 through 8 to add more Internet Fax addresses.

9 For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You will only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

> *Note:In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below. Refer to Chapter 8: Using shared and private forms.*

10 Click the **Save & Print** button.

11 Click the **Continue** button.

The form appears on your **Forms and Applications** page and is printed at your default printer.

To scan the Cover Sheet and document to FlowPort:

1 Place your Cover Sheet on top of a document you want to send by Internet Fax, and mark the Internet Fax checkbox.

If the Cover Sheet is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of the Cover Sheet or login at the Document Centre. See page 8-6.

2 Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and document in a Xerox Document Centre or a Internet fax device.

Sending a document to a remote printer

You can print a document to a remote printer by creating a Distribute Document Cover Sheet, and then scanning it to FlowPort with the document.

To create a Distribute Document Cover Sheet for remote printing:

1 Login to the FlowPort Web Centre (refer to the "Logging in to the FlowPort Web Centre" section in chapter 1).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **Create New Cover Sheet**.

4 In the Cover Sheet Creator page, click *title goes here* and enter a title in the **Title** box.

5 From the menu, click **Remote Printer**.

6 On the form, click the lower blue arrow icon (below the **Send To** heading).

7 In the **Remote Printer** window, enter the following:

Printer name—printer or Internet fax device on which to print, or the email address to use when emailing documents.

> *Note: To get the name of a networked Xerox Document Centre or other printer that is at a remote location, contact the system administrator. Click the Printer Name link in the Remote Printer window for more information about printer names.*

Printer type—type of printer.

Checkbox label—text you want to appear on the form (usually the printer name).

Network Accounting User ID (optional)—your User ID for Network Accounting.

Network Accounting Account ID (optional)—the Account ID to which this print job will be charged.

> *Note: The Network Accounting IDs must be registered for the specified printer. For more information, see "Using Network Accounting with FlowPort" section on page 5-52.*

8 Click **OK**.

The checkbox and label display on the form. You can repeat steps 5 through 8 to add more printers.

9　For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You will only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

- **Private Use**—allows only the form's owner (providing authentication) to use the form, .

  Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below.

10　Click the **Save & Print** button.

11　In the following screen, click the **Continue** button.

The form appears on your **Forms and Applications** page and is printed at your default printer.

To scan the Cover Sheet and document to FlowPort:

1　Place your Cover Sheet on top of a document you want to print remotely, and mark the printer checkbox.

If the Cover Sheet is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of the Cover Sheet or login at the Document Centre. See page 8-6.

2　Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and document in a Xerox Document Centre or an Internet fax device.

Distributing a document in multiple ways

You can email, Internet Fax, store to a repository, remotely print a document, or perform a combination of these tasks all at once. Create a Distribute Document Cover Sheet with checkboxes for all the tasks you want to perform, and select the appropriate checkboxes before you scan in the form.

To create a Distribute Document Cover Sheet for distributing a document in multiple ways:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **Create New Cover Sheet** link.

4 In the Cover Sheet Creator page, click ***title goes here*** and enter a title in the **Title** box.

5 From the menu, select the type of checkbox you want to add. The menu lets you add the following checkboxes for distribution:

- **Email recipient**—an email recipient's address.

- **Internet Fax Recipient**—an Internet Fax recipient's address.

- **Remote printer**—the name of a remote printer.

- **Documentum Repository**—the name of a Documentum docbase.

- **DocuShare Collection**—the URL of a DocuShare collection.

- **Domino Repository**—the Domino server name and database path.

- **Domino.Doc Repository**—the URL of a Domino.Doc library.

- **FTP Directory**—the fully qualified name or IP address of an FTP file server.

- **iManage Repository**—the fully qualified name of an iManage server and a database name.

- **Lotus Notes/Domino**—the SMTP address of a Notes or Domino repository.

- **Microsoft Exchange 2000 Web Folder**—the URL of an Exchange Web Folder.

- **Microsoft Exchange Folder**—the SMTP address of a Microsoft Exchange public folder.

6   On the form, click the lower blue arrow icon (below the **Send To** heading).

In the window that is opened, enter the required information.

Email checkbox—refer to the "Emailing a document with FlowPort" section on page 5-3 in this chapter.

Repository checkbox—refer to the "Storing documents to a repository" section on page 5-18.

Internet fax checkbox—refer to the "Distributing a document by Internet Fax" section on page 5-11.

Remote print checkbox—refer to the "Sending a document to a remote printer" section on page 5-12.

7   It is recommended that if you have different kinds of checkboxes on a form, separate them with headings such as **Send to**, **Store to**, **Internet fax to**, or **Print to**.

To add a heading:

A   *From the menu, click* **Heading**.

B   *On the form, click the blue arrow at the place where you want the heading located.*

C   *In the* **Heading** *window, enter a heading.*

D   *Click* **OK**.

8   For **File Format for Scanned Documents**, select one of the following:

• **TIFF**—creates a TIFF image.

• **PDF Image Only**—creates a simple PDF file.

• **PDF (searchable text)**—creates a PDF file with page-by-page search capability.

• **Other**—creates a file format you choose from the menu.

> *Note: TIFF allows you to perform OCR (optical character recognition) on the document. For all other formats, except* **PDF Image Only***, FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.*

9   Click **OK** in the window.

The checkbox and label display on the form.

10 You can repeat steps 5 through 9 to add more checkboxes.

11 For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You will only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

> *Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below.*

12 Click the **Save & Print** button.

13 In the following screen, click the **Continue** button.

The form appears on your **Forms and Applications** page and is printed at your default printer.

To scan the Cover Sheet and document to FlowPort:

1 Place your Cover Sheet in front of the document you want to distribute, marking checkboxes for the tasks you want to perform.

> *Note: If you mark an **Email** checkbox and a **Store to Repository** checkbox at the same time, by default the document will be stored, and only a URL will be sent to email recipients. If you wish to send the document itself (as an email attachment), de-select **Send URL if available** when you create the Email checkbox.*

If the Cover Sheet is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of the Cover Sheet or login at the Document Centre. See page 8-6.

2 Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and document in a Xerox Document Centre or a Internet Fax device.

Storing documents to a repository

To store a document to a repository you need to create a Distribute Document Cover Sheet, and then scan to FlowPort with the document.

To create a Distribute Document Cover Sheet for storing a document to a respository:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **Create New Cover Sheet** link.

4 In the Cover Sheet Creator tool, click *title goes here* and enter a title in the **Title** box.

5 Create a repository checkbox. From the menu, select a repository. You can select one of these repositories:

- Documentum Repository
- DocuShare Collection
- Domino Repository
- Domino.Doc Repository
- FTP Directory
- iManage Repository
- Lotus Notes/Domino
- Microsoft Exchange 2000 Web Folder
- Microsoft Exchange Folder

    Note: You can create a Cover Sheet with checkboxes for more than one kind of repository.

6 On the form, click the lower blue arrow icon (below the **Send To** heading).

7 In the **Repository** window, enter the following:

Checkbox Label—displays text you want to appear on the form (usually the repository name).

> **Note:** *If you change your repository user name or password afterward, the Cover Sheet will no longer work.*

Other repository information—the repository address, user name, password, or other information. To view help, click a link for an option.

> **Note:** *Refer to Table 5.1 for information regarding specific repositories.*

8   For **File Format for Scanned Documents**, select one of the following:

•   **TIFF**—creates a TIFF image.

•   **PDF Image Only**—creates a simple PDF file.

•   **PDF (searchable text)**—creates a PDF file with page-by-page search capability.

•   **Other**—creates a file format you choose from the menu.

> **Note:** *TIFF allows you to perform OCR (optical character recognition) on the document. For all other formats, except* **PDF Image Only**, *FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.*

9   Click **OK**.

10   The checkbox and label display on the form. You can follow steps 5 to 9 to add other repository checkboxes.

> **Note:** *When you scan a document to a repository that supports both storage and access by Flowport, a Document Token is printed if your job confirmation method (in the Account page) is set to Printer. Storing to the following repositories will generate a Document Token:*
>
> *Documentum*
> *DocuShare*
> *Domino*
> *Domino.Doc*
> *iManage*
> *Microsoft Exchange*
> *Microsoft Exchange 2000 Web Folder*

11 For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You will only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

  Note: If you select Public Use or Shared Use, any Document Token that is printed as a result of storing a document to a repository such as DocuShare, will also be public or shared.

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

  Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below.

12 Click **Save & Print**.

13 Click **Continue**. The form appears on your Forms and Applications page and is printed at your default printer.

To scan the Cover Sheet and document to FlowPort:

1 Place your Cover Sheet on top of the document you want to store.

2 Mark the checkbox to the repository where the document will be stored.

If the Cover Sheet is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of the Cover Sheet or login at the Document Centre. See page 8-6.

  Note: When you store a document to a repository, the stored document inherits the permissions of that repository.

3 Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and document in a Xerox Document Centre or an Internet fax device.

Repository Information

Table 5.1 contains data required to complete the repository address window.

Table 5.1   Repository Information   Page 1 of 4

Repository	Repository Information
FTP Directory	**Checkbox Label**—The text you want to appear on the form (usually the directory name). **FTP Host Name**—The fully qualified name or IP address of the destination file server. For example: ftpserver.mycompany.com or 12.123.456.78. **Name for a Remote FTP Directory**—The directory path for storing documents. For example: /ftp-public/mydocuments. **FTP Remote Host User Name**—The user name used for login (can be "anonymous" if enabled for this FTP site). **FTP Remote Host Password**—The password used for login.
DocuShare Collection	**Checkbox Label**—The text you want to appear on the form (usually the DocuShare collection name). **URL for a DocuShare Collection**—The complete URL of the collection. *Note: Open another browser window, go to the DocuShare collection you want to use, copy all of the text that appears in the **Address** (or **Location**) box, and paste it into the **URL for a DocuShare Collection** box.* **DocuShare User Name**—Your DocuShare user name. You must have Reader and Writer permissions to the collection you specified. **DocuShare Password**—Your DocuShare password. *Note: Any forms created uses the same DocuShare user name and password you specify, unless the information is changed.*
Microsoft Exchange Folder	**Checkbox label**—The text you want to appear on the form (usually the public folder name). **Exchange SMTP Address**—The SMTP address of the folder to store scanned documents. *Note: To find the address, open Microsoft Outlook. Right-click the public folder, then click **Properties**. Click the **Summary** (or **Administration**) tab, click the **Personal Address Book** button, and then click **OK**. Open your Address Book and select **Personal Address Book** (or **Contacts**) from the **Show Names from the** menu. Double-click the public folder name. Click the **E-mail Addresses** tab to display the SMTP address (or in the **Contact** window, double-click the public folder name listed in the **E-mail** section, and then click the **E-mail Addresses** tab in the **Properties** window to display the SMTP address.)*

Table 5.1   Repository Information   Page 2 of 4

Repository	Repository Information
Lotus Notes/Domino	**Checkbox Label**—The text you want to appear on the form (usually the database name).
	Lotus Notes/Domino SMTP Address—The SMTP address of the repository to store scanned documents. See your Notes or Domino administrator if you don't know the address.
Domino.Doc Repository	**Checkbox Label**—The text you want to appear on the form (usually the repository name).
	URL for a Domino.Doc Library—The URL of the Domino.Doc library.
	*Note: In a browser window, go to the Domino.Doc library you want to use, and login. Before opening a file cabinet in the library, copy all of the text that appears in the **Address** (or **Location**) box, and paste it into the **URL for a Domino.Doc Library** box.*
	Domino.Doc User Name—Your Domino Web login name, which could be the same as the your Notes short name. You must have Editor or Manager access level to the file cabinet you specify. See your Domino administrator if you don't remember your access level.
	Domino.Doc Password—Your Domino Internet password. See your Domino administrator if you don't remember your password.
	Domino.Doc File Cabinet Name—The name of the file cabinet in the library you specified.
	*Note: In a browser window, go to the Domino.Doc library you specified in the **URL for a Domino.Doc Library** box, and login. Select a file cabinet in the library and, if prompted, log in. At the top of the Domino.Doc workspace, the name of the file cabinet displays to the right of the file cabinet icon. Copy the name into the **Domino.Doc File Cabinet Name** box. Do not copy the space at the end of the name.*
	Domino.Doc Binder Name—The name of the binder within the file cabinet you specified.
	*Note: In a browser window, go to the Domino.Doc library you specified in the **URL for a Domino.Doc Library** box, and log in. Select the file cabinet you specified in the **Domino.Doc File Cabinet Name** box and, if prompted, login. Select the binder you want to use. At the top of the Domino.Doc workspace, the name of the binder displays to the right of the binder icon. Copy the name into the **Domino.Doc Binder Name** box. Make sure you do not copy the space at the end of the name.*

Table 5.1   Repository Information   Page 3 of 4

Repository	Repository Information
Domino.Doc Repository (*continued*)	**Domino.Doc Profile Name**—The Domino.Doc document profile, or type, to associate with a document when it is stored in the specified binder using a Distribute Document Cover Sheet. *Note: In a browser window, go to the Domino.Doc library you specified in the **URL for a Domino.Doc Library** box, and log in. Select the file cabinet you specified in the **Domino.Doc File Cabinet Name** box and, if prompted, log in. Select the binder you specified in the **Domino.Doc Binder Name** box. On the Actions sidebar, click the **New Document** button. Under **Document Profile**, select a document type from the menu. Enter the document type you selected in the **Domino.Doc Profile Name** box. On the Actions sidebar, click the **Cancel** button.*
Documentum Repository	**Documentum Docbase Name**—The name of the Documentum docbase, or repository. **Documentum Object ID**—The 16-character combination of hexadecimal digits (0-9, A-F) that uniquely identifies the file or folder. **Documentum Remote Host User Name**—The user name used for login to the Documentum system. **Documentum Remote Host Password**—The password used for login to the Documentum system.
iManage Repository	**iManage Server Name/Database Name**—The fully qualified name of the iManage server and the database name. For example: imanageserver.mycompany.com/imanagedb. **iManage Folder Path**—The name of the iManage folder within the specified database. **iManage Remote Host User Name**—The user name used for login to the iManage system. **iManage Remote Host Password**—The password used for login to the iManage system.

Table 5.1 Repository Information Page 4 of 4

Repository	Repository Information
Microsoft Exchange 2000 Web Folder	**URL for an Exchange Web Folder**—The complete URL of the Web Folder. For example: http://hostname/public/foldername.
	*Note: Open Windows Explorer or My Computer and double-click the Web Folders icon. Locate the folder you want to use, right-click on it, and then click **Properties**. Copy all of the text that appears after **Location** and paste it into the **URL for an Exchange Web Folder** box. Then type or copy and paste the folder name that displays at the top of the Properties window after the text in the **URL for an Exchange Web Folder** box.*
	Exchange User Name—The user's Windows 2000 user name. The user must have sufficient access permissions to the Web Folder you specify.
	Exchange Password—The user's Windows 2000 password.
Domino Repository	**Domino Server Name**—The Domino server's Internet host name. For example: hostname.domainname.com.
	Note: Do not enter the server's host name in Notes format (hostname/ orgunit/org).
	Database Path—The pathname for the database. Use a forward slash (/) to separate directory names. For example: announcement.nsf or hr/resume.nsf.
	Note: Do not include the data directory (for example, c:\lotus\domino\data\) in the pathname.
	Form Name—The name of the form to use when creating a document in the database. For example: Employee Profile.
	Note: If the Domino form requires certain fields, then you must also include the corresponding Document Management Fields on the form template. Your Domino administrator can provide you with the list of any required fields.
	Web Login Name—The Domino user's Web login name. The user must have at least Author access level to the specified database. See your Domino administrator if you don't know the user's Web login name or access level.
	Note: Do not enter the login name used to access Domino through Notes.
	Web Password—The Domino user's Internet password. See your Domino administrator if you don't know the password.

Storing a document with document management fields

You store a document with associated fields (or "properties") by creating a Distribute Document Cover Sheet with Document Management Field checkboxes and then scanning to FlowPort with the document.

You can also add Document Management Field checkboxes to a Document Options Sheet, which is placed after your Cover Sheet. See the "Creating a Document Options Sheet" section on page 5-33.

> *Note: For some repositories such as Microsoft Exchange or Lotus Notes, the property text will be stored with the document as an attached XML data file. The repository administrator may have set up the repository to specially process these attached data files.*

To create a Distribute Document Cover Sheet for storing with document management fields:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **New Cover Sheet**.

4 In the Cover Sheet Creator tool, click *title goes here* and enter a title in the **Title** box.

5 Create a repository checkbox; from the menu, click a repository. You can select one of these repositories:

- Documentum Repository
- DocuShare Collection
- Domino Repository
- Domino.Doc Repository
- FTP Directory
- iManage Repository
- Lotus Notes/Domino
- Microsoft Exchange 2000 Web Folder
- Microsoft Exchange Folder

6 On the form, click on the lower blue arrow icon (below the **Send To** heading).

7 In the **Repository** window, enter the following:

Checkbox Label—the text you want to appear on the form next to the checkbox (usually the repository name).

Other repository information—the repository address, user name, password, or other information. (To view help, click a link on a field name.)

> *Note: If you change your repository user name or password afterward, the Cover Sheet will no longer work.*

8 For **File Format for Scanned Documents**, select one of the following:

- **TIFF**—creates a TIFF image.

- **PDF Image Only**—creates a simple PDF file.

- **PDF (searchable text)**—creates a PDF file with page-by-page search capability.

- **Other**—creates a file format you choose from the menu.

  > *Note: TIFF allows you to perform OCR (optical character recognition) on the document. For all other formats, except **PDF Image Only**, FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.*

9 Click **OK**.

The checkbox and label display on the form. You can repeat steps 5 through 9 to add other repository checkboxes.

> *Note: When you scan a document to a repository supported for both storage and access, a Document Token is printed if your job confirmation method (in the Account page) is set to Printer.*

10 As an option, you can add a heading above the field or property checkboxes.

- **A** *From the menu, select **Heading**.*
- **B** *Click on the blue arrow icon.*
- **C** *Enter a Heading in the window; for example, "Store with Document Management Information".*
- **D** *Click OK.*

11 From the menu, click **Document Management Field**.

12 Click on the lower blue arrow.

13 In the window, enter the following:

Checkbox label—the text you want to appear on the form next to the checkbox (usually the value of the property, such as "Case-2401").

Field name—name of the field.

> *Note: Property names are usually case-sensitive; enter names exactly as they are defined for a repository.*

Field Value—value of the field.

Hidden—click if you want all the documents stored to the repository to have this value automatically associated with them. No document management field checkbox appears on the form if you select Hidden.

Handprint region—click to include a checkbox and a rectangular area on the form, which lets you add a handwritten document management field to the document when it is stored in a DocuShare collection.

Refer to Table 5.2 for detail information regarding the document management fields for a specific repository.

14 Click **OK**.

The checkbox and label display on the form. You can repeat steps 10 through 14 to add more property checkboxes.

15 For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

> *Note: If you select Public Use or Shared Use, any Document Token that is printed as a result of storing a document to a repository such as DocuShare, will also be public or shared.*

• **Private Use**—allows only the form's owner (providing authentication) to use the form.

> *Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below.*

16 Click the **Save & Print** button.

17 Click the **Continue** button.

The form appears on your **Forms and Applications** page and is printed at your default printer.

To scan the Cover Sheet and document to FlowPort:

1 Place your Cover Sheet on top of a document you want to store.

If the Cover Sheet is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of it or login at the Document Centre. See page 8-6.

2 Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and document in a Xerox Document Centre or a Internet fax device.

> *Note: When you store a document to a repository that supports both storage and access, a Document Token is printed as a confirmation if your **Job Confirmation Method** is **Printer**. The Document Token represents the stored document, and can be used to retrieve and print it. To select a confirmation method, click the **Account** button.*

Repository document management fields

Table 5.2 contains document management field information for a supported FlowPort repository.

Table 5.2   Repository Document Management Fields   Page 1 of 4

Repository	Document Management Field
FTP Directory	**Field Name**—the name of the document management field. You can enter the following field names: • Title—lets you add a title field to the stored document (corresponds to the Title property). • Description—lets you add a description field to the stored document (corresponds to the FTP Description property). **Field Value**—the value of the field specified in the **Field Name** box. For example, a value for the title field name could be *FlowPort Brochure Copy.*
Microsoft Exchange Folder	**Field Name**—the name of the document management field. You can enter the following field names: • Title—lets you add a title field to the stored document (corresponds to the Title property). • Description—lets you add a description field to the stored document (corresponds to the Exchange Description property). **Field Value**—the value of the field specified in the **Field Name** box. For example, a value for the title field name could be *FlowPort Brochure Copy.* *Note: The field values are stored with the document in an attached XML data file. (The repository administrator may have set up the repository to specially process these attached data files.)*
Lotus Notes/Domino	**Field Name**—the name of the document management field. You can enter the following field names: • Title—lets you add a title field to the stored document (corresponds to the Title property). • Description—lets you add a description field to the stored document (corresponds to the Notes/Domino Description property). **Field Value**—the value of the field specified in the **Field Name** box. For example, a value for the title field name could be *FlowPort Brochure Copy.* *Note: The field values are stored with the document in an attached XML data file. (The repository administrator may have set up the repository to specially process these attached data files.)*

Table 5.2   Repository Document Management Fields   Page 2 of 4

Repository	Document Management Field
DocuShare Collection	**Field Name**—the name of the document management field. You can enter the following field names: • Title—lets you add a title field to the stored document (corresponds to the DocuShare Title property). • Description—lets you add a description field to the stored document (corresponds to the DocuShare Summary property). • Abstract—lets you add an abstract field to the stored document (corresponds to the DocuShare Description property). You can store more than one Abstract field with the document. • Keywords—lets you add a keyword field to the stored document (corresponds to the DocuShare Keywords property). You can store more than one Keywords field with the document. • author—lets you add an author field to the stored document (corresponds to the DocuShare author property). You must type **author** in lower-case letters. You can also enter the name of a DocuShare custom property. For example, your DocuShare administrator may have created a custom property to let users add a budget center or case number to stored documents. To include a custom property, you must type its name in the **Field Name** box exactly as it appears in the DocuShare **Name** box. To add custom properties, see your DocuShare administrator. **Field Value**—the value of the field specified in the **Field Name** box. For example, a value for the title field name could be *FlowPort Brochure Copy,* and *brochure* could be a value for keywords**.** The field value can also include valid HTML markup tags for text formatting (such as <i>, <b>, or <font>). *Note: In DocuShare, you can view the field values of a document stored in a collection by clicking the **Services** button located to the right of the document.*

Table 5.2   Repository Document Management Fields   Page 3 of 4

Repository	Document Management Field
Domino.Doc Repository	**Field Name**—The name of the document management field. You can enter the following field names: • Title—lets you add a title field to the stored document (corresponds to the Title property). • Description—lets you add a description field to the stored document, if the document's profile includes the field. You can also enter the name of a Domino.Doc custom field. For example, your Domino.Doc administrator may have created a custom property to let users add a budget center or case number to stored documents. To include a custom property, you must type its name in the **Field Name** box exactly as it appears in the Profile associated with the Domino.Doc binder in which the document is stored. To add custom properties, see your Domino.Doc administrator. **Field Value**—the value of the field specified in the **Field Name** box. For example, a value for the title field name could be *FlowPort Brochure Copy.* *Note: In Domino.Doc, you can view the document's property values by clicking the Document's name in its Binder. Some fields have a constrained set of values. For example, a property named Department might only allow values Accounting, Legal, and Human Resources.*
Documentum Repository	**Field Name**—the name of the document management field. You can enter the following field names: • Title—lets you add a title field to the stored document (corresponds to the Documentum Title property). • Description (or Subject)—lets you add a description/subject field to the stored document (corresponds to the Documentum Subject property). • Keywords—lets you add keywords to the stored document (corresponds to the Documentum Keywords property). Separate individual keywords with a comma; do not include a space before or after the comma. • Authors—lets you add an authors field to the stored document (corresponds to the Documentum Authors property). **Field Value**—the value of the field specified in the **Field Name** box. For example, a value for the title field name could be FlowPort Brochure Copy, and brochure could be a value for keywords.

Table 5.2   Repository Document Management Fields   Page 4 of 4

Repository	Document Management Field
iManage Repository	**Field Name**—the name of the document management field. You can enter the following field names: • Title—lets you add a title field to the stored document (corresponds to the iManage Title property). • Description—lets you add a description field to the stored document (corresponds to the iManage Description property). **Field Value**—the value of the field specified in the **Field Name** box. For example, a value for the title field name could be FlowPort Brochure Copy.
Domino Repository	**Field Name**—the name of the document management field. You can enter any custom field name the Domino administrator has created for the database. Obtain the list of field names from the administrator. **Field Value**—the value of the field specified in the **Field Name** box. *Note: You can view the document's field values by opening it in a browser window or Notes client. However, the Domino Application Designer determines which document fields display.*
Microsoft Exchange 2000 Web Folder	**Field Name**—the name of the document management field. You can enter the following field names: • Title—lets you add a title field to the stored document. • Description—lets you add a description field to the stored document (corresponds to the Comments field in Outlook). • Keywords—lets you add a keyword field to the stored document. You can store more than one keywords field with the document. • author—lets you add an author field to the stored document. You can also enter the name of a Exchange custom field. For example, your Exchange administrator may have created a custom field to let users add a budget center or case number to stored documents. To include a custom field, you must type its name in the Field Name box exactly as it is defined by your administrator. Exchange custom field names often include a schema name, like "urn:schemas-microsoft-com:office:office." A full Exchange custom field name could be "urn:schemas-microsoft-com:office:office:Version" or "urn:schemas:contacts:callbackphone." To add custom fields, see your Exchange administrator. **Field Value**—the value of the field specified in the **Field Name** box. For example, a value for the title field name could be *FlowPort Brochure Copy*, and *brochure* could be a value for keywords.

Creating a Document Options Sheet

If you want to add options to a FlowPort job, you can create a Document Options Sheet. The following checkboxes can be added to a Document Options Sheet:

• Document Management Field

• Network Accounting

> *Note: If you include Document Management Field checkboxes, you must use the Document Options Sheet with a Distribute Document Cover Sheet that has a checkbox for storing to a repository. See "Storing a document with document management fields" section on page 5-25.*

To add Document Management Fields:

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **New Cover Sheet**.

4 In the Cover Sheet Creator page, click *title goes here* and enter a title in the **Title** box.

5 To add a Document Management Field checkbox, from the menu, click **Document Management Field**.

6 Click on the lower blue arrow.

7 In the window, enter the following:

Checkbox label—the text you want to appear on the form next to the checkbox (usually the value of the property, such as "Case-2401").

Field name—name of the field.

> *Note: Property names are usually case-sensitive; enter names exactly as they are defined for a repository.*

Field Value—value of the field.

Hidden—click if you want all the documents stored to the repository to have this value automatically associated with them . No document management field checkbox appears on the form if you select Hidden.

Handprint region—click to include a checkbox and a rectangular area on the form, which lets you add a handwritten document management field to the document when it is stored in a DocuShare collection.

Refer to Table 5.2 for detail information regarding the document management fields for a specific repository.

8   Click **OK**.

The checkbox and label display on the form. You can repeat steps 6 through 8 to add more Document Management Field checkboxes.

> *Note: For some types of fields, you can store more than one property value with a document (such as selecting multiple checkboxes for that property).*

9   To add a checkbox for Network Accounting, from the menu, select **Network Accounting**.

10   Click on the lower blue arrow.

11   In the window, enter the following:

- **Checkbox label**—the text you want to appear on the form next to the checkbox (usually to indicate the account to be charged).

- **Network Accounting User ID**—your User ID for network accounting on the Document Centre.

- **Network Accounting Account ID**—the Account ID to be charged with the print job.

> *Note: If you want the account to be charged every time the form is used, click the checkbox to select the option permanently. For remote printing, network accounting IDs must be registered for the specified printer.*

12   For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

> *Note: If you select Public Use or Shared Use, any Document Token that is printed as a result of storing a document to a repository such as DocuShare, will also be public or shared.*

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

> *Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below.*

13 Click the **Save & Print** button.

14 Click the **Continue** button.

The form appears on your **Forms and Applications** page and is printed at your default printer.

15 Place the Document Options Sheet after a Distribute Document Cover Sheet and scan in the forms with the document.

If the Options Sheet contain only Network Accounting checkboxes, it can simply be placed on top and scanned with the document.

Using the Document Options Sheet

Use a Document Options Sheet to provide additional instructions to process a FlowPort job.

1 Mark the checkboxes on the Options Sheet to select options (document management fields you wish to associate with the stored document or a Network Accounting number for printing).

2 The Options Sheet is used with or without a Distribute Document Cover Sheet.

- If the Options Sheet has Document Management Field checkboxes it must be placed behind a Distribute Document Cover Sheet that contains a repository checkbox, followed by the document.

- If the Options Sheet has Network Accounting checkboxes, it must be placed behind a Distribute Document Cover Sheet, followed by the document to apply the Network Account number to all documents printed as a result of the Cover Sheet job—such as Confirmation Sheets or retrieved documents

- The Options Sheet has only Network Accounting checkboxes, it can be placed on top of the document without a Distribute Document Cover Sheet. You can also place it with a Document Token or Document Catalog. The Network Account number is applied to all documents printed.

3 If either the Options Sheet or the Cover Sheet is 'Private,' or your system has special security restrictions, provide authentication by placing a Login Sheet in front or login at the Document Centre. See page 8-6.

Retrieving your stored documents from a repository

Retrieving and printing with a Document Token

A Document Token is used to retrieve and print out a document that you stored with a Distribute Document Cover Sheet.

FlowPort prints a Document Token when a document is stored to a repository that supports both storage and access such as:

- Documentum Repository

- DocuShare Collection

- Domino Repository

- Domino.Doc Repository

- FTP Directory

- iManage Repository

- Microsoft Exchange 2000 Web Folder

Note: If you have stored to a repository that is not listed, you must retrieve and print the document from your desktop application.

To retrieve and print a document with a Document Token:

1 Take the Document Token to the Document Centre, and place it face up in the feeder.

2 Refer to the "Scanning forms in the Xerox Document Centre" section on page 4-2 to process the Document Token. Your document is printed.

If you want to retrieve your document by InternetFax, your Internet Fax machine must be able to print. Refer to the "Scanning forms by Internet Fax" section on page 4-3 to fax the Document Token to FlowPort.)

Emailing a stored document

You can email a stored document from your desktop using your regular mail program. With FlowPort, if you have a Document Token that was created when you scanned and stored a document, or if you have a Document Catalog, you can email a stored document directly from a multifunction or Internet Fax device.

> *Note: Document Tokens and Document Catalogs are only created if a document is stored to a repository supported by FlowPort for both storage and access. If you have stored a document in an Exchange public folder or Lotus Notes database, you can email the document from your desktop application.*

First, create a Distribute Document Cover Sheet for emailing; then use it with a Document Token or with a Document Catalog, to email the stored document or documents.

To create a Distribute Document Cover Sheet for emailing:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **Create New Cover Sheet** link.

4 In the Cover Sheet Creator page, click *title goes here* and enter a title in the **Title** box.

5 From the menu, click **Email Recipient**.

6 On the form, click on the lower blue arrow icon (below the **Send To** heading).

7 In the **Email Recipient** window, enter the following:

Email address—the address for an individual or group. You can enter more than one address, separated by commas.

Checkbox label—the text that appears on the form (usually the name of the email recipient).

Send URL if available—click to email the URL of the repository that contains the document, instead of emailing the actual document. To use this option, you must add a checkbox for the URL of a document repository on the form. See "Emailing a stored document URL" section on page 5-7.

> *Note: Although you can select an option under File Format for Scanned Documents, if you are emailing a stored document, it will be emailed in its current format.*

8 Click **OK**.

The checkbox and label display on the form. You can repeat steps 5 through 8 to add other email checkboxes.

9 To add an Email Subject, do the following:

A *From the menu, click Email Subject.*

B *On the form, click a blue arrow.*

C *In the Subject box, enter the text you want and click OK.*

> *Note: By adding one or more Email Subjects, you can select a message subject when emailing a document.*

10 For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You will only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

  > *Note: If you select Public Use or Shared Use, any Document Token that is printed as a result of storing a document to a repository such as DocuShare, will also be public or shared.*

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

  > *Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below.*

11 Click the **Save & Print**.

12 Click the **Continue**.

The form appears on your **Forms and Applications** page and is printed at your default printer.

To scan the Cover Sheet and document to FlowPort:

1 Place your Cover Sheet on top of the Document Token or Document Catalog (for a Document Catalog, mark a checkbox on the Catalog to select a document.

If the Cover Sheet. Document Token, or Document Catalog is 'Private,' or your system has special security restrictions, provide authentication by placing a Login Sheet on top of the stack or login at the Document Centre. See page 8-6.

2 Mark the checkbox on the Cover Sheet to select an email recipient.

3 Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and document in a Xerox Document Centre or a Internet Fax device.

You will receive a confirmation that your document was emailed.

Distributing a stored document in other ways

Use a Distribute Document Cover Sheet and a Document Token or Document Catalog to distribute a document that is stored in a repository.

> *Note: Document Tokens and Document Catalogs are only created if a document is stored to a repository supported by FlowPort for both storage and access. If you have stored a document in an Exchange public folder or Lotus Notes database, you can email the document from your desktop application.*

Create a Distribute Document Cover Sheet for distributing in your preferred method (email, Internet Fax, remote printing, or storing to a repository). Then use it with your Document Token or Document Catalog to distribute the stored document.

To create the Cover Sheet and document to FlowPort:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Distribute Document**, click the **Create New Cover Sheet**.

4 In the Cover Sheet Creator page, click ***title goes here*** and enter a title in the **Title** box.

5 From the menu, click a menu item and then click the blue arrow on the form. The menu items let you add the following checkboxes for distribution:

- **Email Recipient**—the address for an individual or group. You can enter more than one address, separated by commas.

- **Internet Fax Recipient**—an Internet Fax recipient's address

- **Remote Printer**—the name of a remote printer.

- **Documentum Repository**—the name of a Documentum docbase.

- **DocuShare Collection**—the URL of a DocuShare collection.

- **Domino Repository**—the Domino server name and database path.

- **Domino.Doc Repository**—the URL of a Domino.Doc library.

- **FTP Directory**—the fully qualified name or IP address of an FTP file server.

- **iManage Repository**—the fully qualified name of an iManage server and a database name.

- **Lotus Notes/Domino**—the SMTP address of a Notes or Domino repository.

- **Microsoft Exchange 2000 Web Folder**—the URL of an Exchange Web Folder.

- **Microsoft Exchange Folder**—the SMTP address of a Microsoft Exchange public folder.

6 In the window that is opened, enter the required information. For help, click a link for an option.

> *Note: When you create a checkbox to email or store a document, you can select an option for File Format for Scanned Documents. However, when you distribute a stored document it will be distributed in its current format.*

7 Click **OK** in the window. The checkbox and label display on the form.

8 You can repeat steps 6 through 8 to add more checkboxes.

9 For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You will only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

> *Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet, as described below.*

10 Click **Save & Print**.

11 Click **Continue**.

The form appears on your **Forms and Applications** page and is printed at your default printer.

To scan the Cover Sheet, and the Document Token or Document Catalog, to FlowPort:

1 Place your Cover Sheet on top of a Document Token or a Document Catalog, marking checkboxes to select one or more documents for distribution.

If the Cover Sheet, Document Token, or Document Catalog is 'Private,' or your system has special security restrictions, provide authentication by placing a Login

Sheet on top of the stack or login at the Document Centre. See page 8-6.

2 Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Cover Sheet and other forms in a Xerox Document Centre or a Internet Fax device.

Creating a Document Token

Document Tokens can be created for a repository in the following document management systems:

- Documentum Repository

- DocuShare Collection

- Domino Repository

- Domino.Doc Repository

- FTP Directory

- iManage Repository

- Microsoft Exchange 2000 Web Folder

There are two ways to create a Document Token:

- When you use a Distribute Document Cover Sheet to scan a document to a repository that supports both storage and access, by default, you'll receive a Document Token of the document.

    *Note: To ensure that you receive the Document Token, click the **Account** button and check that your Job Confirmation Method is set to **Printer**.*

- In the FlowPort Web Centre, create a Document Token for any document stored in a repository that supports both storage and access.

Any Document Token can be used for distributing a stored document. For example, you could place a Document Token after a Distribute Document Cover Sheet in order to email the represented document.

However, only the following document file types are supported for printing from a Document Token:

- TIFF

- PostScript

- PDF (Portable Document Format) documents

- Microsoft Office documents.

For all other file types, the Document Token indicates with a printed message, that the document cannot be printed.

To create a Document Token in the Web Centre:

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, under **Document Token**, click **Create New Access Sheet**.

4 In the Create Document Token page, under S**elect Document Repository**, choose a repository from the menu.

   The page is refreshed to display options for that repository.

5 Specify information about the stored document and repository. For help about the repository parameters, click a link for an option.

6 For **Limit Form Access To**, click one of the following to specify who can use the form.

   - **Public Use**—allows anyone to use the form. You will only need to authenticate if an administrator has created special security requirements.

   - **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

     Note: If you select Public Use or Shared Use, any Document Token that is printed as a result of storing a document to a repository such as DocuShare, will also be public or shared.

   - **Private Use**—allows only the form's owner (providing authentication) to use the form.

     Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet.

7 Click **Save** or **Save & Print**.

The Document Token is printed at your default printer, and listed on your **Forms and Applications** page.

> *Note: When creating a Document Token for a long or complex document, you may receive a message that the browser could not open a particular internet site. FlowPort continues to create the Document Token. Wait a few minutes and open the browser again.*

Using a Document Token

You can use a Document Token to retrieve stored documents for printing or distribution.

The stored document can be printed from the Document Token only if the document is one of the following file types:

- TIFF
- PDF (Portable Document Format)
- Microsoft Office (Word®, PowerPoint®, and Excel®)
- PostScript.

To print a document represented by the Document Token:

1 Place the Document Token in the device document feeder. Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Document Token.

If the Document Token is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet in front of it or login at the Document Centre. See page 8-6.

2 The document is retrieved and printed.

To distribute a stored document using a Document Token:

1 Place the Document Token after a Distribute Document Cover Sheet, marking checkboxes on the Cover Sheet to indicate how to distribute the document (by email, Internet fax, remote printing, or storing to a repository).

If either the Cover Sheet or Document Token are 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of the Cover Sheet or login at the Document Centre. See page 8-6.

2 Place the forms in the device document feeder. Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Document Token in a Document Centre or a Internet Fax device.

Creating a Document Catalog

You can create and print a Document Catalog from the FlowPort Web Centre.

Document Catalogs can be created for a repository in the following document management systems:

- Documentum Repository

- DocuShare Collection

- Domino Repository

- Domino.Doc Repository

- FTP Directory

- iManage Repository

- Microsoft Exchange 2000 Web Folder

To create and print a Document Catalog:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button. In the **Forms and Applications** page, click **Create New Access Sheet**.

3 In the Document Catalog page, under **Select Document Repository,** choose a repository from the menu. The page refreshes to display the options for that repository.

4 Enter the information for the selected repository. Refer to Table 5.1 for repository information.

5 For **Limit Form Access To**, click one of the following to specify who can use the form.

- **Public Use**—allows anyone to use the form. You will only need to authenticate if an administrator has created special security requirements.

- **Shared Use**—allows any local FlowPort user to use the form, provided 'guest' access is enabled on the Document Centre. See your administrator if you are not sure.

- **Private Use**—allows only the form's owner (providing authentication) to use the form.

> *Note: In general, create a form as 'Public' or you may need to provide authentication such as a Login Sheet.*

6 Click **Save and Print** to print out the Document Catalog, or **Save** to return to the **Forms and Applications** page.

The Document Catalog is printed at your default printer, and listed on your **Forms and Applications** page. Note that the Document Catalog may have multiple pages.

Using a Document Catalog

You can use a Document Catalog form to retrieve stored documents for printing or distribution.

To print one or more documents using a Document Catalog:

> *Note: Only the following document file types can be printed from a Document Catalog:*

- *TIFF*

- *PDF (Portable Document Format)*

- *Microsoft Office (Word, PowerPoint, and Excel)*

- *PostScript*

1 Mark checkboxes on the Document Catalog to select the documents you want to print.

> *Note: A Document Catalog may have multiple pages. You do not need to scan all the pages when you process the Document Catalog; just use the pages on which you have selected documents (the pages with marked checkboxes).*

If you select several documents for printing, and one of them cannot be printed, the FlowPort server will not be able to print any other of the selected documents. For example, if an HTML document is selected, it can not be

printed. Check the file type of a document listed on the Document Catalog before selecting it for printing.

2 Place the Document Catalog in the device document feeder. Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Document Catalog.

> *Note: If a Document Catalog consists of multiple pages, you do not need to use all the pages. Just use the pages that have selected documents.*

If the Document Catalog is 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet on top of the Document Catalog or login at the Document Centre. See page 8-6.

To distribute one or more documents using a Document Catalog:

1 Mark checkboxes on the Document Catalog to select the documents you want to distribute. You can distribute a document of any file type.

> *Note: If a Document Catalog consists of multiple pages, you do not need to use all the pages. Just use the pages that have selected documents.*

2 Place the Document Catalog after a Distribute Document Cover Sheet, marking checkboxes on the Cover Sheet to indicate how to distribute the document or documents (by email, Internet fax, remote printing, or storing to a repository).

Place both forms in the device document feeder. Refer to the "Scanning in FlowPort forms" section on page 4-2 to process the Document Catalog in a Xerox Document Centre or a Internet Fax device.

If either the Cover Sheet or Document Catalog are 'Private,' or your system has security restrictions, provide authentication by placing a Login Sheet in front or login at the Document Centre. See page 8-6.

Receiving Internet Faxes through FlowPort

Receiving faxes by way of the Internet is cost effective because it uses Internet protocols to deliver a faxed document instead of a standard fax phone line. FlowPort provides you the capability to receive Internet Faxes, have them printed, stored for you, and the option of receiving email notification when a fax is sent.

FlowPort provides you with an Internet Fax mailbox with options for how you receive Faxes. You can easily enable or disable your Internet Fax mailbox. Contact your FlowPort administrator for your FlowPort Internet Fax address.

To enable or disable receiving your Internet Faxes:

1   Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2   Click the **Options** button.

3   Under **Application Options**, click **Internet Fax Mailbox**.

4   Depending on whether your Internet Fax Mailbox is already enabled, you see one of the following:

   • If Internet Fax receiving is not enabled, the page provides a status. Click **Enable**.

   • If Internet Fax receiving is enabled, the page displays Current Settings. Under **Changing Settings**, click **Enable/disable receipt of Internet Faxes for <username>**.

5   On the next page, click one of the following options:

   • **Accept Internet Fax via FlowPort SMTP Mail Server**—to receive Internet Faxes.

   • **Accept Internet Faxes via a POP3 mailbox on another server**—to receive Internet faxes.

   Note: The option shown depends on how Internet Fax receiving is setup by your FlowPort administrator (an SMTP mail server or POP mailbox).

- **Do not accept incoming Internet Faxes for this user**—disables your Internet Fax mailbox, so incoming faxes are not received.

6 Click **Next**.

7 If you chose **Accept Internet Faxes via a POP3 mailbox on another server**, you see a page for specifying the POP mailbox. For help, click a link for an option or see your FlowPort administrator. Click **Next** when you are done.

   If you chose **Do not accept incoming faxes for this user**, you see a confirmation page. Click **Save** to confirm (and do not follow any steps below).

8 If you chose the option to accept Internet Faxes, an **Internet Fax Receive Options** page is displayed. Select one or more of the following:

- **Notify by Email**—sends an email message to you when an Internet Fax is received.

- **Print Document**—prints the entire fax on your default printer.

- **Store Document in Repository**—selects a repository for storing Internet faxes. You will be prompted to specify a repository when you click Next.

- **Print Document Token**—prints a one-page document that represents the stored document on the user's default printer. To use this option, you must specify a repository and a repository user name and password.

9 Click **Next**.

10 If you chose **Store Document in Repository**, one of the following is displayed:

- If you have not already specified a repository, a page is displayed for selecting one.

  - Under **Select Document Repository** click a repository from the menu. The page displays repository options.

  - Enter information for each option. (Click a link for help.)

  - Click **Next**, and click **Next** in the confirmation page.

- If a repository was previously selected, a page displays the repository name. To choose a different repository, click **Change Repository** and follow the steps in the bullet above.

11 A confirmation page displays all your selected options. Click **Back** to change any settings, or **Save** to confirm your settings.

Your Internet Fax address

The address that can be used to send Internet Faxes to you is displayed in the FlowPort Web Centre.

To view your Internet Fax address:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Options** button.

3 Under **Application Options**, click **Internet Fax Mailbox**.

Under **Current Settings**, the first sentence displays your Internet Fax address.

Using Network Accounting with FlowPort

Xerox Network Accounting is an optional feature of the Document Centre. If the feature is installed with the Document Centre, your FlowPort account can be configured to track your Document Centre printing jobs.

> *Note: If you do not know whether Network Accounting is installed in your environment, check with your FlowPort administrator or your Document Centre administrator.*

There are several ways to specify using a Network Accounting account ID for printing FlowPort jobs.

- Printing with your Network Accounting ID
- Using a form to set Network Accounting ID
- Setting your default Network Accounting ID

Printing with your Network Accounting ID

When you print a PaperWare form in the FlowPort Web Centre, you can charge the print job to a Network Accounting account.

To specify a Network Accounting account when printing in the FlowPort Web Centre:

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, click a selection box for a PaperWare form and click **Print**.

4 In the window, specify Printer Name and Type, Number of Copies, and DataGlyph Size.

5 Enter the following:

- **Network Accounting User ID**—your User ID for network accounting. See your Document Centre administrator for your User ID.

- **Network Accounting Account ID**—the Account ID to which this print job will be charged. Each user has one or more accounts to which the job can be charged. See your Document Centre administrator for the list of accounts (Account IDs) that you can charge.

6 Click **OK**.

> *Note: You can also specify a Network Accounting account when you use a Cover Sheet to remotely print a document (if the remote printer is a Document Centre that supports Network Accounting).*

Using a form to set Network Accounting IDs

You can add Network Accounting checkboxes to these PaperWare forms:

- Distribute Document Cover Sheet
- Document Options Sheet

When you select a Network Accounting checkbox, it overrides any other account you have specified as follows:

- On a Distribute Document Cover Sheet, the selected Network Accounting checkbox overrides any default account set in your Network Accounting application options. However, if the Cover Sheet has a remote printer checkbox for an Account ID, that account is not overridden by the Network Accounting checkbox.

- On a Document Options Sheet, the selected Network Accounting Checkbox overrides any Network Accounting checkbox on a preceding Distribute Document Cover Sheet, and any default account set in your Network Accounting application options.

When you select a Network Accounting checkbox, that account is charged for printing the FlowPort job.

To add a checkbox for Network Accounting account information:

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button.

3 In the **Forms and Applications** page, click **Create New Cover Sheet** or **Create New Options Sheet**.

4 From the menu in the Distribute Document Cover Sheet or Document Options Sheet creator window, select **Network Accounting**.

5 On the form, click on the blue arrow.

6 In the window, enter the following information:

 • **Checkbox label**—text you want to appear on the form (usually to indicate the account being charged).

 • **Network Accounting User ID**—your User ID for network accounting.

 • **Network Accounting Account ID**—the Account ID to charge for the print job.

 Note: If you want the Network Accounting account to be charged every time you use the form, click the checkbox on the form to select it permanently.

7 Click **OK**.

 Note: For remote printing, the Network Accounting User ID and Account ID must be registered for the specified printer, and the Account ID must list you as an authorized account user. Contact the (Document Centre) administrator for the remote printer.

Setting your default Network Accounting ID

You can specify a default Network Accounting Account ID and User ID to be used for all your FlowPort printing. This account will be charged whenever you print to a Document Centre that supports Network Accounting.

Your default will override any system default User ID and Account ID specified by the FlowPort Administrator.

To set your default Network Accounting ID:'

1 Login to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Options** button.

3 In the Application Options page, click **Network Accounting**.

4 In the **Network Accounting Account ID** field, enter the Account ID you want to charge (to set a default). See your Document Centre administrator for a list of the Account IDs that you are authorized to charge.

5 In the **Network Accounting User ID** field, enter your User ID. See your Document Centre administrator for this value.

6 Click **Set**.

Managing FlowPort forms

You can use the Web Centre to create new forms, and to view, print, and edit your existing forms. This chapter describes how to manage your forms from the Web Centre.

This chapter contains the following topics:

Using the Forms and Applications page

When you click the **Forms** button in the FlowPort Web Centre, a **Forms and Applications** page displays.

The **Forms and Applications** page displays all your FlowPort forms, organized by application. Forms are listed by their form titles., as shown in Figure 6.1.

On this page you can create new forms, and view, edit, print, or delete your existing forms. Click a link for the action you want to perform:

• Creating a new form

• Previewing a form

• Sorting your forms

• Printing forms

• Deleting a form

• Editing an existing form

• Using previous versions of a form

• Printing help about a FlowPort form

Figure 6.1 Forms and Applications page

Click to access previous versions of form

Blue heading shows type of form

Click to sort list by date

Click to view multiple page form

User's name

Open pop-up menu to create form starting from a template

Select form by clicking a selection box...

... and then click a gray button

Click *Create* link to create a new form

Your **Forms and Applications** page has the following features:

• **Blue title boxes**—indicates a type of form. (Forms are grouped by application.)

• ***Create New Form* links**—creates a new form of a specified type.

To start from a template rather than a blank form, select one from the pop-up menu below the ***Create*** link.

• **Selection boxes**—allows you to select special forms.

• **Print, View, Edit, and Delete buttons**—Allows you to print, view, edit, or delete a form.

— You can select multiple forms for printing or deleting.

— The **Edit** button appears only when a form can be edited.

• **Form Name link**—sorts a forms list alphabetically.

• **Date link**—sorts a forms list by date.

• **History link**—appears only if a form has been edited. Click it to view, print, or edit previous versions of the form.

• **Multiple Pages link**—appears only if a form has multiple pages. Click to view the pages, or to print individual pages.

Creating a new form

There are two ways to create a form:

- Create a new form, starting with a blank form or a template.

- Edit an existing form and saving it with a new form title.

To create a new form:

1 Click the **Forms** button.

2 In the **Forms and Applications** page, do one of the following to create a new form.

- Click a *Create New Form* link for the type of form you want to create.

- To start from a template, select a template from the pop-up menu below the *Create New Form* link. For example:

List of templates to start creating a new form

⊟ **Distribute Document** -- Scan a document to email or to a World Wide
Form Title ▲
Create New Cover Sheet starting from [(blank form) ▼]
☐ Scan to my Workgroup
☐ Scan to Myself

> *Note: Your FlowPort administrator creates templates that you and other FlowPort users can use as a starting point. Contact your administrator if you want new templates to be created.*

A form creation page opens for the application you select.

For more about creating or editing each type of form, see Table 6.2.

Pointers to information about creating forms

Table 6.2, Section and Reference Page column, lists the reference pages for creating the various FlowPort PaperWare forms.

Table 6.2 Information about creating new forms

Type of Form	Section and Reference Page
Distribute Document Cover Sheet	*For emailing a document:* "Emailing a document with FlowPort" section on page 5-3 *For storing a document and emailing the URL:* "Emailing a stored document URL" section on page 5-7 *For sending by Internet Fax:* "Distributing a document by Internet Fax" section on page 5-11 *For sending to a remote printer:* "Sending a document to a remote printer" section on page 5-12 *For distributing in multiple ways:* "Distributing a document in multiple ways" section on page 5-14 *For storing to a repository (Xerox DocuShare, Microsoft Exchange, or Lotus Notes):* "Storing documents to a repository" section on page 5-18 *For storing with custom properties:* "Storing a document with document management fields" section on page 5-25
Document Options Sheet	"Creating a Document Options Sheet" section on page 5-33
Document Token	"Creating a Document Token" section on page 5-43
Document Catalog	"Creating a Document Catalog" section on page 5-46
Login Sheet	"Creating a Login Sheet" section on page 8-6

Editing an existing form

To edit an existing form:

1 Click the **Forms** button.

2 In the **Forms and Applications** page, click the checkbox next to a form you want to edit.

> *Note: The Edit button only appears below form types that can be edited.*

3 Click the **Edit** button.

The form is opened in an editing window.

> *Note: If you edit and save the form without changing the title, a new version is created. Previous versions are accessible from the **History** link (refer to the "Using previous versions of a form" section on page 6-11 of this chapter). If you edit and save the form with a new title, it is saved as a new form and is displayed separately on the **Forms and Applications** page.*

Previewing a form

You can preview a form before you decide to print, edit, or delete it.

To preview a form:

1 On the **Forms and Applications** page, do one of the following:

- Click the checkbox for a form, and click **View**.

- Click on a form title.

2 If you clicked **View**, the form is displayed in a **Manage Form** page. If you clicked the form title, a magnifying glass icon is displayed.

Click the icon to display the form.

3 On the **Manage Form** page, you can select to edit, delete, or print this form. To exit, click **Cancel**.

Sorting your forms

When you create and save a PaperWare form, it is added to the forms list for that application. Forms are initially sorted for each application by creation date, with the most recent first.

You can sort all forms for an application alphabetically by form title or by date.

To sort a forms list alphabetically:

1 On the **Forms and Applications page**, go to a list of forms for an application.

2 Click the **Form Name** link at the top of the form list.

The forms are sorted by alphabetical order.

3 Click **Form Name** again to alternate between ascending and descending order. The blue or gray triangle indicates the current sort direction.

To sort a forms list by date:

1 On the **Forms and Applications** page, go to a list of forms for an application.

2 Click the **Date** link at the top of the form list.

The form list is sorted by date.

3 Click **Date** again to alternate between ascending and descending order. The blue or gray triangle indicates the current sort direction.

Printing forms

To print one or more forms at the same time:

1 Click the **Forms** button.

2 On the **Forms and Applications** page, select one or more forms by clicking the checkbox next to each form's title.

3 Click the **Print** button below the list of forms.

4 A **Print Chooser** window displays, allowing you to specify a printer other than your default printer. The default printer is specified in your **Account** page.

If specifying a printer in a **Print Chooser** dialog window, you can select the following values:

Number of copies—number of copies to print.

DataGlyph size (appears only in printing from the Forms page)—to use this option, refer to the "Scanning forms by Internet Fax" section on page 4-3.

5 Click **OK**.

To view and print a form:

1 Click the **Forms** button.

2 Click a form title. In the **Manage Forms** page that opens, click the icon to view the form.

3 Click the **Print** button to print the form.

The form is sent to the default printer specified in your **Account** page.

Deleting a form

You can delete a form by performing the following procedure.

1 Click the **Forms** button.

2 In the **Forms and Applications page**, click the checkbox to the left of all the forms you want to delete.

You can select multiple forms for deletion.

3 Click the **Delete** button.

A confirmation message appears. Click **OK** to continue.

⚠ Caution: If you delete a form, any copies of the form that you have, will not work if you scan them to FlowPort.

Do not delete a form unless you are sure that you do not need to use any printed versions of the form.

Using previous versions of a form

If a form was edited and not given a new title, previous versions are stored in the form's *History*.

A form with previous versions has a **History** link in the far right column of the **Forms and Applications** page, as displayed:

Date ▾

new

Apr 11, 2000 2:06:24 PM

May 9, 2000 11:50:10 AM <u>History</u>

To access a form's history:

1 Click the **Forms** button.

2 In the **Forms and Applications** page, click the **History** link for a form.

3 In the **Forms History** page, you can do the following.

- View a previous version by selecting it and clicking **View**.

- Print a previous version or versions by selecting them and clicking **Print**.

- Delete a previous version or versions by selecting them and clicking **Delete**.

- Edit a previous version by selecting it and clicking **Edit**.

   Note: When you edit and save a form, the new version is displayed on the Forms and Applications page, and the previous version is now listed only on the Form History page.

   - If you edit an old version of a form and save it, it supersedes all later versions and becomes the latest version.

   - If you give the form a new title when saving it, you do not create a new version but creates a new form that is listed separately on the **Forms and Applications** page.

4 You can sort, by date, versions of the form by clicking the **Date** link.

5 To exit, click **Cancel**.

Viewing and printing multiple page forms

If a form consists of morethan one page, you can use the **Multi-page form** link to view or print individual pages.

When using a multi-page form, you do not have to submit all pages. You only need to submit the pages that contain checkboxes you marked.

To view or print multiple page forms:

1 Click the **Forms** button.

2 In the **Forms and Applications** page, click the **Multiple Pages** link for a form.

A **Multi-Page Form** screen opens with the individual pages of the form listed and sorted by page number.

3 To view a page, click its checkbox and click **View**.

On the Form viewing page, click **Print Form** to print the page, or click **Cancel** to return to the **Forms and Applications** page.

4 To print a form page, click its checkbox and click **Print**. You can select more than one page for printing.

A **Print Chooser** window opens. Refer to the to specify print options.

5 To exit, click **Cancel**.

7 Specifying user preferences and printers

This chapter describes how to specify user preference and printer information for printing PaperWare forms and documents.

This chapter contains the following:

Changing your account information

As a FlowPort user, you can change your account information—user name, password, default printer, email address, and options for submitting forms, such as your personal identification number (PIN) on the Login Sheet. You can also set up your account to receive Internet Faxes by setting your Internet Fax Mailbox application options.

To change your account information:

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Account** button.

3 Enter new values for the user account fields described below.

User Name (required)—name you use to login to the FlowPort server.

First Name—your first name, which is printed with your last name on forms.

Last Name—your last name, which is printed with your first name on forms.

E-mail Address (required)—your email address.

Default Printer (required)—the printer or Internet fax device on which you print PaperWare forms, or the email address to use when emailing PaperWare forms. (Refer to the "Specifying a printer" section on page 7-7 in this chapter for examples.)

Printer Type (required)—type of printer for your default printer.

Default Form Size—paper size used to print forms on the default printer.

Job Confirmation Method—notification format to be used when a FlowPort-initiated job is successfully processed.

> *Note: To receive a Document Token when storing a document in a repository that supports access, the **Job Confirmation Method** must be set to **Printer**. If you do not want a Document Token, you can select Email as a job confirmation method.*

Locale—language used to display the FlowPort Web Centre interface and print PaperWare forms. If you select **System Default**, the default language selected by the FlowPort administrator is used.

> Caution: If you select System Default, and the administrator changes the default Locale setting, PaperWare forms that you created in the previous language cannot be used. You should select an explicit language unless your system requires that you do otherwise.

Change PIN—click to change your four-digit personal identification number (PIN).

New PIN and New PIN Again—your four-digit code to be used on a Login Sheet to provide authentication.

Change Password—click to change or delete your password.

New Password and New Password Again—your password to login to the FlowPort server.

4   Click the **Submit Changes** button.

Setting your application options

Some FlowPort applications allow you to set your own user options. You can use the **Options** button to set these options.

1   Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2   Click the **Options** button. Your User Profile is displayed.

3   Under **Application Options**, click a link to an application to set its options.

Setting your Internet Fax options

You can receive Internet Faxes through FlowPort, and specify the type of mail server to use to receive Internet Faxes.

To set up your Internet Fax options:

1   Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2   Click the **Options** button.

3   Under **Application Options**, click the link for **Internet Fax Mailbox** options.

4   In the **Internet Fax Mailbox Options** page, you can set the following options:

Accept Internet Faxes via the FlowPort SMTP Mail Server—FlowPort receives Internet Faxes using its built-in SMTP mail server.

Note: This option displays if the Internet Fax SMTP Service is enabled.

Accept Internet Faxes via a POP3 Mailbox on Another Server—FlowPort receives Internet Faxes by polling a POP3 mail server.

Note: This option displays if the Internet Fax POP3 Mail Polling is enabled.

Do Not Accept Incoming Internet Faxes for This User—FlowPort does not receive Internet Faxes.

User Name for POP3 Mailbox Account—specifies the user's account name for the POP3 mailbox.

Password for POP3 Mailbox Account—specifies the user's password for the POP3 mailbox.

Host Name of POP3 Mailbox Server—specifies the host name of the server running the POP3 mail server.

Mail Domain—specifies the mail domain name.

Notify by Email—sends an email message to the user when an Internet Fax is received.

Print Document—prints the fax on the user's default printer.

Store Document in Repository—stores the fax in a repository

Print Document Token—prints, on the user's default printer, a one-page document that represents the stored document.

Select Document Repository—specifies the type of repository in which to store Internet Faxes and information about the repository.

5   Click **OK**.

Setting your Network Accounting options

Network Accounting is an optional feature of the Xerox Document Centre. It provides the ability to track the machine's usage by having users enter a preset User ID and Account ID. If the feature is installed on the Document Centre, you can specify the User ID and Account ID to which the FlowPort user charges print jobs.

To set up your Network Accounting options:

1   Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2   Click the **Options** button.

3 Under **Application Options**, click the link for **Network Accounting** options.

4 In the **Network Accounting** page, you can set the following options:

Network Accounting Account ID—specifies the Account ID set on the Document Centre network accounting system. See your Document Centre administrator for the Account IDs you can use to charge printing jobs.

Network Accounting User ID—specifies the User ID set on the Document Centre network accounting system. See your Document Centre administrator for the list of User IDs set up for the machine.

> *Note: The IDs you specify override the default Account ID and User ID set on the Default Network Accounting page.*

5 Click **OK**.

Specifying a printer

You can set a default printer in your **Account** page or override the default printer any time you print a form by specifying a different printer name in the **Print Chooser** dialog window.

You can print forms to the following printers:

- Xerox Document Centre

- Any networked printer supporting the **lpr** protocol and PostScript Level 2 or PCL3.

- A printer directly attached to your PC.

- Internet fax device.

When you specify a printer, the **Default Printer** is the device to which FlowPort forms are printed. The **Printer Type** must correspond to the printer specified.

Please see your System Administrator if you are unsure whether a printer meets these requirements.

Printing to a Document Centre or other networked printer

To specify a default printer in your user Account page:

Note: Because FlowPort supports the lpr protocol, all printers are specified with UNIX-style printer names that are fully qualified DNS names. See your system administrator to obtain the DNS name of a printer. Examples are given below.

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Account** button.

3 Enter the device (fully qualified) name or the printer's IP address in the **Default Printer** field.

   For example, a Xerox Document Centre printer name can be:

   documentcentre-1.organization.company.com

   or

   13.255.255.255

Another example of a networked PCL3 printer name can be:

hplj4.organization.company.com (or the IP address)

4 For **Printer Type**, select the type of printer specified in step 3.

> ⚠ *Caution: Select the correct **Printer Type** for your specified Printer to assure that your forms and documents are printed correctly. For example, if you specify a regular PostScript printer or PCL printer as **Printer**, and select one of the Document Centre options as a **Printer Type**, printing may not work correctly*

5 Click the **Submit Changes** button.

Printing to a local printer

You can print FlowPort forms to a local printer attached directly to your personal computer running Windows NT (3.5.1 or higher).

To specify a default printer in your Account page:

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Account** button.

3 In the **Printer** field, enter your machine name and your printer name, separated by a forward slash (/), as follows:

your-machine-name/your-printer-name

> ▭ *Note: Only the forward slash (/) can be used as a separator. Other separating characters such as a colon (:) are not supported.*

An example of specifying an attached printer:

jims-pc/HP DeskJet 870Cse

or

13.255.255.255/HP DeskJet 870Cse

> **Note:** *To find the name of your computer and local printer, click the Windows **Start** button, point to **Settings**, and click **Control Panel**. Double-click **Network**. The computer's name appears in the **Computer Name** box. Click the **Cancel** button. In the Control Panel, double-click **Printers**. Right-click the local printer and click **Properties**. Click the **Ports** tab. The printer's name is highlighted. Enter this name exactly as it is shown, using the same case and spelling.*

4 For **Printer Type**, select the **PCL Printer** or **PostScript Level 2** option.

5 Set your workstation's TCP/IP Print Server to start and run automatically. Click the Windows **Start** button, point to **Settings**, and click **Control Panel**.

> **Note:** *If your client workstation is running Windows 95 or 98, see your FlowPort administrator to obtain a TCP/IP Print Server.*

6 Double-click **Services**.

7 Click the **TCP/IP Print Server** and click the **Startup** button.

8 For Startup Type, click **Automatic**.

9 Click **OK** and then **Close**.

Printing to an Internet Fax device

To specify a default printer in your Account page:

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Account** button.

3 In the **Printer** field, enter the Internet fax address (for example, internetfax@bestcompany.com).

4 For **Printer Type**, select the **Internet Fax (SMTP, fine resolution)** or **Internet Fax (SMTP, superfine resolution)** option.

5 Click the **Submit Changes** button.

Using shared and private forms

This chapter describes how to use public, shared, and private forms, and how to authenticate yourself when you use a secure form.

This chapter contains the following:

Security and your FlowPort system

Your FlowPort system offers you secure access to stored documents and FlowPort forms.

Security features that are available in any FlowPort system include the following:

- **DataGlyph ID on forms**—FlowPort forms have a built-in security feature in the DataGlyph that appears on each form, encoding the information needed to process that form. DataGlyph encoding protects against forgery or alteration.

- **Private and Shared forms**—Users can optionally protect access to their personal Cover Sheets and Access Sheets by making them 'private' or 'shared.'

  (Refer to the "Public, shared, and private forms" section on page 8-4.)

- **Security in storing to and retrieving from a repository**—When you store to a secure repository such as a Xerox DocuShare collection that is private, you must supply a user name and password in order to store a document to it.

Special security policies defined by your administrator

Your FlowPort administrator has the option of setting special security policies. Special security will require you to provide authentication whenever a FlowPort job is processed.

- **All "portals" require authentication**—The administrator can set a maximum level of security by specifying that you need to provide authentication whenever you use FlowPort forms from any device.

- **Some "portals" do not require authentication, but all others do**—Alternatively your administrator can specify a list of devices (Xerox Document Centres) which do not require special authentication, but you must authenticate from all other devices, whether they are local or remote Document Centre devices or Internet Fax devices.

> *Note: See your FlowPort administrator for information about the need to authenticate at your local Document Centre.*

If you plan to use FlowPort forms on a Document Centre or Internet fax machine at a remote location, check with your administrator about the need for authentication from that location.

> *Note: If you will be using FlowPort forms from other locations, it is recommended to take a Login Sheet.*

For more about authenticating your forms, see the "Providing authentication when you use FlowPort forms" section on page 8-6.

Public, shared, and private forms

By default, your FlowPort forms have public access, allowing anyone to use them. You can limit access to your FlowPort forms so that only you, or your local FlowPort users can use them.

For example, you can make a Distribute Document Cover Sheet private so that no one else is able to send documents in your name.

You can specify that an Access Sheet, such as a Document Token or Document Catalog, can only be used by you or by other local FlowPort users, which provides an extra level of security for your stored documents.

To protect access to your FlowPort forms and stored documents, you can create forms with the following levels of access.

public—the FlowPort form can be used without any special authentication (login).

You are only required to authenticate if your administrator has set special restrictions on using FlowPort forms from a Document Centre, and if guest access is disabled (see your administrator; refer to the "Security and your FlowPort system" section on page 8-2).

shared —the FlowPort form can be submitted by anyone, provided your administrator has set up guest access on the Document Centre (the default). If guest access is disabled, user authentication is required.

If you want FlowPort users in your workgroup to be able to use a form, but you want to restrict other people from using it, make it shared. Other local FlowPort users can use the shared form at a Xerox Document Centre if the following occurs:

• they use a Login Sheet belonging to any user of the local system.

• they use a scan template on the Document Centre that has the 'guest' user name and password as specifed by their administrator.

• they use a scan template on the Document Centre that has a valid user name and password for any registered user of the local FlowPort server.

Other local FlowPort users will be able to use your shared form at an Internet Fax machine if they use a Login Sheet belonging to any user of the local system.

private —the FlowPort form must be submitted by the owner of the form, and must be authenticated. To submit a private form, either use your Login Sheet or login at the Document Centre.

Defining a shared or private form

1 Log in to the FlowPort Web Centre (refer to the "Login to the FlowPort Web Centre" section on page 2-2).

2 Click the **Forms** button and click a '**Create form**' link. Refer to the "Creating a new form" section on page 6-5 for information creating forms.

3 In the form creator page, under **Limit form access to**, select **private** or **shared**.

The printed form will indicate 'private' or 'shared' in the upper right corner.

Using a private or shared form

If you submit a FlowPort form that is private or shared, you must authenticate your job for the FlowPort server. Authentication provides the necessary FlowPort user login information. There are two ways you can do this:

• Using the Login Sheet to submit FlowPort jobs

• Login at the Document Centre

Providing authentication when you use FlowPort forms

If you submit a form that is private, or if you use a shared form and the FlowPort scan template is not set with 'guest' access, you must authenticate your job for the FlowPort server.

In addition, there may be other situations in which you must authenticate yourself when using a shared form (as described in the "Public, shared, and private forms" section on page 8-4).

Your FlowPort administrator can set up your system to require that all users authenticate whenever they use any form. See the "Security and your FlowPort system" section on page 8-2 for more about special security.

Authentication provides the necessary FlowPort user login information. There are two ways you can provide authentication:

• Using a Login Sheet to submit FlowPort jobs

• Login at the Document Centre

> *Note: Because a Login Sheet is easy to use and carry with you, using a Login Sheet is recommended.*

Creating a Login Sheet

The Login Sheet enables you to enter a four-digit numeric personal identification number (PIN) with a FlowPort job. You enter the PIN by marking checkboxes and placing the Login Sheet in front of the other PaperWare forms and documents in the job.

Your FlowPort administrator can assign you a PIN when adding you as a user. The PIN is emailed to you in the FlowPort Welcome message.

> *Note: You cannot use a Login Sheet without having a PIN.*

To create a Login Sheet:

1 If you do not have a personal identification number (PIN) assigned to you, or you want to change your PIN, do the following.

   A In the FlowPort Web Centre, click the **Account** button.

   B Click **Change PIN**.

   C Enter a four-digit numeric PIN in the **New PIN** and **New PIN Again** fields.

   D Click **Submit Changes**.

   E Click **Continue**.

2 In the **Applications and Forms** page, under **Login Sheet**, click **Create New Login Sheet**.

3 Click the **Create Login Sheet Form** button.

4 Click **Print Form** to print the form.

   The Login Sheet is printed at your default printer.

5 Click **Continue**.

Using the Login sheet

A Login Sheet is used when you need to authenticate a FlowPort job. You can use a Login Sheet at the Document Centre as an alternative to logging in at the control panel; or you can use it when submitting jobs to the FlowPort server from an Internet Fax device.

To use the Login Sheet:

1 On the Login Sheet, enter your 4-digit personal identification number (PIN) by marking the checkboxes.

For example, if your PIN is 1234, put an 'X' or mark each column for each number. Your PIN must be 4 digits.

2 Place the Login Sheet on top of a FlowPort form and any accompanying pages.

> *Note: The Login Sheet must be the first sheet in the stack. Only one Login Sheet can be used in a stack; it applies to all the pages in the stack.*

3 Submit your job in the Document Centre or via an Internet Fax device.

Protecting access to your Login Sheet

Protect access to your Login Sheet, as it contains your PIN information; it is the key that provides access to your documents.

If you need to discard the Login Sheet, shred the sheet or mark extra checkboxes to hide your PIN.

If you lose a Login Sheet, it is recommended that you delete the Login Sheet from your **Applications and Forms** page and create a new one. It is not necessary to change your PIN.

To delete an old Login Sheet and print a new one:

1 Click the **Forms** button.

2 In the **Applications and Forms** page, under **Login Sheet**, click its checkbox and click the **Delete** button below.

3 Click **OK;** click **Continue**.

4   To create a new Login Sheet, click the **Create New Login Sheet** and follow the steps indicated.

Login at the Document Centre

There are several situations when you must authenticate a FlowPort job that you are processing at the Xerox Document Centre. For example, when:

• you are using a 'private' FlowPort form

• you are using a 'shared' form, and the FlowPort scan template is not set up with the 'guest' user

• your administrator has specified that you must always login at the Document Centre

• your administrator has specified a list of 'trusted' portals from which you can submit FlowPort jobs. For example, you are submitting a PaperWare form at a Document Centre that is not listed (such as a Document Centre located in another office)

• you use a 'public' form, only if your administrator has set special restrictions on using PaperWare forms from a Document Centre, and guest access is disabled.

In all these situations, you can either use a PaperWare Login Sheet, or login using the Document Centre control panel.

To login at the Document Centre:

> *Note: The following procedure applies to the Document Centre 220 ST or 230 ST. Refer to the login procedures in the Document Centre documentation specific to your system.*

1   Place your PaperWare form, and any accompanying pages, face up in the Document Centre feeder.

2   On the control panel, press the **Scan** tab.

3   Press the **FlowPort scan template**.

4   Press the **Filing Setups** tab.

5   Press **Login Name/Password**.

6   Press **Login**.

7 Use the keypad to enter your FlowPort user name (do not include spaces).

8 Press **Save**.

9 Press **Password**.

10 Use the keypad to enter your FlowPort password (do not include spaces).

11 Press **Save**.

12 Press **Save** in the Login/Password screen.

13 Press the **Start** button.

A *Viewing documents scanned by FlowPort*

This appendix provides guidelines for viewing PDF or multi-page TIFF document output by FlowPort.

This appendix contains the following:

Viewing scanned documents

When you use a Distribute Document Cover Sheet to scan, email, or stored documents, the scanned document is emailed to a recipient or stored to a repository as a PDF (default), multi-page TIFF image file, or a file format you select from the **File Format for Scanned Documents** menu.

Viewing PDF documents

You can view FlowPort's scanned PDF documents with Adobe Acrobat Reader which is available for free downloading from Adobe's website:

> http://www.adobe.com

When you have Adobe Acrobat Reader installed, double-clicking on a PDF document in the body of a FlowPort email message or Web repository will launch the viewer and display the document.

Viewing TIFF documents

You can view FlowPort's scanned TIFF documents in any viewer that supports multi-page TIFF, such as the following:

• Imaging for Windows

   Available with Windows NT, Windows 98, and most versions of Windows 95

   > *Note: If you do not have Imaging for Windows, you can download the Pagis Viewer from the URL below.*

• Pagis 2.0.6 Viewer (or higher)

   The Pagis Viewer is available for free downloading from:

   http://www.scansoft.com/products

When you have either of the viewers installed, double-clicking on a TIFF document in the body of a FlowPort email message or Web repository will launch the viewer and display the document.

If you encounter problems viewing TIFF files, refer to the "Troubleshooting multi-page TIFF viewing problems" section on page A-3.

Troubleshooting multi-page TIFF viewing problems

In some circumstances, viewing multi-page TIFF files in Windows for the first time may be difficult.

In the event of problems, please see the troubleshooting scenarios below.

Scenario 1: I cannot view the TIFF file attachment that was emailed to me because I do not have the appropriate viewer associated with the TIFF files. (When I double-click on a TIFF file, no viewer is launched.)

This situation may occur when this is your first attempt at viewing a TIFF file on your system.

Solution: Most Windows systems come with the Imaging for Windows program, which can view all multi-page TIFF files. If your computer does not have Imaging for Windows installed, you may be able to install it from your original Windows install CD (or diskettes). However, users of early Windows 95 (prior to version OSR2) do not have this option. There are free multi-page TIFF viewers that can be downloaded from the Web, such as the Pagis Viewer 2.06 downloadable from:

http://www.scansoft.com/products

Perform the following steps:

1 Download or locate a multi-page TIFF file viewer (see the URL for downloading the Pagis Viewer from Scansoft.)

2 Install the multi-page TIFF file viewer.

3 You may need to reboot your system in order for TIFF association to take effect.

4 When you double-click a TIFF file, the viewer should launch.

Scenario 2: I cannot view the URL link to a TIFF file stored in DocuShare (but I have no problem with email attachments to TIFF files).

This situation probably indicates that your system has no association for files with extension **.tiff**, but does have an association for **.tif** files. This is usually the case in Windows NT.

Solution: In order to associate **.tiff** files correctly, visit the FlowPort Web site at:

http://www.xerox.com/flowport

Scenario 3: I have TIFF files associated with the wrong viewer, how can I fix this?

You can tell that multi-page TIFF files are associated with an incompatible viewer when you double-click on a TIFF file, and an image viewing program is launched but the file can not be displayed, or is displayed incorrectly, or cannot be displayed past Page 1.

When you originally associated TIFF with a program, you unknowingly chose a program which was not multi-page TIFF compliant while it may have been a single-page TIFF compliant program.

Solution: To associate multi-page TIFF files with the correct viewer, visit the FlowPort Web site at:

http://www.xerox.com/flowport

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