



SMARTsend[™]

Frequently Asked Questions

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Overview

Application, device, and network errors can occur in a variety of situations. This guide includes some of the common issues and Frequently Asked Questions that pertain to SMARTsend, Xerox Multifunction Devices, and related networking issues that have been added or updated after the release of SMARTsend 2.0.

This guide should be used in addition to the SMARTsend *Installation and Administration Guide* and *User Guide* that is installed with the application.

Troubleshooting a Problem

When a problem persists, document the error messages and gather information to define the problem. The following problem-solving procedures are recommended:

- Accurately define the problem. When, where, and how does the problem occur?
- Reproduce the problem. Can the problem be reproduced consistently or is it an intermittent problem?
- Ask other users if they have encountered the problem, and keep a log to track problem occurrences.
- Examine the data for trends and the common attributes that may be related to the problem. For example, does the problem occur only with a specific multifunction device or on a specific workstation or network configuration?
- Review the product documentation, including the README files and problem solving topics, to see if any similar problems are documented.

If a cause and solution to the problem cannot be identified, call Xerox Customer Support to report the error information. Provide the support representative with the documentation that you have gathered to define the problem. Be sure to have your product Serial Number available at the time you place the call. See *Customer Support* on page 1-7 of the *Installation and Administration Guide* for additional information.

Additional Information

Xerox Customer Service welcomes feedback on all documentation - send feedback via e-mail to: <u>USA.DSSC.Doc.Feedback@mc.usa.xerox.com</u>.

You can reach Xerox Customer Support at 1-800-821-2797 (USA), TTY 1-800-855-2880, 1-800-939-3769 (CANADA) or at <u>http://www.xerox.com</u>.

Other Tips about Xerox multifunction devices are available at the following URL: <u>http://www.xerox.com/DocumentCentreFamily/Tips</u>.

Frequently Asked Questions

After manually configuring a device, I am unable to refresh templates? Why?

When manually configuring a device to use the SMB filing protocol, the SMARTsend user interface instructions show the short server name instead of the fully qualified domain name. In some networks, this will not be enough information for the server name to map to an address. This will cause a template refresh at the device to fail and, potentially, the device may fail to file to its default repository.

This problem is encountered when performing the following procedure:

- 1. From the Administration Home Page, click on the Add/Update Xerox Devices link.
- 2. On the Manage Xerox Devices page, enter the name or IP address of the device you wish to configure.
- 3. Select the Device Properties icon to open the Edit Xerox Device Properties page for the device being configured.
- 4. On the Edit Xerox Device Properties page, select the SMB filing protocol, manual configuration options and click **Configure**.
- 5. Click **OK** on the Manual Device Configuration Status dialog. The Manual Device Configuration Instructions dialog will be displayed. Note that the server name that is displayed for the default repository and template pool uses a short name (e.g. myserver instead of myserver.myorg.com).
- 6. If your network requires a fully qualified domain name, please use the server fully qualified domain name when entering the server name at the device user interface.

Am I required to install SMARTsend from the CD or ISO Image on the SMARTsend Computer?

To insure your system is configured correctly, you should copy the SMARTsend ISO image from the CD to your local computer or run the SMARTsend install from the CD.

Note: If you will be using the SMARTsend ISO image, you will need to mount the ISO image so that Windows will recognize it as a drive. There are tools available online that will mount the image. After the ISO image is mounted, the drive should act as if the source CD you obtained the ISO image from is inserted.

If you attempt to install SMARTsend from a network share (For example: If you are running Microsoft Virtual Server and create a share to the host computer), you will receive a popup error with the heading 'SetDirAccess.exe - Common Runtime Language Debugging Services'. If you click **OK**, the installation will complete successfully. However, the SMARTsend directory tree may not have all of the required directory permissions. If you have already installed and received this and other errors while running SMARTsend, please copy the ISO image locally or run the install again, and repair the installation using the following procedure:

To repair an existing SMARTsend installation:

- 1. Log in to the SMARTsend computer as an administrator.
- 2. Open the Windows Control Panel and select Add/Remove Programs.
- 3. Select **SMARTsend**, and then select **Change**.
- 4. Select **Repair** on the Application Maintenance Page (*Figure 1*), and then click **Next**.
- 5. Click **Next** on the Ready to Repair the Application page.

6. Follow the directions provided by the installer to complete the repair.

FreeFlow SMARTsend - Insta	allShield Wizard
Welcome Modify, repair, or remove the pro	
wooliy, repair, or remove the pro	igrani.
	Welcome to the FreeFlow SMART send Setup Maintenance program. This program lets you modify the current installation. Click one of the options below.
	Repair Reinstall all program features installed by the previous setup.
	Bemove Bemove all installed features.
	< <u>B</u> ack <u>N</u> ext > Cancel

Figure 1

Do newer Xerox Multifunction Devices require additional configuration steps when they are being manually configured?

For newer Xerox Multifunction Devices, SMARTsend requires that the Login Credentials Source (labeled **Login Credentials Access to the Destination** on the device's web embedded server's File Repository Setup page) be set to System. When manually configuring a newer Xerox Multifunction Device, please access the device's embedded web server and confirm that the value is set to System. If you are not manually configuring a new Xerox Multifunction Device, SMARTsend will take care of this setting.

How do I configure SMARTsend to use a Sun Java System Directory LDAP Server for Integrated Address Book Lookup?

The following string entry should be added to the Registry before configuring the SMARTsend LDAP settings:

[HKEY_LOCAL_MACHINE\SOFTWARE\Xerox\FreeFlowDDS\Settings\Install] LdapObjectFilter = (objectClass=person)

Note: This value is not required for other types of LDAP servers and may cause them to fail to return user records. Also, depending on server setup, a different filter string may be required.

When configuring the SMARTsend LDAP settings:

1. At the E-mail and Address Book Setup page (*Figure 1*), enter a valid LDAP host name (e.g. v-sundir)

LDAP Server Configuration Optionally provide the LDAP Server Configuration to support the SMARTsend™ integrate Server Configuration from a web browser that is not on the SMARTsend™ server. Other	ed address book. Click Test to verify the configuration information. Please test the LDAP wise, the test results may not be accurate for all SMARTsend™ users.
LDAP Server: v-sundir:389/0=Test_Domain SSL SSL	
LDAP Authentication (Optional) * Name Password Confirm Password * If the LDAP server does not support anonymous directory access, please enter credentials that can be used when accessing the LDAP server.	LDAP Property Mappings E-mail Address mail Name cn City
	Apply Reset

Figure 1

- 2. Enter colon port number after the host name (e.g. v-sundir:389)
- 3. Enter a forward slash and base (e.g. v-sundir:389/o=Test_Domain)
- 4. Enter valid LDAP property mappings.
- 5. Select Apply button and then select Test to verify success.

Note: Short host names may or may not work so please use the full host name (**e.g. v-sundir.domain.com**).

How do I create a scan directory that can be used by the SMARTsend Scan to Home Utility to scan to an FTP home location?

Option 1: Create the scan directory inside the FTP root directory.

Note: The following sample procedure is based on a Windows 2000 server.

- 1. Open Windows Explorer on the computer or server that will be the "scan server."
- 2. Create a directory inside of the last directory of the FTP root path (*the ftp root path in this example is c:\inetpub\ftproot*).
- 3. Right-click the **ftproot** directory (or the last directory in the FTP root path that the scan server was just created in) and select **Sharing** (*Figure 1*). The folder Properties dialog will appear.

File Edit View Favorites Tools Help				
4 -Back $\bullet \rightarrow \bullet$ 1 Q Search B-Folders 3 1 1 1 1 1 1 1 1 1 1				
Address 🗋 C:\Inetpub			▼ ∂ 60	
	Inetpub Rproot File Folder Modified: 3/14/2006 11:52 AM Attributes: (normal)	Name A AdminScripts The Scripts Scri	Size Type File Folder File Folder File Folder File Folder File Folder File Folder	
- A Internet Explorer		•		
Displays the properties for sharing the selected folder				

Figure 1

4. Select the radio button for **Share this folder** then click **OK** (*Figure 2*).

ftproot Properties					
General Web Sharing Sharing Security					
You can share this folder among other users on your network. To enable sharing for this folder, click Share this folder.					
O Do not share this folder					
Share this folder					
Share name: ftproot					
Comment					
User limit: @ Maximum allowed					
C Allow Users					
To set permissions for how users access this folder over the network, click Permissions.					
To configure settings for Offline access to this shared folder, click Caching.					
OK Cancel Apply					

Figure 2

5. The **Permissions** dialog will appear (*Figure 3*). Make sure that the **Everyone** group has been granted **Full Control, Change** and **Read** permissions. Click **OK**.

Note: Although the **Everyone** group has been granted Full Control, Change and Read permissions to the share, NTFS permissions for users will override share permissions and can be used to control access.

Permissions for ftp Share Permissions	root		<u>? ×</u>
Name			Add Remove
Permissions: Full Control Change Read		Allow V V	Deny
	ОК	Cancel	Apply

Figure 3

6. The last directory in the FTP root path will appear in Windows Explorer with a hand under it to signify that it is now a shared folder (*Figure 4*).

Inetpub	Help		
← Back - → - 🔂 🔍 Search			
Address C:\Inetpub			▼ 200 GO
	Inetpub File Folder Modified: 3/14/2006 11:52 AM Attributes: (normal)	Name A	Size Type File Folder File Folder File Folder File Folder File Folder File Folder
object(s) selected	1	<u> </u>	My Computer



- 7. Close Windows Explorer.
- 8. Proceed to creating user folders with the SMARTsend Scan to Home Utility.

Option 2: Create a Virtual Directory in the Microsoft IIS service.

Note: The following sample procedure is based on a Windows 2000 server.

- 1. First, create a "parent" directory on the computer or server that will be the "scan server" and share this directory. Then create a subdirectory inside the shared parent directory. The Virtual Directory that will be created in the next several steps will point to this parent and subdirectory (e.g. c:\SMARTsend\Scans).
- 2. Open the Internet Information Services Manager (Start > Settings > Control Panel > Administrative Tools > Internet Services Manager) and expand IIS in the tree view (*Figure 1*).

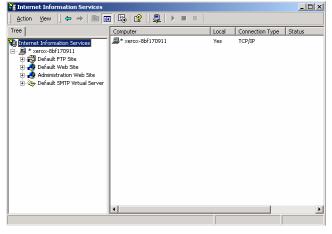


Figure 1

3. Right-click **Default FTP Site** and select **New > Virtual Directory**. The Microsoft Virtual Directory Creation Wizard (*Figure 2*) will appear.



Figure 2

- 4. Click Next.
- 5. Enter the name you would like used when gaining access to this virtual directory (Figure 3).

Virtual Directory Creation Wizard		×
Virtual Directory Alias You must give this virtual directory a short name	e, or alias, for quick reference.	J
Type the alias you want to use to gain access t naming conventions that you would for naming		
Alias:		
Scan_To_Home		
,		
	(<u>B</u> ack <u>N</u> ext) Can	cel

Figure 3

- 6. Click Next.
- 7. Enter the path of the "scan server" created in step 1 (*Figure 4*).

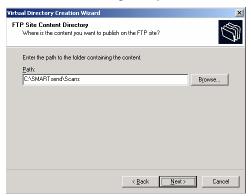


Figure 4

- 8. Click Next.
- 9. Select access permissions (*Figure 5*). Please note that SMARTsend will require write permissions to the Virtual Directory.

Virtual Directory Creation Wizard	×
Access Permissions What access permissions do you want to set for this virtual directory?	(D)
Allow the following:	
✓ <u>R</u> ead	
Vite Vite	
Click Next to complete the wizard.	
< <u>B</u> ack <u>N</u> ext >	Cancel

Figure 5

- 10. Click Next.
- 11. Click **Finish** to exit.
- 12. Close the Internet Services Manager.
- 13. Proceed to creating user folders with the SMARTsend Scan to Home Utility.

How do I create a scan directory that can be used by the SMARTsend Scan to Home Utility to scan to a Network Folder home location?

Note: The following sample procedure is based on a Windows 2000 server.

- 1. Open Windows Explorer on the computer or server that will be the "scan server."
- 2. Create a directory (e.g. c:\SMARTsend\Network_Folder_Scans).
- 3. Right-click the directory created in step 2 and select **Sharing** (*Figure 1*). The folder Properties dialog will appear.

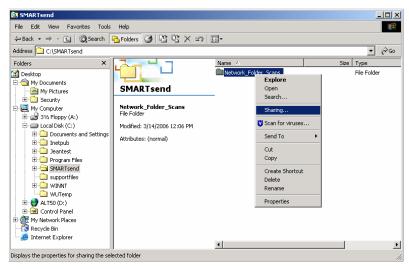


Figure 1

4. Select the radio button for Share this folder then click Permissions (Figure 2).

Network_Folder_Scans Properties					
General Web Sharing Sharing Security					
You can share this folder among other users on your network. To enable sharing for this folder, click Share this folder.					
O Do not share this folder					
Share this folder					
Share name: Network_Folder_Scans					
Comment:					
User limit: Maximum allowed					
C Allow Users					
To set permissions for how users access this folder over the network, click Permissions.					
To configure settings for Offline access to Caching Caching					
OK Cancel Apply					

Figure 2

5. The **Permissions** dialog will appear (*Figure 3*). Make sure that the **Everyone** group has been granted **Full Control, Change** and **Read** permissions. Click **OK**.

Note: Although the **Everyone** group has been granted Full Control, Change and Read permissions to the share, NTFS permissions for users will override share permissions and can be used to control access.

ermissions for Network Share Permissions	vork_Folder_S	cans	<u>? ×</u>
Name			Add Remove
Permissions: Full Control Change Read		Allow V V	Deny
	ОК	Cancel	Apply



6. The "scan server" will appear in Windows Explorer with a hand under it to signify that it is now a shared folder (*Figure 4*).

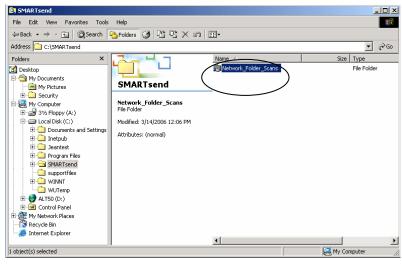


Figure 4

- 7. Close Windows Explorer.
- 8. Proceed to creating user folders with the SMARTsend Scan to Home Utility.

How do I create and configure a Domino Document Library for use with SMARTsend?

Verify Domino is ready to accept uploads from SMARTsend

1. Ensure the DIIOP and HTTP tasks are running on the Domino Server (*Figure 1*). To run the DIIOP task, simply type "load DIIOP" at the domino prompt. To make sure this task runs at a server reboot, add DIIOP to the notes.ini file in the line titled "ServerTasks=".

Note: For Domino 6.0 and later, HTTP is optional for DIIOP. However, SMARTsend still needs the HTTP task running in order to file documents.

🔮 "v-DominoDoc" Remote Conti	rol - Microsoft Interne	t Explorer provided by Xerox Office Group		
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🚱 Back 🝷 🕥 - 💌 💈	Search S	🚼 Favorites 🔗 🔗 - 🍃 🔳 - 🗾 💽 😏 - 🎇 🦓		Links »
Address 🗃				- 🕞 Go
	🚽 🖸 Search 🔹 🄇	🗿 🚿 PageRank 🔯 33 blocked 👋 Check 🔸 🔍 AutoLink 🔹 🗐 Anom 🖉	Options 🔗	
Google *				
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] (= + =) + (2) (3) (* + =)				
V-DOMINODOC Domain				П
People & Groups Files S	Server Messaging	Replication Configuration		
Release 6.0	ODOCIXerox 0 on Windows NT 5.2		Use Directory Current Server	√Tools
Gerver	Edit Server 🛞 Creat	e Web (R5) 🛞 Cancel		> 🔯 Certification
All Serve	cept SSL site	C Yes @ No		A > S Registration
	rtificates:			
	cept expired SSL	€ Yes C No		Policies
External Cer	rtificates:			> 💱 Hosted Org
🕨 🛐 Messaging				> Server
Replication Monopole Monopole Weh	h Directory Mail DI	IIOP Remote Debug Manager		
> 🔝 Policies				Miscellaneous
	emote Java/Domino)P			
	P/IP port number:	63148		
	P/IP port status:	Enabled		
	force server access ttings:	No		
Aut	thentication options:			
N	Name & password:	Yes		
	Anonymous:	Yes		
	SL port number:	63149		
	GL port status:	Disabled		
	thentication options:	711		
	Client certificate:	N/A		
	Name & password:	No		
	nonymous:	Yes		
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	O combra	takan 🕅 👘 🚔 Danisar 🕅 Manana Merina 🖮		🖉 Internet

Figure 1

- 2. Set Java/JavaScript/COM Security
 - a. In order to communicate with the Domino server, the appropriate security setting must be made for "Restricted Java/JavaScript/COM" code.
 - b. From the Domino Administrator, click Configuration, and open the Server document.
 - c. Click the **Security** tab.
 - d. In the Programmability Restrictions section, select the Run restricted Java/JavaScript/COM field and enter names or groups of people who will use SMARTsend to communicate with the Domino server.
 - e. Use a "*" to allow access to all users.
- 3. Enable the Domino Server for File Uploads
 - a. SMARTsend application uses HTTP POST to upload files to the Domino server. To enable Domino server to accept HTTP file uploads, open the notes.ini file in Notepad. Ensure that the line titled DominoDisableFileUploadChecks is set to "1". If this line does not exist add the following as a new line at the end of the file: DominoDisableFileUploadChecks =1

Create and configure a Domino Library

1. Open Domino Administrator and select **File** > **Database** > **New** (*Figure 1*). The New Database dialog will be displayed (*Figure 2*).

🛷 V-DOMINODOC Domaii					<u>_8×</u>
	Actions Administration Con				
	inter とひひなな	🔁 💽 수 — 💠 🖘 🏘 🔍 🔒			
Open Ser <u>v</u> er Open In New Window					
	Ctrl+W Stest - All Documen	its X			
	Challens	Replication Configuration			
Document Properties	Messaging	Treplication Configuration			
<u>D</u> atabase	DC/Xerox Vindows NT 5.2			Use Directory V-DOMINODOC/Xerr -	∽Tools
Replication Mobile				~n· '	
	βerver 🛞 Crea	ate Web (R5) 🛞 Cancel			> 🧕 Certification
<u>A</u> ttach Import			Sugar (Sugar	0100100101010	> 🕥 Registration
Export	er : V-DOM	INODOC/Xerox		101010101919	<u> </u>
Print	Ctrl+P	14 May 2001000 48 8444	101010101	10101010101	> 👰 Policies
Page Setup	Becurity Ports	Server Tasks Internet Protocols MTAs Misc	ellaneous Transactional Log	ging Shared Mail Administration	📏 🌍 Hosted Org
Preferences Security					Server
Tools	hame:	V-DOMINODOC/Xerox	Server build number:	Release 6.0	
Exit Administrator	itle:	V-DOMINODOCIZENX	Routing tasks:	Mail Routing	Miscellaneous
Veb	Domain name:	V-DOMINODOC	SMTP listener task:	Disabled	
🕨 🌭 Monitoring C	Fully qualified Internet	V-DOMINODOC.na.xde3.xerox.org	Server's phone		
 Image: Cluster Image: Servic 	host name:		number(s):		
Certificates	Cluster name:		CPU count:	1	
🕨 🧰 Miscellaneou	Load Internet	Disabled	Operating system:	Windows/NT 5.2 Intel	
	configurations from Server\Internet Sites				
	documents:				
	Maximum formula	120 seconds	Is this a Sametime	No	
	execution time:		server?:		
	Directory Information		Fault Recovery		
	Directory assistance		Fault Recovery:	Enabled	
	database name:		i dan i locoroly.		
	Name of condensed		Cleanup Script Name:		
	directory catalog on this server:				
	Trust the server based	☐ Yes	Cleanup Script	300 seconds	
	condensed directory		Maximum Execution		-
				▲ (🛶 ▲) (ם) Difice 🔺 🗔 🔺
🏄 Start 🛛 🔞 🧔	V-DOMINODOC/Xerox:	L 🔗 ¥-DOMINODOC Domai			🕅 9:41 AM
			-		

Figure 1

2. Select the **Server/Domain** of the location where you would like to create the database and enter a **Title** of your preference. The **File name** will be updated for you. However, you may choose a different file name.

Note: Please record the file name. You will need to know what it is when creating a SMARTsend workflow.

3. Select the "Doc Library – Notes & Web" Template and click **OK** to create the Document Library *Figure 2*).

ew Datab	ase	?
	New Database Name and Location	
<u>S</u> erver	V-DOMINODOC/Xerox	• OK
<u>T</u> itle	SampleDocLib	Cancel
<u>F</u> ile name	SampleDo.nsf	<u> </u>
	Encryption	
	Create full text index for searching	Ad <u>v</u> anced
Server	Local	•
Tempļate	Palank- Database Library Database Library Discussion - Notes & Web (6) Doc Library - Notes & Web (R6) Extended Mail (R6) Lotus SmartSuite Library (6)	<u> </u>
File <u>n</u> ame	doclbw6.ntf	<u>A</u> bout
	Show advanced templates Inherit future design changes	

- 4. Set the Access Control List (ACL) for the new database
 - a. From the **Tools** pane, select **File** > **Database** > **Access Control** (*Figure 1*). In the Access Control dialog box (*Figure3*), select the user you want to have access to this database. Select

the User type as Person and Access as Editor. Select the Delete documents and Create shared folders/views options. Click OK to grant access to the selected user.

Note: ACL decisions are made by the Administrator. Access can be granted based on individual users or groups. This is not SMARTsend specific, but users that will be filing to this library will need the appropriate access.

Access Control List	
People, Servers, Groups Show All	User type Unspecified
Octavile Administrator/Xerox Anorymous OteoDomanServers OtheoDomanServers PotAninoBorCxXerox X+DOMINDDDCXXerox Effective Access Full name:	Access Author ▼ ✓ Create Jocuments ✓ Create private agents ✓ Create private agents ✓ Create private agents ✓ Create private agents ✓ Create shared folders/views ■ Create LotusSoripUJava agents Ø Replacete or copy documents Ø Replacete or copy documents Rojes
Select a name in the list to see or set the access assigned to the na st change: Administrator on 01/17/2006 10:14:59 AM	
	Administrator/Xerox Anorymous CoeBiOnamServers ChepDonamServers ChepDonamServers P V-DOMINDDDC:Xerox Add Remoye Effective Access

5. Reboot Domino Server to enable configuration changes.

Creating a Domino Workflow in SMARTsend

- 1. Launch Internet Explorer (or other supported browser) and access the SMARTsend site (<u>http://hostname/smartsend</u>).
- 2. From the SMARTsend User Home Page (Figure 1), select Add New Distribution Workflow.



3. From the Document Destination page, select the link Add Locations under the section called Domino (*Figure 2*).



Figure 2

- 4. At the Domino Properties dialog, configure the Domino destination (*Figure 3*).
 - a. Enter a document **Destination Name**. This is just the name of the destination. It can be any text value.
 - b. Enter (or cut and paste) the URL of your Document Library into the **Domino Database URL** field. This is in the format <u>http://dominohost/libraryfilename.nsf</u>.
 - c. Form name is optional.
 - d. Select OK.

Domino Properties	and the second		He
Configure the Domino settings for t			
Destination Name			
Sample Library			
Select Starting Point			
Sample Library 💌			
Domino Database URL			
http://v-dominodoc.org/sampledo.ns	f		
		OK C	ancel
Done		OK _C	ancel

5. The Account Settings pop-up will appear (*Figure 4*). Enter the User Name and Password of a user that has been granted access to the Domino Document Library.

Note: Pop-up blockers must be turned off to allow the Account Settings dialog to appear.

Xerox FreeFlow™ - SMARTsend™ - M	1y Credentials - Microsoft Inte 💶 🗖
A A A A A A A A A A	
Xerox FreeFlow™ - SMA	ARTsend™ - My Credentials - Microsoft Intern
Add/Edit	279999444 112222 20
Account Type:	
Domino	(Q)
Name:	
Sample Library	
Domino Database IIRI	
	· · · · · · · · · · · · · · · · · · ·
http://v-dominodoc.org/sampled	0.NST
User Name	
System_User	
Password	
•••••	
Confirm Password	
••••••	
1	
Secure Page	OK Cancel
Done	Local intranet
Fig	uro 1
гіз	ure 4

- 6. Select **OK** and you will be returned to the Domino Properties dialog. Press **OK** for the Domino destination to be added to the SMARTsend workflow.
- 7. Select **Next** if this is the last destination you will be using.
- At the Document Name and Type page (*Figure 5*), enter the document identification and type information as required and click Next.

FreeFlow [™] SMARTsend [™]	Site Administration About	
Home >> Workflow Explorer >> Add N	lew Workflow	
✓ Document Destinations	Define naming options and output formats for scanned documents.	
Document Name and Type	Document Name	^
Document Attributes	Name	
Workflow Settings	O Help me choose	
Save Workflow	O Auto Generate a Name (8 characters)	
	 Name Provided at Scan Source Name Suffix Date and Time Document Type 	
	Use the same Document or Print Type for all destinations	
	Document Type PDF, Image Only (*.pdf) Properties Format: PDF, Image Only - Preserve Image from Scan Source Print Type Original Image v	
	Format: Not Applicable	
	O Use a different Document or Print Type for each destination	
XEROX.	Destination Document Type and Format	~
	<< Previous Next >> Car	icel

Figure 5

9. At the Document Attributes page (Figure 6), enter document attributes as required and click Next.

FreeFlow [™] SMARTsend [™]	Site Administration About Help
Home >> Workflow Explorer >> Add New V	/orkflow
Document Destinations	Document Attributes Optionally, define attributes to make identification and management of scanned documents easier.
Document Name and Type	Document Attribute Fields
Document Attributes	Use the Following Profile:
Workflow Settings	No Document Profile
Save Workflow	
	Add Field
2 The second	
XEROX.	<< Previous Next >> Cancel
Build: 2.1.7.0	Copyright © 2001-2006 Xerox Corporation. All rights reserved.

Figure 6

10. At the Workflow Settings page (*Figure 7*) Job Confirmation method and Workflow Access and click **Next**.



11. At the Save Workflow page (*Figure 8*), enter Workflow Name and Description.

Note: The name that is entered is the name of the overall workflow. This is different from the Destination Name since one workflow can have many destinations.

12. Select **Publication Options**. In this example, we will be publishing a PaperWare cover sheet. The steps for publishing to a Xerox Multifunction device are similar.

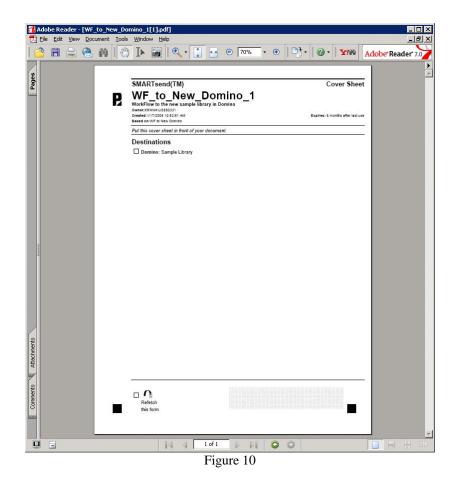


Figure 8

13. At the Publish PaperWare Cover Sheet for Workflow page (*Figure 9*), click **Create Cover sheet** (or select a Xerox multifunction and click OK if you are using the publish to a Xerox Multifunction Device option).

FreeFlow [™] SMARTsend [™]	Site Administration About Help
Home >> Workflow Explorer >	> Publish PaperWare Cover Sheet for Workflow
	🛿 Publish PaperWare Cover Sheet for Workflow: workflow3
and the second	Publishing this workflow will create a PaperWare cover sheet which can be used at Xerox Multifunction Device(s) and Internet Fax devices.
	workflow3
	Publication Settings
	Publication Name (Cover Sheet Title) workflow3 Cover Sheet Description
	Expires after not used for: 6 months V 🕑 Help me choose
	Destinations
	Select the destinations you want checked on your PaperWare cover sheet. Note: All destinations will appear on the cover sheet. Domine: http://v-dominodoc.na.xde3.xerox.org/sstest.nsf
XEROX.	Create Cover Sheet Cancel
	Figure 9

- 14. A PaperWare cover sheet (*Figure 10*) will be created and sent to your client. Some security settings may prevent this download; make sure the SMARTsend computer is in your list of "trusted" sites.
- 15. Print the PaperWare cover sheet.



- 16. On the PaperWare cover sheet printed in the previous step, select the Domino location by putting an x in the checkbox.
- 17. Scan the cover sheet and scan job using the PaperWare template on the multifunction device (Or select the template on the multifunction device if you published to the device directly).
- 18. Verify the scan job processed by either opening the Library from Lotus notes or via a web browser at the URL you used for the workflow (*Figure 11 and 12*).

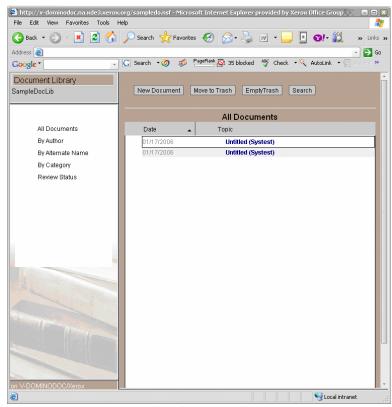


Figure 11

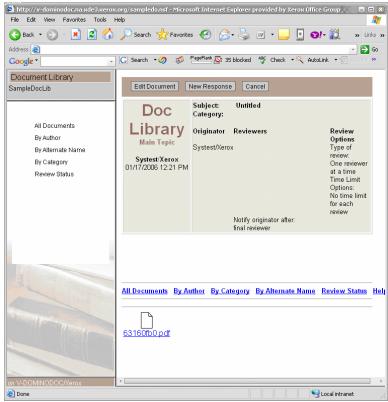


Figure 12

More information about DIIOP

An HTTP server is necessary for the Lotus Domino remote libraries to make a CORBA connection to the Domino DIIOP server. On a Lotus Domino 5 server you must use anonymous access to the Domino HTTP server but the Domino 6 DIIOP server has a simple built-in HTTP server which can be used for this purpose.

The information returned from this initial HTTP GET request is called the IOR, it contains, amongst other things, the real DIIOP server host-name/IP-number and the IP-port the SMARTsend application should connect to.

It is very important that the IOR information is correct; otherwise the SMARTsend application will try to connect to the wrong machine and/or port.

The DIIOP server generates this information in ".../Lotus/Domino/Data/domino/html/diiop_ior.txt" the first time it starts, i.e. in the root of the Domino Web server root.

The only way to regenerate this file is to change the DIIOP host or port in Domino Administrator, restart the Domino DIIOP task ("restart task diiop"), change the host or port back to normal in Domino Administrator and restart the Domino DIIOP task again.

To load the DIIOP server automatically when the Domino server starts, open the notes.ini file on the Domino server in Notepad and add "DIIOP" to the list of tasks to run on the server.

To check if the IOR has been generated and is accessible you can point a web browser to "http://host:port/diiop_ior.txt" where host is the host-name/IP-number of the HTTP server and port is 63148 if you want to use the HTTP server built in to the DIIOP server (and you are using the default DIIOP port) or 80 if you want to use the Domino built-in HTTP server (and you are using the default HTTP port).

If this test works, you will get back a very long hexadecimal string (>350 characters) and the host and port can be used by the SMARTsend application to get the IOR, if it does not work SMARTsend application will not be able to connect.

Internet Links to Domino Information

Running Server Tasks <u>http://www-</u> 12.lotus.com/ldd/doc/domino_notes/6.5/help65_admin.nsf/b3266a3c17f9bb7085256b870069c0a9/7d5c04d bf086b6c785256d9b004b337c?OpenDocument

Setting up DIIOP http://www-

12.lotus.com/ldd/doc/domino_notes/6.5/help65_admin.nsf/89d3962efd85426f85256b870069c0aa/be442e1 584f16beb85256d9b004b03af?OpenDocument

Some information about the DominoDisableFileUploadChecks line in Notes.ini http://www-1.ibm.com/support/docview.wss?uid=sim28bc635261a61084785256cc30001cdaf

How do I populate Domino metadata using a SMARTsend workflow?

Note: SMARTsend is not able to query the Domino Server for metadata (document attribute) fields. Therefore, there are some administrative steps that must be performed before a SMARTsend workflow can be used to populate Domino metadata fields.

Administration Steps

- 1. Decide which Domino metadata fields you would like to populate using a SMARTsend workflow. To know which ones are available, see the design tab of a document in your Domino Document Library. The most common fields to populate are Categories, Body, and Subject. Therefore, these are the fields that will be covered in this document.
- 2. Enter the Domino specific XML into the service settings for Domino
 - a. Launch Internet Explorer (or other supported browser) and access the SMARTsend site (<u>http://hostname/smartsend</u>).
 - b. On the SMARTsend Administration Home Page, select Configure Service Settings.
 - c. On the Configure Service Settings page, click Edit for the Domino service
 - d. Scroll to bottom of page and insert the following XML:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
<metadataConfig
xmlns="http://www.xerox.com/dsp/2002/services/repositories/domino">
<metadata label="Subject" name="Subject" required="false"/>
<metadata label="Body" name="Body" required="false"/>
<metadata label="WebCategories" name="WebCategories" required="false"/>
</metadataConfig>
```

Note: This XML can be edited to your own requirements by changing the "metadata" elements of the xml. The metadata elements consist of the following:

label – This is the text that the user will see when mapping document attributes.

name – This is the name of the field as defined in Domino.

required – This can be set to true or false and specifies whether or not the user has to enter data for this field in order for the workflow to be successful.

e. Click Apply.

User Steps - Create a SMARTsend Workflow to populate the metadata fields

- 1. Go to the SMARTsend User Home page and click Add New Distribution Workflow.
- 2. At the Document Destinations page, add a Domino destination.
- 3. Click Next.
- 4. At the Document Name and Type page, enter the document identification and type information as required and click **Next**.
- 5. At the Document Attribute screen, click Add Field.
- 6. At the Attribute Properties dialog, enter a Field Name for the attribute.

Note: It may be easiest to name these fields the same as they are named in Domino. Users can see the fields that have been defined for them by scrolling down to the attribute mapping section of the Attribute Properties dialog screen (*Figure 1*).

Attribute Properties - Microsoft Internet Explorer	
Attribute Properties Add or modify the properties for a Document Attribute	Help 🗠
Field Security Show User Input 🕑 🍪 Help me choose	^
Field Type Text Box	
Attribute Mapping	
Enabled Select data fields from each of the service destinations below that you would like to be mapped to this field. When you scan, values will be added to these data fields/propertie in your service destinations. Common	s
I want values entered into this field to populate the following data field(s) for a document distributed to Domino.	
Subject Body WebCategories Form Name	
Advanced Attribute Settings (optional)	
Field ID	
	~
ОК Са	ncel 🗸
🕘 Done 😽 😽 Local intranet	

Figure 1

- 7. Select **Default Values** as expected.
- 8. Select Field Properties as required.
- 9. In the Attribute Mapping section of the dialog, select the data field in Domino that you want populated with this information.
- 10. Click **OK**.
- 11. Repeat steps 5-9 for each field required in Domino.
- 12. If desired, click Save as new Profile (Figure 2) to enable the use of these fields in future workflows.

FreeFlow [™] SMARTsend [™]				DSP3\geminia
ome >> Workflow Explorer >> Add Nev	v Workflow			
Document Destinations	Document Attri Optionally, define att	ibutes ributes to make identification	and management of scanne	d documents easier.
Jocument Name and Type	Document Attribute	e Fields		
Document Attributes	Use the Following P	rofile		
Workflow Settings	No Document Profile	loine.	~	
Save Workflow				
	Fields:			
		Suggested Values	Value Required	
	Subject	SMARTsend Metadata	Yes	Properties Delete
	Body	<none></none>	Yes	Properties Delete
	Web Categories	<none></none>	Yes	Properties Delete
	Form Name	<none></none>	Yes	Properties Delete
	Add Field Save	as New Profile		
XEROX,				

Figure 2

- 13. Continue workflow creation and publication as required.
- 14. Use publication page or the user interface of the Xerox Multifunction Device to enter the metadata values.

Note: If the Domino Document Library requires you to populate the "Categories" field on the default form for a document library, you need to use the Field name of "WebCategories" as seen in the sample XML above. The use of just "Categories" is not supported.

I am able to add a destination to a SMARTsend workflow. However, the workflow publication fails to execute. Why?

When adding a destination to a SMARTsend workflow, the user credentials that are entered for the destination (e.g. DocuShare, SharePoint Portal Server 2003) must have write permission on the destination server. If the credentials have only read permission, the user will be able to add the destination to a SMARTsend workflow. However, the workflow publication will fail to execute because the user does not have permissions to upload a document to the destination server.

I am unable to import a large number of users into the SMARTsend Scan to Home user database? Why?

Depending on the amount of memory available to the SMARTsend application, importing more than 25,000 users at a time into the SMARTsend Scan to Home user database may cause application problems.

To remedy this problem, perform the following procedure:

- 1. Use the SMARTsend Scan to Home Utility to create CSV files that have a maximum of 25,000 users.
- 2. Use the SMARTsend Scan to Home application features to import each of the CSV files individually into the SMARTsend user database.

Note: Please ensure that the **Append the users above to the users in the database** option is selected when importing multiple CSV files. Please consult Chapter 6 of the Installation and Administration Guide for additional information on creating CSV files and importing Scan to Home users.

I am unable to scan to a URL destination that is an IIS folder. Why?

In order to scan to a URL destination that is an IIS folder, SMARTsend requires that the IIS folder be configured to allow write access. When you create a new folder in IIS, the default settings are to allow anonymous access, but with read only (no write) permissions. Please reconfigure the IIS folder to allow write access and resubmit your job.

What versions of Netscape Navigator are supported by SMARTsend?

Netscape Navigator version 7.2 or higher is supported for viewing and configuring the SMARTsend 2.0 site, managing devices and managing workflows.

When I attempt to uninstall SMARTsend, I receive an IIS error and the un-installation is not successful. Why?

In order to successfully uninstall SMARTsend from your computer, you must have IIS installed. If IIS was uninstalled first, please reinstall IIS and then attempt to uninstall SMARTsend again.

If you attempt to uninstall SMARTsend after IIS has been uninstalled, you will receive the error message shown in *Figure 1*.

Error	×
8	The Microsoft IIS Service must be installed on the local computer before installation can complete. Please configure the Microsoft IIS Service and restart the SMARTsend installer. On a Windows 2000 Server or a Windows XP Workstation, please uninstall the Microsoft .NET Framework if present before installing IIS.
	ОК
	Figure 1

Why can I only file to one Hummingbird server at a time? Once the Hummingbird DM version 5.1.0.5 client is installed on the SMARTsend computer, the client requires that the desired Hummingbird DM server be specified using the DM Connection Wizard. Due to this requirement, SMARTsend will be able to use only one Hummingbird server at a time.