SMARTsend™ Release 3
Administrator Quick Reference

Note

DO NOT attempt to install SMARTsend using this document alone. The cross references in this document pertain to the *SMARTsend Installation and Administration Guide,* which contains detailed information and instructions that are essential for a successful installation. See Chapter 2, *Prepare for Installation* of the SMARTsend Installation and Administration Guide for information and issues that should be considered before you attempt to install and use the SMARTsend application. Please allow adequate lead time to address these issues.

SMARTsend Configuration Requirements

Computer configuration is the foundation for a successful SMARTsend installation. Please follow and confirm all the guidelines and requirements in this section to ensure that the computer is properly configured to support SMARTsend.

- For best performance, install SMARTsend on a dedicated computer with a minimum of a 1.0 GHz or faster CPU, at least 750 MB of free disk space, 512 MB RAM (1 GB or more is recommended and is required for Windows Vista), and a single network adapter (multiple adapters are not supported). The computer cannot be a domain controller.
- SMARTsend Standard or Professional Editions can be installed on the following platforms: Windows 2000 Server or Advanced Server (SP4 or later), Windows 2003 Server with all critical operating system software updates installed, Windows Vista, or a Windows XP Professional computer (SP2 or later).
- SMARTsend may also be installed on any of the supported operating systems in conjunction with VMware or Microsoft Virtual PC/Virtual Server.

Note

SMARTsend performance may degrade when it is run on a shared file/print server, or when using VMware or Microsoft Virtual PC/Virtual Server. Performance degradation is likely to be more significant when using SMARTsend Professional OCR features.

- TCP/IP must be enabled and functional.
- Confirm that the ports required for each supported protocol are not blocked by filtering at a switch, router, or firewall. See *TCP/IP Port Configuration* in chapter 2 of the Installation and Administration Guide.
- If using DNS, it must be properly configured. If the PaperWare Form Forwarding options are used (Professional Edition), DNS must also be configured on all SMARTsend and FlowPort computers that will be receiving forwarded forms. See "Verifying the SMARTsend Computer DNS Configuration" on page 9. and "Configure PaperWare Form Forwarding Settings" on page 40.
- File and Printer Sharing must be enabled on the network adapter and port 139 must be available. See "Enable File and Printer Sharing" on page 10..
- Internet Information Services (IIS) 5.0, or higher, must be installed and configured with the Common Files, Internet Information Services Manager, and World Wide Web Service. For Windows Vista, IIS 6.0 compatibility must be installed. If using FTP for filing, the FTP Server component must also be enabled. See "Install and Configure IIS / FTP" on page 11.. Please note that IIS is part of the Windows operating system, and its components can be installed using the Windows Add/Remove Programs options.

Note

The SMARTsend installation program will install the .NET Framework if it is not present on the computer. However, IIS must be installed before the .NET Framework is installed on a Windows 2000 Server/Advanced Server, a Windows XP Professional computer or a Windows Vista computer. If the .NET Framework and IIS are currently installed on the computer and you are not certain if IIS was installed first, then these components should be uninstalled and reinstalled in the proper sequence. (IIS and then SMARTsend, which installs .NET Framework 2.0)

- Confirm that the Default Web Site and the FTP server are running under IIS before using SMARTsend.
- Confirm that the Windows Authentication Methods are properly configured in IIS before installing SMARTsend. Integrated Windows authentication is always required. Basic Authentication is also needed when non-Microsoft browsers are used with SMARTsend. See "Windows Authentication Methods Configuration" on page 12..
- ASP.NET must be enabled *(Windows Server 2003 only). See "Enable ASP.NET" on page 13..*
- If SMARTsend is being installed on a Windows XP Professional computer, then Simple File Sharing must be disabled. Please consult the Microsoft web site, www.microsoft.com, for Simple File Sharing configuration instructions.
- If SMARTsend is being installed on a Windows Vista computer, configure your PC by following these instructions:
  - Disable the User Account Control by opening the Control Panel and the User Accounts icon, selecting the **Turn User Account Control On or Off** link and deselecting the **Use User Account Control (UAC)** checkbox. Select **OK**.
  - Enable SNMP by opening the Programs and Features icon from the Control Panel, selecting the **Turn Windows feature on or off** link and select the **SNMP Feature** checkbox. You do not need to select the WNI SNMP Provider checkbox.
  - Enable the Internet Information Services by opening the Control Panel and the Programs and Features icon.
  - Expand the Internet Information Services directory and then expand the FTP Publishing Service.
  - Enable the FTP option under IIS. You do not need to select the FTP Management Console. Select the **Web Management Tools** option.
  - Expand Web Management Tools and verify that all checkboxes are selected.
  - Expand WWW Services and Application Development Features.
  - Select .NET Extensibility, ASP.NET, ASP, ISAPI Extensions and ISAPI Filters.
  - Select the **Common HTTP Features** checkbox.
  - Expand Common HTTP Features and verify that all checkboxes are selected.
  - Expand Security and select the **Basic Authentication, Request Filtering** and **Windows Authentication** checkboxes.
  - To allow a program through the Windows Firewall, open the Control Panel and the Windows Firewall icon.
  - Select the **Allow a Program through Windows Firewall** and, from the Exceptions tab, select the **File and Printer Sharing, Secure World Wide Web Services (HTTPS)**, and **World Wide Web Services (HTTP)** checkboxes. If other programs are selected, do not deselect those checkboxes.
- SMARTsend administrator, user, and device accounts must be configured. See "Create Administrator, User, and Device Accounts" on page 14.
- If secure password entry is required, a security certificate must be installed *(Optional). See "Obtain and Install a Security Certificate" on page 17.*
- Additional configuration is required to manage the SMARTsend computer as a secure web site. See "Secure Web Site Configuration" on page 3.
- Additional configuration is required on the SMARTsend computer when using Domino.doc, SharePoint Portal Server 2001, Novell NetWare, Remote Printers, DocuShare, and other optional destinations. See "Additional Requirements for Destinations" on page 21.

Client and Browser Configuration Requirements

Confirm and test the following client and browser requirements prior to installing and using SMARTsend:

- Microsoft Internet Explorer version 5.5 or higher. *(Internet Explorer is recommended for best performance.)*
- Netscape version 7.2 or higher.
- Mozilla version 1.7 or higher.
- Mozilla FireFox version 1.0.6 or higher.
- If you are running SMARTsend on an intranet, the browser must be configured to include the SMARTsend computer in the proxy server exceptions list. See *"Modifying Proxy Server Settings" on page 23.*
- Popup blockers should be disabled or reconfigured to bypass or exclude SMARTsend. Popup blocking software will prevent certain SMARTsend screens from displaying.
- When installing SMARTsend, you have the option to select the language to use for the installation (the default language is English). During the installation, a language screen displays allowing you to select one, some, or all languages listed in which SMARTsend Help and screens can be displayed on the browser. See "Language Settings" on page 25. for more information.
- Adobe Acrobat Reader version 4.0 or higher is required for viewing and printing PaperWare cover sheets (Professional Edition feature) and the SMARTsend documentation.

Scanning Device Configuration

Note

An updated list of supported devices and device requirements is available from the Support & Drivers link on the Xerox web site at www.xerox.com.

The following Xerox Multifunction Devices can be used with SMARTsend:

- Document Centre 265/255/240 (system software versions 18.6 or greater), 440/432/425/420 ST, 430/426 ST, 490/480/470/ 460 ST, or 555/545/535 ST
- WorkCentre Pro 65/75/90, 35/45/55, 32/40, 123/128/133, 165/175, C2128/C2636/C3545, 232/238/245/255/265/275, Work- Centre 5632/5638/5645/5655/5665/5675/5687, 7132, 7228/7235/7245, 7328/7335/7345, 7655/7665/7675
- Xerox 4590/4595 Copier/Printer
- Xerox 4590/4110 Copier/Printer—subject to the following caveats:
  - Device discovery is not supported. The IP Address or Host Name must be entered manually.
  - Private templates are not supported because this device does not support network authentication.
  - Auto-refresh of templates is not supported. Users must select the Refresh button at the device user interface to update the template list.

The following configuration requirements apply to all Xerox Multifunction Devices that will be used with SMARTsend:

- TCP/IP must be enabled and properly configured.
- The Network Scanning Option must be enabled and properly configured.
- SMARTsend automatically creates several Windows accounts that are needed for device configuration. It also provides options to create and manage the device accounts manually. See "Create Administrator, User, and Device Accounts" on page 14. and "Manage Device Accounts" on page 15 for additional information.
- If authentication is required for private workflows/Scan to My E-mail, then authentication must be enabled and configured to authenticate users from the same domain or trusted domain as the SMARTsend computer. Please consult the documentation provided with your Xerox device for instructions on enabling and configuring authentication.
- During device configuration, SMARTsend overwrites the Default Repository and Template Pool scan settings of a Xerox Multi- function Device. If you have existing applications that use the Default Repository, reconfigure the applications and the device to use an Alternate Repository for those applications *before* configuring the device to use SMARTsend. See "Scanning Device and Application Migration" on page 3. for additional information.
- A single Xerox Multifunction Device cannot use both CentreWare Network Scanning Services and SMARTsend. If existing Cen- treWare Network Scanning Services templates need to be utilized within SMARTsend, use the SMARTsend Template Importer to import the desired templates. See "Template Importer" on page 3..

Internet Fax and E-mail Enabled Device Requirements

Note

An updated list of supported devices and device requirements is available from the Support & Drivers link on the Xerox web site at www.xerox.com.

The following Internet Fax and e-mail enabled devices can be used with SMARTsend Professional Editions via PaperWare cover sheets:
- E-mail enabled devices, including:
  - Xerox WorkCentre M20i
  - Xerox WorkCentre Pro 416si
  - Xerox WorkCentre 4150s/4150x/4150xf
  - Xerox WorkCentre M118i
  - Xerox WorkCentre M24

Note

Due to the architecture of the e-mail feature on these devices, there may be certain scan file format restrictions associated with scanning from these devices. Please refer to "Internet Fax and E-mail Enabled Device Requirements" on page 30 for additional information.

  The same dedicated POP3 e-mail account that is created for the Internet Fax inbox on the incoming mail (POP3) server can be used for receiving e-mail from these devices. See "Configure PaperWare Internet Fax Settings" on page 24. for additional information.
- All Internet Fax devices that support RFC 2301 file format profiles S, F, or C, including Xerox WorkCentre Pro 685/785 and Xerox WorkCentre Pro 416Si.

The following configuration requirements apply to all Internet Fax devices:
- TCP/IP must be enabled and properly configured.
- A DNS Host Name, static IP address, or DHCP must be configured *(requirements vary by manufacturer)*.
- Simple Mode Internet Fax must be available (Extended Mode is not supported by SMARTsend).
- A dedicated e-mail account must be created for the Internet Fax inbox, which is used by the SMARTsend computer.

Consult the documentation provided by the Internet Fax device manufacturer for specific network configuration requirements.

Installation Information

- SMARTsend Administrator information

  (Used to provide SMARTsend users with a point of contact for site administration and support. This information will appear on confirmation pages and other notifications.)

  Telephone: _____

  Name: _____

  E-mail Address: _____

- Mail (SMTP) server fully qualified DNS name or IP address

  (Used for Scan to E-Mail, scan job confirmations, administrative event notifications, and configuration messages.)

  DNS name or IP Address: _____

- Application "Reply To" e-mail account address

  (This Reply To information appears in the Reply to field of e-mail confirmation messages and error notifications. See "SMTP Server Configuration" on page 25. and "General Settings" on page 35 for more information.)

  "Reply To" address:_____

- LDAP server fully qualified DNS name or IP address

  (Used for the integrated address book e-mail address lookup features.)

  DNS name or IP Address: _____

- Password for database access

  (This password is required for configuration of the database that SMARTsend creates. It is only used by SMARTsend. Administrators and users do not need to use this password at any time other than the initial installation.)

  Password: _____

- Application path, if different from default *(path cannot be changed after installation)*

  Path:_____

- SMARTsend Device Account names and passwords—*Optional*
  (SMARTsend creates device accounts for each protocol automatically. However, if you choose to create and manage these accounts manually, you should record this information in the space provided below. See "Create Administrator, User, and Device Accounts" on page 14..)

  FTP Account Name/Password: _____

  SMB Account Name/Password: _____

  HTTP Account Name/Password: _____

  HTTPS Account Name/Password: _____

Software Installation and Site Configuration

The SMARTsend configuration wizard can be re-run at any time to repair settings or perform an upgrade. Please refer to Chapters 3 and 4 of the SMARTsend Installation and Administration Guide for additional instructions.

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