July 2009

Xerox® SMARTsend® Release 3
User Guide

Document Version: July 2009

Contents

Welcome to SMARTsend 1

This chapter describes the features and functions of the Xerox SMARTsend software and the support services available through both application documentation and Xerox customer support services.

What is in this chapter:

What is Included in This Release?

SMARTsend is available in Standard and Professional Editions.

Features common to all versions

- Workflow creation features that define the conversion and transmission of paper-based documents from Xerox Multifunction Devices to the following destinations:
    - DocuShare server
    - E-Mail address
    - FTP location
    - Microsoft SharePoint Portal Server 2003/2007
    - Network Folder
    - Remote Printer
    - External Application Connection
- Workflow publication and management features
- Backup and Restore Tools—to save SMARTsend workflows, credentials, user preferences, device configurations, and general settings.
- Repair All Devices
- Template Importer—to import CentreWare Network Scanning Services templates into SMARTsend.
- Job History Exporter—to create a job history text file for analysis and reporting.

Standard and Professional Edition features

In addition to the destinations common to all versions, support the conversion and transmission of paper-based documents to the following destinations:

- URL location
- Netware Folder
- Microsoft Exchange 2000 Web Folder
- Microsoft SharePoint Portal Server 2001
- Domino
- Domino.Doc

Optional components for Standard or Professional versions

- Documentum version 5.2 destination support
- Hummingbird version 5.1.0.5 destination support
- Interwoven WorkSite version 8 destination support
- LiveLink version 9.5.0 destination support
- TRIM Context Server 6.0 destination support

What is New in This Release?

- SMARTsend can now be installed on and accessed through Windows Vista computers.
- The SMARTsend installation wizard has been revised to include a new Language selection screen, a Serial Number and Serial Number confirmation screen, customer settings, and a progress bar at the bottom of each window.
- At the end of the configuration process during installation, the administrator has the option to select the Upon Finish, Launch the Restore Tool checkbox to import a backup database set as part of an upgrade.
- Administrators can preinstall either the SQL Server 2005 or SQL Server 2005 Express application or they now have the option to install SQL Server 2005 Express through the configuration portion of the SMARTsend installation.
- When upgrading, the user has the option to upgrade from V1x or V2x to 3x, or from 3x to 3x.
- From the Start menu, the user can view and select documentation that is available from all installed languages.
- SMARTsend now accepts and supports output file formats Linearized PDF, Secure (encrypted) PDF, and XPS. The user can now encrypt a PDF file before distributing it with the workflow.
- A Repair All Devices tool has been added to the Start menu to reconfigure device settings or recreate templates.
- For quicker results and ease-of-use, the Workflow Explorer window has been redesigned, including such windows as the User Publications List, Admin Workflows, Publications List and Manage Credentials.
- Administrators, and not just the originator of a workflow, can edit a workflow.
- A link to the device web user interface can be viewed from the Xerox Manage Devices area of the Administration window.
- In the Scan to Home Setup area, the system now remembers the last publish option selected during the current session.
- In the Scan to Home Setup area, the publish option templates can be shared and the administrator can now choose suffixes to attach to documents.
- The Advanced Settings page has been added to the Administration window for users to easily change the proxy server settings if needed.
- To help the user find and select a device when publishing a workflow to a multi-function device, more specific information about the device has been added and the ability to search (filter) the list of devices.
- Support of TRIM optional component destination has been added to this release.
- New printer devices are now supported such as WorkCentre 7655/7665/7675, 5632/5638/5645/5655/5675/5687, 7328/7335/7345 and the WorkCentre 4150s/4150x/4150xf.
- Users can create workflows with macros in the filename Document Management field on the multifunction device user interface.
- Xerox TrueMatch (optional), which allowed users to create search workflows that located documents on the network, is not supported in this release.

SMARTsend Overview

SMARTsend combines and enhances many of the powerful features of two Xerox products—FlowPort™ and CentreWare™ Network Scanning Services—to deliver one integrated software application. Built on the Microsoft .NET platform, SMARTsend software works with new and legacy Xerox advanced multifunction systems, as well as many types of Internet Fax devices from Xerox and other manufacturers.

Using SMARTsend, paper documents can be scanned in full color and converted into a variety of industry standard digital formats, including PDF, XPS, JFIF/JPEG, TIFF, and Multi-Page TIFF formats. SMARTsend can also convert scanned documents into editable files such as Excel, Word, PowerPoint or searchable PDF. The resulting files can then be edited, manipulated, saved and shared. The system will also allow a PDF to be encrypted before being distributed. SMARTsend also allows the user to add descriptive information (also known as metadata) that will accompany the scanned documents. These versatile features make it simple to categorize, search and retrieve scanned documents.

Web-based application

SMARTsend is a web-based application that requires no additional client software. Users can easily create workflows that define the type of scanned document, the distribution locations and processes, and the methods and devices that can be used to submit SMARTsend scan jobs. The workflow is then published to make it available to users as device scan templates, or as PaperWare cover sheets (Professional Edition). These publications make it simple for anyone to scan a document and distribute the resulting electronic file(s) to a wide variety of destinations, including e-mail addresses, network folders, FTP folders, remote printers, external applications, Web URLs, Domino and Domino.doc repositories, Microsoft SharePoint Portal Server repositories, and Xerox DocuShare respositories. Additional destinations, such as advanced document management repositories, can be added as optional components.

Ease of use

SMARTsend is designed for ease of use, versatility, and security. Wizards assist users with complex tasks, and descriptive instructions, status messages, and help system information that accompany all SMARTsend screens. Users can set up e-mail and printed confirmation reports, and administrators can create job logs to track usage and obtain audit trails in support of legal and regulatory requirements. Where security is important, SMARTsend stands above the competition with support for the latest secure protocols and secure web site configuration options. In addition, the open and flexible .NET architecture permits easy integration with other programs and provides the flexibility to expand capabilities and features as Xerox makes future enhancements available.

SMARTsend Documentation

Several forms of documentation are available with SMARTsend, including printable guides that are provided as Adobe Acrobat PDF format documents. The documentation components can be accessed from the links that are provided on the SMARTsend Home Pages, or from the links in the CD autorun program. SMARTsend administrators can also access the Readme file and the Installation and Administration Guide from the Start Menu on the SMARTsend computer.

The Adobe Acrobat Reader is required to view and print the guides. Obtain the reader from the Adobe Web site, www. adobe.com.

SMARTsend Installation and Administration Guide

The *SMARTsend Installation and Administration Guide* includes step-by-step instructions for installing and configuring the SMARTsend computer, clients, and supported scanning devices.

For information about installing the SMARTsend device extensions software, access and download the *Device Extensions Installation & Administration Guide* from the SMARTsend Drivers and Download page on www.xerox.com.

SMARTsend User Guide

The *SMARTsend User Guide* introduces SMARTsend to new users. It includes overviews of all the main SMARTsend pages and features, as well as step-by-step instructions for key tasks users perform with SMARTsend.

Help

SMARTsend contains extensive online Help that covers the use of the application beyond installation and initial configuration. Help links are included in the upper right corner of any SMARTsend page.

Quick Reference Cards

SMARTsend documentation includes the following Quick Reference Cards:

- **Administrator Quick Reference**—Contains requirements, basic installation procedures, and site configuration information for SMARTsend administrators.
- **User Quick Reference**—Contains basic overview and getting started information for general SMARTsend users.

Note: The Administrator Quick Reference is not recommended for first-time installations of the product. Please use the Installation and Administration Guide for detailed planning and installation instructions.

Readme.txt

Readme.txt provides product support information that was not available when the other documentation components were released for publication. This information is intended primarily for SMARTsend administrators, and it can be accessed by administrators using the following methods:

- After SMARTsend is installed:

  On a Windows 2000 server, click **Start** > **Programs** > **Xerox** > **SMARTsend** > **View ReadMe.txt**;

  - OR -

  On a Windows XP Professional computer or server running Windows Server 2003, click **Start** > **All Programs** > **Xerox** > **SMARTsend** > **View ReadMe.txt.**
- Insert the SMARTsend CD into your CD drive. Click the README File link from the CD Installer program.
- Click the View Readme file button during installation.

Customer Support

You can contact Xerox for support either by telephone or Internet.

Telephone Support

For additional assistance, contact Xerox by telephone to speak with a Customer Support Representative. Before you call, locate the SMARTsend Serial Number by clicking the About link in the upper right corner of any SMARTsend page. For future reference, be sure to record the Serial Number in the space provided below. The Serial Number is required to obtain technical support from Xerox.

Xerox SMARTsend Serial Number:

Note: SMARTsend permits the management of a limited number of devices. To identify the number of supported devices, click the About link on any SMARTsend page and locate the product serial number. The last set of digits appended to the serial number indicate the number of supported devices. By default, SMARTsend Standard and Professional Editions support the configuration of up to five devices and SMARTsend

The Xerox customer support telephone numbers are listed in the following table. If the telephone number for your country is not listed, please contact your local Xerox representative to obtain the number. If necessary, please record the telephone number in the space provided below.

Xerox Customer Support Telephone Numbers:	
UNITED STATES	800-821-2797
UNITED STATES (TTY)	800-855-2880
CANADA	800-939-3769 (800-93-XEROX)

Internet Support

Additional tips and technical information are available from the Support & Drivers link on the Xerox Web site, www.xerox.com. Locate or search for your product and access the product support resources. The documents in this section cover specific issues that may require special procedures or application notes regarding the operation and configuration of your Xerox product.

Site Overview

2

This chapter summarizes the basic components of the User Home Page. It is intended to explain the entry points to the SMARTsend application and to provide a foundation for later chapters.

What is in this chapter:

Accessing the User Home Page

SMARTsend is a web-based application. The User Home Page is the central access point for creating and accessing workflows and workflow publications, managing credentials, and configuring personal settings.

The following browsers are currently supported:

- 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.

➤ To access the User Home Page:

1. Open a browser window.
2. Enter the following URL or address:

   http://[computer name]/SMARTsend

   where *computer name* is the name of the SMARTsend computer. Contact your SMARTsend administrator if you are unsure of the computer name.
3. Press **Enter**.
4. You may be asked to enter your user name and password. Enter your SMARTsend user name and password and click **OK**.
5. A SMARTsend Welcome screen will be displayed. Select **Click here to enter SMARTsend**.
6. The User Home Page appears. Keep in mind that some SMARTsend options and buttons that are located at the bottom of the pages may not be visible on all displays. Use the scroll bar on the right side of the window to scroll to the bottom of the pages as needed. If you change the settings on the page, you will need to click the **Save** or **Save As** button at the bottom of the page in order to save the changes on certain pages.

Note: If a proxy server is used to connect to the Internet, you may need to bypass the proxy server in order to connect to SMARTsend. This is done by bypassing the proxy server for all local addresses or by adding the IP address and fully qualified Host Name of the SMARTsend computer to the proxy server exceptions list. See your administrator for detailed instructions.

Note: Pop-up blockers may interfere with some SMARTsend windows. Pop-up blockers should be disabled for the SMARTsend URL. See your administrator for instructions on disabling your pop-up blocker.

About the User Home Page

The User Home Page contains visual cues to indicate who is logged in, what computer the user is logged into, and where in the application the user is.

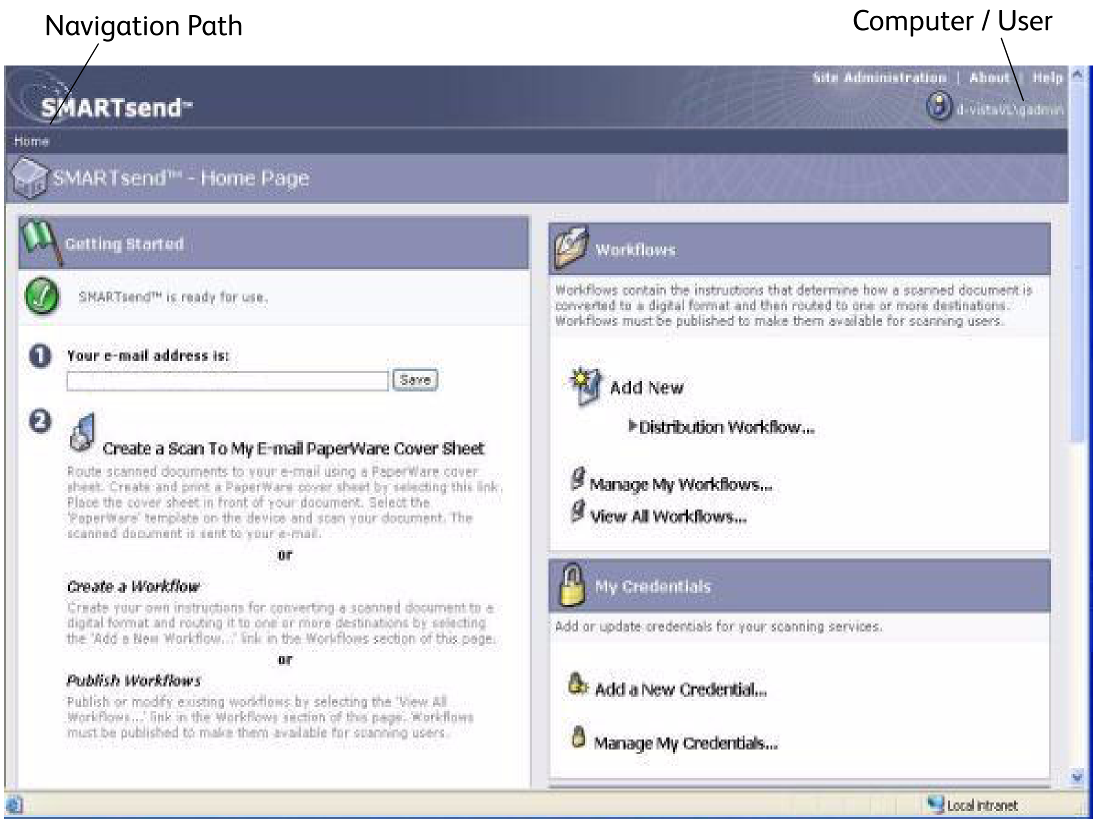

Figure 2-1: User Home Page (Top Section)

- **Navigation Path** – This area lists the current page and the pages that were used to access the current page. For example, *Home >> Workflow Explorer >> Add New Distribution Workflow* is displayed when adding a new workflow. Keep in mind that the text provides links to each page. Click on the links to access any of the SMARTsend pages in the path.
- **Computer / User Name** – This area displays the SMARTsend computer name and the user who is currently logged in.

Note: On many of the SMARTsend pages it may be necessary to scroll down to see additional buttons or to view error messages.

Getting Started

The left side or Getting Started section of the User Home Page indicates the status of the application.

The following icons appear to indicate the status of a step or the application:

 Indicates that a step is not complete or that the application is not ready for use.

 Indicates that a step may not be complete.

 Indicates that a step is complete or that the application is ready for use.

E-mail Address

You must enter an e-mail address before managing workflows and credentials. Your e-mail address is used for e-mail confirmation and as a destination for the My E-mail workflow which comes with the SMARTsend installation. Type your e-mail address and click **Save**.

Create a Scan To My E-mail PaperWare Cover Sheet

Professional Edition Feature

Although the My E-mail workflow is part of the SMARTsend installation, the workflow must be published before it can be used. Creating a PaperWare cover sheet is one method of publishing the workflow. Use this link to create a cover sheet for the My E-mail workflow. See Publishing Workflows on page 83, for details on publishing workflows.

The My E-mail workflow is used to automatically e-mail a scanned document to the e-mail account of the scan submitter. The scan submitter is the owner of the PaperWare cover sheet or the person who is logged in at the Xerox Multifunction Device. If the device requires authentication, however, the scan will always be sent to the person who is logged in at the device.

Workflows

Add New Workflow

Any user can create a new workflow. The *Add New* links invoke a wizard which leads you through the steps necessary to define the workflow, including defining the document destinations, specifying the document attributes, and determining the workflow settings. See Adding a Distribution Workflow on page 27 for more information on adding workflows.

Manage My Workflows

This link invokes the Workflow Editor which you can use to manage workflows and publications you have created. From the Workflow Editor you can view, add, edit, delete, and publish workflows, as well as view and delete publications. For more information on the Workflow Editor, see Distribution Workflows on page 23.

View All Workflows

This link invokes the Workflow Explorer which you can use to view all public workflows, as well as all private workflows you own. The workflow tasks that are available from the left panel depend upon the workflow selected from the list of workflows on the right panel. For more information on the Workflow Explorer, see Distribution Workflows on page 23.

My Credentials

Scanning credentials are needed for all scanning destinations that require credentials for storing and filing scan documents, e.g., DocuShare, Domino, Microsoft Exchange, FTP, NetWare Folder, Network Folder, or Microsoft SharePoint. The My Credentials region enables you to add or modify credentials (login user name/password) for scanning document destinations.

Add a New Credential

You will be prompted to add credentials for new destinations when you add a new workflow. See Adding a Distribution Workflow on page 27. You may also add credentials for new destinations using the *Add a New Credential* link on the User Home Page. For more information on adding credentials, see Managing Destination Credentials on page 34.

Manage My Credentials

When credentials on an existing destination have changed, the new credentials must be reflected on the SMARTsend computer or the workflow scanning job will fail. You can manage credentials for destinations using the *Manage My Credentials* link. For more information on changing or deleting credentials, see Managing Destination Credentials on page 34.

Customization Options

Job Confirmation E-mail Address

This option specifies an e-mail address for jobs that are configured for e-mail confirmation.

- Select **Use my e-mail address for e-mail job confirmation** to use your SMARTsend e-mail address. See E-mail Address on page 18.
- To use an alternate address, select **Use the following e-mail address for e-mail job confirmation**, specify an e-mail address, and click **Save**.

Site Preferences

User preferences for using SMARTsend are configured here.

Select **Show status pages on both failure and success** to have status pages appear after successfully performing tasks such as publishing workflows. If this option is not selected, no status pages will be displayed when workflows are successfully published.

Select **Show Welcome screen next time I access SMARTsend** to have the Welcome Page appear when you access the application.

Manage My Document Attribute Profiles

This link takes you to the Manage Document Profiles page. Document attributes are pieces of additional information which can be added to each scanned document to describe the document—information such as document version, document title, or document description. These document attributes can be created when a workflow is created and will be applied when the workflow is scanned.

The SMARTsend installation comes with pre-packaged sets of document attributes, also called document profiles. All document attribute profiles are publicly accessible by all SMARTsend users. The document profiles displayed during workflow creation are filtered by workflow document destinations. For example, FTP Only is a document profile for an FTP destination and will only be displayed when a workflow has an FTP destination.

The Manage Document Profiles page will display all document profiles in the system. From this page document profiles can be deleted by the workflow owner or by an administrator. Custom document attribute profiles can be created during workflow creation. See Document Attribute Profiles on page 60 for details on managing document profiles.

Personalize Your PaperWare Form Scan Settings

Professional Edition Feature

This link allows you to publish templates with customized scan settings for PaperWare cover sheets.

During device configuration, a PaperWare template (named *PaperWare*) is automatically published for each device configured for the application. This PaperWare template uses a set of default scan settings.

If you often choose alternate settings at the Xerox Multifunction Device when using the PaperWare form, you may publish a new device template with the desired scan settings. When scanning at the device using a PaperWare cover sheet, you then select the new template rather than the default PaperWare template. See Customizing PaperWare Scan Settings on page 85 for more information on personalizing PaperWare scan settings.

Distribution Workflows 3

This chapter covers how to create and edit distribution workflows. Included are detailed instructions for specifying document destinations, filenames and formats, document attributes, and other settings that affect the operability of SMARTsend distribution workflows.

What is in this chapter:

Workflow Overview

SMARTsend uses the concept of workflows to manage how scanned documents are converted to a digital format and then routed to various destinations. For example, a workflow can be created that will convert paper documents to PDF files and then route the PDF files to a document repository such as a DocuShare repository. The workflow can also specify multiple destinations, such as e-mail accounts, network folders, or any combination of document repositories.

Workflows offer:

- Automation of frequently used tasks and settings
- Versatile security options
- Simple use and maintenance

Workflows are a convenient method of combining scan job settings such as destinations, document name and type, document attributes, and imaging settings into a single entity that can be used and reused whenever appropriate. The Document Name and Type are properties that define and describe a scanned document. Defining the basic attributes for the scanned document, such as the file name and the type of digital format (for example, PDF, XPS, JFIF, Single-Page TIFF, Multi-Page TIFF, etc.), are essential to creating a usable workflow. SMARTsend also provides a way to add optional document attributes, commonly referred to as metadata, to scanned documents. These attributes are stored with the digital document and can be used to automate document storage, retrieval, and management tasks.

Workflows can be designated as either public or private. Public workflows are available for use by all SMARTsend users to view, use, and edit (if edits are saved, a copy of the original is made for this new owner). Private workflows can be viewed, used, deleted and edited only by the workflow owner (workflow creator). SMARTsend administrators can list, view, edit (without making a copy) and delete private or public workflows. Administrators do not publish workflows.

Workflows must be published to make them available for use when scanning documents. For information on publishing workflows, see Publishing Workflows on page 83.

Workflow Explorer

The Workflow Explorer page is used to access and manage workflows and is where the majority of SMARTsend user operations are performed, including viewing, adding, editing, and publishing workflows. Access the Workflow Explorer from the Home Page by clicking **Manage My Workflows**, which displays only the workflows created by the user who is logged into SMARTsend, or by clicking **View All Workflows**, which displays all workflows to which the user who is logged in has access.

The left side of the Workflow Explorer contains the menus for Workflow Tasks and Workflow Views. Details of the particular workflow selected on the right side of the Workflow Explorer are displayed in the Details region on the left side.

The right side of the Workflow Explorer displays the workflows in a table. The list of workflows can be sorted by a particular heading by clicking on that heading. A workflow must be selected when editing or publishing a workflow.

The following icons appear next to workflow names:

 Indicates a workflow created by the user who is logged in.

 Indicates a workflow created by a user other than the user who is logged in.

 Indicates a private workflow created by the user who is logged in.

 Indicates a PaperWare Scan Settings workflow (Professional Edition feature).

Workflow Tasks

The Workflow Tasks region lists the tasks that are available to the user for the selected workflow. Except for adding a new workflow, the task selected will operate on the workflow selected in the right panel.

The tasks available will vary based upon the workflow selected. For example, if a workflow has not yet been published, the tasks to view or delete the workflow publications will not be available for that workflow.

Note: The My_E-mail workflow that comes with the SMARTsend installation cannot be deleted.

Workflow Views

View options allow you to view different listings of workflows and publications.

Show All

Click **Show All** to view all of the workflows to which you have access. This includes all public workflows and only the private workflows that you have created.

My Workflows

Click **My Workflows** to view all the public and private workflows that you have created.

Workflow Details

The Details region displays information about the workflow selected in the right panel. The following information is displayed:

- The name of the workflow
- The description of the workflow, if any
- The owner of the workflow
- Whether the workflow is public or private
- When the workflow was last used for scanning
- When the workflow was last edited
- Number of device publications
- Number of PaperWare publications (Professional Edition feature)
- Total number of publications for that workflow or owner
- Indicates that the workflow is a Distribution workflow.

Adding a Distribution Workflow

There are two ways to create a workflow. A new workflow can be created by using a wizard which steps the user through the process of defining the workflow. Alternatively, a new workflow can be created by basing the new workflow on an existing workflow.

Creating a New Distribution Workflow

Any user can create a new workflow. A wizard leads the user through the steps necessary to define the workflow, including defining the document destinations, defining the filename and formats, specifying the document attributes, and determining the workflow settings.

To create a new distribution workflow:

1. Navigate to the User Home Page and click **Add New Distribution Workflow** under the Workflows heading.
2. Select the desired destinations for the scanned output files. For destinations that have already been configured, checkboxes will be displayed. Select a configured destination by selecting the checkbox for the destination. If a desired destination is not listed, go to the destination type and click **add locations**. See Document Destinations on page 32 for detailed information on adding destinations.
3. Click **Next >>**.
4. Specify the document name and type. See Document Name and Type on page 46 for detailed information.
5. Click **Next >>**.
6. Specify the document attributes. See Document Attributes on page 60 for detailed information.
7. Click **Next >>**.
8. Specify the workflow settings. See Save Workflow on page 67 for detailed information on specifying workflow settings.
9. Click **Next >>**.
10. At the Save Workflow page review the workflow details specified in the previous steps. If something needs to be changed, click the **Change** buttons on the page to return to the previous screens. Otherwise, click **Finish** to create the workflow.

If you specify that the workflow is to be published later, you will be returned to the User Home Page. Otherwise, the appropriate Publish Workflow page will be displayed. See Publishing Workflows on page 83 for information on publishing workflows.

Creating a Workflow from an Existing Workflow

Sometimes a new workflow may be needed that is similar to an existing workflow, except that a different document destination or some other property of the workflow needs to be altered. Rather than creating a new workflow, you can make the needed changes to the existing workflow and save it under a different name.

Note: In order to create a new workflow from an existing one, you must edit the existing workflow. See Editing a Workflow on page 29 for information on editing a workflow.

➤ To create a new workflow from one that already exists:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the list of workflows in the Workflow Explorer select the workflow that you want to use as the basis of the new workflow.
3. Click **Edit this workflow** from the Workflow Tasks list on the left side. The Save Workflow page will be displayed.
4. Before making any other changes, you should rename the workflow. Change the workflow name and click **Save As**. The Workflow Explorer window will be displayed, and the new workflow will now be in the list of workflows. This workflow is identical to the workflow on which it was based, except that it now has a different name.
5. To make additional changes, follow the steps in
6. Editing a Workflow on page 29.

Note: If you are saving the workflow of another user, you will need to add credentials for the destinations. The workflow always uses the credentials of the owner. If you do not add new credentials at the time you create the workflow, you will be prompted to add them when the workflow is published. See Add a New Credential on page 20 for information on adding credentials.

Editing a Workflow

Any user or administrator can edit a public workflow. Only the administrator or workflow owner (i.e., creator) can edit a private workflow. Workflows are edited with the Workflow Editor.

Note: You can only save changes to a workflow if it has not been published. If the workflow has already been published, you must save the changes as a new workflow by clicking **Save As**. If you want to edit a published workflow, you can delete all publications using the *Delete this workflow's publications* task and then edit and save the edited workflow.

➤ To access the Workflow Editor:

1. Navigate to the User Home Page and click **View All Workflows**. If you are editing your own workflow, you can also click **Manage My Workflows**.
2. From the list of workflows in the Workflow Explorer select the workflow you want to edit.
3. Click **Edit this workflow** from the Workflow Tasks list on the left side. The Save Workflow page will be displayed.

   Note: If you are editing the workflow of another user, you will need to add credentials for the destinations. The workflow always uses the credentials of the owner at scan time. If you do not add new credentials at the time you edit the workflow, you will be prompted to add them when the workflow is published. See Add a New Credential on page 20 for information on adding credentials.

4. From the Save Workflow page you can modify the Workflow Name and Description, as well as the Publication Options. You can also modify any of the editable workflow properties using the Change buttons. There are Change buttons for each of the main workflow components.
   a. **Workflow Settings**—click the **Change Settings** button to modify the settings on the Workflow Settings page. See Save Workflow on page 67 for additional information.
   b. **Document Attributes**—click the **Change Attributes** button to modify the settings on the Document Attributes page. See Document Attributes on page 60 for additional information.
   c. **Document Name**—click the **Change Name** button to modify the settings on the Document Name and Type page. See Document Name and Type on page 46 for additional information.
   d. **Document Destination and Formats**—click the **Change Destinations** button to modify the settings on the Document Destinations page, or the Change Formats button to modify the document format settings on the Document Name and Type page. See Document Destinations on page 32 and Document Type on page 48 for additional information.

5. Click **Save** to overwrite the current workflow, if desired. If you have change the workflow name, the name will also be overwritten. This option is only available if the current workflow has not already been published and if you own the workflow. Otherwise, click **Save As** to create a new workflow based upon the current workflow.

   Note: If you click **Save** or **Save as** from this page, you will be returned to the Workflow Explorer (or to the Publish Workflow page if you selected to have the workflow published), and you will have to click **Edit this workflow** to edit the newly named workflow and make additional changes.

6. If you selected to publish the workflow, the Publish Workflow page will be displayed. See Publishing Workflows on page 83 for more information on publishing workflows.

Deleting a Workflow

Only the owner of a workflow or an administrator can delete a workflow from the Workflow Explorer page.

Note: When a workflow is deleted, all publications of that workflow are also deleted.

➤ To delete a workflow:

1. Navigate to the User Home Page and click **Manage My Workflows**.
2. Select the workflow to be deleted from the list of workflows in the Workflow Explorer.
3. Click **Delete this workflow** from the list of tasks in the left panel. A warning window will be displayed asking if you are sure you want to delete the workflow.
4. To delete the workflow, click **OK**. The workflow will be removed from the list of workflows in the Workflow Explorer. If you do not want to delete the workflow, click **Cancel**.

Note: Workflow publications will also be deleted.

Document Destinations

The Document Destinations page is used to configure destinations for scanned documents. A destination is the final location to which a document is scanned. One or more destinations must be specified when a workflow is created.

➤ To access the Document Destinations page:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the list of workflows in the Workflow Explorer select the workflow for which you want to change document destinations.
3. Click **Edit this workflow** from the list of workflow tasks in the left panel.
4. From the Workflow Editor click **Document Destinations** in the left panel.

Note: The Document Destinations page is also accessed from the **Add New > Distribution Workflow...** link.

The Document Destinations page lists all of the types of destinations that are enabled and can be configured. Within each type, under the *my locations* or *my addresses* sub-heading, are listed the specific destinations that the user who is logged in has configured. Under the *other locations* and *other addresses* sub-headings are destinations configured by other users. Destinations configured by other users only appear if they are used in the specific workflow being edited.

Adding/Removing Listed Destinations to/from a Workflow

To add a listed destination to the workflow, select the checkbox for the destination. To remove a destination from the workflow, clear the checkbox for the destination.

Adding New Destinations

Destinations that are defined and entered into a workflow are kept, regardless of whether the workflow changes are saved. They are not removed unless manually removed from the Document Destinations page. This allows the destination to be selected during the definition of other workflows.

➤ To add a new destination:

1. Find the destination type (for example, DocuShare, FTP, etc.) on the Document Destinations page and click **add locations**. A window specific to the destination type will be displayed.
2. Enter the destination properties. See Destination Properties on page 35.
3. Click **OK**.

4. If credentials to access the destination are needed, an Account Settings page will be displayed. Add the user name and password and click **OK**.

Note: When the Accounts Settings page is displayed, you may be prompted to enter your SMARTsend computer credentials. You must use the same credentials you used to log in to SMARTsend. If you supply different credentials, you may need to use your browser to delete the Temporary Internet Files on your workstation before you can proceed. For example, using Internet Explorer you would choose the following options to delete your Temporary Internet Files: Tools > Internet Options > General > Delete Files > OK.

Editing Destinations

Destination properties other than the destination name can be changed.

➤ To edit the properties of a destination:

1. From the Document Destinations page click the name of the destination to be changed. The properties of the destination are displayed.
2. Edit the properties as appropriate. See Destination Properties on page 35 for information specific to the destination. Editing a destination will cause it to be automatically added to the workflow. Uncheck the checkbox beside the destination if you want to remove it from the workflow.
3. Click **OK**.

Deleting Destinations

Only destinations added by the user and listed under *my locations* or *my addresses* can be deleted.

➤ To remove a single destination:

1. From the Document Destinations page find the destination to be deleted.
2. Without further warning the destination will no longer be available when defining future workflows, so be sure you want to delete the destination before clicking **remove**. Click **remove** to remove the destination.

Note: Workflows that already use the destination will not be affected. For those workflows, the destination will be displayed beneath the *other locations* heading the next time destinations are edited.

To remove all destinations of a particular type:

1. From the Document Destinations page find the destination type.
2. Without further warning all destinations will no longer be available when defining new workflows, so be sure you want to delete the destinations before clicking **remove all locations** or **remove all addresses**. Click **remove all locations** or **remove all addresses** to remove the destinations.

Note: Workflows that already use the destinations will not be affected. For those workflows, the destinations will be displayed beneath the *other locations* heading the next time destinations are edited.

Managing Destination Credentials

Scanning credentials are needed for all scanning destinations that require credentials for storing and filing scan documents, e.g., DocuShare, Domino, Microsoft Exchange, FTP, NetWare Folder, Network Folder, or Microsoft SharePoint. You will be prompted to add credentials for new destinations when you add a new workflow, but you may also add credentials for new destinations before adding a workflow using the *Add a New Credential* link on the User Home Page.

Tip: For DocuShare destinations, you must first create login credentials at the DocuShare root level before adding a workflow for that credential. You can not create credentials for parent folders or subfolders in DocuShare. Enter credentials for the DocuShare server rather than an individual collection whenever possible. This can make it easier to locate collections when browsing, and may eliminate the need to add credentials for individual collections. When entering credentials for the DocuShare server, test that you are able to log into the DocuShare server. Log in using the URL that you will enter into SMARTsend followed by /Login (for example, http://www.docushare.companyx.com/dsweb/Login). The login is case sensitive.

To add new credentials:

1. Navigate to the User Home Page and click **Add a New Credential**. The Account Settings page will be displayed.
2. Select the destination type from the Account Type drop-down list. The number and names of the other edit boxes will change based upon the type of destination selected.
3. Complete the other edit boxes for the destination.
4. Click **OK**.

Note: You may be prompted to enter your SMARTsend computer credentials after clicking **Add a New Credential**. You must use the same credentials you used to log in to SMARTsend. If you supply different credentials, you may need to use your browser to delete the Temporary Internet Files on your workstation before you can proceed. For example, using Internet Explorer you would choose the following options to delete your Temporary Internet Files: Tools > Internet Options > General > Delete Files > OK.

The credentials you have added will now be a "starting point" when creating a destination for this account.

When credentials on an existing destination have changed, the new credentials must be reflected on the SMARTsend computer or the workflow scanning job will fail.

Note: When adding a destination to a SMARTsend workflow, the user credentials that are entered for the destination (e.g. DocuShare, SharePoint Portal Server 2003/2007) must have written 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.

➤ To change the credentials for an existing destination:

1. Navigate to the User Home Page and click **Manage My Credentials**. A list of all destinations with credentials is displayed.
2. Select the destination credential to be changed.
3. From the Credentials Tasks region on the left, click **Edit this credential**. The Account Settings page is displayed.
4. Edit the credential properties as appropriate.
5. Click **OK**.

Note: You may be prompted to enter your SMARTsend computer credentials after clicking **Edit this credential**. You must use the same credentials you used to log in to SMARTsend. If you supply different credentials, you may need to use your browser to delete the Temporary Internet Files on your workstation before you can proceed. For example, using Internet Explorer you would choose the following options to delete your Temporary Internet Files: Tools > Internet Options > General > Delete Files > OK.

➤ To delete an existing credential for a destination:

1. Navigate to the User Home Page and click **Manage My Credentials**. A list of all destinations with credentials is displayed.
2. Select the destination credential to be deleted.
3. From the Credentials Tasks region on the left click **Delete this credential**. A window will be displayed asking for confirmation.
4. Click **OK**.

Destination Properties

This section identifies the types of document destinations supported and the addressing requirements for each. See Adding New Destinations on page 32 for additional information.

Destination Naming and Behavior

There is a limit of 64 alphanumeric characters (including underscores and dashes) for destination names. The name is used to identify destinations at publication time and will appear on PaperWare cover sheets (Professional Edition feature) and on confirmation pages.

E-mail Recipient

Define e-mail recipient properties by entering the appropriate information for recipients, copy (Cc:), and blind copy (Bcc:) recipients. Separate the e-mail addresses with a semicolon, for example:

recipient1@comp.com;recipient2@company.com

You may enter partial names and click **Check name(s)** to search for recipient names. In order for the Check Name(s) feature to work, your administrator must configure the SMARTsend LDAP Property Mappings for your integrated address book. A maximum of 50 names will be displayed when names are checked. If more than 50 names are returned, refine the search by adding more characters.

There is no limit to the number of e-mail addresses you can add. However, mail servers impose size limitations for file attachments. Scan-to-e-mail jobs that exceed the size limitation will fail.

- Select the type of encoding used to send e-mail attachments over the Internet. Both UUEncode and Base64 are standards for encoding binary data as text. UUEncode uses some characters that are not compatible with Extended Binary Coded Decimal Interchange Code (EBCDIC), a character set used mostly in Europe. Internet mail messages use Base64 or MIME (Multipurpose Internet Mail Extensions) encoding. Select Base64 for greater compatibility with European systems.
- Select **E-mail to the submitter of this workflow** if you want to additionally e-mail the scanned document to the submitter automatically. The submitter is the person who scans the document. When device scan templates are used, this option only works on Xerox Multifunction Devices with authentication enabled.
- Select **Send URL link to document (no document attached)** if you only want to send a link. No file is attached or sent to recipients. The link will only be sent if other destinations in the workflow are URL-addressable. Sending a link instead of an actual file attachment is useful for e-mail systems that have memory restrictions for handling large documents. Links to multiple repositories appear in the e-mail if scanning to all destinations is configured.

Note: You must have at least one other destination defined in the workflow that matches the format that has been selected for your e-mail recipient. If not, you will get an attached document and no URLs.

Remote Printer

Text, Multi-Page TIFF, PDF, Microsoft Word, Excel, and PowerPoint format files can be printed using this feature.

- Select the printer from the drop-down list. These are printers that have drivers set up on the SMARTsend application computer. If no printers are shown, contact an administrator to configure printers for the application.
- Enter the number of copies to print. The maximum number of copies you can print will vary based on the selected remote printer.

Documentum (Standard or Professional Edition feature)

The Documentum service is an optional component that can be purchased from Xerox and added as a SMARTsend destination. Documentum version 5.2.5 is currently supported by SMARTsend.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your Documentum credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the Cabinet name and Folder name fields. Otherwise, you may leave the Starting Point blank and enter the Cabinet name and Folder name manually.
- Enter the name of the Documentum Docbase that will be used as the repository for filing scanned documents.
- The Documentum Cabinet name and Folder name define the filing location that the workflow will use. A cabinet is the highest level component for organizing objects in Documentum. Folders, documents, and other objects are created and stored within Documentum cabinets. If you would like to select a folder that branches off from an existing cabinet, you may click Expand to view and select additional folders. You may need to add a user name and password for the cabinet, if the required Documentum credentials have not been configured within SMARTsend. A Cabinet name is required. Adding an additional Folder name is optional.
- ***File overwriting***: Files with the same name are not overwritten.

DocuShare

DocuShare (version 3.1 and 4.0) is a supported document destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your DocuShare credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the DocuShare Collection URL. Otherwise, you may leave the Starting Point blank and enter the Collection URL manually.

- Enter the DocuShare Collection URL for the destination. If the destination branches off from a starting point specified above, then you may click **Expand** to expand the starting point and then select the branch for the destination.

  Example

  http://<server>/view/collection-12345

  You may need to add a user name and password for the DocuShare collection, if the required DocuShare credentials have not been configured within SMARTsend. See Managing Destination Credentials on page 34 for more information.
- ***Custom Object Name***: Custom objects are optional. If needed, enter a name to define a custom object for a DocuShare (version 3.1 and higher) destination. See Appendix C: Specifying a Custom Object in a SMARTsend Workflow on page 81 for additional information.

Note: The custom object must be created in DocuShare before using the SMARTsend workflow that references it. Otherwise, workflow execution will fail.

- ***File overwriting***: Files with the same name are not overwritten.

Domino (Standard or Professional Edition feature)

Domino (version 5.x or 6.0) is a supported document destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your Domino credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the Domino server database URL. Otherwise, you may leave the Starting Point blank and enter the database name manually.
- Enter the URL for the Domino server database. A user name and password are required.

  Example

  http://ff/doclib.nsf
- Enter the name of the form.
- ***File overwriting***: Files with the same name are not overwritten.

Domino.doc (Standard or Professional Edition feature)

Domino.doc (version 3.1) is a supported document destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your Domino.doc credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the Domin.doc library URL, Cabinet title, and Binder title. Otherwise, you may leave the Starting Point blank and enter the information manually.

- Enter the URL of a Domino.Doc library (DDocLIBRARY) for the destination. A user name and password are required.

  Example

  http://ff/domdoc/dominodoclib.nsf
- Enter a Cabinet (DDocCabinet) title.
- Enter a Binder (DDocBinder) title.
- Specify a unique identifier (DDocID) in Upload Document Title for the output document.
- Enter the Domino.doc Profile name. This is the Interchange Document Profile (IDP) that defines the content of the document, such as name, author, etc. It is part of Domino's Document Interchange Architecture.
- Add any check-in Comments for the document.
- ***File overwriting***: Files with the same name are not overwritten.

Hummingbird (Standard or Professional Edition feature)

The Hummingbird service is an optional component that can be purchased from Xerox and added as a SMARTsend destination. Hummingbird version 5.1.0.5 is currently supported by SMARTsend.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your Hummingbird credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the Library Name and Folder Name fields. Otherwise, you may leave the Starting Point blank and enter the Library Name and Folder Name manually.
- Enter the Library Name that will be used as the repository for filing scanned documents.
- Enter the Folder Name that the workflow will use as the document filing location. If the destination folder branches off from an existing folder, you may click **Expand** to expand and select a new folder. A user name and password are required.
- ***Publish (Yes/No):*** Choose Yes if you want to publish the document. This option will designate the resulting scanned document as a published version that has been released to the public. A published document is typically treated as a read-only document.
- ***File overwriting***: Files with the same name are not overwritten.

Interwoven WorkSite (Standard or Professional Edition feature)

The Interwoven service is an optional component that can be purchased from Xerox and added as a SMARTsend destination. Interwoven WorkSite version 8 is currently supported by SMARTsend.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your Interwoven credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the Server Name and Database fields. Otherwise, you may leave the Starting Point blank and enter the Server Name and Database manually.
- Enter the Server name that is hosting the WorkSite database.
- Enter the Database name that will be used as the repository for filing scanned documents.

- Displays the Folder path that the workflow will use as the document filing location. Click **Expand** and select a folder. A user name and password are required.
- ***Publish (Private/Public/View):*** The Publish options determine whether the scanned document will be accessible to other users when it is stored in the Interwoven database.
  - **Public**—all users have read and write access to the document.
  - **Private**—read and write access is restricted to the document/workflow owner (or administrator).
  - **View**—all users have read access to the document. The document/workflow owner or administrator has read and write access.
- ***Checkin Comments:*** Add any check-in Comments for the document.
- ***Document Type:*** This option defines the type of document being stored in the database. This selection determines the metadata schema that is applied to the document, which often varies among applications and different document types. Keep in mind that the list of available document types can be modified by the Interwoven WorkSite administrator. Please contact your administrator if your preferred document type is not available in the list.
- ***File overwriting***: Files with the same name are not overwritten.)

Note: Free-form text entry of attributes (metadata) for custom fields is not supported for Interwoven WorkSite destinations *(optional component)*. Metadata values for custom fields must match the predefined set of values defined by the WorkSite administrator.

LiveLink (Standard or Professional Edition feature)

The LiveLink service is an optional component that can be purchased from Xerox and added as a SMARTsend destination. LiveLink version 9.5.0 is currently supported by SMARTsend.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your LiveLink credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the Server and Folder fields. Otherwise, you may leave the Starting Point blank and enter the Server and Folder manually.
- Enter the Server that is hosting the LiveLink application.
- Click Expand to browse for the Folder that the workflow will use as the document filing location. A user name and password are required.

- ***Category:*** Entering a Category is optional. A Category defines custom metadata that will be used when mapping metadata using document attribute profiles. If needed, click Expand to select a predefined LiveLink Category to apply to the document. See Appendix D: Specifying a LiveLink Category in a SMARTsend Workflow on page 82 for additional information.

  Note: The Category must be created in LiveLink before using the SMARTsend workflow that references it. Otherwise, workflow execution will fail. Also, if a type mismatch is detected for a custom LiveLink document attribute field defined in a “Category”, the error will be ignored, the value will be skipped, and the application will continue the upload. For example, if you define a category field of type ‘Integer’, yet provide a value of ‘NotAnInt’ at the device, the document will be uploaded but the category field will be empty. The confirmation report will report that the job was successful as well.

- ***File overwriting:*** Files with the same name are not overwritten.

TRIM Context Server (Standard or Professional Edition feature)

The TRIM Context Server is an optional component that can be purchased from Xerox and added as a SMARTsend destination. The TRIM adapter must be installed on the SMARTsend computer before the TRIM option can be added to SMARTsend. TRIM Context Server version 6.0 is currently supported by SMARTsend.

- In SMARTsend, add a new credential and select TRIM as the Account Type. Enter the name of the account and the server name. Enter the virtual directory name. The virtual directory is configured within Microsoft IIS 6, and is where the TRIM Connectivity Toolkit binaries reside. By default the name of virtual directory is TRIMCT2.

  Note: This is not the Virtual directory where the "WebDrawer" application is installed. The WebDrawer application is not necessary to use SMARTsend with Trim. In some newer versions of Trim Context, the Trim Connectivity Toolkit is called the "Trim Context Web Sevices".

- Enter the username and password. The user must belong to the domain group on which TRIM Context Services is running. This can be any TRIM user that has been granted remote access, launch and activation rights. Click **OK**.
- Create a SMARTsend workflow. Select Add a New Distribution Workflow to enter a Destination Name that identifies the workflow.
- If the Create folders option is selected, a folder will be created with the name specified in subfolder option if it does not exist and the document will be uploaded in this folder location. If the sub-folder field has more than one folder name with appropriate delimiters (i.e. "/"), the adapter will iterate through the sub-folders list and create all if they do not exist. By default, the documents will be checked into the server. The user can specify the check in comments. These comments will be displayed in the Notes section of the TRIM Desktop.
- The user must enter a valid Record type that is configured to exhibit document behavior. If the behavior of the record type is not "Document", SMARTsend will produce an error.

- A subfolder can be created within a parent folder only when its container level is below the level of the parent folder. The number of subfolders identified by the delimiters must be less than or equal to the available valid folder container levels (folders having container levels less than the parent's container level). The number of available folder types should be less than the number of subfolder levels.
- To set the correct DCOM settings on the TRIM Context Server, select **Start>Administrative Tools> Component**. Expand the Component Services\Computers container. Right click **My Computer** and select **Properties**. On the COM Security tab, click **Edit Limits** in the Launch and Activation Permissions area or in the Remote Activation area. Click the **Edit Limits** button in the Launch and Activation Permissions section. Click the account for which the permissions need to be changed and click **Allow for the Remote Access permissions** or for the **Remote Launch and Remote Activation permissions**. The user should be a domain level account and not a local user. All users who need to access TRIM need to be part of this domain level group. Select **OK**. Click the **Edit Limits** button in Access Permissions section. Click the account to be modified and the Remote Access checkbox.

  Note: Multiple documents cannot be filed to the same sub folder. If a second scan is sent to an existing sub folder, a new sub folder will be created with the same name but a different record ID.

Microsoft Exchange 2000 Web Folder (Standard or Professional Edition feature)

Microsoft Exchange 2000 Web Folder is a supported document destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your Exchange 2000 credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the URL field. Otherwise, you may leave the Starting Point blank and enter the URL manually.
- Enter or select the URL of the Microsoft Exchange web folder. If the new destination branches off from an existing destination, you may click **Expand** to expand the location chosen as the starting point and select the new destination. A user name and password are required.

  Example

  \\organization\publicfolders\testfolder\docs
- ***File overwriting***: Files with the same name are overwritten. It is recommended that a suffix be appended to the file name. See Document Name and Type on page 46.

FTP

FTP is a supported document destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your FTP credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the FTP Host Name and Folder Path. Otherwise, you may leave the Starting Point blank and enter the Host Name and Folder Path manually.

- Enter the FTP host name for the destination. A fully qualified name (server name and domain name) or IP (Internet Protocol) address of the destination file server is required.

  Example

  ftp:companyserver.com or 10.14.121.32

  The port defaults to the standard port 21. If port 21 is not available, specify a port to use as part of the host name, for example, ftp:companyserver.com:99.
- Enter the folder path for the Remote FTP directory in which the document is stored. A user name and password are required. However, anonymous FTP is permitted. The user name must be "anonymous" and the password should be left blank.

  Example

  /ftp-public/mydocuments
- ***File overwriting***: Files with the same name are overwritten. It is recommended that a suffix be appended to the file name. See Document Name and Type on page 46.
- ***Advanced Properties:*** This feature provides the capability to export and customize device job logs. It is available when Job Log Export Support is enabled for the SMARTsend FTP service, and it is intended for use by advanced users and system integrators.

Note: When scanning to a secure FTP site, the "Output Documentation" links in job confirmation e-mails will not work unless the password is also included with the URL, e.g., ftp://user:password@host/path/file or ftp://anonymous@host/path/file.

NetWare (Standard or Professional Edition feature)

NetWare is a supported document destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your NetWare credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the Folder Path field. Otherwise, you may leave the Starting Point blank and enter the Folder Path manually.
- Enter the Folder Path for the destination. If the new destination branches off from an existing destination, you may click **Expand** to expand the location chosen as the starting point and select the new destination.

  Example

  \\server-1\scan\docs

  A user name and password are also required. Common name, context, and tree information are required. A valid NetWare user name takes the following form:

  .cn=[common name].ou=[organizational unit].o=[organization].c=[context].t=[tree]

  Example

  .cn=myname.ou=dsp.o=mycompany.c=us.t=us123sales
- ***File overwriting:*** Files with the same name are overwritten. It is recommended that a suffix be appended to the file name. See Document Name and Type on page 46.

Network Folder

Network folders are supported document destinations.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your Network credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the Folder Path field. Otherwise, you may leave the Starting Point blank and enter the Folder Path manually.
- Enter the entire path to the network folder. If the new destination branches off from an existing destination, you may click **Expand** to expand the location chosen as the starting point and select the new destination. A user name and password are required.

  Example

  \\server-1\scan\docs
- ***File overwriting:*** Files with the same name are overwritten. It is recommended that a suffix be appended to the file name. See Document Name and Type on page 46.
- ***Advanced Properties:*** This feature provides the capability to export and customize SMARTsend job logs. It is available when Job Log Export Support is enabled for the SMARTsend Network Folder service, and it is intended for use by advanced users and system integrators.

Scan to URL Service (Standard or Professional Edition feature)

Scan to URL service is a supported destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your Scan to URL credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the URL Path field. Otherwise, you may leave the Starting Point blank and enter the URL Path manually.
- Enter the URL Path for the destination. If the new destination branches off from an existing destination, you may click **Expand** to expand the location chosen as the starting point and select the new destination.
- ***File overwriting***: Files with the same name are overwritten. It is recommended that a suffix be appended to the name. See Document Name and Type on page 46.

Microsoft SharePoint Portal Server 2001 (Standard or Professional Edition feature)

Microsoft SharePoint Portal Server 2001 is a supported destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your SharePoint Portal Server 2001 credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the SharePoint Folder URL field. Otherwise, you may leave the Starting Point blank and enter the SharePoint Folder URL manually.
- Enter the URL of the SharePoint workspace folder path. If the new destination branches off from an existing destination, you may click **Expand** to expand the location chosen as the starting point and select the new destination.

  Example

  http://dsp1/workspace/documents/dm
- Accept the default or enter a new SharePoint document profile. The SharePoint document profile contains information associated with a SharePoint Portal folder, for example, Author Name or version fields. The application queries the SharePoint Portal to determine the Profile fields that are associated with the destination folder.
- The check-in option is available when the destination is a SharePoint Portal. Select **Yes** if you want to publish the document to SharePoint. This makes the document available to others in SharePoint.
- Enter any check-in comments.
- ***File overwriting:*** Files with the same name are not overwritten.

Microsoft SharePoint Portal Server 2003/2007

Microsoft SharePoint Portal Server 2003/2007 is a supported destination.

- Enter a Destination Name to identify the workflow.
- Select a Starting Point from the drop-down list. The default starting point is defined by your SharePoint Portal Server 2003/2007 credentials. If your credentials provide additional access levels, the drop-down list may include multiple Starting Points. This selection will automatically populate the SharePoint Folder URL field. Otherwise, you may leave the Starting Point blank and enter the SharePoint Folder URL manually.
- Enter the URL of the SharePoint workspace folder path. If the new destination branches off from an existing destination, you may click **Expand** to expand the location chosen as the starting point and select the new destination.
- The check-in option is available when the destination is a SharePoint Portal. Select **Yes** if you want to publish the document to SharePoint. This makes the document available to others in SharePoint.
- Enter any check-in comments.
- ***File overwriting:*** Files with the same name are not overwritten.

Document Name and Type

The Document Name and Type page is used to configure the file name, type, and format of the scanned documents created with SMARTsend.

To access the Document Name and Type page:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the list of workflows in the Workflow Explorer select the workflow for which you want to change the document name or format.
3. Click **Edit this workflow** from the list of workflow tasks in the left panel.
4. From the Workflow Editor click **Document Name and Type** from the left panel.

Note: The Document Name and Type page is also accessed from the Add New Distribution Workflow link when a workflow is created.

Document Name

The Document Name options define the output file name of file to be generated. Identification information is applied after the document is scanned. Determine the constraints (such as the characters allowed and the file overwrite policy) of your filing destinations before naming the output document.

The ability to change the output file name (Document Name) at scan time is subject to the following conditions:

- When using device scan templates on Xerox WorkCentre Pro 232/238/245/255/265/275 or newer devices, you will be unable to change the Document Name at scan time unless the **Name Provided at Scan Source** option is selected in the workflow. This constraint does not apply to older devices which will allow you to override the Document Name at scan time, regardless of the naming option specified in the workflow.
- When using PaperWare templates (Professional Edition feature) containing editable Document Attributes on Xerox WorkCentre Pro 232/238/245/255/265/275 or newer devices, you will always be permitted to modify the Document Name at the device user interface. However, the document naming option that will be used to distribute the document will be the one specified in the workflow used to publish the template.
- The My_E-mail scan template will always use a Document Name provided at the scan source and a user will be able to modify it at scan time at all supported devices.

Name

The Name specifies the name of the output file. The naming options are as follows:

- **Name:** Enter a file name for the output document. The name you enter can contain alphanumeric characters, dashes, and underscores. Spaces are not allowed. This name will be the base file name of the output file. If a name suffix is specified, the resulting output file name is the base file name entered in this edit box, appended by the suffix (either date and time, a unique ID, or nothing at all) and file extension. That is, the resulting output file name will be in the following form:

  Base File Name + Suffix + File Extension

  If no suffix is specified, the resulting output file name will be in the following form:

  Base File Name + File Extension

  If the base file name is left blank, the resulting output file name will consist of a unique ID or date and time identifier, plus the extension. However, if None is selected for the Name Suffix, you must enter a base file name to identify the document.
- **Auto Generate a Name (8 characters):** Have SMARTsend auto-generate an 8-character name. In this case, no suffix can be specified.

  Note: Selecting this option with the Single-Page TIFF or JFIF type (see Document Type on page 48) will result in file names longer than 8 characters because page identifiers (beginning with **-1** and incrementing) will be appended to the name to differentiate the pages.

- **Name Provided at Scan Source *(default)***: Have a file name entered at the scan source. If the scan source is a Xerox Multifunction Device, the name will be entered at the device; if the scan source is an Internet Fax device, the name will be the attachment name generated by the device. The name will be used as the base file name of the output file. If a name suffix is specified, the resulting output file name is the base file name, appended by the suffix (either date and time, a unique ID, or nothing at all) and the file extension. The file name can be blank but a suffix must be specified. The resulting output file names can be in the following form:

  Base File Name + Suffix + File Extension

  If no suffix is specified, the resulting output file name will be in the following form:

  Base File Name + File Extension

  Suffix + File Extension

  If no name is specified at the scan source, a default name as generated by the device will be used.

Note: When selecting a name, use one that will work with the destinations to which you are filing. For example, if your destination will only allow 8 characters, only use 8 characters; otherwise, filing will fail.

Name Suffix

When a base file name is specified or the **Name Provided at Scan Source** option is selected, a suffix may be specified to be appended to the end of the base file name. By using suffixes, unique file names can be assured. This is especially important for document destinations that overwrite files with the same name.

Select one of the following suffixes:

- **None**.
- **Date and Time *(default)***: The date and time (year, month, day, hour, minute, second) when the file is processed will be appended to the base file name. For example, if a base file name of *myFile* and a file type of PDF are specified and a document is scanned on August 25, 2004, at 12:24:06, the resulting output file name will be:

  myFile20040825122406.pdf

  Choose this setting when scan files are created or modified often and each file must be kept.
- **Unique ID:** automatically generates and appends to the base file name a unique identification number of 32 characters. Choose this setting when simple tracking of scan files can be accomplished by random ID numbers.

Note: A suffix cannot be used when **Auto Generate a Name (8 characters)** is selected for file naming.

Document Type

The Document Type options specify the type and format of the distribution output files. By default, SMARTsend will assign a single common document type to be used for destinations in the workflow. However, you can also specify different document types for each destination in the workflow. Select one of the following options to configure the Document Type settings for the workflow:

Use the same Document or Print Type for all destinations

Enables you to select and configure a single document type/format and print type (when applicable) for the workflow destination(s).

Use a different Document or Print Type for each destination

Enables you to select and configure different document types/formats and print types (when applicable) for each destination type specified in the workflow.

Document Types Supported by Smartsend

- PDF, Text Searchable (*.pdf)—Professional Edition feature; available only if optical character recognition (OCR) is enabled.
- PDF, Image Only (*.pdf)
- Secure (encrypted) PDF
- JFIF (*.jpg)
- XPS
- Single-Page TIFF (*.tif)
- Multi-Page TIFF (*.tif)
- Original Document Type *(file format determined by device at scan time)*
- Other (Professional Edition feature; available only if OCR is enabled). The Other option includes OCR file formats. See Table 3-1 on page -50 for a complete list of OCR file formats.

Each Document Type has an associated file format. When a type is selected from the drop-down list, the details for that file type are displayed below the selection. The format and details can be changed for certain Document Types. When this is the case, simply click the **Properties** button and select a format from the list.

Print Type

Print Type is only available when a Remote Printer destination is selected in a workflow. Remote Printer destinations can be configured with the following properties:

Original Image

Prints a scanned image that is visually faithful to the original document image.

Other (Professional Edition Feature)

Enables you to choose and configure a supported OCR format. The format selections available may vary based on the capabilities of the Remote Printer. See Other (Professional Edition Feature) on page 57 and OCR Properties (Professional Edition Feature) on page 59 for additional information.

Note: JFIF and Single-Page TIFF are supported for file distribution to FTP, Network Folder, NetWare Folder, and E-mail destinations only. These file types will be filtered from the list of available types if other destinations are selected in combination with the FTP, Network Folder, Netware Folder, and E-mail destinations.

Document Format and Properties

Properties further define the format and certain characteristics of the output file. The format options can be accessed by clicking the **Properties** button in the Document Type region of the Document Name and Type page. The format selections vary based on the type of output file selected. The document types and formats supported by SMARTsend, along with the considerations for each format, are listed in the following table:

Document Type	Output File Formats	Considerations
PDF, Image Only	PDF, Image Only PDF, Image Only - Preserve Image from Scan Source PDF, Secure (encrypted) PDF, Linear	• Supported on all major platforms • Can be filed to all SMARTsend repositories • Many compression options • Excellent balance of portability, compatibility, and compression options • Some imaging tools may not support PDF
PDF, Text Searchable (Professional Edition feature)	PDF with normal text PDF with image substitutes PDF with image on text PDF with image on text - Preserve Page Orientation PDF with image on text - Preserve Image from Scan Source PDF, Secure (encrypted) PDF, Linear	• All of the above, plus support for OCR • Document can be searched for text • Text can be copied from document • Requires extra processing • Information loss possible during processing
XPS	XPS	• New open format from Microsoft • Page by Page view • Comes with Windows Vista / Available for XP
JFIF	JPEG	• Each page stored as single document • Widely supported image format • Excellent for color images • JPEG is the only supported compression • May exhibit "ringing" artifacts in text documents • Some repositories do not support single-page files • No OCR support

Table 3-1: Supported Document Types and Formats

Document Type	Output File Formats	Considerations
Single-page TIFF	Single-page TIFF 6.0 Single-page TIFF 6.0 TTN2	• Each page stored as single document • Widely supported image format • Moderate range of compression options • Some repositories do not support this format • No OCR support
Multi-page TIFF	Multi-page TIFF 6.0 Multi-page TIFF 6.0 TTN2 Multi-page TIFF - Preserve Image from Scan Source	• Each page stored as single document • Widely supported image format • Moderate range of compression options • Can be filed to all SMARTsend repositories • No OCR support
Original Document Type	File format is determined at scan time. Some devices will enable you to choose a format at the device user interface, while other devices may be constrained to a specific format.	• Minimal information loss • No OCR support • File format determined at scan time and may vary by device

Table 3-1: Supported Document Types and Formats

Document Type	Output File Formats	Considerations
Other - OCR formats (Professional Edition feature)	Microsoft Word 97, 2000, 2002, 2003 (*.doc) Text, standard (*.txt) Microsoft Excel 97, 2000, 2002, 2003 (.xls) Microsoft PowerPoint 97 (*.rtf) Microsoft Publisher 98 (*.rtf) ASCII Text, formatted (*.txt) ASCII Text, standard (*.txt) ASCII Text, standardEx (*.txt) Rich Text Format (*.rtf) RTF Word 2000 (*.rtf) RTF Word 6.0/95 (*.rtf) RTF Word 97 (*.rtf) Text, smart (*.txt) Text, stripped (*.txt) Text, plain (*.txt) Text, comma delimited (*.csv) Text, tab delimited (*.txt) WordPad (*.rtf)	• Output file formats are created by SMARTsend after scanned documents have undergone OCR processing • Requires extra processing time • Original image data is not preserved (may include embedded pictures) • Creates files that are editable in a variety of popular software applications.

Table 3-1: Supported Document Types and Formats

PDF Files

PDF files preserve the page layouts, text, and images of documents. They are easily reproduced and can be used in most environments, making PDF a universal format. A PDF file can be quite manageable because of its small file size.

This section explains the PDF file options available to you.

PDF, Text Searchable (*.pdf) (Professional Edition feature)

The following PDF formats are searchable for text characters.

- **PDF with normal text** contains text and images that match the original source document. Does not provide control over output image compatibility and compression. Page orientation of output will be automatically oriented so that text reads normally.

Note: High compression formats will not work with many older devices when printing scanned images.

- **PDF with image substitutes** contains text that matches the original source document. The output will display smaller, substitute images taken from the original source image, if OCR problems are encountered. Substitute images are used in the following cases: words containing suspect characters in the text, words not contained in the checking dictionary, words containing rejection symbols, and words containing missing symbols. This does not provide control over output image compatibility and compression. The page orientation of the output will be automatically oriented so that text reads normally.
- **PDF with image on text** contains one image for each page in the document, as well as text characters. This does not provide control over output image compatibility and compression. The page orientation of the output will be automatically oriented so that text reads normally. See Table 3-2 on page -53.
- **PDF with image on text - Preserve Page Orientation** contains one image for each page in the document, as well as text characters. This provides control over output image compatibility and compression. The page orientation of the input documents will be preserved. See Table 3-2 on page -53.

  Note: If the input documents are not oriented in the standard orientation, or they are skewed significantly, you may not be able to highlight text in the PDF output document. You will, however, still be able to search the document.

- **PDF - Preserve Image from Scan Source** preserves the original image data that the device sends to SMARTsend. This setting provides minimal loss of image acuity, but it does not provide control over output image compatibility and compression. The page orientation of the input documents will be preserved.

Document Type	Orientation of Input Documents	Orientation of Output Documents
PDF with image on text		
PDF - Preserve Page Orientation		

Table 3-2: How page orientation is affected by selected PDF option

PDF, Image Only (*.pdf)

The following PDF formats do not contain text characters, making the text unsearchable.

- **PDF, Image Only** contains one image for each page in the document.
- **PDF - Preserve Image from Scan Source** preserves the original image data that the device sends to SMARTsend. This setting provides minimal loss of image acuity, but it does not provide any compression options.

Note: High compression formats will not work with many older devices when printing scanned images.

Linear PDF

A linearized PDF file is optimal for web viewing and is structured in a way that displays the first page of the PDF file in the browser before the entire file is downloaded from the web server. This structure allows linear PDF documents to open almost instantly.

Secure PDF

A secure, or encrypted, PDF allows the user to control how an output PDF file is accessed and used. All secure PDF files are encrypted and password protected by an owner and a user. In addition, restrictions such as no printing, no content copying, no acroForm updates can each be applied to a user.

You can secure a PDF file so that a user password is required to open it and a master password is required to change security settings. If you set any security restrictions in your file, you should also specify a master password so no one who opens the file could remove the restrictions. If a file is opened with a master password, the security restrictions are temporarily disabled. If the file has both passwords, you can open it with either one.

PDF Image Optimization Settings

Several PDF image optimization settings can be configured within SMARTsend. These default settings can be defined by the SMARTsend system administrator, and they can also be adjusted by each SMARTsend user when workflows are published.

The following Image Optimization Settings are currently supported:

Emphasize Compatibility—use this option when compatibility with older versions of Acrobat Reader is the most important consideration. This setting may result in larger file sizes. See PDF Compatibility Settings below for additional information.

Emphasize Compression—use this option when file size reduction is the most important consideration. This format may not be supported by older versions of Acrobat Reader.

Custom—use this option to adjust all the Image Optimization settings manually.

Note: The compatibility and compression settings in the Document Type Properties dialog can only be adjusted manually when the Custom option is selected.

PDF Compatibility Settings

The Compatibility Settings are available when the Image Optimization selection is set to Custom. These settings alter the PDF format based on the following parameters:

Acrobat Reader 4 and older—maintains PDF compatibility with current and older Acrobat Reader versions dating back to version 4.0. This setting optimizes compatibility but may result in larger file sizes.

Acrobat Reader 5 and newer—maintains PDF compatibility with more recent Acrobat Reader versions dating back to version 5.0. This setting provides more file compression options.

PDF Compression Settings

The Compression Settings are available when the Image Optimization is set to Custom. The settings alter the PDF format based on the following parameters:

Use Mixed Raster Content—applies different compression techniques to different parts of scanned images. This setting typically provides the best compression for business documents, including documents with color line drawings. This setting is not recommended for color photographs.

Monochrome—provides a choice of CCITT Group 4, JBIG2 Huffman Encoded, or JBIG2 Arithmetic Encoded compression options for monochrome images. Additional information is provided in the following table:

Compression Type	Considerations
CCITT Group 4	• Lossless compression • Widely supported • Some document types may not compress significantly
JBIG2 Huffman Encoded	• Better compression than CCITT Group 4 • Support is more limited
JBIG2 Arithmetic Encoded	• Best compression for monochrome images • Support is more limited compared to other options

Table 3-3: PDF Compression Settings

Contone—displays the compression settings that will be applied to color images. The Contone settings are defined by the application. JPEG is the default, and JPEG/Flate is used when Mixed Raster Content is selected.

JFIF/JPEG

JFIF (*.jpg) uses JPEG compression, which is a lossy compression file format (some data is lost or eliminated). This is often the best format for photographs and graphics. The output will be one file for each page or image that is scanned.

Note: JFIF/JPEG only works when processing color or grayscale images; binary or black and white images cannot be converted to the JFIF/JPEG format.

TIFF Files

Tagged Image File Format (TIFF) files are highly flexible and platform-independent. They are used and supported by many image processing applications. TIFF file sizes can be quite large but produce good print quality for hard-copy documents.

Single-Page Tiff (*.tif)

Single-page TIFF files contain a single image or page. One image or page is contained in a file. Only FTP, Network Folder, and E-mail destinations support the single-page TIFF format. If other destination types are in the workflow, this format will not be available.

Multiple-Page Tiff (*.tif)

Multiple-page TIFF files contain more than one image or page. All images or pages are contained in one file.

The following formats are supported for TIFF:

- Multi-page TIFF 6.0 (default)
- Multi-page TIFF 6.0 (TTN2)
- Multi-page TIFF - Preserve Image from Scan Source preserves the original image data that the device sends to SMARTsend. This setting provides minimal loss of image acuity, but it does not provide any compression options.

When color and grayscale images are received by SMARTsend, JPEG compression is used. When black and white images are received, G4 compression (up to 4 gigabytes of raster data) is used.

Original Document Type

When this option is selected, the file format is determined at scan time and may vary based on the type of device that is being used to scan the document. Some devices will enable you to choose a format at the device user interface, while other devices may be constrained to a specific format.

Please consult the documentation provided with your Xerox Multifunction Device or Internet Fax device to determine the supported file formats that are compatible with SMARTsend.

Other (Professional Edition Feature)

Other formats are supported and produced by optical character recognition (OCR). These may be used if you want to output a file that can be read by a word processor.

Application

These output files are compatible with specific applications. For example, Rich Text Format (.rtf) files can be read and edited in Microsoft Word, WordPad, and PowerPoint.

Microsoft Word 97, 2000, 2002, 2003 – document output (.doc) or rich text format (.rtf).

Microsoft Excel 97, 2000, 2002, 2003 – output format (.xls).

Microsoft PowerPoint 97 – rich text format (.rtf).

Microsoft Publisher 98 – rich text format (.rtf).

WordPad – rich text format (.rtf).

Text

Text files are usually small in size and can be edited by most text editor and word processing applications, for example, Microsoft Notepad or Word. These files do not contain complex formatting.

The following file formats are available:

Table 3-4: Text File Format Options

Text, standard	text with line breaks after each line. Tabs are used to position table content.
Text, smart	text with line breaks after each line. Spaces are used to position margins and table text content.
Text, stripped	text with line breaks after each paragraph. Tabs are used to position table text content.
Text, plain	text with line breaks after each line. Spaces and line breaks are used to position the left and top margins. Tabs are used to position table text content.
Text, comma delimited	comma-separated text. Text content is enclosed with quotes.
Text, tab delimited	tab character-separated text. Text content is enclosed with quotes.

ASCII

ASCII files contain a special 94-character code that includes letters, digits, and punctuation or mathematical symbols for English language documents. These files can be converted to text but cannot be edited directly.

The following file formats are available:

Table 3-5: ASCII File Format Options

ASCII Text, formatted	layout is retained with spaces. Text content is separated by quotes.
ASCII Text, standard	quick text conversion and compatibility.
ASCII Text, StandardEx	quick text conversion and compatibility. Line breaks after each line and zone.

OCR Properties (Professional Edition Feature)

The Professional Edition of SMARTsend enables documents to be scanned using OCR so that text files are produced rather than image files. These properties may be set with the PDF, Text Searchable and the Other output file types. Use the following features to specify the formats that use OCR:

OCR Optimization

Select how to process the scanned input:

Table 3-6: OCR Optimization Options

Optimize for Speed	has the fastest processing time with standard OCR accuracy. This is the default setting.
Balance Speed and Accuracy	balances processing time and OCR accuracy.
Optimize for Accuracy	takes the longest to process but has the best OCR accuracy.

The following settings help improve the accuracy of the OCR function. The source document is the document that you are scanning.

Table 3-7: OCR Accuracy Options

Source Document Language	Select the language of the source document.
Source Document Printed On	Select the type of printer from which the source document was printed.
Source Document Layout	Select to have the application auto-detect the source document columns, or select if the source document is a single column.

Document Attributes

The Document Attributes page is used to add additional information to scan documents for filing and managing documents in specific destinations. Document attributes, commonly called "metadata," are the properties that describe the output document. They are stored with the document and help organize filing to document destinations.

Fields for a particular workflow can be set using the Fields region. Alternatively, a profile can be used as a shortcut to apply fields to a workflow.

➤ To access the Document Attributes page:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the list of workflows in the Workflow Explorer select the workflow for which you want to change document attributes.
3. Click **Edit this workflow** from the list of workflow tasks in the left panel.
4. From the Workflow Editor click **Document Attributes** from the left panel.

The Document Attributes page is also accessed by following the workflow creation wizard when a workflow is created.

Document Attribute Profiles

Document profiles are sets of document attribute fields configured for reuse. Using a profile eliminates the need to configure attribute properties for each workflow. Each field in the profile is associated or mapped to a corresponding field for one or more destinations.

A document profile may include default or custom attribute properties and mappings that are common to a specific workflow. Typically, document profiles are listed by workflow document destinations. For example, the profile *FTP only* is a document profile for an FTP destination. The Basic document profile (containing Title and Description fields) is installed with SMARTsend. If specific attributes are used often, then a specialized profile should be customized and saved for these attributes.

For example, if Name and Version attributes are often needed, a profile can be created which groups these attributes under a profile. A mapping is then made of these attributes to fields for one or more destinations. For the DocuShare destination, the Name attribute in the profile can be mapped to the Title field on DocuShare, and the Version attribute can be mapped to the Description field on DocuShare.

Specifying a Profile

To specify a profile for a workflow:

1. Navigate to the Document Attributes page for the workflow.
2. Select an existing document profile from the **Use the Following Profile** drop-down list.

Profile lists are filtered by destinations in the workflow. You will only see those profiles with mappings to destinations in the current workflow.

Deleting a Profile

Users can only delete profiles that they own.

To delete a profile:

1. Navigate to the User Home Page.
2. Under Customization Options click **Manage My Document Profiles**.
3. Select the profile to be deleted from the list of document profiles.
4. Click **Delete** from the left panel.

Creating a New Profile

If the set of fields can be used again in another workflow, save them into a new profile.

To create a new profile:

1. Navigate to the Document Attributes page for a workflow.
2. From the **Use the Following Profile** drop-down list select the profile that most closely matches the profile to be created.
3. Click **Save as New Profile** below the fields region.
4. On the Save as New Profile window enter a profile name and description which identify the profile.
5. Click **OK**.
6. Add and delete fields, and change field properties, as desired.

Editing a Profile

Unless a profile is associated with a workflow that has not yet been published, it is not possible to change the profile without renaming it using **Save as New Profile**.

Document Attribute Fields

Document attribute fields are used to provide mappings for data to document destinations. For example, an *e-mail subject* document attribute field may be used to map to the subject of an e-mail when a document is scanned to an e-mail address. The field gives the user the opportunity to specify the e-mail subject.

- To view or change the properties of a field, click **Properties** in the row in which the field is listed. Make the changes in the Attribute Properties window and click **OK**.
- To add a field, click **Add Field** at the bottom of the list of fields. Specify the properties in the Attribute Properties window and click **OK**.
- To delete a field, click **Delete** in the row in which the field is listed.

Attribute Properties

Field Name

A field name assigns a descriptive or meaningful name to a document attribute field. This field name will appear at publication time, on cover sheets, and at scan time if **Editable at the device** is selected at publication.

Choose a name that is intuitive and will prompt users to enter the desired information into the field, especially if many users are going to be using publications that contain this field.

Default Values

Table 3-8: Default Value Options

No Default Value	indicates that a default value is not provided for the field.
Single Default Value	indicates that the value entered in the edit box will be used as the default value. Only one default is sent to a Xerox Multifunction Device for device publications. This value can be overwritten at the time the workflow is published if Non-Editable Field Value is not selected for the field security.
Multiple Default Values	enables multiple values when the workflow is published or on the cover sheet from which the user can select a value. Enter a value and click Add. The value will appear in the list box. Organize the values using the Move Up and Move Down buttons. Remove values from the list using Remove or Remove All. The default is always the value at the top of the list. Multiple defaults for PaperWare publications (Professional Edition feature) enable corresponding checkboxes for selection on the PaperWare cover sheet.

Required Field

Fields are generally configured as required in order to capture critical information about the scanned document. The information or attributes may be entered in advance when the workflow is created or published, or it may be entered at scan time at the Xerox Multifunction Device or on the PaperWare cover sheet (Professional Edition feature). The entry of attributes at scan time is subject to the following conditions:

- When using the Multiple Default Values option, you can also specify required document attributes at scan time using the Editable at the Device or Select on PaperWare cover sheet options.
- When a workflow with required fields that are Editable at the Device is published to any Xerox WorkCentre Pro 232/238/245/255/265/275 or newer device, the scan will not initiate until a value has been entered.
- When published to an older Xerox device, workflow execution will fail.

Field Security

Field Security determines how information fields appear when being entered at the device and on the cover sheet. Select how the value of the field appears:

- *Show Field Value* displays the value in clear text on SMARTsend publish pages, on the PaperWare cover sheet (Professional Edition feature), and at the Xerox Multifunction Device. Choose this setting when the field does not contain sensitive information and it does not matter if others see the value.

  Example: Arthur_M_Template
- *Mask User Input (****)* will display the value with asterisks (*) on all SMARTsend pages, cover sheets, and confirmation sheets. Choose this setting if confidential information is contained in the field.

  Example: ********* (asterisks used to mask a social security number)

Note: Xerox WorkCenter Pro 232/238/245/255/265/275 or newer devices fully support masking features. Older Xerox devices do not support masking features. In addition, masking is not available when a workflow is published with Multiple Default Values.

- *Non-Editable Field Value* will not allow the field to be edited outside of the Workflow Editor. The field will not be shown from the Publication page or when scanning but will map values to the scanned documents. A default value must be provided when this option is selected.

  Example: Client ID for a client site.

Note: The field default value will be shown in the Fields region of the Document Attributes page when this option is selected. Select this option for field values that will never change or for fields that require high security.

Field Type

Field Type specifies the kind of field to use for input of field values when the workflow is published. The field types that are available change as the number of default values changes. Choose a type that reflects the kind of entry required by the values.

Table 3-9: Field Type Options

Text Box	accepts entry of alphanumeric text values of up to 256 characters.
Multi-Line Text Box	accepts entry of alphanumeric text values of any length.
E-mail Address	accepts entry of an e-mail address format. The format is validated to determine that an e-mail address was entered.
Drop Down List	enables the selection of a value from a drop-down list.
Radio Button List	enables the selection of a value from a radio button list.
List Box	enables the selection of a value from a list box.

Note: Free-form text entry of attributes (metadata) for custom fields is not supported for Interwoven WorkSite destinations *(optional component for SMARTsend Standard or Professional Editions)*. Metadata values for custom fields are restricted to the predefined set of values defined by the WorkSite administrator.

Field ID (optional)

Field ID specifies the name of the XML file element when the document attribute fields are added to an XML file. If a name is not specified, the XML file element will default to Field_0, Field_1, etc. Choose a Field ID that reflects the kind of entries that will be written to an XML file.

Attribute Mapping

Attributes can be mapped to fields available at document destinations. All available fields supported by the destinations in the workflow will be shown. Select the attributes you want the field to map to for the destination. For example, for e-mail, *Body* and *Reply To* are available fields; for DocuShare, *Title*, *Description*, *Keywords* and others are available. During scanning, the data fields that you select here will be populated using the value(s) of the attributes. You cannot map more than one attribute to the same destination field, but more than one destination field can be mapped to the same document attribute.

Example

A document attribute field named "Title" can be mapped to a MS SharePoint Folder field called "Title".

Alternatively, arbitrary document attribute fields can be defined in a workflow. Document attribute fields can be defined in the workflow, without having to map them to a specific service parameter, and a value for the field can still be entered at workflow creation time, publication time or at scan time.

If document attribute support has been enabled for the service, the fields (both mapped and unmapped) and their values will be exported in the form of an XML file. Currently, the FTP, Netware

Folder (Standard or Professional Edition feature), Network Folder and Scan to URL (Standard or Professional Edition feature) services support the export of document attribute fields in the form of an XML file.

Specifying Custom Document Attributes in a SMARTsend Workflow

This procedure illustrates how to create a SMARTsend workflow that stores a scanned document, with document attribute fields, to an FTP destination:

To specify custom document attributes in a SMARTsend workflow:

1. From the SMARTsend User Home Page, click the **Add New Distribution Workflow** link.
2. On the Document Destinations page, click the **add locations** link under the FTP page element.
3. Type the properties for the FTP destination. Click **OK**.
4. Click **Next**. The Document Name and Type page opens.
5. Select the desired options for the Document Name and Document Type.
6. Click **Next**.
7. On the Document Attributes page, select the **FTP Only** document attribute profile.
8. Click **Add Field**. The Attribute Properties dialog opens, allowing you to create and define a document attribute.
9. Choose the options for the document attribute:
   a. Type a **Field Name** (for example, "Plex").
   b. If you wish to set a **Default Value** or multiple values, choose an option and type the value(s) (for example, "Duplex").
   c. Select **Required** if this is a field the user must complete.
   d. Select a **Field Security** option.
   e. Select a **Field Type**.
10. Under **Attribute Mapping**, clear the **Enabled** checkbox.
11. Click **OK**.
12. To add another field, repeat steps 8 through 11.
13. On the Document Attributes page, click **Save as New Profile** to save the fields as a new profile for later use in other workflows.
14. Continue programming the workflow.

Upon publishing and executing the workflow, values for the document attribute fields will be exported to the FTP destination specified in the workflow.

> Note: This requires that document attribute support for the FTP service be enabled by the SMARTsend System Administrator.

The values for the custom document attribute fields may be used by system integrators for follow-on processing of the scanned documents. For example, these values can be used to give information to a print shop on the number of sets that should be made of the documents and the plex mode that should be used when printing.

Save Workflow

The Save Workflow page is used to select the job confirmation preference for scan jobs and to specify the access level for the workflow.

➤ To access the Save Workflow page:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the list of workflows in the Workflow Explorer select the workflow for which you want to change settings.
3. Click **Edit this workflow** from the list of workflow tasks in the left panel.
4. From the Workflow Editor click **Workflow Settings** from the left panel.

Job Confirmation

When a user performs a scan, typically some indication is needed that the job was successful or failed. Select how the user will receive job confirmation upon completion of a job:

Table 3-10: Job Confirmation Options

No job confirmation	provides no confirmation of job completion.
Workflow owner's e-mail	enables an e-mail message to be sent to the owner of the workflow.
Workflow user's e-mail	enables an e-mail message to be sent to the workflow submitter. This option is only available when scanning at a device with authentication or when using a PaperWare cover sheet (Professional Edition feature). If used on a Xerox Multifunction Device with no authentication and no cover sheet, no job confirmation will be generated.
Printed confirmation	enables a page to be printed at the Xerox Multifunction Device used for scanning. The confirmation prints after the job is successfully sent to the destination or if an error occurs. If sensitive information is included in the job, you may not want the confirmation printed at a device where it may be easily viewed.

Workflow Access

Workflow access controls who can view, use, and change the workflow.

- *Public* allows viewing, using, editing, and publishing by any SMARTsend user. Only owners or administrators can delete a public workflow.
- *Private* allows viewing the content (such as attribute properties), using, editing, and deleting by the owner of a private workflow or the administrator. Only the workflow owner can publish the workflow. Private workflows published using device scan templates require authentication at the device.

Workflow Summary

The Workflow Summary page is used to review workflow settings after you have edited or defined a workflow. Before publishing, you can make modifications to the workflow using the links provided on the left side of the page.

➤ To access the Workflow Summary page:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the list of workflows in the Workflow Explorer select the workflow for which you want to review settings.
3. Click **Edit this workflow** from the list of workflow tasks in the left panel.

Workflow Name and Description

Enter a new name and description for the workflow or modify the displayed information. The name should be unique and something you will remember, as this name will appear in the Workflow Explorer and on publications. When you are first adding a workflow, the default naming convention begins with Workflow1 and will increment that name for new workflows unless a different name is supplied.

Publication Options

Before you can scan, you must publish a workflow. Select how to publish the workflow:

Table 3-11: Publication Options

Publish workflow later	enables you to publish the workflow at another time. Use this setting if you are just creating a workflow for someone else and that person will publish the workflow when needed.
Publish PaperWare cover sheet from workflow	(**Professional Edition feature**) generates a PaperWare cover sheet for the workflow. Use this option if you want to determine destinations at scan time, if you want to scan using Internet Fax, or if you have sensitive information that you do not want to be viewed by other SMARTsend users.
Publish workflow to Xerox Multifunction Device	allows you to create a new device scan template for the workflow.

For more on publishing workflows, see Publishing Workflows on page 83.

Setting Up Create Sub Folders if Needed

In SMARTsend, a user can create multiple levels of sub-folders when creating the workflow or while entering metadata at the local user interface. They can also alter the final filing destination relative to an initial location when scanning with device templates.

Document Destinations where dynamic folder creation and filing to a sub-folder is possible are DocuShare, Microsoft SharePoint, FTP, and Network folders. Network Folders as a Document Destination has been used here to illustrate how to use this feature and explain some scenarios.

This feature of SMARTsend requires that the SMARTsend application is already installed and preliminary setup has taken place (for example, SMTP setup if needed, device configuration, etc.).

Configuring SMARTsend for Create Sub Folders if Needed

To configure SMARTsend for Create Sub Folders if Needed:

1. Navigate to the User Home Page on the SMARTsend server. In the **Workflows** area, below **Add New**, click **Distribution Workflow**.
2. The **Document Destinations** page appears. The "Create Sub Folders if needed" feature is available for the following types of document destinations:
   - DocuShare
   - Microsoft SharePoint
   - FTP
   - Network Folder

   For this document, **Network Folders** is used as an example. Modify your settings appropriately for the other Document Destination types.

   Click **add locations...**
3. The **Network Folder Properties** page appears. A **Create folders if needed** option is available on this page, along with a **Sub-folder** text box. Complete the following:
   - **Destination Name:** CreateSubFolder
     Provide a name for this destination. CreateSubFolder is used here as an example.
   - **Select Starting Point:** Select a starting point or provide a Folder Path to a destination folder. You may use the **Expand** button to browse for a location,

   Note: If you have not entered a credential for the location provided, the Account Settings page will appear. Type the **User Name** and **Password** credentials that give access to the folder indicated in the **Folder Path** and click **OK** and then click **OK** again to proceed.

   - **Folder Path:** Type the complete path to the destination folder. The destination folder must already exist.

- Create folders if needed:
  - **Yes:** Select **Yes** to enable a sub-folder to be created if needed, if it does not already exist.
  - **No:** Select **No** to prevent the creation of a sub-folder if it does not exist. Selecting **No** in certain cases is useful for scenarios where automated tools or processes are checking for output in a particular location. It will prevent inadvertent filing of outputs to wrong locations by user error while scanning in the data.
- **Sub-Folder:** The **Sub-folder** text box allows the creator of the workflow to type a sub-folder name to be used if no sub-folder is specified through Document Attributes.

Click **OK** when you have completed this page.

4. The **Document Name and Type** page appears. Click **Next** to proceed since none of the features on this page apply to the "Create Sub-folders if needed" feature.
5. The **Document Attributes** page appears. This page allows the creator of the workflow to enable the user to create sub-folders and also to enter the sub-folder name using metadata at the local User Interface on the device. From the **Use the Following Profile** menu, you may select an appropriate profile or you may select **No Document Profile**.
6. After the page refreshes, click **Add Field**.
7. The **Attribute Properties** window appears. In order to demonstrate the "Create folders if needed" feature, two folders have to be mapped to capture data the user enters at the User Interface. The two feels that require mapping are:
   - Create folders if needed
   - Sub-folder

   The workflow creator can choose the attributes for the metadata values that the workflow user can enter at the local User Interface on the device.

Note: Metadata values will **always** override the preset workflow defaults.

Type or enter the following for **Create folders if needed**. Note that some of the values are suggested:

a. **Field Name** (suggested value)**:** Create folders if needed
   Type a label that a workflow user will view on the local User Interface on the device.
b. In the **Field Properties** area select **Required Field** if you want to make entering a value in this field mandatory for devices that support required Document Attributes. For **Create folders if needed**, ensure **Required Field** is cleared.
c. In the **Attribute Mapping** area, select **Enabled**.
d. In the **Network Folder** area, under the **Attribute Mapping** area, select the attribute that needs to be mapped to the field that is being created. In this case, select **Create folders if needed** since it is the attribute that needs to be mapped to the similarly named folder.
e. Click **OK**. The **Document Attributes** page refreshes and the new field **Create folders if needed** appears.

8. Repeat the procedure steps starting from Step 9 above to map the **Create Sub-folder** attribute with the following changes:
   a. **Field Name** (suggested value)**:** Sub-Folder Name
   Type a label that a workflow user will view on the local User Interface on the device.
   b. In the **Network Folder** area, under the **Attribute Mapping** area, select the attribute that needs to be mapped to the field that is being created. In this case select **Sub-folder** and then click **OK**.
9. The **Document Attributes** page refreshes and the new field **Sub-folder** appears. Click **Next**.
10. The **Workflow Settings** page appears. You may make changes on this page but note that none of the changes selected will affect the usage of the "Create sub-folder if needed" feature. The following options are available:
    - **Job Confirmation:** Select the type of confirmation that will be sent.
    - **Workflow Access:** Select who can access the workflow.

    Click **Next** when you have completed your selections.
11. The **Save Workflow** page appears. You may change the name of the workflow, which will appear on the local User Interface on the device as well as the description for the workflow.
12. Examine the summary to ensure that all the settings are correct.
13. In the **Publication Options** area, select **Publish workflow to Xerox Multifunction Device**.
14. Click **Finish**.
15. The **Publish Workflow to Xerox Multifunction Device** page appears. Select the Multifunction Devices where you want this workflow to appear. Be sure to select the **Editable at device option** and click **OK**.

Note: The workflows on selected devices may have to be refreshed on the local User Interface before they are available for use.

Scenarios

What follows are two possible usage scenarios. These scenarios assume that the local User Interface fields for capturing metadata data on the device for both **Create folders if needed** and **Sub-folder** attributes have been created.

Scenario 1

When the desired sub-folder already exists in the document repository and the workflow user does not input document attributes at the local User Interface for either field.

- If a sub-folder value is provided in the **Sub-folder** field, then ***regardless*** of the value in **Create folders if needed**, the scanned data will get filed to the location provided in the Sub-folder field provided in **Document Destinations** page.

  Refer to the figure below. The scanned data generated by this workflow will go to \\test-server\test1\Folder2 since Folder2 is specified in the **Sub-folder** field.

- If ***no*** value is provided in the **Sub-folder** field, then ***regardless*** of the value in **Create folders if needed**, the scanned data will get filed to the base destination location provided in the **Folder Path**, in this case \\test-server\test1\

Scenario 2

When the workflow user inputs an existing sub-folder location as document attributes for "Sub-folder" field.

- If the user provides a value, **Sub-folder M** for example, for the **Sub-folder** in metadata, then the scanned data is stored at this location at \\test-server\test1\Sub-folder M, ***regardless*** of whether values are specified for:
- the metadata value for **Create folders if needed**
- **Sub-folder** value in the **Document Destinations**
- **Create folders if needed** in **Document Destinations**

Scenario Truth Table

Use this table to examine the behavior of the possible scenarios for this feature.

Sub-folder already exists at destination?	"Yes" or "No" Document Attribute value assigned to "Create Folders if needed" attribute?	Document Attribute value assigned to "Sub Folders" attribute?	"Yes" or "No" value in "Create Folders if needed" attribute in Document Destinations?	"Sub Folder" attribute in Document Destinations?	Behavior
REGARDLESS	REGARDLESS	N	REGARDLESS	N	File stored in base location defined in Document Destinations.
Y	REGARDLESS	Y	REGARDLESS	REGARDLESS	File stored in sub-folder provided in "Sub-folder" Document Attribute value.
Y	REGARDLESS	N	REGARDLESS	Y	File stored in sub-folder defined in Document Destinations
N	Y	Y	REGARDLESS	REGARDLESS	File stored in sub-folder provided in "Sub-folder" Document Attribute value
N	Y	N	REGARDLESS	Y	File stored in sub-folder defined in Document Destinations.

Sub-folder already exists at destination?	"Yes" or "No" Document Attribute value assigned to "Create Folders if needed" attribute?	Document Attribute value assigned to "Sub Folders" attribute?	"Yes" or "No" value in "Create Folders if needed" attribute in Document Destinations?	"Sub Folder" attribute in Document Destinations?	Behavior
N	N	REGARDLESS	REGARDLESS	REGARDLESS	Scan will fail - the "Sub-Folder" value exists in a Document Attribute but the folder does not exist and the "Create folders if needed" Document Attribute value is No which overrides the "Create folders if needed" setting in Document Destinations.
N	Not Mapped	REGARDLESS	N	REGARDLESS	Scan will fail. The "Sub-Folder" value exists in Document Destination but the folder does not exist, the "Create folders if needed" setting in Document Destinations is No and there is no Document Attribute mapped to "Create folders if needed".

Sub-folder already exists at destination?	"Yes" or "No" Document Attribute value assigned to "Create Folders if needed" attribute?	Document Attribute value assigned to "Sub Folders" attribute?	"Yes" or "No" value in "Create Folders if needed" attribute in Document Destinations?	"Sub Folder" attribute in Document Destinations?	Behavior
N	Not Mapped	Y	Y	REGARDLESS	File stored in sub-folder provided in "Sub-Folder" Document Attribute value.
N	Not Mapped	N	Y	Y	File stored in the sub-folder defined in Document Destinations.

Note: **Regardless** indicates that an action will take place whether or not there is a value or attribute present for indicated field.

Appendix A: Sample Network Folder Workflow Creation

The following procedure covers the steps required to create a sample workflow that files to a network folder destination.

1. Open a browser window.
2. Enter the following URL or address:

   http://[computer name]/SMARTsend

   where *computer name* is the name of the SMARTsend computer. Contact your SMARTsend administrator if you are unsure of the computer name.
3. Press **Enter**.
4. You will be asked to enter your user name and password. Enter them and click **OK**.
5. A SMARTsend welcome screen will be displayed. Select **Click here to enter SMARTsend**.
6. The User Home Page will be displayed. Click **Add a New Distribution Workflow** under the Workflows heading.
7. The destinations that have been used by you and other users for other workflows are listed under headings designating destination types. Find the *Network Folder* heading.
8. Select the network folder destinations you want for the workflow.
   a. If destinations you want to use are listed, check the checkboxes beside them.
   b. If you need to add a network folder destination, click **add locations**. The Network Folder Properties window will be displayed.
      i Add a name for the destination.
      ii Add the folder path, for example: **\\myComputer\scans**, where *myComputer* is the name of the machine on which the folder is located, and *scans* is the name of a network sharing folder.
      iii Click **OK**.
   c. A Security Alert dialog may be displayed. Click **Yes** to proceed.
   d. You may be prompted to enter your SMARTsend computer credentials. Enter your user name and password for the SMARTsend computer and click **OK**.

   Note: You must use the same credentials you used to log in to SMARTsend. If you supply different credentials, you may need to use your browser to delete the Temporary Internet Files on your workstation before you can proceed. For example, using Internet Explorer you would choose the following options to delete your Temporary Internet Files: Tools > Internet Options > General > Delete Files > OK.

   e. The Account Settings page is displayed. Enter your user name and password for the network folder, add your password again in the Confirm Password edit box, and click **OK**.
   f. On the Network Properties page click **OK** again.

   g. The new destination should now be displayed on the Document Destinations page, and it should be checked. If more network folder destinations need to be added, click **add locations** and repeat the above steps for adding destinations.

9. When all destinations have been added on the Document Destinations page, click **Next >>**.
10. The Document Name and Type page will be displayed. Specify the base name of the output file under Document Identification. For this example enter a name such as *myDocName*.
11. Select **Date and Time** from the Name Suffix drop-down list. This will append the date and time to the name specified above *(myDocName)*.
12. Select a Document Type. For this example, select **PDF, Image Only (*.pdf)**.
    a. To change the format of the file, click the **Properties** button. For this example, click **Properties**. The Document Type Properties page will be displayed. From the Format drop-down list select **PDF, Image Only**.
    b. Click **OK**.
13. Click **Next >>**.
14. The Document Attributes page will be displayed. Specify any document attribute fields that are needed. For this example we will use the default Basic profile which contains Title and Description fields.
15. Click **Next >>**.
16. The Workflow Settings page is displayed.
17. Select a job confirmation option. For this example select **Printed confirmation** from the Job Confirmation drop-down list.
18. Select the level of access for the workflow. For this example we will use the default **Public** access level.
19. Click **Next >>**.
20. The Save Workflow page is displayed. Specify a unique workflow name.
21. Select the type of Publication desired. For this example we will publish the workflow as a device scan template. Select **Publish workflow to Xerox Multifunction Device**.
22. Review the workflow settings and change as required.
23. Click **Finish**.
24. The Publish Workflow to Xerox Multifunction Device page is displayed. Specify a unique publication name.
25. Select an expiration time.
26. Select the devices to which the template will be published.
27. Enter document attribute values. If the values are to be specified at the device, select **Editable at the device**.
28. Select a scan profile. Click **Properties** to adjust the scan settings as needed.
29. Click **OK**.
30. The template will be published. Click **Return to Home Page** at the bottom of the page to return to the User Home Page.

Appendix B: Sample E-mail Workflow Creation

The following procedure covers the steps required to create a sample workflow that uses an e-mail recipient as a destination.

1. Open a browser window.
2. Enter the following URL or address:

   http://[computer name]/SMARTsend

   where *computer name* is the name of the SMARTsend computer. Contact your SMARTsend administrator if you are unsure of the computer name.
3. Press **Enter**.
4. You will be asked to enter your user name and password. Enter them and click **OK**.
5. A SMARTsend welcome screen will be displayed. Select **Click here to enter SMARTsend**.
6. The User Home Page will be displayed. Click **Add New > Distribution Workflow...** under the *Workflows* heading.
7. The destinations that have been used by you and other users for other workflows are listed under headings designating destination types. Find the *E-mail Recipient* heading.
8. Select the e-mail recipients you want for the workflow.
   a. If recipients you want are listed, select the checkboxes beside them.
   b. If you need to add a recipient, click **add addresses**. The E-mail Recipient Properties window will be displayed.
      i Add a name for the destination.
      ii Add one or more e-mail addresses for the desired recipients (To:), copy recipients (Cc:), and blind copy recipients (Bcc:). Separate multiple e-mail addresses with semicolons. If the address verification feature has been configured by your administrator, you may click **Check name(s)** to verify the addresses.
      iii Select an attachment encoding format. The default Base64 for MIME encoding should be fine in most cases.
      iv Select **Scan to My E-mail** if you want the output file to be e-mailed to the scan submitter. This option requires authentication at the scan device when used with device scan templates and should only be selected if the device supports authentication.
      v Select **Send URL link to document (no document attachment)** if you only want to send a link to the document and not the document itself.
      vi Click **OK**.
9. The new recipients should now be displayed on the Document Destinations page, and they should be checked. When all destinations have been added on the Document Destinations page, click **Next >>**.
10. The Document Name and Type page will be displayed. Specify the base name of the output file under Document Identification. For this example enter a name such as *myDocName*.
11. Select **Date and Time** from the Name Suffix drop-down list. This will append the date and time to the name specified above *(myDocName)*.

12. Select a Document Type. For this example, select **PDF, Image Only (*.pdf)**.
    a. To change the format of the file, click the **Properties** button. For this example, click **Properties**. The Document Type Properties page will be displayed. From the Format drop-down list select **PDF, Image Only**.
    b. Click **OK**.
13. Click **Next >>**.
14. The Document Attributes page will be displayed. Specify any document attribute fields that are needed. For this example we will use the default Basic profile which contains Title and Description fields.
15. Click **Next >>**.
16. The Workflow Settings page is displayed.
17. Select a job confirmation option. For this example select **Printed confirmation** from the Job Confirmation drop-down list.
18. Select the level of access for the workflow. For this example we will use the default **Public** access level.
19. Click **Next >>**.
20. The Save Workflow page is displayed. Specify a unique workflow name.
21. Select the type of Publication desired. For this example we will publish the workflow as a device scan template. Select **Publish workflow to Xerox Multifunction Device**.
22. Review the workflow settings and change as required.
23. Click **Finish**.
24. The Publish Workflow to Xerox Multifunction Device page is displayed. Specify a unique publication name.
25. Select an expiration time.
26. Select the devices to which the template will be published.
27. Enter document attribute values. If the values are to be specified at the device, select **Editable at the device**.
28. Select a scan profile. Click **Properties** to adjust the scan settings as needed.
29. Click **OK**.
30. The template will be published. Click **Return to Home Page** at the bottom of the page to return to the User Home Page.

Appendix C: Specifying a Custom Object in a SMARTsend Workflow

The following procedure creates a SMARTsend workflow that stores a scanned document, with document attribute fields, to a DocuShare collection as a Custom Object.

1. From the SMARTsend User Home Page, click on the **Add New Distribution Workflow...** link.
2. On the Document Destination page, click on the **add locations...** link under the DocuShare section.
3. Enter the properties for the DocuShare destination, including the Custom Object Name to use when storing the document within DocuShare.
4. Click **Next >>**.
5. On the Document Name and Type page, define the name and format to use for the distributed document(s).
6. Click **Next >>**.
7. On the Document Attributes page, select the **DocuShare Only** document attribute profile.
8. Click on the **Add Field...** link to add the appropriate fields for use within the DocuShare Custom Object you have specified for your destination.
9. On the Attribute Properties dialog, add a document attribute field and map it to the appropriate DocuShare field defined in the Custom Object.

   Note: The fields defined in the specified Custom Object will be available for attribute mapping. For example, if a law firm uses a document that stores the *matter_id* with each document, then a user may want to add a SMARTsend field named Matter_ID and map it to the DocuShare Custom Object field.

10. Click **OK**.
11. On the Document Attributes page, click on the **Save as New Profile...** link to save the fields as a new profile for later use in other workflows.
12. Click **Next >>**. Continue defining the workflow in the remaining screens and publish the workflow as needed.

Appendix D: Specifying a LiveLink Category in a SMARTsend Workflow

The following procedure creates a SMARTsend workflow that stores a scanned document, with document attribute fields, to a LiveLink folder with a category (Standard or Professional Edition feature).

1. From the SMARTsend User Home Page, click on the **Add New Distribution Workflow...** link.
2. On the Document Destinations page, click on the **add locations...** link under the LiveLink section.
3. Enter the properties for the LiveLink destination, selecting a category from the list provided.
4. Click **Next >>**.
5. On the Document Name and Type page, define the name and format to use for the distributed document(s).
6. Click **Next >>**.
7. On the Document Attributes page, select the **Basic** document attribute profile.
8. Click on the **Add Field...** link to add the appropriate fields for use with the LiveLink category you have specified for your destination.
9. On the Attribute Properties dialog, add a document attribute field and map it to the appropriate LiveLink field defined in the category.
10. Click **OK**.
11. Optionally, on the Document Attributes page, click on the **Save as New Profile...** link to save the fields as a new profile for later use in other workflows.
12. Click **Next >>**. Continue defining the workflow in the remaining screens and publish the workflow as needed.

Publishing Workflows 4

After a workflow is created, it must be published to a device as a scan template or as a PaperWare cover sheet (Professional Edition feature) before it can be used. This chapter describes how to publish a workflow as well as how to print documents from a document repository.

What is in this chapter:

Publication Overview

Once a workflow has been created, it must be published before it is available for use when scanning documents. Publishing a public workflow makes it available for use by all users; publishing a private workflow makes it available only to the owner. Unless the workflow is used within the amount of time specified at the time of publication, the workflow will be unpublished and no longer available for scanning.

Workflows can be published as device scan templates or as PaperWare cover sheets (Professional Edition feature).

Device Scan Templates

Device scan templates are used for scanning from Xerox Multifunction Devices. Device scan templates are said to be distributed templates because they are distributed to particular devices specified at the time of publication. The workflows can only be used at those devices. Publishing to Xerox Multifunction Devices using device scan templates provides an extra level of security for devices which support authentication at the device. When publishing using a device scan template, scanned documents are distributed to all destinations.

PaperWare Cover Sheets

Professional Edition Feature

A workflow can be published by creating a PaperWare cover sheet. PaperWare cover sheets are printed cover pages that are scanned at the device as the first page of the job. The cover sheet provides the information needed to perform the scan—information such as the document attributes and destinations. The user selects the desired scan destinations from the available options on the cover sheet.

By default, authentication at the device is not required to scan with cover sheets, so they can be used at any Xerox Multifunction Device unless the default is changed by the administrator or unless the workflow is created as a private workflow and the device supports authentication. PaperWare cover sheets can also be used with any Internet Fax device.

Because a PaperWare workflow can only be viewed and used by the owner of the cover sheet, the PaperWare cover sheet is a good option for those who do not want others to have access to their workflow.

PaperWare Cover Sheets with Editable Document Attributes

When a workflow is published as a PaperWare cover sheet and document attributes are specified as editable at the device, a device scan template is distributed to specified devices when the PaperWare cover sheet is created. The user should select the published template at the device rather than the PaperWare template used for standard PaperWare cover sheets (without editable document attributes). See Publishing to a PaperWare Cover Sheet on page 4-92 for additional information.

Customizing PaperWare Scan Settings

If you typically need to use scan settings that differ from those used for the standard PaperWare cover sheet, you or the administrator can create and publish a customized scan template to meet your personal scanning needs. You must then select the new template at the device before you scan.

Publishing to a Xerox Multifunction Device

Publishing a workflow to a Xerox Multifunction Device creates a device scan template and assigns it to the selected Xerox Multifunction Device(s). Below are the steps for publishing to a device, followed by greater details on each of the publication settings.

➤ To publish a workflow to a Xerox Multifunction Device:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the Workflow Name column in the Workflow Explorer, select the name of the workflow to be published.
3. From the list of Workflow Tasks, click **Publish to Xerox Multifunction Device**.
4. Specify Publication Settings:
   a. Enter a name for the publication. This name will appear in the list of templates and must be unique. See Publication Name on page 87.
   b. Select the time when the publication will expire. See Expires After Not Used For on page 87.
   c. Select the devices on which the workflow will reside. See Add Workflow Publication to the Following Device(s) on page 87.

   Note: If the device you need is not listed, contact your SMARTsend administrator to have it added.

5. Specify the Document Attributes. Select **Editable at the device** if the document attributes will be editable on the device during scanning. Up to six attributes can be edited at the device. See Document Attributes on page 88.
6. Specify the Scan Profile. Select the type of document that will be used for scanning with this template. Click **Properties** to select custom settings for the document. See Scan Profile on page 88.
7. When you are finished, click **OK**.

   Note: The template may not appear in the list of templates at the device until the list is refreshed.

Publication Settings

The Publish Workflow page contains a Publication Settings region where you can set the publication name, expiration date, and the devices to which the template will be distributed.

Publication Name

The name will appear in the list of templates at the device and must be unique. The name also cannot be the same name as a workflow (except for the workflow being published). The name must contain between 1 and 20 characters and cannot contain: ", <, >, |, *, ?, /, \, ., :, null, backspace, Unicode characters 16-18 and 20-25, or separator characters.

Some devices may not support names with more than 11 characters. If you enter a name containing more than 11 characters and publish to a device that does not support names with more than 11 characters, an error message will be displayed when you click **OK** to publish the template.

Expires After Not Used For

This option automatically unpublishes, and removes from devices, templates that are not used within a specified time period. However, expired templates may still appear in the list of templates on the device until the list is refreshed at the device.

The workflows themselves will not be removed or lost, but the published templates will be unavailable for use and must be republished if needed. If a template is used within the specified time period, then the time for expiration is reset.

Example: If the published workflow is set to expire in one week and the template is used before the week is over, the expiration date is reset to expire one week from the day of its last use.

> Note: You may want to set this option so that the application automatically cleans up publications when they are not used. Otherwise, administrators will need to manually clean up publications in the application and on devices.

Add Workflow Publication to the Following Device(s)

Select one or more devices to which to add the workflow. Select consecutive devices by pressing and holding the <Shift> key while you select the first and last devices. Select non-consecutive devices by pressing and holding the <Ctrl> key while you click individual devices. If a desired device is not listed, contact your SMARTsend administrator to have it added.

> Note: If a workflow requires authentication at the device (by default, any private workflow and the My_E-mail workflow) but the device does not support authentication, the device will not be displayed.

Document Attributes

Document attributes are created when the workflow is created. Values for the attributes can be specified at workflow creation or publication time. The values may be changed at the device at scan time by selecting the **Editable at the device** option. If this option is selected, you will be prompted by the device to enter the attribute values at scan time.

Note: When security is a concern, the text entry in these fields may be masked with asterisks (*). This option is defined in the workflow using the Field Security > Mask User Input (****) option. See Document Attributes on page 60 for more information.

Scan Profile

Scan Profiles contain sets of imaging settings that are optimized for different types of documents. Scan Profiles can be selected, customized, and applied to a workflow when you publish it to a Xerox Multifunction Device as a device scan template, or when personalizing your PaperWare form (Professional Edition feature) scan settings (See Personalize Your PaperWare Form Scan Settings on page 21).

	1-Sided B/W Business Document	2-Sided B/W Business Document	B/W Photo	1-Sided Color Business Document	2-Sided Color Business Document	Color Photo
Output Color	Black/White	Black/White	Gray-scale	Full Color	Full Color	Full Color
Original Type	Mixed	Mixed	Photo	Mixed	Mixed	Photo
Contrast/Darkness/ Sharpness	Normal	Normal	Normal	Normal	Normal	Normal
Edge Erase	3mm or 0.1in	3mm or 0.1in	3mm or 0.1in	3mm or 0.1in	3mm or 0.1in	3mm or 0.1in
Input Media Size	Auto	Auto	Auto	Auto	Auto	Auto
Resolution	300x300	300x300	200x200	300x300	300x300	200x200
Sides to Scan	1	2	1	1	2	1
Auto Exposure	ON	ON	ON	ON	ON	ON

Table 4-1: Default Scan Profile Settingsl

Select the profile that best matches the type of document you are scanning, for example, 1-Sided Black/White Business Document. If a scan profile setting is not supported by a device, the device will use its default or auto setting. You can also use the following methods to customize the scan settings:

Custom Scan Profile—this method enables you to modify any default scan profile and apply the settings to the current workflow. When publishing a workflow, simply choose a profile from the Scan Profile selection list, then click the **Properties** link located next to the selection list. Change the settings as needed, then click the **OK** button to save the settings. The Scan Profile selection will now indicate that a Custom Scan Profile will be applied to the publication. See Customizing Scan Profiles on page 89 for additional information.

Adjust at Device—this method enables you to adjust or override the scan settings at the device at scan time. After choosing the scan template at the device, you can modify any of the scan profile settings (Table 4-1) using the device user interface. The local scan settings on the device will then override the scan template settings for the current scan job.

Note: You should NOT change settings such as IF File Already Exists or File Format at the device. Changing these settings could have adverse affects on the document output.

Customizing Scan Profiles

The following scan profile settings can be customized:

Output Color

Output color provides the optimal processing settings to produce the highest quality color, grayscale, or black/white output.

Note: If JFIF/JPEG is specified as the document output type (See Document Type on page 48) but the document is scanned on a monochrome device, the job will fail. If JFIF/JPEG is specified as the document output type and the document is scanned on a color device, the job will fail if the scan profile or the device has Output Color set to Black and White.

Original Type

Original type determines the kind of output that is produced—either photo, text, mixed (photo and text), or halftone. Halftone is a pattern of dots used to simulate and print a continuous-tone image.

Note: If the Original Type is Photo at the Xerox device, then Auto Exposure will be changed to OFF and the control will be disabled at the device.

Contrast

Contrast controls the difference between light gray and dark gray regions of the output document. A high contrast scanned image appears sharp and vivid and is composed of mainly black and white regions. A low contrast scanned image is softer and is composed of varying shades of gray.

Darkness

Darkness controls the level of darkness of the output document so it appears lighter, darker, or the same as the original document.

Sharpness

Sharpness makes the edges of a scanned image appear more or less pronounced than those of the original document. Sharpness is useful in enhancing fine lines or fine details in pictures. Softening can help to mask fine spots.

Edge Erase Metrics

Edge Erase Metrics removes spots, punch holes, staple marks, or any other dark marks that may appear around the edge of the original document.

You can erase marks that appear in the outer 0 to 50 mm of the page, or up to 2 inches.

The default is 3 mm or .1 inch.

Note: Some devices do not support Edge Erase settings, In this case, the edge erase values must be manually set at the device when the user scans.

Input Media Size

Input media size is the physical size of the original document.

Resolution

Resolution specifies the desired resolution of the output document. This setting does not need to match the resolution at which the original document was printed. A 600 dpi image produces a finer, higher quality image than a 300 dpi setting. However, a 600 dpi resolution will result in a larger file size.

Sides to Scan

Sides to scan specifies the number of sides that are used in the original document, either 1-Sided, 2-Sided, or Second Side Rotation.

Auto Exposure On/Off

Auto Exposure enhances the output of documents that have color backgrounds.

When Auto Exposure is on, the scanner automatically selects an exposure level that is appropriate for the original document.

When Auto Exposure is off, the scanner uses the lightness/darkness settings of the template to control the exposure level of the produced image. This may result in larger output file sizes.

Note: If the Original Type is Photo at the Xerox device, then Auto Exposure will be changed to OFF and the control will be disabled at the device.

Publishing to a PaperWare Cover Sheet

Professional Edition Feature

PaperWare cover sheets can be used to submit scan jobs at a multifunction or Internet Fax device.

The cover sheet has checkboxes that can be used to select destinations. Document attributes will also appear on the cover sheet. If attributes are specified as editable at the device, a device scan template will also be published to specified devices when the cover sheet is generated. The cover sheet can only be used at those specified devices.

When a cover sheet is published, a PDF file of the PaperWare cover sheet is generated. It can be saved to a location that you choose or it can be printed on a local printer.

> Note: When using PaperWare cover sheets with Xerox Multifunction Devices, you must use a device that was configured by the same SMARTsend computer that was used to create the workflow/cover sheet. However, you may be able to use the cover sheet at devices that have been configured by other SMARTsend or Xerox Flowport computers if they have been configured to support PaperWare Forms Forwarding. Please contact your system administrator for a list of devices that support PaperWare Forms Forwarding.

➤ To publish a workflow as a PaperWare cover sheet:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the Workflow Name column in the Workflow Explorer, select the name of the workflow to be published.
3. From the list of Workflow Tasks, click **Publish a cover sheet**.
4. Specify Publication Settings.
   a. Enter a name for the publication. This name will appear on the cover sheet and must be unique. See Publication Name on page 95.
   b. Specify a description for the cover sheet. This will appear on the cover sheet below the name.
   c. Select the time when the publication will expire. See Expires After Not Used For on page 95.
5. Check only the document destinations that you want to be selected automatically on the cover sheet. If you do not select a destination now, it still appears on the cover sheet but will need to be manually selected on the printed form for that destination to receive documents. See Destinations on page 95.

6. Specify the Document Attributes. Select **Editable at the device** if the document attributes will be editable on the device during scanning. In this case, the cover sheet can only be used at the devices where it is published. Up to six attributes can be edited at scan time. If the **Create new metadata template** checkbox is selected, you will be prompted to select devices to which a template will be published. If you deselect this option, a new template will not be published. At scan time, you will then need to select a previously published PaperWare template that has the same metadata (document attribute) fields defined as editable at the device. If you select a PaperWare template that does not contain the correct metadata fields, and the fields in this workflow have been defined as required, your workflow will fail. See Document Attributes on page 96.
7. Specify the Scan Settings. See Scan Settings on page 96.
    a. Select where the document will be scanned.
    b. Select a resolution. When selecting a resolution, consider whether you are scanning using an Internet Fax. The settings affect the glyph size, which is determined by the resolution and Internet Fax setting. See Resolution on page 97 for more information on resolution and DataGlyphs.
8. Click **Create Cover Sheet** to create the PaperWare cover sheet. A PDF file is created from which the cover sheet will be printed. PDF files preserve the page layouts, text, and images of documents.
9. If document attributes were specified as editable, you must select the devices to which a template will be published, as well as a scan profile. See Scan Profile on page 88 for more on scan profiles.
10. A File Download window will be displayed, asking if you would like to open or save the file. You may save the file so that you can access it later for printing or e-mailing. Click **Save** to save it. If you click **Open**, be sure to print the file before closing the window. If necessary, you can re-create the cover sheet by clicking **Refetch this cover sheet** from the View Publications page. See the procedure provided below, and Refetching the Cover Sheet on page 109 for additional information.

    Note: You will need Adobe Acrobat Reader® to open and view the PDF file. You can obtain the Acrobat Reader® from the Adobe web site at www. adobe.com.

11. Open the saved file using Adobe Acrobat Reader®.
12. Print the PDF file. The file should be printed at 100 % . That is, the zoom factor on the Print window should be at or near 100 % . In addition, the cover sheet must be printed on 8.5" x 11" or A4 paper.

A cover sheet may also be "refetched" or re-created after the workflow has been published to a cover sheet. This may be necessary if the PDF file for the cover sheet was generated and printed, but the file was not saved and the cover sheet printed page is subsequently lost or marked up.

➤ To refetch a PaperWare cover sheet:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the Workflow Name column in the Workflow Explorer, select the name of the workflow for which you want to refetch the cover sheet.
3. From the list of Workflow Tasks, click **View publications**. A list of publications for the selected workflow will be displayed. To sort the list by a column, click the column heading. A list of publication tasks is displayed on the left. The tasks available will change based upon your rights to the publication selected.
4. From the Name column in the Workflow Explorer, select the cover sheet that you want to refetch.
5. From the list of Publication Tasks, click **Refetch this cover sheet**.
6. A File Download window will be displayed, asking if you would like to open or save the file. You may save the file so that you can access it later for printing or e-mailing. Click **Save** to save it. If you click **Open**, be sure to print the file before closing the window.

Cover sheets may also be refetched by clicking the **Refetch Form** button on the Publication Details page. See Viewing Publications on page 98.

Using a PaperWare Cover Sheet with Internet Fax

You can scan from an Internet Fax device using a PaperWare cover sheet which allows the use of any Xerox or non-Xerox Internet Fax device with SMARTsend.

➤ To use a PaperWare cover sheet with Internet Fax

1. Obtain the e-mail address of an Internet Fax device from your administrator.
2. From Workflow Explorer, click **Add New > Distribution Workflow**.
3. Define the Document Destinations, Document Name and Type, Document Attributes, and Workflow Settings as needed. Click Next >> to proceed to each page.
4. On the **Save Workflow** page, select the option to **Publish PaperWare cover sheet from workflow**. Click **Finish** to proceed.
5. On the Publish PaperWare Cover Sheet page, scroll down to the **Scan Settings** section, and select one of the **Internet Fax** options as the **Scan Source**. You must also select the **Resolution** setting that is appropriate.
6. Click the Create Cover Sheet button.
7. Use the PaperWare cover sheet to perform the scan at the Internet Fax device. The document is sent as an e-mail attachment.

Note: If you have defined attribute properties for the workflow, this functionality will be lost at scan time; however, you can configure attribute properties as check boxes on your cover sheet. This enables you to use attribute properties functionality at scan time.

Publication Settings

Publication Name

The name will appear at the top of the cover sheet and must be unique. The name also cannot be the same name as a workflow (except for the workflow being published). The name must contain between 1 and 20 characters and cannot contain: ", <, >, |, *, ?, /, \, ., :, null, backspace, Unicode characters 16-18 and 20-25, or separator characters.

Some devices may not support names with more than 11 characters. If you enter a name containing more than 11 characters and publish to a device that does not support names with more than 11 characters, an error message will be displayed when you click **OK** to publish the template.

Cover Sheet Description

The description will appear directly below the publication name on the cover sheet.

Expires After Not Used For

This option automatically renders the cover sheet unusable if not used within a specified time period. The PaperWare template will not be removed from the list of templates on the device, however. The time period will be printed on the upper right corner of the cover sheet.

The workflows themselves will not be removed or lost, but the cover sheets will be unavailable for use and will need to be created again if needed. If a cover sheet is used within the time period, then the time for expiration is reset.

> **Example**: If the published workflow is set to expire in one week and the cover sheet is used before the week is over, the expiration date is reset to expire one week from the day of its last use.

Note: You may want to set this option so that the application automatically cleans up publications when they are not used. Otherwise, administrators will need to manually clean up publications in the application.

Destinations

All destinations added to the workflow will appear on the cover sheet. Select only those that you want to appear pre-checked. To scan to a particular destination using the cover sheet, check the checkbox on the cover sheet for the destination to which you want to send the output document.

Document Attributes

Document attributes are created when the workflow is created. Values for the attributes can be specified at publication time. The values may be changed at the device at scan time by selecting the **Editable at the device** option. If this option is selected, you will be prompted by the device to enter the attribute values at scan time.

If there are multiple default values at publish time, there will be checkboxes on the cover sheet for each value. You will select the desired option by checking the checkbox beside the desired value on the cover sheet. When no attributes are editable at the device, the cover sheet can be used at any configured Xerox Multifunction or Internet Fax Device.

When a document attribute is editable at the device, a device scan template will be published when the PaperWare cover sheet is created. When you click **Create Cover Sheet**, you will be prompted to specify the devices which will be used and a Scan Profile. Click **Create Cover Sheet** again to publish and create the cover sheet. The cover sheet created when document attributes are specified as editable at the device can only be used at the devices specified at the publication step. The cover sheet will indicate the name of the device scan template to be used with the cover sheet.

Scan Settings

The Scan Settings area is used to describe the device where your document (and Paperware cover sheet) will be scanned. SMARTsend uses this information to adjust the DataGlyph on the printed PaperWare cover sheet for the specific scanning device.

Scan Source

Select a Scan Source for your document. PaperWare cover sheets can be used at a Xerox Multifunction Device or Internet Fax device. Select Internet Fax if you are planning on using the cover sheet at an Internet Fax device.

Note: When you are using document attributes and Internet Fax, you cannot select the option to edit the attribute properties at the Internet Fax device.

Resolution

The resolution setting determines the size of the PaperWare DataGlyph. Publication creates a PaperWare cover sheet with the workflow information captured in a DataGlyph in the lower right corner of the cover sheet.

DataGlyphs are a technology for encoding machine-readable data onto paper documents. They encode information into thousands of tiny diagonal lines, each representing a single 0 or 1, depending on whether it slopes to the left or right. Sequences of these can be used to encode numeric, textual, or other information. A lower resolution produces a larger DataGlyph; conversely, a higher resolution produces a smaller DataGlyph.

Please consider the following factors when creating PaperWare cover sheets:

- The DataGlyph must be a large size for use with the lower resolution scan performed by Internet Fax devices. The large DataGlyph covers a larger portion of the cover sheet needed for document attribute checkboxes. In addition, at the lowest resolution the *Refetch this form* checkbox may be lost.
- When using a scanning device with poor image quality (e.g., dirty platen or improper calibration), selecting a lower resolution may improve results.
- Always print your PaperWare cover sheet on a high quality laser or inkjet printer with a minimum resolution of 300 dpi.

Use the following table as a guideline for selecting the correct resolution setting:

Resolution (dpi)	Applications
High (300x300 and higher)	Scanning at 300 dpi or higher
Medium (200x200 and higher)	Scanning at 200 dpi or higher Fine resolution Internet Fax
Low (below 200x200)	Scanning at 150 dpi or higher Standard resolution Internet Fax

Table 4-2: PaperWare Cover Sheet Resolution Settings

Personalizing Scan Settings for PaperWare Forms

Scan settings for PaperWare cover sheets can be customized by publishing a device template which specifies the desired settings. The user must then select the template at the device before scanning. Personalizing scan settings can be done from the User Home Page.

To publish a customized template:

1. From the User Home Page click **Personalize Your PaperWare Form Scan Settings**.
1. Specify the desired publication settings.
2. Select the desired Scan Profile or customize the settings by clicking **Properties**.
3. Click **OK** to publish.

Viewing Publications

Any user can view the publications of a particular workflow.

➤ To view the publications of a workflow:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the Workflow Name column in the Workflow Explorer, select the name of the workflow whose publications you want to view.
3. From the list of Workflow Views, click **Show All**. A list of publications for the selected server will be displayed in the right panel. To sort the list by a column, click the column heading. A list of Publication Tasks is displayed on the left. The tasks available will change based upon your rights to the publication selected.
4. To view the details of a particular publication, select the publication from the list and click **Publication details** from the left panel. You will only be able to view publication details for publications that you own.

Publication Details

This option displays a window that shows the actual publication content and settings for all types of workflow publications. Administrators can view any workflow and edit the content and attributes of any publication. Publication owners can view only their own publication's content.

The types of publications that can be viewed are Device Scan Templates, PaperWare Cover Sheets, PaperWare Cover Sheets with Document Attribute Templates, and Xerox PaperWare Settings templates.

Using features on this page you can:

- update the list of devices for device publication
- regenerate a PaperWare Cover Sheet by clicking Refetch Form (Professional Edition feature)

Adding or Removing Devices from a Publication

Since scan device templates are loaded to particular devices when they are published, details of the publication cannot be changed without re-publishing. However, it is possible to change the devices to which the template is published.

➤ To add or remove a device to which a template has been published:

1. Follow the steps for navigating to the publication details of the publication for which you want to add or remove a device. See Viewing Publications on page 98.
2. Do one of the following:
   - To add a device, select the checkbox to the left of the Device Hostname or IP Address column for that device and click **Add >>**.

   Note: If the device you want to add is not on the list of available devices, see your administrator to add it.

   - To remove a device, uncheck the checkbox to the left of the Device Hostname or IP Address column for that device and click **<< Remove**.

Deleting Workflow Publications

Only the owner of a publication can delete the publication. The publication tasks available to a user will change based upon the rights the user has to the publication.

Deleting Individual Publications of a Workflow

➤ To delete a particular publication:

1. Navigate to the User Home Page and click **View All Workflows**.
2. From the Workflow Name column in the Workflow Explorer, click the name of the workflow whose publication you want to delete.
3. From the list of Workflow Tasks, click **View publications**.
4. Select the publication you want to delete.
5. From the list of Workflow Tasks, click **Delete this publication**. This task will only be available if you own the publication.
6. A window asking for confirmation will be displayed. To delete the publication, click **OK**.

Deleting All Publications of a Workflow

➤ To delete all publications of a workflow:

1. Navigate to the User Home Page and click **Manage My Workflows**.
2. From the Workflow Name column in the Workflow Explorer, select the name of the workflow whose publications will be deleted.
3. From the list of Workflow Tasks, click **Delete this workflow's publications**. This task will only be available if you own all publications of the workflow.
4. A window requesting confirmation will be displayed. To delete the publications, click **OK**.

Printing Documents from a Document Repository

The following describes how to use the Print from Repository SMARTsend application. This feature requires SMARTsend to already be installed and configured based on the *SMARTsend Device Extensions Installation Guide*.

SMARTsend for the Print from Repository Application

To use the SMARTsend Print from Repository Application:

1. From the Multi Function Device (MFD), the user selects **All Services** > **Custom Services** on the device User Interface.
2. The **Print from Repository** button should be visible. Note that the label of the button can or may have been customized by the System Administrator. In this case, the user should check with their System Administrator for the modified name of the Custom Service.
3. The user should select the **Print from Repository** or equivalent button at the MFD user interface. If the System Administrator has not enabled default logging in, the user will be asked to provide their SMARTsend User Name, Password and Domain details and then select **Enter**. However if default logging in is enabled, the user would not need to log in at this point.
4. Once successfully logged in, the user at the device will see a list of shortcuts to folders that will act as repositories for the documents to be searched and subsequently printed. These shortcuts were entered by the SMARTsend Administrator. Refer to the *SMARTsend Device Extensions Installation Guide* for instructions on creating the shortcuts.
5. The user can select the destination to search for the documents to be printed. The user can expand the folders in the list to select the folder where the documents are stored for printing. The documents may be part of the original list that the Administrator had entered. The user will be asked to verify their credentials to the destination where the documents reside by using the keyboard on the User Interface. The URL to the file is shown in the top left portion of the MFD User Interface.
6. Once the document is chosen, the user selects **Print**. The User Interface indicates that the device is preparing to print.
7. To go to another Custom Service or move to another service all together, the user should select the **All Services** button. The user is taken to the **Custom Services** screen. This screen shows available Custom Services and the **Close** button to exit Custom Services. After exiting Custom Services, the user can check the MFD job queue for the output by exiting the Custom Services mode by selecting **All Services** and then by pressing the job status hard button on the MFD.

How to Scan

5

After a workflow has been created and published to a Xerox Multifunction Device or to a PaperWare cover sheet (Professional Edition feature), it is ready to be used to scan documents. This chapter covers the steps for using workflows to scan documents at the device.

What is in this chapter:

Before Scanning

Before a user can use a workflow to scan a document, the following steps must be performed:

- A workflow must be created. See Chapter 3, Distribution Workflows for instructions on creating a workflow.
- A workflow must be published to a Xerox Multifunction Device or to a PaperWare cover sheet (Professional Edition feature). See Chapter 4, Publishing Workflows, for instructions on publishing a workflow.
- If the workflow was published as a PaperWare cover sheet, the cover sheet must be printed on 8.5" x 11" or A4 paper at 100 %, not torn, without pen marks and does not show faint/light text.
- If the published workflow requires authentication, a cover sheet or device with authentication configured and enabled is required.
- If you have been using a trial version of SMARTsend but it has expired, you must obtain a license or scanning jobs will fail.

How Publication Affects Scanning

A workflow can be published either to one or more devices or, if using the Professional Edition of SMARTsend, as a PaperWare cover sheet. If the workflow is published to one or more devices, then the workflow is available for use only at those devices. If the workflow is published as a PaperWare cover sheet, then the workflow is available for use at any Xerox Multifunction Device configured for SMARTsend or any Internet Fax Device.

If the workflow specifies that one or more document attributes is editable at the device and the workflow is published as a PaperWare cover sheet, then a device template will be published to devices specified at publication when the PaperWare cover sheet is generated.

If a customized PaperWare settings scan template is created to override default scan settings used for PaperWare jobs, then that template is available only at that device. Of course, the generic PaperWare template can be used instead, but the customized scan settings will not be used by the device.

For more information on publishing, see Chapter 4, Publishing Workflows.

Scanning with a Device Scan Template

To scan a document using a published device scan template:

1. Select the desired template from the device user interface. The name of the template shown at the device is the name of the publication specified at publication time. If the template is not shown, refresh the list of templates using the device interface.

   Note: The refresh procedure varies with the device. Consult the device administrator for instructions on refreshing the templates on your device.

2. Enter any document attributes specified as editable at the device when the workflow was published.
3. Place the document to be scanned in the feeder.
4. Press **Start**.
5. If job confirmation was specified when the workflow was created, a job confirmation should be printed or e-mailed. Check the job confirmation to be sure that the job completed successfully. The output file should be at every destination specified by the workflow.

Scanning with a PaperWare Cover Sheet

Professional Edition Feature

To scan a document using a PaperWare cover sheet without editable document attributes:

1. Select the **PaperWare** template or the **Default** template from the device user interface. If the Default template has been properly configured for use with SMARTsend, it will function within the same conditions and limitations that apply to PaperWare templates. Please check with your SMARTsend administrator to determine if the Default template has been properly configured for use with SMARTsend.
2. On the cover sheet select the checkboxes for the destinations to which you want the scan file to be delivered.

   Note: If destinations were checked at the time of publication, those destinations will already be checked on the cover sheet.

3. Place the document to be scanned and the cover sheet in the feeder, with the cover sheet as the first page. Multiple jobs can be placed on the device, provided each is separated by a cover sheet. If using Internet Fax, select the Internet Fax option, select text mode, and enter the Internet Fax address for the SMARTsend computer.

   Note: On some devices it may be necessary to manually enable the Auto Exposure and Text Mode settings using the device user interface. If these settings are not enabled, the PaperWare cover sheet may not work properly, especially when images from the scanner have high background or other imaging defects. In addition, the Edge Erase setting on the scan device must not exceed 12 millimeters.

4. Press **Start**.
5. If job confirmation was specified when the workflow was created, a job confirmation should be printed or e-mailed. Check the job confirmation to be sure that the job completed successfully. The output file should be at every destination specified by the workflow.

Workflows with Editable Document Attributes

When a workflow specifies that one or more document attributes is editable at the device and the workflow is published as a PaperWare cover sheet, a device template will be published to devices specified at publication when the PaperWare cover sheet is generated. The cover sheet will list each attribute. Beside those attributes for which values must be entered at the device, the cover sheet will say, "Enter Value at the device when prompted."

Note: Not all devices support entry of data. In addition, you cannot use Internet Fax to enter data.

To scan a document using a PaperWare cover sheet when the workflow has editable document attributes:

1. From the device user interface select the device scan template which was published when the cover sheet was created. The name of the device template that is needed will be printed on the cover sheet. If the template is not listed on the device, refresh the list of templates using the device interface.
2. The device will prompt you to enter values for attributes that are specified as editable. Enter the values.
3. On the cover sheet select the checkboxes for the destinations to which you want the scan file to be delivered.

   Note: If destinations were checked at the time of publication, those destinations will already be checked on the cover sheet.

4. Place the document to be scanned and the cover sheet in the feeder, with the cover sheet as the first page. Multiple jobs can be placed on the device, provided each is separated by a cover sheet.
5. Press **Start**.
6. If job confirmation was specified when the workflow was created, a job confirmation should be printed or e-mailed. Check the job confirmation to be sure that the job completed successfully. The output file should be at every destination specified by the workflow.

Customized PaperWare Scan Settings

To scan a document using customized PaperWare scan settings, a device template with the modified scan settings must first be published at the device(s). See Personalize Your PaperWare Form Scan Settings on page 2-21.

To scan a document using the new scan settings:

1. Select the template with the customized settings from the device user interface. If the template is not shown, refresh the list of templates using the device interface.

2. On the cover sheet select the checkboxes for the destinations to which you want the scan file to be delivered.

   Note: If destinations were checked at the time of publication, those destinations will already be checked on the cover sheet.

3. Place the document to be scanned and the cover sheet in the feeder, with the cover sheet as the first page. Multiple jobs can be placed on the device, provided each is separated by a cover sheet.
4. Press **Start**.
5. If job confirmation was specified when the workflow was created, a job confirmation should be printed or e-mailed. Check the job confirmation to be sure that the job completed successfully. The scan file should be at every destination specified by the workflow.

Refetching the Cover Sheet

At the bottom left corner of each cover sheet is a checkbox labeled "Refetch this form." If this checkbox is checked, a new cover sheet will be printed when the current cover sheet is used. The newly printed cover sheet will be a clean version, without any check marks added by the user to indicate destinations for previous scan jobs.

Note: When the resolution scan setting is set to low, the DataGlyph on the cover sheet that results when the cover sheet is generated may be so large that the *Refetch this form* checkbox is lost.

A new version of the cover sheet can also be created by clicking **Refetch the cover sheet** from the View Publications page. Finally, a new version of the cover sheet can be created from the Publication Details page by clicking **Refetch Form**. See Viewing Publications on page 98 for information on accessing the View Publications and Publication Details pages.

Recall that when a cover sheet is created at the time the workflow is published, destinations can be checked to indicate that the output file for the job should always be delivered to those destinations. See Publishing to a PaperWare Cover Sheet on page 92. When the cover sheet is created, the destinations that were checked will appear checked on the cover sheet. Refetching the cover sheet will not remove those checks. To assure the greatest flexibility at scan time, it is recommended that no default destinations be selected when a workflow is published to a cover sheet.

Scanning Documents to a Document Repository

The following describes how to use the Scan to Repository SMARTsend application. This feature requires that the SMARTsend Device Extension Server already be installed and configured based on the *SMARTsend Device Extensions Installation Guide*.

SMARTsend for the Scan to Repository Application

To use the SMARTsend Scan to Repository Application:

1. From the Multi Function Device (MFD), the user selects **All Services** > **Custom Services** on the device User Interface.
2. The **Scan to Repository** button should be visible. Note that the label of the button can or may have been customized by the System Administrator. In this case, the user should check with their System Administrator for the modified name of the Custom Service.
3. The user should select the Scan to Repository or equivalent button at the MFD User Interface. If the system administrator has not enabled default logging in, the user will be asked to provide their SMARTsend User Name, Password and Domain details and then select **Enter**. However if default logging in is enabled, the user would not need to log in at this point.
4. Once successfully logged in, the user at the device will see a list of shortcuts to folders that will act as starting points for the user to browse for a suitable repository for the scanned document. These shortcuts have to be entered by the SMARTsend Administrator. Refer to the *SMARTsend Device Extensions Installation Guide* for instructions on creating the shortcuts.
5. Select the destination for the scan. Users can navigate folders by using the "expand" and "up" buttons similar to browsing folders on a PC. A valid folder must be selected to enable scanning. If the user has not created a SMARTsend credential for the destination, the user will be prompted to enter their credentials
6. After selecting **Scan**, the User Interface indicates that a scan is in progress. The job is scanned and shows a thumbnail view. The user can scroll through the thumbnail images to inspect the scanned images. If the images are acceptable, the user can store the document. If not, the user can use the **Back** button to cancel the job and return to browsing for a folder.
7. The **Options** button on this screen provides the user the ability to change the document format that the image is saved in. For example the output could be saved as a PDF with image on text or as a PDF with normal image.
8. The user then has the option of changing the name of the document at the MFD using the touchscreen keyboard on the User Interface.
9. The user may press the **Store** button on the User Interface to store the image in the destination selected earlier. The MFD will print out a confirmation report to give the status of the job.
10. If the user wants to scan to another folder available in the application, the user can select **Back** on the User Interface. If the User wants to go to another Custom Service or move to another service all together, then the user should select the **All Services** button. The user would be taken to **Custom Services** screen showing all the available **Custom Services** and the **Close** button to exit Custom Services.

Common Issues

The following are problems sometimes encountered when scanning:

The template does not appear among the list of templates on the device.

The list of templates may need to be refreshed. Devices may refresh automatically at particular time intervals. However, if the device has not refreshed the list of templates itself, you may need to manually request that the list be refreshed.

Also, be sure the template was published to the device. To view devices to which a template was published, go to the User Home Page, click **View All Workflows**, select the workflow, click **View publications**, select the publication, and click **View publication details**. The devices to which the workflow was published will be displayed within the Selected Devices list.

The template appears among the list of templates on the device even though the template was deleted or has expired.

The list of templates may need to be refreshed. See the above issue.

The template specifies that document attributes are to be entered at the device, but I am not being prompted to enter data.

Your device may not support data entry at the device. If the attributes are required, the job will fail on devices that do not support data entry. If attributes are specified as editable at the device but not all of your devices support data entry, be sure that the attributes are not required. See Save Workflow on page 67 for information on document attribute properties.

My job failed because "One or more services [destinations] in the job failed to execute" or "A login failure occurred."

Check the details for the destinations as printed on the confirmation report. Your credentials for the destination may have changed. Update your credentials from the User Home Page by clicking **Manage My Credentials**. For more information, see My Credentials on page 20 and Managing Destination Credentials on page 34.

My job failed with the message "You do not have permission for this workflow."

The workflow may require authentication at the device.

The back side of the cover sheet is included in the output file.

The condition of the scanner hardware and other image settings might cause the back side to be included. This problem can be avoided by proper maintenance and cleaning of the scanning device. Turning on background suppression on the device may also resolve this problem.

How do I scan a document that is not 8.5" x 11" using a 8.5" x 11" or A4 PaperWare cover sheet (Professional Edition feature)?

You must make sure that the Original Type scan profile properties setting is set to *Mixed*, either by setting it at the device, or by publishing and using a customized Xerox PaperWare Settings template with that scan profile property setting. The device must support Mixed size originals. See Original Type on page 4-89 for information on the Original Type property and see Personalizing Scan Settings for PaperWare Forms on page 97 for information on customizing PaperWare scan settings.

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