



SMARTsend[™]

Frequently Asked Questions

Aug 15th 2006 Xerox Corporation 855 Publisher's Parkway, Bldg. 0855-01D Webster, NY 14580 USA

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Overview

Application, device, and network errors can occur in a variety of situations. This guide includes some of the common issues and Frequently Asked Questions that pertain to SMARTsend, Xerox Multifunction Devices, and related networking issues that have been added or updated after the release of SMARTsend 2.1

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

Troubleshooting a Problem

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

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

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

Additional Information

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

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

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

Frequently Asked Questions

Why do I get a web proxy network error?

WindowsXP needs to configure its firewall for SMARTsend to be able to launch. If the firewall has not been configured to allow http and https to have access, you'll get a message similar to the one shown below in Figure 1when launching SMARTsend after it has been installed on the Windows XP.



Figure 1

Solution: Configure the XP server by (refer figure below):

- 1. Select "Windows Firewall" from Control Panel.
- 2. Select "Advanced" Tab
- 3. Select "Settings" in the "Network Connection Settings" group, to add the exceptions for an individual connection
- 4. Select the "Services" tab from the resultant "Advanced Settings" windows
- 5. Check "Web Server (HTTP)" and Secure Server (HTTPS)" on the firewall. From Windows Firewall/Advanced



Why do I get a Guest user login popup when I try to login?



Solution: Set "Network Access: Sharing and Security model for local accounts" to "Classic – Local users authenticate as themselves" by

- 1. Select "Administrative Tools" from the "Start" Menu.

- Select Administrative roots from the Start Mend.
 Choose "Local Security Policy"
 Select "Local Policies"
 Select "Security Options"
 Scroll down to "Network Access: Sharing and Security model for local accounts" and double click it.

📴 Local Security Settings			- 6 🛛
File Action View Help			
← → 🖻 × 🗗 🔂 🛛	8		
📴 Security Settings	Policy /	Security Setting	~
🖻 🤷 Account Policies	BInteractive logon: Message title for users attempting to log on	Not defined	
E 🚨 Local Policies	BInteractive logon: Number of previous logons to cache (in case domain controller is not available)	10 logons	
E 🤐 Audit Policy	Interactive logon: Prompt user to change password before expiration	14 days	
🛨 🧾 User Rights Assignmen	BInteractive logon: Require Domain Controller authentication to unlock workstation	Disabled	
Security Options	🕮 Interactive logon: Require smart card	Not defined	
Public Key Policies	Interactive logon: Smart card removal behavior	No Action	
TP Security Policies on Loca	BigMicrosoft network client: Digitally sign communications (always)	Disabled	
E G IF Security Policies of Loca	BigMicrosoft network client: Digitally sign communications (if server agrees)	Enabled	
	B Microsoft network client: Send unencrypted password to third-party SMB servers	Disabled	
	BMicrosoft network server: Amount of idle time required before suspending session	15 minutes	
	BMicrosoft network server: Digitally sign communications (always)	Disabled	
	BMicrosoft network server: Digitally sign communications (if client agrees)	Disabled	
	Content of the server of the s	Enabled	
	BNetwork access: Allow anonymous SID/Name translation	Disabled	
	BNetwork access: Do not allow anonymous enumeration of SAM accounts	Enabled	
	BNetwork access: Do not allow anonymous enumeration of SAM accounts and shares	Disabled	
	BNetwork access: Do not allow storage of credentials or .NET Passports for network authentication	Disabled	
	Wetwork access: Let Everyone permissions apply to anonymous users	Disabled	
	BNetwork access: Named Pipes that can be accessed anonymously	COMNAP, COMNODE, SQL\QUERY, SPOO	
	Bill Network access: Remotely accessible registry paths	System\CurrentControlSet\Control\Prod	
	Wetwork access: Shares that can be accessed anonymously	COMCFG,DFS\$	
	Network access: Sharing and security model for local accounts	Guest only - local users authenticate as	
	🕮 Network security: Do not store LAN Manager hash value on next password change	Disabled	
	WNetwork security: Force logoff when logon hours expire	Disabled	
	BNetwork security: LAN Manager authentication level	Send LM & NTLM responses	
	Wetwork security: LDAP client signing requirements	Negotiate signing	
	BNetwork security: Minimum session security for NTLM SSP based (including secure RPC) clients	No minimum	
	BigNetwork security: Minimum session security for NTLM SSP based (including secure RPC) servers	No minimum	
	Recovery console: Allow automatic administrative logon	Disabled	
	Recovery console: Allow floppy copy and access to all drives and all folders	Disabled	
	BShutdown: Allow system to be shut down without having to log on	Enabled	
	Butdown: Clear virtual memory pagefile	Disabled	
	Bystem cryptography: Use FIPS compliant algorithms for encryption, hashing, and signing	Disabled	
	Bystem objects: Default owner for objects created by members of the Administrators group	Object creator	
	Bystem objects: Require case insensitivity for non-Windows subsystems	Enabled	
< >	🐯 System objects: Strengthen default permissions of internal system objects (e.g. Symbolic Links)	Enabled	~
<	System objects: Strengthen default permissions of internal system objects (e.g. Symbolic Links)	Enabled	

6. Select "Classic - Local users authenticate as themselves" from the list of options (see figure below)

etwork access: Sh Local Security Setting	aring and security model for I	ocal 🥐
Network ac	cess: Sharing and security model for loo	cal accounts
Guest only - local	lusers authenticate as Guest	*
Classic - local use Guest only - local	ers authenticate as themselves I users authenticate as Guest	
		1

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Why does the Integrated install of Walk up print driver fail on a clean W2K3 or XP install of SMARTsend?

On a clean install of XP or 2k3 there are no PSCRIPT print drivers installed so the install of the Walk Up driver does not complete properly. The visible symptom is that there is no instance of this Walk-up driver in the Printers and Faxes folder. The driver does appear in the add/remove programs list. User should follow the "Add Printer" wizard to install any Xerox Postscript driver before installing SMARTsend.

Scan To Home. Am I required to install SMARTsend from the CD or ISO Image on the SMARTsend Computer?

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

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

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

To repair an existing SMARTsend installation:

- 1. Log in to the SMARTsend computer as an administrator.
- 2. Open the Windows **Control Panel** and select **Add/Remove Programs**.
- 3. Select **SMARTsend**, and then select **Change**.

Select **Repair** on the Application Maintenance Page (*Figure 1*), and then click **Next**.

4. Click **Next** on the Ready to Repair the Application page.

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

FreeFlow SMARTsend - Inst	allShield Wizard 🛛 🔀
Welcome	
modiry, repair, or remove the p	ogram.
	Welcome to the FreeFlow SMARTsend Setup Maintenance program. This program lets you modify the current installation. Click one of the options below.
	Repart Reinstall all program features installed by the previous setup.
	C Berrove Remove all installed features.
	< Back Next Cancel

Figure 1

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

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

Certain Xerox Devices namely WCP 232/238/245/255/265/275 family with releases x.27.24.020 & x.50.03.000 have PDF Linearization turned on by default. PDF Linearization is new feature for PDF scanning to enable faster viewing of PDFs in a web browser. However in such cases it is possible that the scan gets to the SMARTsend server and never gets delivered to the destination. When running the Job History Exporter, the error message observed in the log is "Incoming images could not be processed". For a workaround please follow steps below. Please note that you shall need Administration rights to make the necessary change for which you may want to contact your SA or Xerox Corporation Support.

- 1. Use CentreWare Internet Services to get to the Xerox Device's properties page.
- 2. Select Services from the menu on the side.
- 3. Select Network Scanning

Internet S	ervices				XEROX WORK	CENTRE PRO			Index Contents Help
Status	Jobs	Print	Scan	Properties	Support				
Properties Description I General Setur	p		Default Temp	late					
 Connectivity Services Printing Fax Notwork Sc. 	amina		Destination Services Services:			✓ <u>File</u> □ Fax			
General File Repos Validation Scan Tem	sitory Setup Servers plate Management		Name / Format Document Name: Document Format:			DOC PDF			Edit
Advanced Advanced Scan to Mail Scan to Hon Machine Sot Internet Mes Xerox Servi Custom Ser	ilibox ilibox ne fftware ssaging ices tvices		File File Destinations File (Default): / on //0.0	0.0:0/					Add Edit Delete
► Security			Document Managem Field Name, Field Label	<mark>ent Fields (Optic</mark> Default ∀alue	onal)				Add Edit Delete
			Scan Options Image Adjustment: Confirmation Report: Job Log:			(Select Edit) Enabled Enabled			Edit
X	EROX					Apply Factory Default Settin	ngs		

- Select Default Template.
 In the Name / Format Section, select Edit to change the default options.
 Change the scan file type from PDF to Multi-TIFF. Select Apply.

	rtion - Microsoft Internet Explorer		
File Edit View Favorites Tools He			
🔇 Back 🔹 🔘 🔹 😰 🏠	🔎 Search 🤺 Favorites 😧 🍙 🍓 🔜 🛄 🏭	-3	
Address 🗃 https://13.121.32.121/propertie	s/index.dhtml		<u>▼</u> ∋∞ 🕏
Internet Services	XER	OX WORKCENTRE PRO	Index Contents Help
Status Jobs	Print Scan Properties Supp	port	
Properties Description	Default Template		
▶ General Setup	Name / Format		
 Connectivity Services 	Document Name:	DOC	
▶ Printing	Document Format	O TIFF	
Fax Astwork Scanning		O Multi-Page TIFF	
General		PDF	
File Repository Setup	Note: Selected options will be applied to all File desti	inations.	
Scan Template Management]
Default Template		Apply Cancel	
Advanced Scan to Mailbox			
▶ Scan to Home			
▶ Machine Software			
Internet Messaging Xerox Services			
► Custom Services			
▶ Security			
νερογ			
XEKUX			
ê			🔒 🧐 Local intranet 💡

- 7. A log in box will appear where you have to enter the Device Administrator User Name and Password. Enter the specific information requested and select OK for the changes to be accepted.
- 8. Please note the following
 - a. PaperWare Cover Sheets will work with the default template if your SMARTsend software version is v1.0.317.0 or higher. Otherwise, using the default template with a PaperWare Cover Sheet results in a failed scan job. If this affects your workflows, please contact Xerox Support.
 - b. Note: The PDF Linearization feature may affect other scanning solutions but, at this time, we are only aware of the effect it has on SMARTsend.

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Will all features of SMARTsend be available while using DC 420/425/430/432/440 devices?

Even though DC 420/425/430/432/440 devices support network authentication, they do not pass any information to the filing destination about which user logged in when a scan was done. The absence of this information prevents the use of the following SMARTsend features on these devices: Private workflows, Scan to My_Email, or network authenticated Scan to Home.

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

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

[HKEY_LOCAL_MACHINE\SOFTWARE\Xerox\FreeFlowDDS\Settings\Install] LdapObjectFilter = (objectClass=person) **Note**: This value is not required for other types of LDAP servers and may cause them to fail to return user records. Also, depending on server setup, a different filter string may be required.

When configuring the SMARTsend LDAP settings:

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

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

Figure 1

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

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

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

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

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

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

File Edit View Favorites Tools	Help		
🗢 Back 🔹 🔿 👻 🔯 Search 🗍	🔁 Folders 🧭 💾 🔁 🗙 න 📋	*	
Address 🗀 C:\Inetpub			▼ @60
Faders X Desktop My Documents My Pictures Bostop My Retures Description Descrintern Des	Inetpub Prot File Folder Modified: 3/14/2006 11:52 AM Attributes: (normal)	Name / Advmisfying / Advmisfying / Advmisfying / Advmisfying / Search Search Search Search Search / Search / Copy Create Shotrout Delete Rename Properties 1	Size Type File Folder File Folder File Folder File Folder File Folder File Folder
Displays the properties for sharing the se	lected folder		//.



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

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

Figure 2

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

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

ermissions for ftp	root]	? ×
Share Permissions				
Name			Add	
Everyone		_	Remove	
Permissions:		Allo	w Deny	_
Full Control			□	
Change Bead		ᅜ		
- Incode				
	ΠΚ	Cancel	Anni	, 1



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

🙉 Inetpub				
File Edit View Favorites Tools	Help			
😓 Back 🔹 🤿 👻 🔯 Search 🛛	🔁 Folders 🧭 階 😵 🗶 🖉	ז 📰 -		
Address 🗀 C:\Inetpub			▼ @Go	
Folders X		Name 🛆	Size Type	
Desktop		AdminScripts	File Folder File Folder	
- My Documents	Inetpub	issamples	File Folder	
E G Security		🚞 mailroot	File Folder	
E 🖳 My Computer	ftproot	iscripts	File Folder	
🗄 🚽 31⁄2 Floppy (A:)	File Folder	🗀 wwwroot	File Folder	
E - Cal Disk (C:)	Modified: 3/14/2006 11:52 AM			
Documents and Settings	Attributes: (normal)			
Program Files				
E SMARTsend				
- Supportfiles				
III 🗀 WINNT				
WUTemp				
H 🖓 ALT50 (D:)				
H My Network Places				
Recycle Bin				
Internet Explorer				
		•		
1 object(s) selected	object(s) selected 📃 My Computer			

Figure 4

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

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

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

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





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

Virtual Directory Creation Wi	zard 🔀
	Welcome to the Virtual Directory Creation Wizard
	This wizard will help you create a new virtual directory on this FTP site.
	Click Next to continue.
	< Back Next> Cancel

Figure 2

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



Figure 3

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

Virtual Directory Creation Wizard	×
FTP Site Content Directory Where is the content you want to publish on the FTP site?	(D)
Enter the path to the folder containing the content.	
Path:	
C:\SMARTsend\Scans	Browse
< <u>B</u> ack <u>Next</u> >	Cancel

Figure 4

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

Virtual Directory Creation Wizard	×
Access Permissions What access permissions do you want to set for this virtual directory?	Ĵ
Allow the following:	
₩ Read	
Vite	
Click Next to complete the wizard.	
< <u>B</u> ack <u>N</u> ext > C	ancel

Figure 5

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

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

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

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

🔯 SMARTsend				_ 🗆 ×
File Edit View Favorites Tools	Help			1
😓 Back 🔹 🤿 👻 🔯 Search	Polders 🧭 🎦 🏹 🗙 🔊			
Address 🛅 C:\SMARTsend				
Folders × Image: Sector Sect	SMARTsend Network_Folder_Scans File Folder Modified: 3/14/2006 12:06 PM Attributes: (normal)	Name A Network, Folder Soons Explore Open Search Staring Scan for Viruses Send To Cut Copy Create Shortcut Delete Rename Properties	Size	Type File Folder
	1	•		<u>•</u>

Figure 1

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

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

Figure 2

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

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

Permissions for Net	work_Folder_Scans	<u>? ×</u>
Share Permissions		
Name		Add Remove
Permissions: Full Control Change Read		Allow Deny
	OK C	Cancel Apply



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



Figure 4

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

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

Verify Domino is ready to accept uploads from SMARTsend

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

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

🖉 "v-DominoDoc" Remote	e Control - Microsoft Interi	net Explorer provided by Xerox Office Group		
Eile Edit View Favorite	is <u>T</u> ools <u>H</u> elp			1
🙆 Back 🔹 🕥 - 💽	Search	🕹 Eavoritor 🙆 🔿 - 🏊 🔳 - 🥅 🖡	o. # 3	Links
Address 🤮		A DassDask 🕅		👻 🔁 Go
Google *	- G Search -	🌀 🐌 🤷 33 blocked 🥱 Check 🔹	🕻 AutoLink 👻 🔄 Antoni 🛃 Options 🖉	
	1 6 2 6 8 3 3	· ि 10 + − + − + A ⊂ 届		
] (+ + + > + (2) (3) Q* Q*	•			
People & Groups P	iles Server Messaging			
Server: V-D Rele	OMINODOC/Xerox ase 6.0 on Windows NT 5.2		Use Directory Current Server	▼ Tools
Verver	🖉 Edit Server 🛞 Cre	ate Web (R5) 🛞 Cancel) is Certification
All Serve	Accept SSL site certificates:	C Yes 🖲 No		Registration
Connecti	Accept expired SSL	€ Yes C No		> 💦 Policies
External	certificates:			> W Hosted Org
Replication				🗦 🚺 Server
Directory	Weh Directory Mail	DIIOP Remote Debug Manager		Miscellaneous
 Policies Web Maximum C 	Remote Java/Domin IIOP	0		
	TCP/IP port number:	63148		
🕨 🐼 Offline Servic	TCP/IP port status:	Enabled		
 Certificates Miscellaneou 	Enforce server access settings:	No		
	Authentication options:			
	Name & password:	Yes		
	Anonymous:	Yes		
	SSL port number:	63149		
	SSL port status:	Disabled		
	Authentication options:			
	Client certificate:	N/A		
	Name & password:	No		
	Anonymous:	Yes		
	•			
				▲ Office ▲] [▲
a)			Trans.	Internet
a a 🛪 🗖 🙉 🗛 🕽	Secondary 1			

Figure 1

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

Create and configure a Domino Library

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

🤣¥-DOMINODOC Domain	- Domino Administrator				<u>_8×</u>
Eile Edit View Greate A	actions Administration Con nter 2 쇼 자 찫 찫	figuration Help 한 💽 슈 드 슈 드 🏘 🔍 🐻			
Open Ser <u>v</u> er Open In New <u>Wi</u> ndow			1		
<u>C</u> lose Cl	trl+W Stest - All Documen	ts 🗙			
Document Properties	Messaging	Replication Configuration			
Database Replication	DC/Xerox /indows NT 5.2			Use Directory V-DOMINODOC/Xerr -	√Tools
Mobile	📩 📩 Berver 🛞 Crea	ite Web (R5) 🗴 Cancel) 🧕 Certification
<u>A</u> ttach Import Export	er : V-DOM	INODOC/Xerox	State.	010010101010	> Registration
Print Cl Page Setup Preferences	trl+P Becurity Ports	Server Tasks Internet Protocols MTAs	Miscellaneous Transactional Logg	jing Shared Mail Administration	Policies Hosted Org
Security	×				> 📋 Server
Tools	lame:	V-DOMINODOC/Xerox	Server build number:	Release 6.0	> 🗍 Miscellaneous
Exit Administrator	itle:		Routing tasks:	Mail Routing	
Monitoring Co	Fully qualified Internet host name:	V-DOMINODOC V-DOMINODOC.na.xde3.xerox.org	Server's phone number(s):	Disadied	
Offline Servic	Cluster name:		CPU count:	1	
 Image: Certificates Image: Certificates<	Load Internet configurations from Server(Internet Sites documents:	Disabled	Operating system:	Windows/NT 5.2 Intel	
	Maximum formula execution time:	120 seconds	Is this a Sametime server?:	No	
	Directory Information		Fault Recovery		
	Directory assistance database name:		Fault Recovery:	Enabled	
	Name of condensed directory catalog on this server:		Cleanup Script Name:		
	Trust the server based condensed directory	T Yes	Cleanup Script Maximum Execution	300 seconds	
				▲] [~) [)lfice 🔺 🛄 🔺
🏄 Start 🛛 🕜 🥭 👘	n V-DOMINODOC/Xerox: L	L 🥪 ¥-DOMINODOC Domai			💟 9:41 AM

Figure 1

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

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

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

Server		
0000		
<u>T</u> itle	SampleDocLib	Cancel
Eile name	SampleDo.nsf	
	Encryption	
	Create full text index for searching	Advanced.
	Template for New Database	
Server	Local]
Tempjate	Sank-]
	Database Library	1
	Discussion - Notes & Web (6)	
	Extended Mail (B6)	
	Lotus SmartSuite Library (6)	Ŀ
File <u>n</u> ame	doclbw6.ntf	About
	Show advanced templates	
	V Inherit future design changes	

- 4. Set the Access Control List (ACL) for the new database
 - a. From the Tools pane, select File > Database > Access Control (Figure 1). In the Access Control dialog box (Figure 3), select the user you want to have access to this database. Select the User type as Person and Access as Editor. Select the Delete

documents and Create shared folders/views options. Click OK to grant access to the selected user.

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

Less cond of	List to, samplebottib	
Basics	Access Control List People, Servers, <u>Groups</u> Show All	Attributes
₩ Roles	-Default Administrator/Xerox Anonymous LocaliomainServers DotherDomainServers V+DDMIN0DD0C/Xerox	Access Author
	Add Bename Remove Effective Access Full name: Full name: An Access Control List (ACL) defines who can view and edit your do Select a name in the list to see or set the access assigned to the name in the set to see or set the access assigned to the name in the set to see or set the access assigned to the name in the set to see or set to see or set the access assigned to the name in the se	atabase.
	Last change: Administrator on 01/17/2006 10:14:59 AM According to: Xerox	OK Cancel

Figure 3

5. Reboot Domino Server to enable configuration changes.

Creating a Domino Workflow in SMARTsend

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



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



Figure 2

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

Domino Properties Configure the Domino settings for this workflo	w.
Destination Name Sample Library Select Starting Point	
Domino Database URL http://v-dominodoc.org/sampledo.nsf	
Form Name	
	OK

Figure 3

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

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

kerox FreeFlow™ - SMARTsend™ - My C	redentials - Microsoft Inte 📃 🗖
Account Xerox FreeFlow - SMART: Add/Edit	send™ - My Credentials - Microsoft Interi
Account Type:	
Domino	(v)
Name	
Sample Library	
Domino Database URL	
http://v-dominodoc.org/sampledo.n	sf
User Name	
System_User	
Password	
Casting Desemand	
Secure Page	OK Cancel
Done	🕒 🍕 Local intranet
	· . 1

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

FreeFlow [™] SMARTsend [™]	Site Administration About Help
Home >> Workflow Explorer >> Add 1	New Workflow
✓ Document Destinations	Define naming options and output formats for scanned documents.
Document Name and Type Document Attributes Workflow Settings Save Workflow	Name O O Auto Generate a Name (8 characters) O Name Provided at Scan Source Name Suffix Date and Time ▼ Document Type
	Use the same Document or Print Type for all destinations Document Type PDF, Image Only (*.pdf) Properties Format: PDF, Image Only - Preserve Image from Scan Source Print Type Original Image Format: Not Applicable Use a different Document or Print Type for each destination
XEROX.	Destination Document Type and Format << << << << <

Figure 5

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

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

Figure 6

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

FreeFlow [™] SMARTsend [™]	Site Administration About Help
Home >> Workflow Explorer >> Add N	ew Workflow
✓ Document Destinations	Workflow Settings Choose the confirmation and access level for this workflow.
 Document Name and Type Document Attributes Workflow Settings Save Workflow 	Job Confirmation How will the workflow user receive job confirmation? Workflow owner's e-mail v v Help me choose
	Workflow Access What type of access would you like to assign to this workflow? Public Of Public
XEROX.	All users can access and use this workhow.
	<< Previous Next >> Cancel

Figure 7

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

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

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



Figure 8

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

FreeFlow [™] SMARTsend [™]	Site Administration About Help DSP3\geminiadmin
Home >> Workflow Explorer >	> Publish PaperWare Cover Sheet for Workflow
	🛿 Publish PaperWare Cover Sheet for Workflow: workflow3
and the second	Publishing this workflow will create a PaperWare cover sheet which can be used at Xerox Multifunction Device(s) and Internet Fax devices.
	workflow3
	Publication Settings
	Publication Name (Cover Sheet Title) workflow3 Cover Sheet Description
	Expires after not used for: 6 months V 🕑 Help me choose
	Destinations Select the destinations you want checked on your PaperWare cover sheet. Note: All destinations will appear on the cover sheet. Domino: http://v-dominodoc.na.xde3.xerox.org/sstest.nsf
XEROX.	Create Cover Sheet Cancel
	Figure 9

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



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



Figure 11



Figure 12

More information about DIIOP

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

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

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

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

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

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

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

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

Internet Links to Domino Information

Running Server Tasks <u>http://www-</u> <u>12.lotus.com/ldd/doc/domino_notes/6.5/help65_admin.nsf/b3266a3c17f9bb7085256b870069c0a</u> 9/7d5c04dbf086b6c785256d9b004b337c?OpenDocument

Setting up DIIOP http://www-

12.lotus.com/ldd/doc/domino_notes/6.5/help65_admin.nsf/89d3962efd85426f85256b870069c0aa /be442e1584f16beb85256d9b004b03af?OpenDocument

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

How do I populate Domino metadata using a SMARTsend workflow?

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

Administration Steps

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

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

Note: This XML can be edited to your own requirements by changing the "metadata" elements of the xml. The metadata elements consist of the following:
label – This is the text that the user will see when mapping document attributes.
name – This is the name of the field as defined in Domino.
required – This can be set to true or false and specifies whether or not the user has to enter data for this field in order for the workflow to be successful.
e. Click Apply.

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

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

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

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

Figure 1

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

FreeFlow™ SMARTsend™				Site Administration About He
Home >> Workflow Explorer >> Add New	Workflow			
Document Destinations	Document Attri Optionally, define att	butes ributes to make identification a	and management of scanned	l documents easier.
Document Name and Type	Document Attribute	e Fields		
Document Attributes	Use the Following P	rofile:		
Workflow Settings	No Document Profile	ionic.	~	
Save Workflow				
	Field Name	Suggested Values	Value Dequired	
	Subject	SMAPTcend Metadata	Yec	Properties Delete
	Body		Yes	Properties Delete
	Web Categories	<none></none>	Yes	Properties Delete
	Form Name	<none></none>	Yes	Properties Delete
XEROX.	Add Field Save	as New Profile		
				<< Previous Next >> Cancel

Figure 2

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

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

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

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

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

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

To remedy this problem, perform the following procedure:

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

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

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

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

What versions of Netscape Navigator are supported by SMARTsend?

Netscape Navigator version 7.2 or higher is supported for viewing and configuring the SMARTsend 2.1 site, managing devices and managing workflows.

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

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

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

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

Why can I only file to one Hummingbird server at a time?

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

Why am I having difficulty creating credentials for TRIM Context6 Servers?

While creating credentials for the TRIM Adaptor, the user must use the new user nomenclature, not the legacy NT nomenclature. The format to be used should be username@domain and not the Win NT style domain\username