

**XEROX®**



## **Frequently Asked Questions**

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# Table of Contents

<b>Overview</b> .....	5
<b>Troubleshooting a Problem</b> .....	5
<b>Additional Information</b> .....	5
<b>Frequently Asked Questions</b> .....	6
<b>AFTER MANUALLY CONFIGURING A DEVICE, I AM UNABLE TO REFRESH TEMPLATES? WHY?</b> .....	6
<b>AM I REQUIRED TO INSTALL SMARTSEND FROM THE CD OR ISO IMAGE ON THE SMARTSEND COMPUTER?</b> .....	6
<b>DO NEWER XEROX MULTIFUNCTION DEVICES REQUIRE ADDITIONAL CONFIGURATION STEPS WHEN THEY ARE BEING MANUALLY CONFIGURED?</b> .....	7
<b>HOW DO I CONFIGURE SMARTSEND TO USE A SUN JAVA SYSTEM DIRECTORY LDAP SERVER FOR INTEGRATED ADDRESS BOOK LOOKUP?</b> .....	7
<b>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?</b> .....	8
<b>Option 1: Create the scan directory inside the FTP root directory.</b> .....	8
<b>Option 2: Create a Virtual Directory in the Microsoft IIS service.</b> .....	10
<b>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?</b> .....	12
<b>HOW DO I CREATE AND CONFIGURE A DOMINO DOCUMENT LIBRARY FOR USE WITH SMARTSEND?</b> .	14
<b>Verify Domino is ready to accept uploads from SMARTsend</b> .....	14
<b>Create and configure a Domino Library</b> .....	15
<b>Creating a Domino Workflow in SMARTsend</b> .....	17
<b>More information about DIIOP</b> .....	24
<b>Internet Links to Domino Information</b> .....	24
<b>HOW DO I POPULATE DOMINO METADATA USING A SMARTSEND WORKFLOW?</b> .....	25
<b>Administration Steps</b> .....	25
<b>User Steps - Create a SMARTsend Workflow to populate the metadata fields</b> .....	25

<b>I AM ABLE TO ADD A DESTINATION TO A SMARTSEND WORKFLOW. HOWEVER, THE WORKFLOW PUBLICATION FAILS TO EXECUTE. WHY?</b> .....	27
<b>I AM UNABLE TO IMPORT A LARGE NUMBER OF USERS INTO THE SMARTSEND SCAN TO HOME USER DATABASE? WHY?</b> .....	27
<b>I AM UNABLE TO SCAN TO A URL DESTINATION THAT IS AN IIS FOLDER. WHY?</b> .....	27
<b>WHAT VERSIONS OF NETSCAPE NAVIGATOR ARE SUPPORTED BY SMARTSEND?</b> .....	27
<b>WHEN I ATTEMPT TO UNINSTALL SMARTSEND, I RECEIVE AN IIS ERROR AND THE UN-INSTALLATION IS NOT SUCCESSFUL. WHY?</b> .....	27
<b>WHY CAN I ONLY FILE TO ONE HUMMINGBIRD SERVER AT A TIME?</b> .....	28

## Overview

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

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

## Troubleshooting a Problem

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

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

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

## Additional Information

Xerox Customer Service welcomes feedback on all documentation - send feedback via e-mail to: [USA.DSSC.Doc.Feedback@mc.usa.xerox.com](mailto:USA.DSSC.Doc.Feedback@mc.usa.xerox.com).

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

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

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

#### This problem is encountered when performing the following procedure:

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

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

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

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

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

#### To repair an existing SMARTsend installation:

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

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

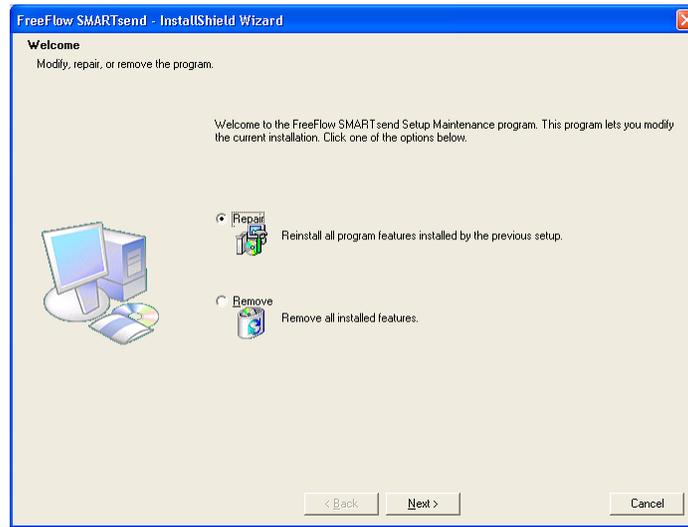


Figure 1

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

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

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

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

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

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

When configuring the SMARTsend LDAP settings:

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

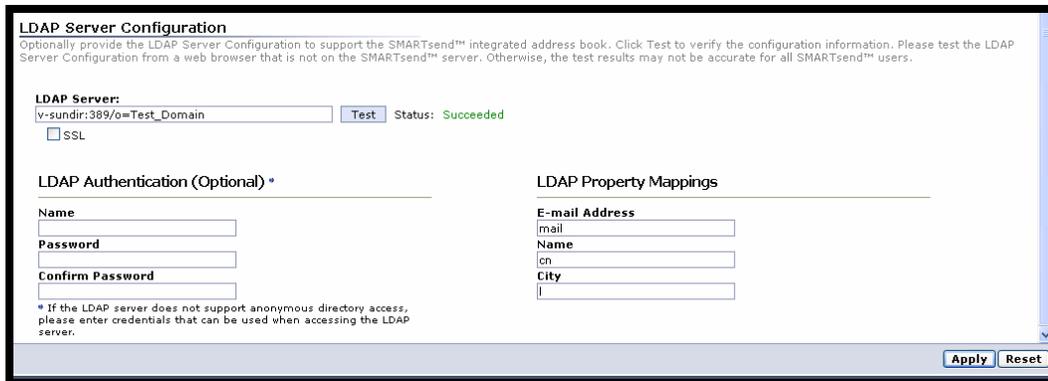


Figure 1

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.

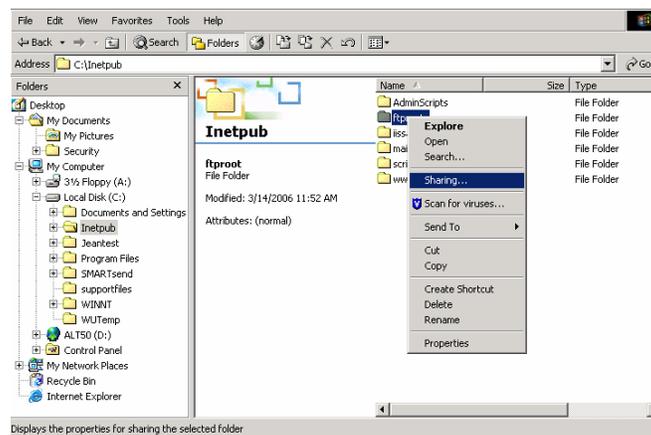


Figure 1

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

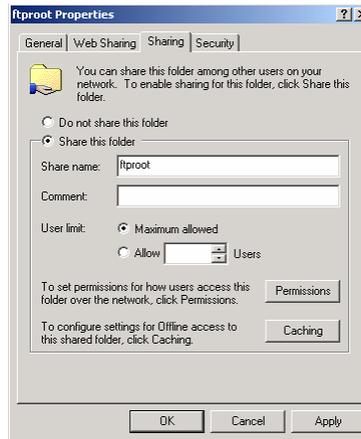


Figure 2

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.

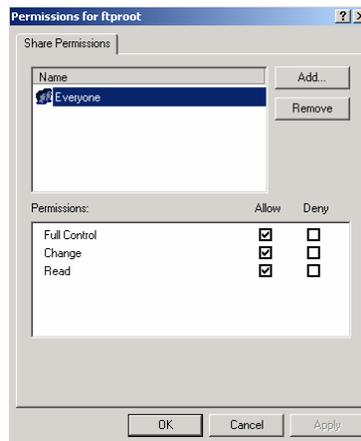


Figure 3

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

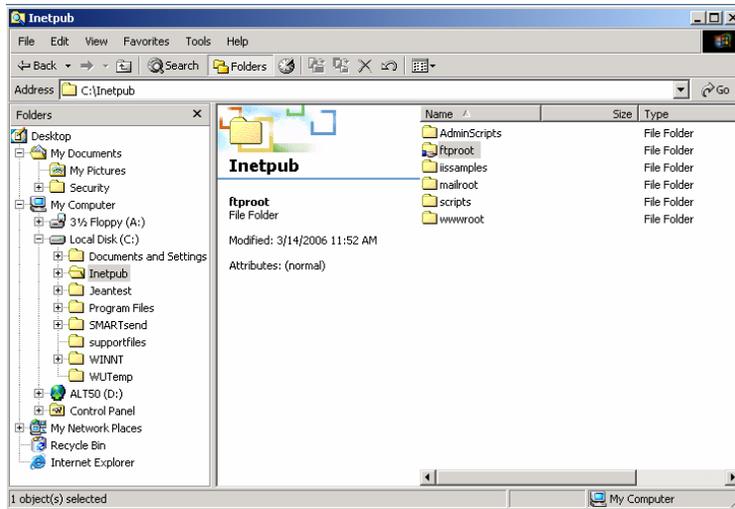


Figure 4

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).
2. Open the Internet Information Services Manager (**Start > Settings > Control Panel > Administrative Tools > Internet Services Manager**) and expand IIS in the tree view (*Figure 1*).

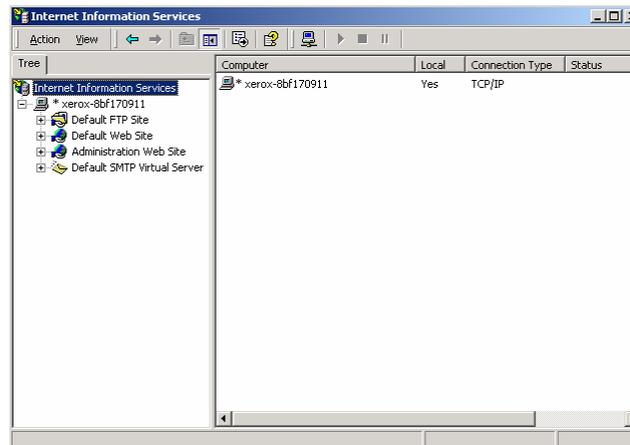


Figure 1

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



Figure 2

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

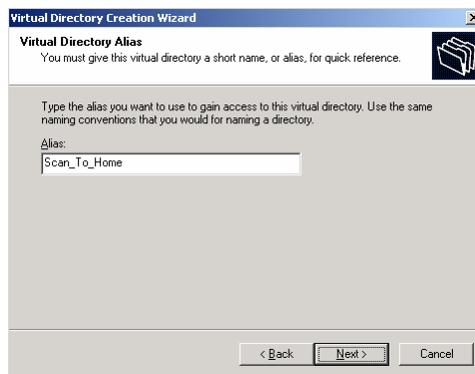


Figure 3

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

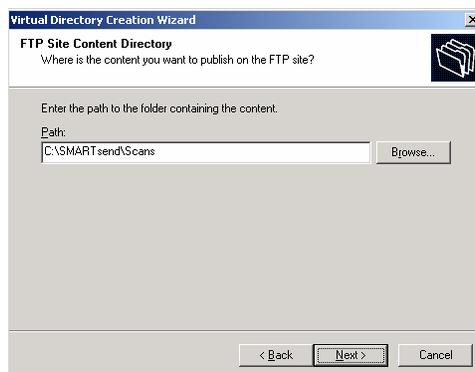


Figure 4

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



Figure 5

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

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

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

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

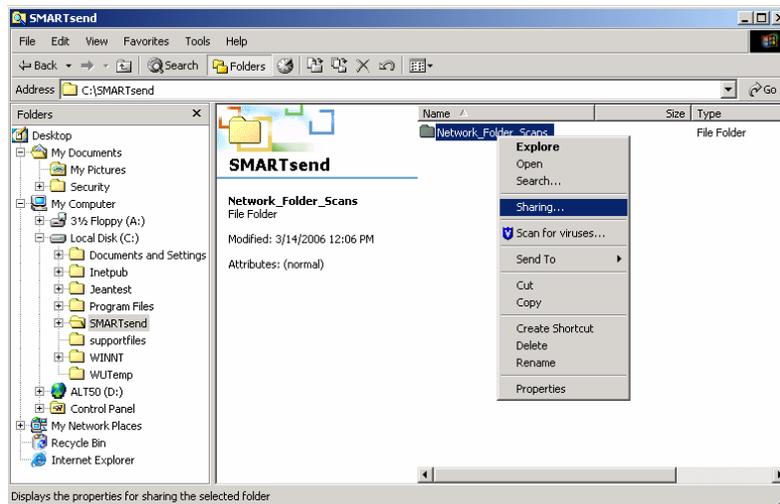


Figure 1

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

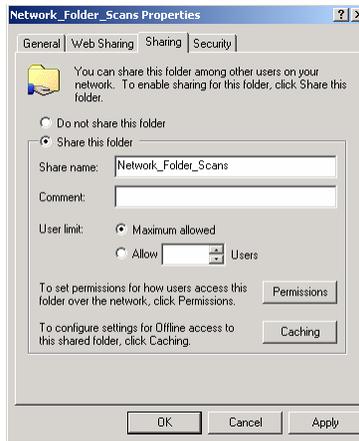


Figure 2

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.



Figure 3

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*).

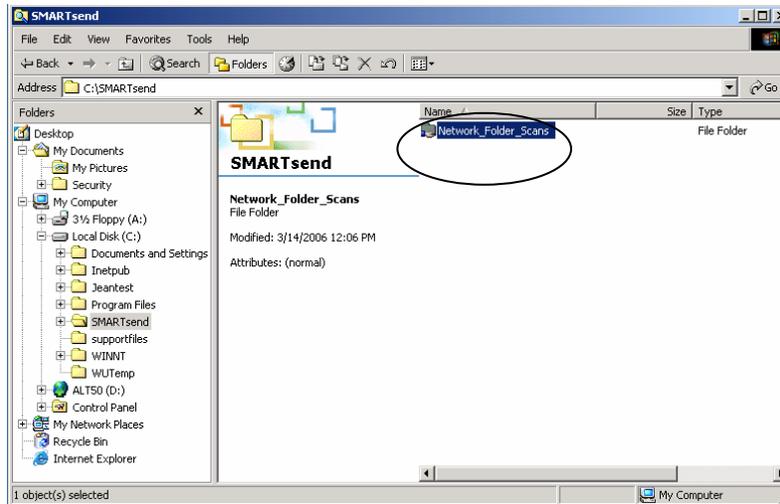


Figure 4

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.

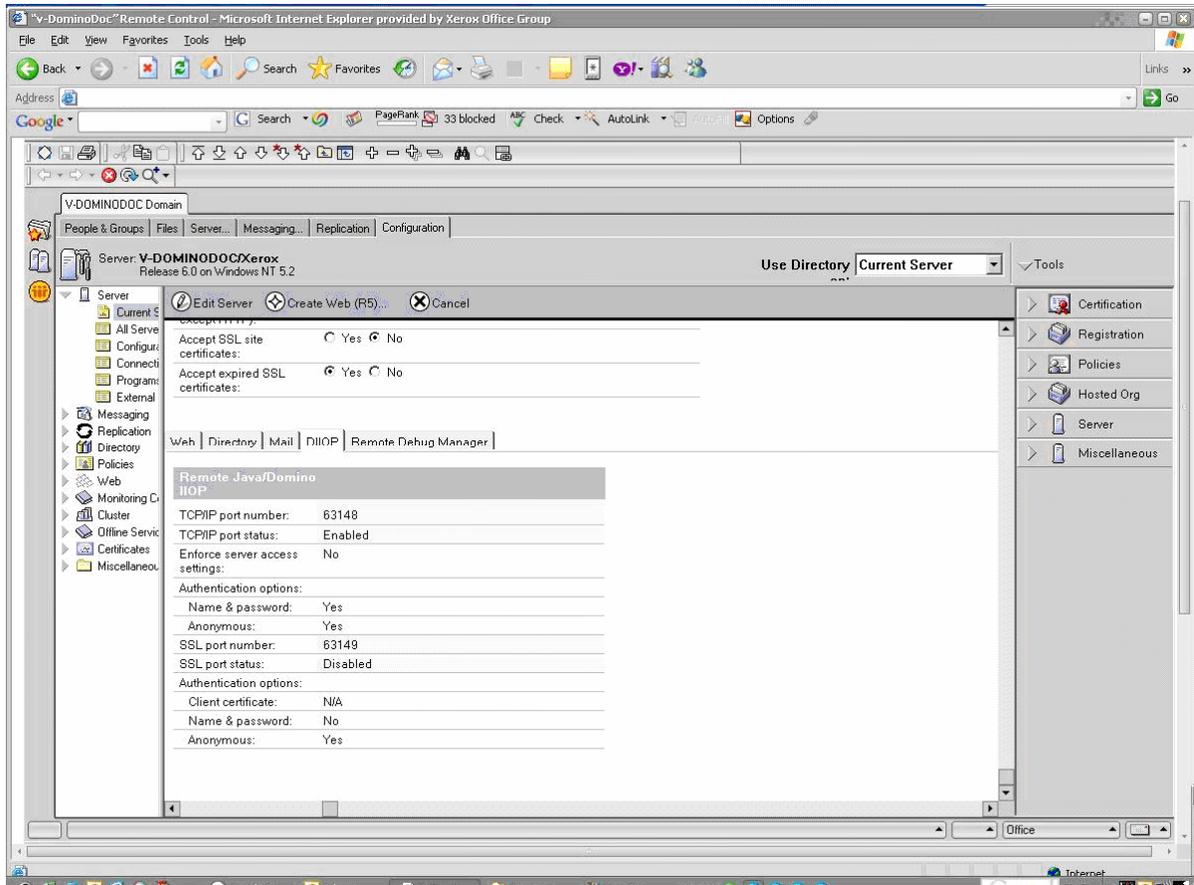


Figure 1

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).

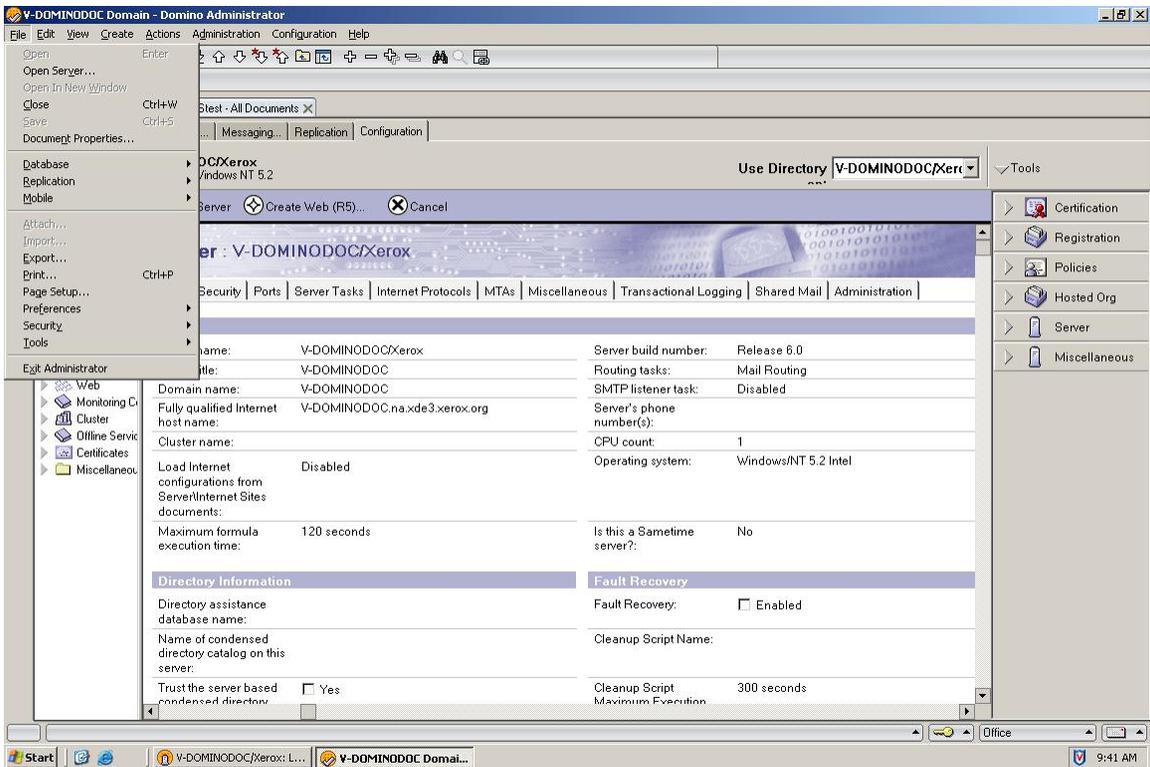


Figure 1

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).



Figure 2

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.

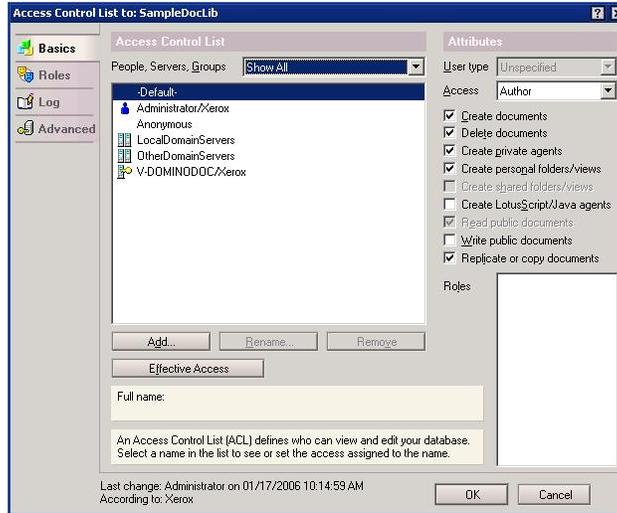


Figure 3

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 (<http://hostname/smartsend>).
2. From the SMARTsend User Home Page (Figure 1), select **Add New Distribution Workflow**.

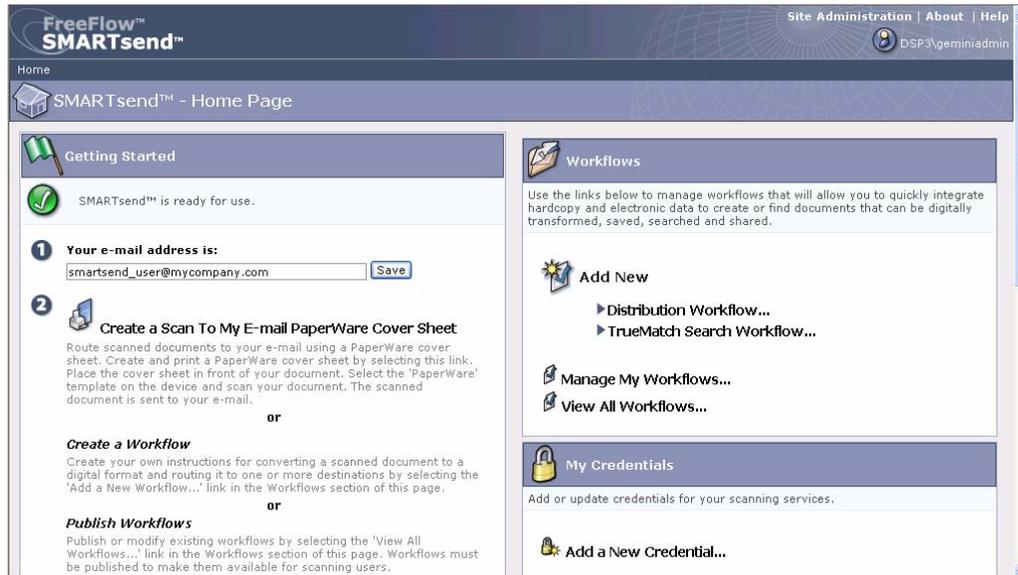


Figure 1

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

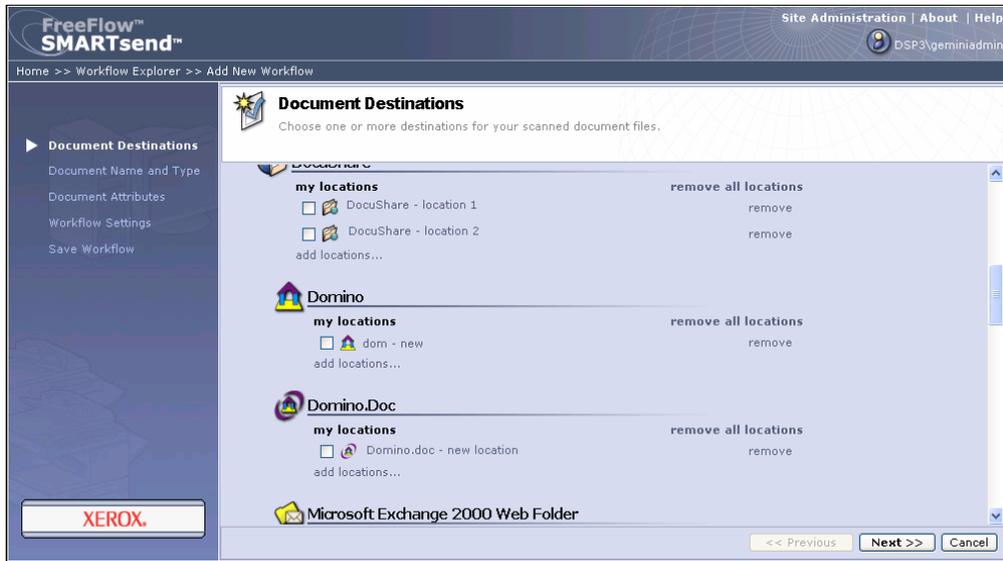


Figure 2

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 <http://dominohost/libraryfilename.nsf>.
  - c. **Form name** is optional.
  - d. Select **OK**.

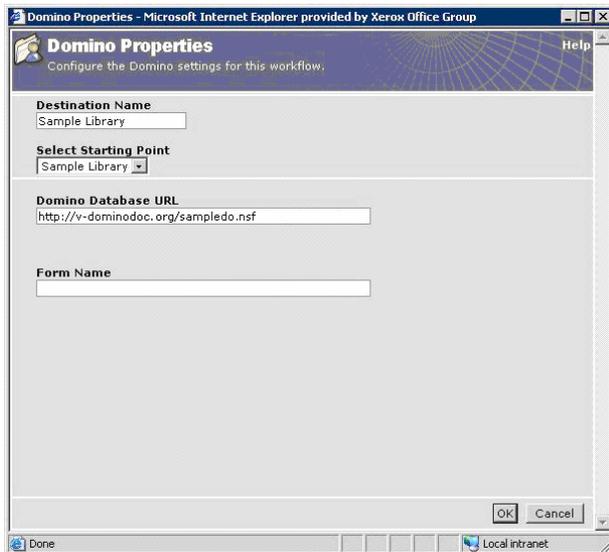


Figure 3

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.

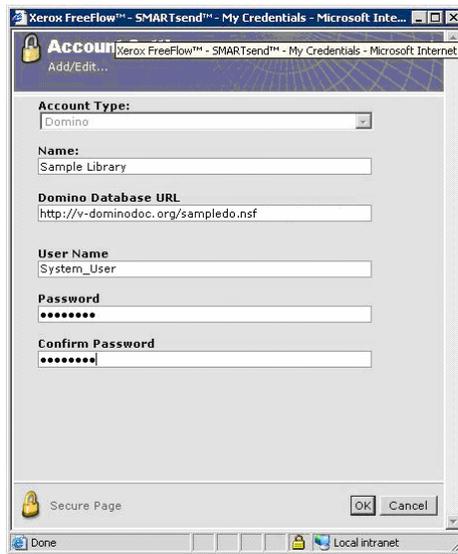


Figure 4

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



Figure 5

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

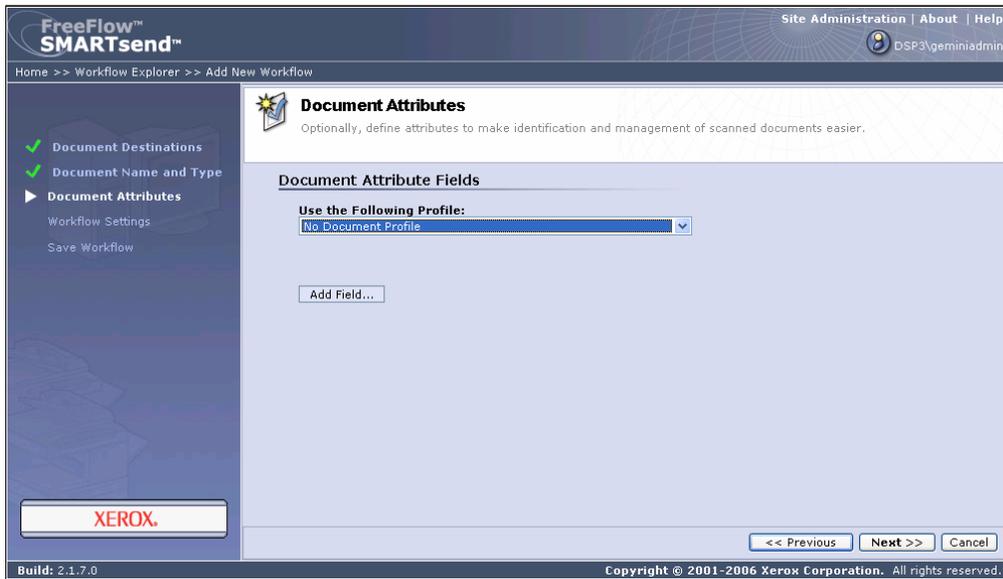


Figure 6

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



Figure 7

- 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.

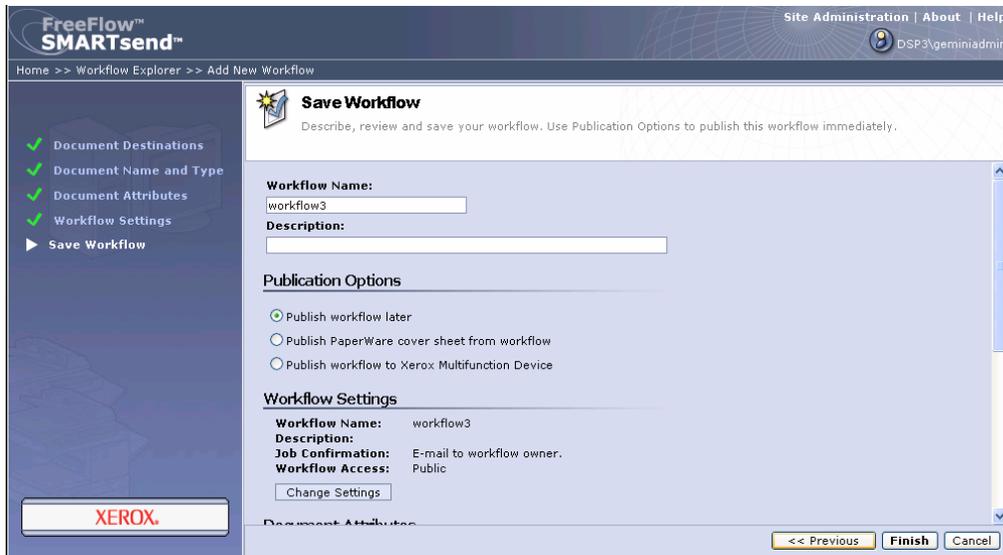


Figure 8

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).

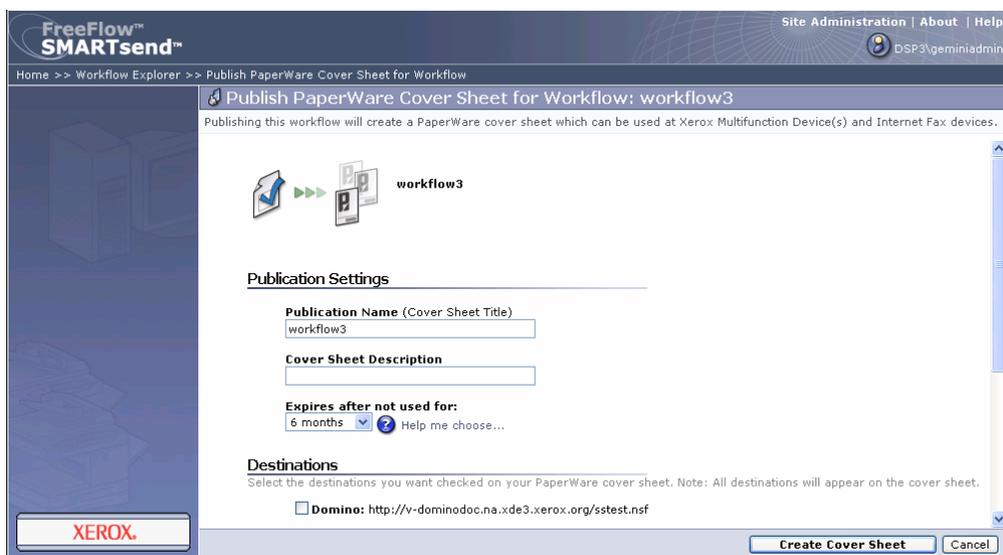


Figure 9

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

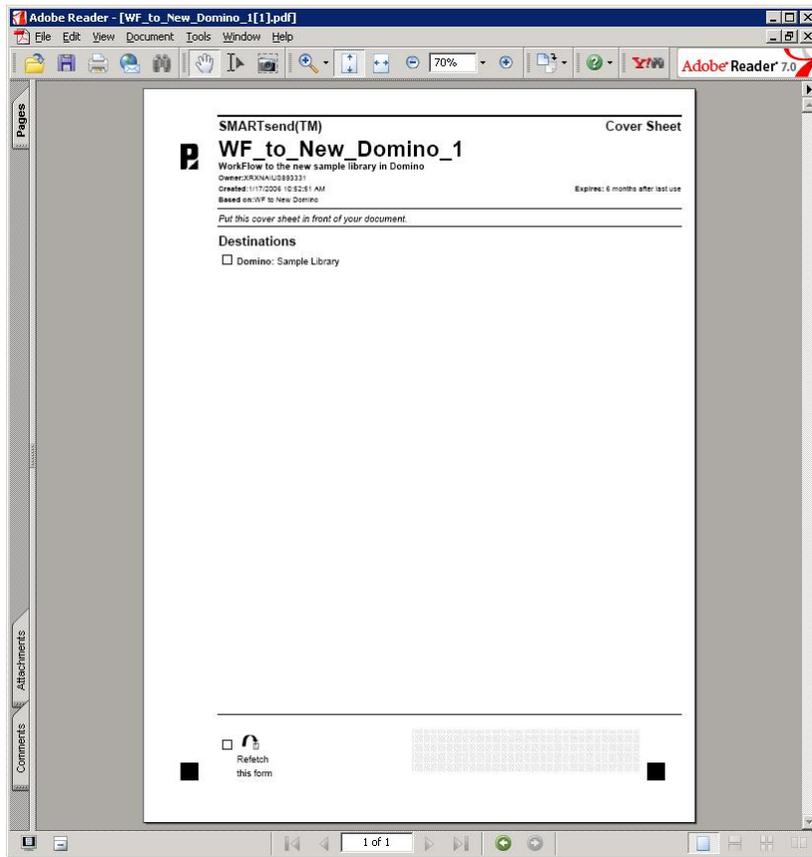


Figure 10

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*).

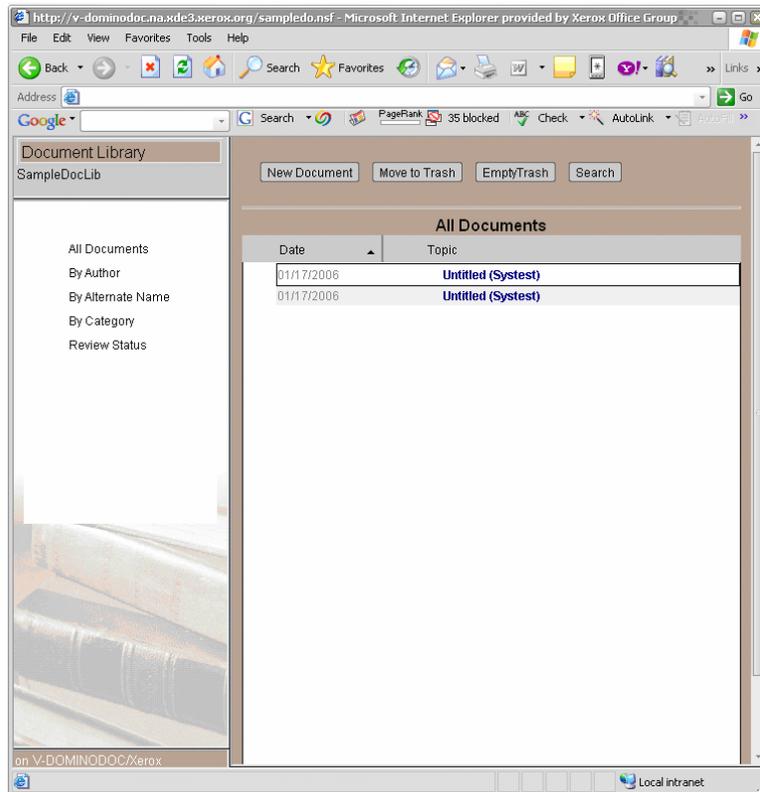


Figure 11

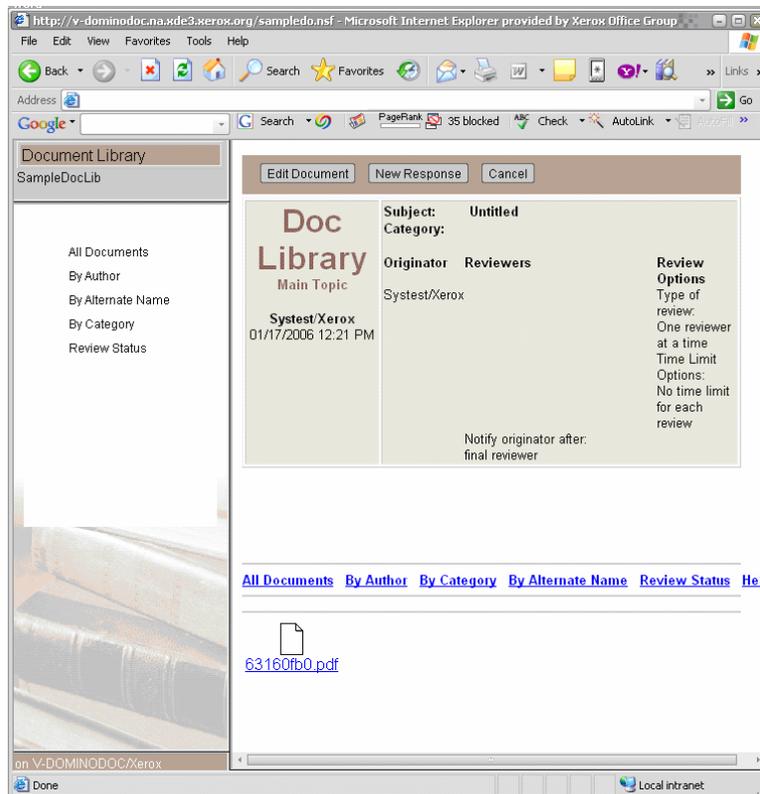


Figure 12

## 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 [http://www-12.lotus.com/ldd/doc/domino\\_notes/6.5/help65\\_admin.nsf/b3266a3c17f9bb7085256b870069c0a9/7d5c04dbf086b6c785256d9b004b337c?OpenDocument](http://www-12.lotus.com/ldd/doc/domino_notes/6.5/help65_admin.nsf/b3266a3c17f9bb7085256b870069c0a9/7d5c04dbf086b6c785256d9b004b337c?OpenDocument)

Setting up DIIOP [http://www-12.lotus.com/ldd/doc/domino\\_notes/6.5/help65\\_admin.nsf/89d3962efd85426f85256b870069c0aa/be442e1584f16beb85256d9b004b03af?OpenDocument](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

1. Decide which Domino metadata fields you would like to populate using a SMARTsend workflow. To know which ones are available, see the design tab of a document in your Domino Document Library. The most common fields to populate are Categories, Body, and Subject. Therefore, these are the fields that will be covered in this document.
2. Enter the Domino specific XML into the service settings for Domino
  - a. Launch Internet Explorer (or other supported browser) and access the SMARTsend site (<http://hostname/smartsend>).
  - 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*).

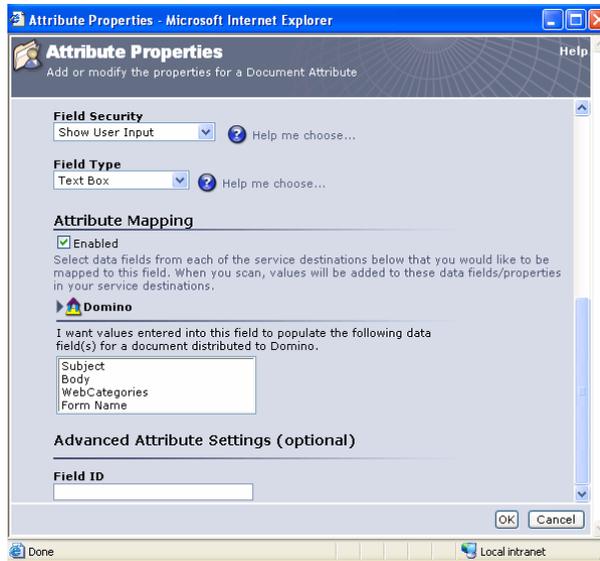


Figure 1

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



Figure 2

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

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

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

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

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

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

### To remedy this problem, perform the following procedure:

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

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

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

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

## What versions of Netscape Navigator are supported by SMARTsend?

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

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

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

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



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.