

*FlowPort*TM
Paper that knows where it's going.

*Administrator
Guide*

701P39663
April 2003



Copyright © 1999-2003 Xerox Corporation. All Rights Reserved.

Publication number: 701P39663

Copyright protection claimed includes all forms of matters of copyrightable materials and information now allowed by statutory or judicial law or hereinafter granted, including without limitation, material generated from the software programs which are displayed on the screen such as styles, templates, icons, screen displays, looks, etc.

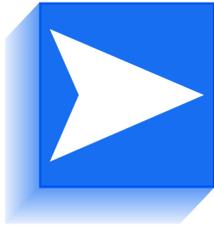
XEROX®, The Document Company®, X® (Stylized), DataGlyph, Document Centre, CentreWare, DocuShare®, FlowPort™, DocuStamp, PaperWare and Document Token are trademarks of or licensed to Xerox Corporation.

Adobe® and Acrobat® are registered trademarks of Adobe Systems, Incorporated. Lotus, Lotusphere, and Lotus Notes® are registered trademarks and Notes and Domino™ are trademarks of Lotus Corporation. Pagis® and TextBridge are registered trademarks of ScanSoft, Inc. Microsoft, Microsoft Windows, Microsoft Word, Microsoft Exchange™, Microsoft Internet Explorer, Microsoft Office, Imaging for Windows, MS, MS-DOS, and Windows are registered trademarks of Microsoft Corporation. Netscape Navigator and Netscape Enterprise Server are registered trademarks of Netscape Communications Corporation. HP, PCL, and HP Deskjet are registered trademarks of Hewlett-Packard Company. IBM is a registered trademark of International Business Machines Corporation. Java, Java Runtime Environment, JRE, Java Archive, JAR, and Sun Solaris are trademarks or registered trademarks of Sun Microsystems, Inc. All other product names are trademarks/tradenames of their respective owners.

Notice

Specifications described in this publication are subject to change without notice. Use of some features may be limited by your hardware or software configuration. Contact your dealer or Xerox for details.

April 2003



Contents

Chapter 1	Welcome	1-1
	<i>About FlowPort and PaperWare.....</i>	<i>1-3</i>
	<i>What's in this guide</i>	<i>1-4</i>
	<i>Where to find more information</i>	<i>1-5</i>
	<i>How to get help.....</i>	<i>1-5</i>
Chapter 2	Getting started	2-1
	<i>Logging in.....</i>	<i>2-2</i>
	<i>About the FlowPort Web Centre Administration window.....</i>	<i>2-4</i>
	<i>Logging out.....</i>	<i>2-5</i>
Chapter 3	Managing user accounts	3-1
	<i>Creating a user account</i>	<i>3-2</i>
	<i>Setting up a user's account to receive Internet faxes</i>	<i>3-4</i>
	<i>Setting up a user's account to use Network Accounting.....</i>	<i>3-6</i>
	<i>Creating login credentials</i>	<i>3-7</i>
	<i>Shared Login Credentials</i>	<i>3-10</i>
	<i>Setting a local printer as the user's default printer</i>	<i>3-11</i>
	<i>Changing the user's account information</i>	<i>3-12</i>
	<i>Changing the admin's account information</i>	<i>3-13</i>
	<i>Deleting a user account.....</i>	<i>3-14</i>
	<i>Viewing the list of users.....</i>	<i>3-14</i>

Chapter 4	Creating form templates	4-1
	<i>About form templates.....</i>	<i>4-2</i>
	<i>Controlling access to forms</i>	<i>4-4</i>
	<i>Creating a form template</i>	<i>4-5</i>
	<i>Editing a form template.....</i>	<i>4-20</i>
	<i>Deleting a form template.....</i>	<i>4-21</i>
Chapter 5	Managing the FlowPort server	5-1
	<i>Changing the server's configuration settings</i>	<i>5-2</i>
	<i>Restarting and shutting down the FlowPort service</i>	<i>5-4</i>
	<i>Starting the FlowPort service after a shutdown.....</i>	<i>5-5</i>
	<i>Backing up and Restoring the FlowPort server files.....</i>	<i>5-5</i>
	<i>Viewing administrative messages.....</i>	<i>5-7</i>
Chapter 6	Managing applications and services	6-1
	<i>Viewing the installed applications and services.....</i>	<i>6-2</i>
	<i>Configuring applications and services.....</i>	<i>6-2</i>
	<i>Configuring the Authentication Service.....</i>	<i>6-3</i>
	<i>Configuring the Distribute Document application</i>	<i>6-4</i>
	<i>Configuring the Internet Fax Receive Service.....</i>	<i>6-5</i>
	<i>Configuring the Network Accounting application</i>	<i>6-6</i>
	<i>Configuring the TextBridge OCR Service</i>	<i>6-7</i>
	<i>Configuring the Xerox Network Scanning Service</i>	<i>6-7</i>
	<i>Using Form Cleaner</i>	<i>6-8</i>
	<i>Using Patch Manager.....</i>	<i>6-9</i>
	<i>Installing new applications and services.....</i>	<i>6-10</i>
Appendix A	FlowPort Security	A-1
	<i>Portal Security.....</i>	<i>A-2</i>
	<i>Xerox Network Scanning Service</i>	<i>A-4</i>
	<i>Xerox Network Scanning Directory Watching Service</i>	<i>A-5</i>



Welcome

<i>About FlowPort and PaperWare</i>	<i>1-3</i>
<i>What's in this guide</i>	<i>1-4</i>
<i>Where to find more information</i>	<i>1-5</i>
<i>How to get help</i>	<i>1-5</i>

Welcome to Xerox FlowPort. FlowPort provides a set of server applications that lets you seamlessly integrate paper documents within your electronic document processes.

Using FlowPort you can:

- Share your paper documents with others through email, Internet fax, remote printing, or storage to a Web repository.
- Access your stored documents and print them on a network printer or distribute the documents.
- Store a document and receive a Document Token—a piece of paper that represents the stored document—that you can later use to copy, Internet fax, or email the actual document.
- Receive and access Internet faxes by printing the entire fax, storing the fax and retrieving it later using a Document Token, or viewing the fax on the Web.

About FlowPort and PaperWare

FlowPort provides an innovative paper user interface called PaperWare. Using PaperWare forms with a Xerox Document Centre or an Internet fax device, you instruct your FlowPort server to distribute, store, and retrieve your paper and electronic documents.

The following applications are included with your FlowPort server:

Distribute Document—Scans paper documents and distributes the resulting electronic documents through email, Internet fax, remote printing, or storage to a document repository. The application features a PaperWare form called a Distribute Document Cover Sheet. You scan the Cover Sheet with your printed document to provide distribution instructions to a Document Centre or an Internet fax machine.

Document Token—Accesses a document stored in a repository using a Document Token form—a piece of paper that represents the stored document. When you want to retrieve the stored document, you scan the one-page Document Token to print the original document, or scan a Document Token with a Distribute Document Cover Sheet to retrieve and distribute the stored document.

Document Catalog—Accesses the documents stored in a repository using a Document Catalog form—a printed list of the repository's contents with a checkbox for each stored object. To retrieve stored documents, mark the checkboxes for the documents you want and scan the form to print the original documents. When using a Document Catalog form with a Distribute Document Cover Sheet, you can distribute the retrieved documents, regardless of their original format.

Internet Fax Mailbox—Receives Internet faxes and prints, stores, and accesses the faxes. When storing received faxes, the FlowPort server can print a one-page Document Token of the fax and inform you in an email message of the URL in which the fax is stored.

FlowPort 2.1.1 SP3 now lets you receive an Internet Fax and use OCR technology to convert it to one of many popular document formats. For more information, please contact Xerox Flowport Technical Support.

Login Sheet—Specifies your personal identification number (PIN) on a Login Sheet form when submitting jobs that require authentication. You can use a Login Sheet at a Document Centre as an alternative to logging in at the device's control panel, or when submitting jobs to the FlowPort server from an Internet fax machine.

PaperWare Copy—Prints copies of documents. As the default application, it makes a copy of your document when you scan a Document Token, Document Catalog, or document at a Document Centre without a PaperWare Cover Sheet.

Document Options—Adds document management fields to a document when you store it in a repository, and charges print jobs to your account on a Document Centre network accounting system. The application uses a Document Options Sheet that you place after a Distribute Document Cover Sheet to add fields or account information to the document.

Network Accounting—Charges each printing job to an Account ID set up on a Document Centre network accounting system.

What's in this guide

In addition to this chapter, this guide includes the following:

- Chapter 2 Getting started**—Explains how to log in and out, and describes the administrator's Web Centre.
- Chapter 3 Managing users**—Describes how to set up, edit, and delete user accounts, and how to edit the admin account.
- Chapter 4 Creating form templates**—Provides an overview of form templates, and explains how to create, edit, and delete form templates.
- Chapter 5 Managing the FlowPort server**—Details the server management tasks you perform.

Chapter 6 Managing applications and services—Describes how to view, install, and configure applications and services, including Patch Manager and Form Cleaner.

Appendix A How to use security on the FlowPort server—Explains how to use security features to restrict access to the FlowPort server.

Where to find more information

Xerox FlowPort Installation and Setup Guide

The guide provides a checklist of system requirements and step-by-step instructions for installing and setting up the FlowPort server.

On-line Help

On-line help describes FlowPort features and provides step-by-step instructions for both the administrator and the user. To open Help, click the **help** link located in the upper right corner of the Web Centre.

Xerox FlowPort User Guide

The guide describes how use PaperWare forms to distribute, store, and retrieve documents, and how to create new forms.

How to get help

For questions about FlowPort, visit the Xerox Support web site at www.xerox.com/support/





2

Getting started

<i>Logging in</i>	2-2
<i>About the FlowPort Web Centre Administration window</i>	2-4
<i>Logging out</i>	2-5

As the FlowPort administrator, you set up user accounts, create form templates for users, and manage the FlowPort server. You perform these tasks in the FlowPort Web Centre Administration window.

This chapter explains how to log in and out as the FlowPort administrator. It also provides an overview of the Web Centre.

Logging in

When the FlowPort software was installed, the administrator account was created automatically. The user name, *admin*, is the only account with administrative privileges for the FlowPort server.

To log in:

- 1 Open a Web browser.



*Note: If you are using Netscape Navigator on the same computer as the FlowPort server, you must set Navigator's priority to low to avoid performance problems. To set the priority, right-click the **Windows taskbar** and click **Task Manager**. On the **Processes** tab, right-click *netscape.exe*, point to **Set Priority**, and click **Low**.*

- 2 In the **Address** (or **Location**) box, type the FlowPort server's name and press ENTER. For example, if the server's name is *fish*, you type *http://fish*.

The **FlowPort Welcome** page displays. You enter your username and password in the area shown below.



Please login

username:

password:

Login

Contact your [administrator](#) if you forget your username or password.

- 3** In the **username** box, type **admin**.
- 4** In the **password** box, type the admin password.
- 5** Click **Login**.

Any new system messages that require your attention are displayed after you log in.

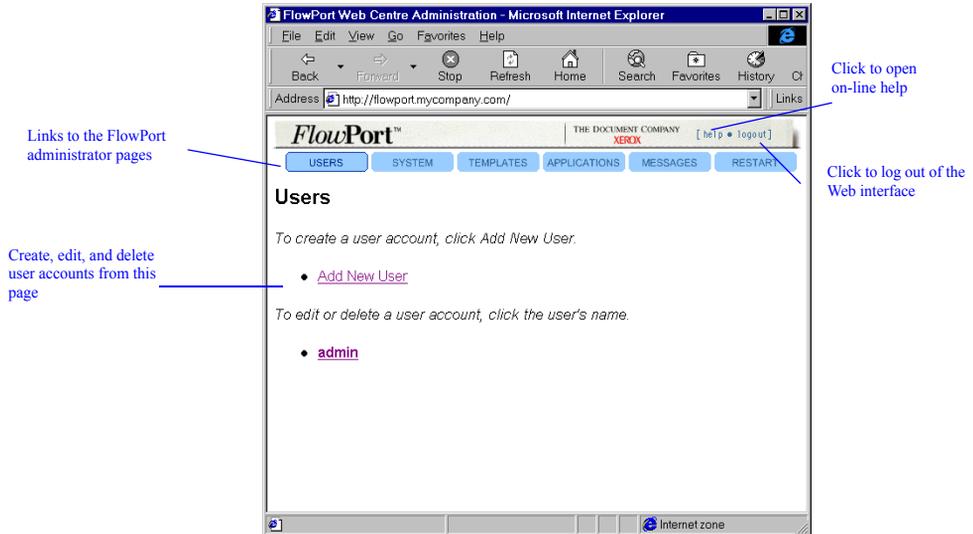
You can add your name to the administrator account, so users will know you are the administrator, and change the default password. Refer to the “Changing the admin’s account information” section on page 3-13.

About the FlowPort Web Centre Administration window

After logging in as the admin, the following window is displayed.



Note: If the System Configuration window opens after logging in, you need to configure the system. Refer to the *Installation and Setup Guide* for more information.



Links to the FlowPort administrator pages

Create, edit, and delete user accounts from this page

Click to open on-line help

Click to log out of the Web interface

The links to the FlowPort administrator pages let you do the following:

Users—Create, edit, and delete user accounts, including Internet Fax options.

System—Change the FlowPort server's configuration settings.

Templates—Create form templates, from which users can create their own forms.

Applications—Configure, install, and get information about FlowPort applications and services.

Messages—View administrative messages.

Restart—Restart or shut down the FlowPort service.

Logging out

To log out:

- 1 Click the **logout** link located in the upper right corner of the Web Centre.

The **FlowPort Welcome** page displays, from which you can log in again.



***Note:** If you close your Web browser or go to another Web site, you are not be logged out of FlowPort. You should always click the **logout** link to log out.*





3

Managing user accounts

<i>Creating a user account</i>	<i>3-2</i>
<i> Setting up a user's account to receive Internet faxes</i>	<i>3-4</i>
<i> Setting up a user's account to use Network Accounting.....</i>	<i>3-6</i>
<i> Creating login credentials</i>	<i>3-7</i>
<i> Shared Login Credentials</i>	<i>3-10</i>
<i> Setting a local printer as the user's default printer</i>	<i>3-11</i>
<i>Changing the user's account information</i>	<i>3-12</i>
<i>Changing the admin's account information</i>	<i>3-13</i>
<i>Deleting a user account.....</i>	<i>3-14</i>
<i>Viewing the list of users.....</i>	<i>3-14</i>

You manage FlowPort user accounts from the Users page. On this page, you can perform the following tasks:

- Create a user account
- Change a user's account information
- Delete an account
- View the list of FlowPort users.

Creating a user account

To enable users to access FlowPort through a Web browser, you must create an account for each user. After you've set up the account, the user can start using PaperWare forms.

When creating an account, you must provide the user's login name, email address, and default printer. You can also enter the optional account information or let the user provide the information. After you create the account, the user can change any of the information you specify.

Note: You can also add a large number of users from a database.

To create a user account:

- 1 Click the **Users** button.
- 2 Click the **Add New User** link.
- 3 On the **Add New User** page, enter the following information:
 - First Name**—User's first name, which is printed with the last name on PaperWare forms.
 - Last Name**—User's last name, which is printed with the first name on PaperWare forms.
 - User Name** (required)—Name used to log in to FlowPort.
 - Email Address** (required)—User's email address (for example, jsmith@bestcompany.com).

Default Printer (required)—The printer or Internet fax device on which the user prints PaperWare forms, or the email address to use when emailing PaperWare forms.

- For printers, specify the fully qualified printer name (for example, documentcentre1.bestcompany.com).



Note: FlowPort supports the Xerox Document Centre, any networked lpr-enabled printer, and a local PCL printer. To set up a user's account to print to a local printer, refer to the “Setting a local printer as the user's default printer” section on page 3-11.

- For Internet fax devices, specify the Internet fax address (for example, internetfax@bestcompany.com).
- For the **Email PDF File** printer type, specify the user's email address. PaperWare forms are emailed as PDF attachments, which allows the user to print forms outside a firewall.

Printer Type (required)—Type of printer selected as the default printer.

Default Form Size—Paper size used to print PaperWare forms on the default printer. Options are **US Letter** and **A4**.

Job Confirmation Method—Method by which the user is notified when a PaperWare-initiated job has been successfully processed. Options are **Printer** and **Email**.



*Note: To receive a Document Token when storing a document in a repository that supports access, the **Job Confirmation Method** must be set to **Printer**.*

Create Document Tokens—Users can select whether or not a Document Token is created when they store a document to a repository. Note that this feature is only available to users if the FlowPort administrator has set the “Enable Document Tokens” system parameter.

Locale—Language used to display the FlowPort Web Centre interface. **System Default** displays the interface in the language set on the System page. Therefore, any time you change the **Locale** setting on the System page, the user's **Locale** setting also changes.

PIN and PIN Again—User's four-digit code that is specified on a Login Sheet when using private forms, and when using shared and public forms if you change the default security settings.

Password and Password Again—User's password for logging in to the FlowPort Web Centre and at the Xerox Document Centre control panel.

Include Password & PIN in Email to User—Provides the user's password and PIN, if specified, in the email message that is automatically sent to the user after the account is created.

4 Click the **Submit** button.

5 Click **Continue** to set up the user's applications.

6 On the **User Profile** page, click the link for the application you need to set up.

7 On the application page, specify the appropriate options.

For information on setting up the applications, refer to the “Setting up a user’s account to receive Internet faxes” section on page 3-4 and the “Setting up a user’s account to use Network Accounting” section on page 3-6.

8 Click **OK**.

FlowPort sends an email message to the new user that explains how to get started using FlowPort and provides your email address.

Setting up a user’s account to receive Internet faxes

To set up a user’s account to receive Internet faxes, you specify the type of mail server to use to receive the faxes and how you want FlowPort to process incoming faxes. FlowPort can process the faxes in the following ways:

- Store faxes to a repository
- Store faxes to a repository and print a Document Token for each stored fax
- Print faxes.

You can also have FlowPort send an email message to the user when an Internet fax is received.

To set up a user’s account to receive Internet faxes:

1 Click the **Users** button.

2 Click the user’s name whose account you want to set up to receive Internet faxes.

3 On the **User Profile** page, click the **Internet Fax Mailbox** link.

4 Click the **Enable** button.

- 5 Specify the type of mail server to use to receive Internet faxes and then click **Next**.

Accept Internet Faxes via the FlowPort SMTP Mail

Server—FlowPort receives Internet faxes using its built-in SMTP mail server.



*Note: This option displays if **Internet Fax SMTP Service Enabled** is set on the Internet Fax Receive Configuration page.*

Accept Internet Faxes via a POP3 Mailbox on Another

Server—FlowPort receives Internet faxes by polling a POP3 mail server.



*Note: This option displays if **Internet Fax POP3 Mail Polling Enabled** is set on the Internet Fax Receive Configuration page.*

Do Not Accept Incoming Internet Faxes for This

User—FlowPort does not receive Internet faxes.

- 6 If you chose to accept Internet faxes via a POP3 mailbox, enter the following information and then click **Next**.

User Name for POP3 Mailbox Account—Specifies the user's account name for the POP3 mailbox.

Password for POP3 Mailbox Account—Specifies the user's password for the POP3 mailbox.

Host Name of POP3 Mailbox Server—Specifies the host name of the server running the POP3 mail server.

Mail Domain—Specifies the mail domain name.

- 7 Choose how to process incoming faxes and then click **Next**.

Notify By Email—Sends an email message to the user when an Internet fax is received.

Print Document—Prints the entire fax on the user's default printer.

Store Document in Repository—Stores the fax in a repository. To use this option, you must specify a repository in step 8.

Print Document Token—Prints a one-page document that represents the stored document on the user's default printer.

- 8 If you chose to store Internet faxes in a repository, select the type of repository to use, enter the repository information, and then click **Next**.

Setting up a user's account to use Network Accounting

- 9 Click **Save**.
- 10 On the confirmation page, click **Continue**.

Network Accounting is an optional feature of the Xerox Document Centre. If the feature is installed on the machine, you can specify the Account ID to which the FlowPort user charges printing jobs.

To set up a user's account to use Network Accounting:

- 1 Click the **Users** button.
- 2 Click the user's name whose account you want to set up to use Network Accounting.
- 3 On the **User Profile** page, click the **Network Accounting** link.
- 4 On the **Network Accounting** page, set the following options:

Network Accounting Account ID—Specifies the Account ID set on the Document Centre network accounting system. See your Document Centre administrator for the Account IDs you can use to charge printing jobs.

Network Accounting User ID—Specifies the User ID set on the Document Centre network accounting system. See your Document Centre administrator for the list of User IDs set up for the machine.



Note: The IDs you specify override the default Account ID and User ID set on the Default Network Accounting Configuration page. Refer to the "Configuring the Network Accounting application" section on page 6-6.

- 5 Click **Save**.
- 6 On the confirmation page, click **Continue**.

Creating login credentials

FlowPort 2.1.1 SP3 has a new feature called “Login Credentials” that allows users to change a repository username and password, but still use existing forms that require a login.

For example, to access a DocuShare Collection, you must supply your DocuShare User Name and Password. In FlowPort 2.1.1 SP3, each user maintains a list of uniquely named login credentials, where each login credential contains credential information such as:

- the name of the credential
- the repository user name
- the user’s password for the repository

A DocuShare login credential would appear as the following:

Name: joesmith Purchasing Server

DocuShare User Name: joesmith

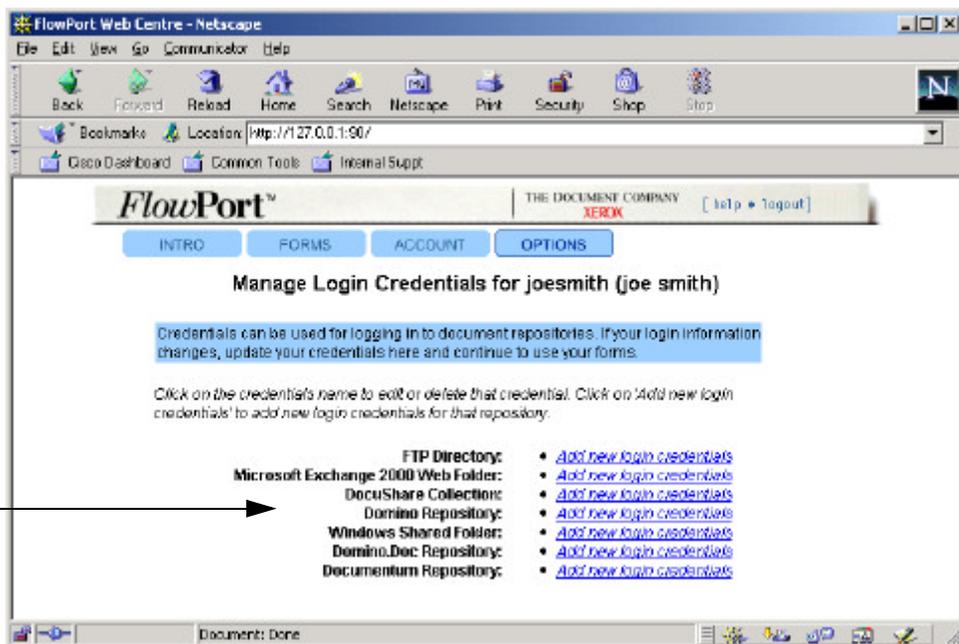
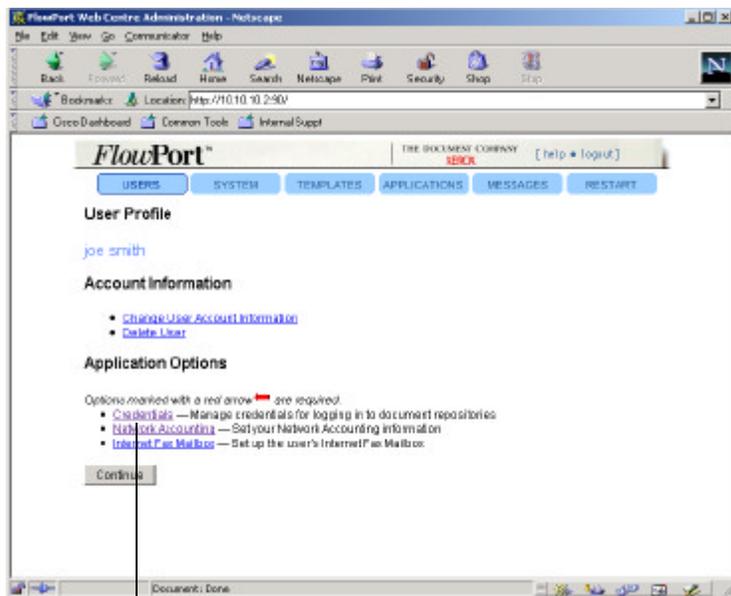
DocuShare Password: *****

When users creates a PaperWare form that requires repository information (such as a Document Token), they must specify the login credential they wish to use. They select a named credential (if one has been created by them or the FlowPort administrator), or they create a new login credential. In the example above, Joe Smith created a login credential named “joesmith Purchasing Server.”

For any new forms that Joe creates that require access to the repository on the Purchasing Server, Joe simply needs to specify that credential by name, and not worry about the user name or password. In the future, if Joe’s DocuShare password changes, only the credential must be edited - not any of the forms using that credential. All existing forms could still be used without modification.

To set up a user’s account with a login credential:

- 1 Click the **Users** button.
- 2 Click the user’s name whose account you want to add a login credential.
- 3 On the **User Profile** page, click the **Credentials** link.



- 4 On the **Manage Login Credentials** page, select a repository or click on an existing login credential to edit. Enter information into the following fields. Exact field names and options may be different, depending on the repository. Use online help for more information.

Name for these login credentials—Enter a name for the credentials you are creating. Once you create this set of credentials, this name will appear in the menu labelled Log in as:.

Selecting a name from the Log in as menu will cause FlowPort to use the login information (for example, user name and password) which had been specified when that set of login credentials was created.

Recommendation: construct a name that identifies both the repository and the login name used for that repository, because the Log in as menu will contain all names created for all repositories of the current type.

User Name—Enter the user name for the repository

Password—The password used for login.

- 5 Click **Save**.
- 6 On the confirmation page, click **Continue**.

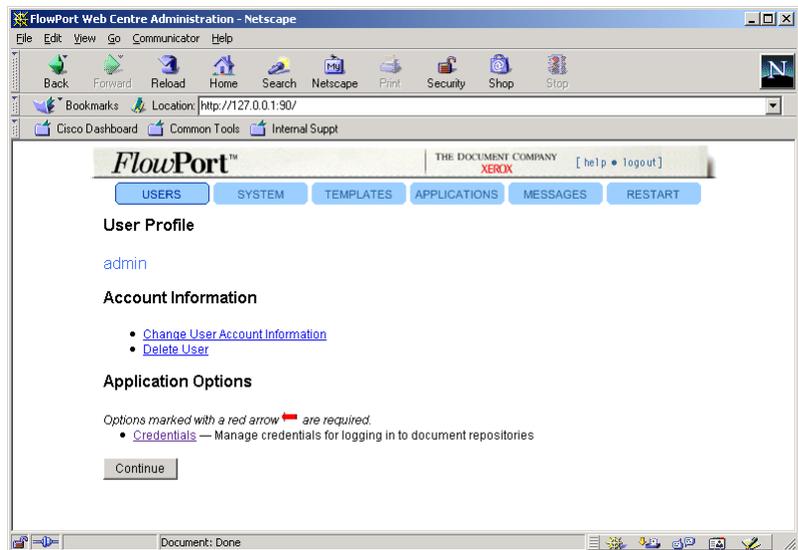
Shared Login Credentials

Login credentials created under the “admin” account are shared credentials.

Shared Credentials can be used by all users for logging in to document repositories, and can be saved in Form Templates. If the login information changes, updates to these credentials here will affect all forms defined using those templates or credentials.

Credentials are available for use (but not editing) by all users, and are available for use in Form Templates. Click on 'Add new shared credentials' to add new login credentials for that repository. Click on the credentials name to edit or delete that shared credential.

Deleting credentials from this list will make all forms using those credentials unusable (though if the forms are editable they can still be edited).



Setting a local printer as the user's default printer

FlowPort allows you to print to a local PCL printer from a computer running Windows NT.

To set a local printer as the user's default printer:

- 1 Click the **Users** button.
- 2 Click the user name whose account you want to set up to print to a local PCL printer.
- 3 On the **User Profile** page, click the **Change User Account Information** link.
- 4 In the **Default Printer** box, enter the user's computer name and printer name, separated by a forward slash (/). For example, jims-pc/HP DeskJet 870Cse.
- 5 In the **Printer Type** box, select **PCL Printer**.
- 6 Click the **Submit Changes** button.
- 7 Go to the user's computer to set the TCP/IP Print Server to start and run automatically.
- 8 At the user's computer, click the **Start** button, point to **Settings**, and click **Control Panel**.
- 9 Double-click **Services**.
- 10 Click the **TCP/IP Print Server** and click the **Startup** button.
- 11 For **Startup Type**, click **Automatic**.
- 12 Click **OK** and then **Close**.

Changing the user's account information

To change the user's account information:

- 1 Click the **Users** button.
- 2 Click the user name whose account information you want to change.
- 3 On the **User Profile** page, click the **Change User Account Information** link.
- 4 On the **Change User Account Information** page, change any of the following information:

User Name (required)—Name used to log in to FlowPort.

First Name—User's first name, which is printed with the last name on PaperWare forms.

Last Name—User's last name, which is printed with the first name on PaperWare forms.

Email Address (required)—User's email address.

Default Printer (required)—The printer or Internet fax device on which the user prints PaperWare forms, or the email address to use when emailing PaperWare forms.

- For printers, specify the fully qualified printer name (for example, documentcentre1.bestcompany.com).
- For Internet fax devices, specify the Internet fax address (for example, internetfax@bestcompany.com).
- For the **Email PDF File** printer type, specify the user's email address. PaperWare forms are emailed as PDF attachments, which allows the user to print forms outside a firewall.

Printer Type—Type of printer selected as the default printer.

Default Form Size—Paper size used to print PaperWare forms on the default printer.

Job Confirmation Method—Method by which the user is notified when a PaperWare-initiated job has been successfully processed.



Note: To receive a Document Token when storing a document in a repository that supports access, the **Job Confirmation Method** must be set to **Printer**.

Create Document Tokens—Users can now select whether or not a Document Token is created when they store a document to a repository. Note that this feature is only available to users if the FlowPort administrator has set the “Enable Document Tokens” system parameter

Locale—Language used to display the FlowPort Web Centre interface. **System Default** displays the interface in the language set on the System page. Therefore, any time you change the **Locale** setting on the System page, the user's **Locale** setting also changes.

Change PIN—Click to change or delete the user's PIN.

New PIN and New PIN Again—User's four-digit code that is specified on a Login Sheet when using private forms, and when using shared and public forms if you change the default security settings. (Make sure **Change PIN** is checked.)

Change Password—Click to change or delete the user's password.

New Password and New Password Again—User's password for logging in to the FlowPort Web Centre and at the Xerox Document Centre control panel. (Make sure **Change Password** is checked.)

- 5 Click the **Submit Changes** button.

Changing the admin's account information

As the FlowPort administrator, you are identified as “admin” to users. You can specify both your first name and last name, which will be included in the email message that is automatically sent when you create a new user account. You should change the default password to a password you prefer.

To change the admin's account information:

- 1 Click the **Users** button.
- 2 Click the **admin** link.
- 3 On the **User Profile** page, click the **Change User Account Information** link.
The **Change User Account Information** page displays.
- 4 In the **First Name** box, type your first name.

- 5 In the **Last Name** box, type your last name.
- 6 In the **Password** and **Password Again** boxes, type the password you want to use for logging in to the FlowPort Web Centre Administration window.
- 7 Click the **Submit Changes** button.

Your name appears on the **Users** page as the administrator.

Deleting a user account

After you delete a user's account, the user cannot log in to FlowPort and any forms the user created are no longer valid. Any documents the user stored in a repository are unaffected.

To delete a user account:

- 1 Click the **Users** button.
- 2 Click the user name whose account you want to delete.
 **Note:** You cannot delete the admin account.
- 3 On the **User Profile** page, click the **Delete User** link.
- 4 To confirm the deletion, click the **Delete** button.
- 5 Click **Continue**.

Viewing the list of users

To view the list of users:

- 1 Click the **Users** button.
The list of FlowPort users displays on the page.



4

Creating form templates

<i>About form templates.....</i>	<i>4-2</i>
<i> Controlling access to forms.....</i>	<i>4-4</i>
<i>Creating a form template</i>	<i>4-5</i>
<i>Editing a form template.....</i>	<i>4-20</i>
<i>Deleting a form template.....</i>	<i>4-21</i>

A form template is a sample PaperWare sheet that helps users to get started creating their own forms. You can create any number of form templates, which users can access on the **Forms and Applications** page.

This chapter describes the types of form templates you can create, and explains how to create, edit, and delete templates.

About form templates

The **Form Templates** page lists the applications you can use to create form templates:

- You use the **Distribute Document** application to create Cover Sheet form templates. Cover Sheets enable users to distribute paper documents in a variety of ways: through email, Internet fax, remote printing, and storage to a Web repository.
- You use the **Document Options** application to create Options Sheet form templates. With an Options Sheet users can add document management fields to a document when storing it in a repository, or charge print jobs to their accounts on a Document Centre network accounting system.

After you create and save a form template, it is immediately available to all FlowPort users. Users can print the form and start using it, or they can edit the form template to create their own forms.

The types of form templates you create depend on the needs of your group. For example, you can create a template for distributing paper documents to office co-workers by email. Or, you can set up a template that lets users distribute a document in several ways: through email, storage to a repository, and remote printing.

The form template shown below provides users with a cover sheet that they can use to email the URL of a stored document. The user marks any of the Send To checkboxes and the checkbox of the repository in which to store the document, and then scans the form with the document.

Figure 4.1 Cover Sheet Form Template

FlowPort Cover Sheet User Name _____

P Put this Cover Sheet in front of your document.

Email URL to Sales Group

Send To

- [Susan Brown](#)
- [Rick Greene](#)
- [Anne Lee](#)
- [Sheila Mann](#)
- [Tom Richards](#)
- [Daniel Rodriguez](#)
- [Mike Young](#)

Store To

- [Account Information](#)
- [Competition](#)
- [Product Presentations](#)

Cancel & Re-fetch Help

Controlling access to forms

When you create a form template, you can set the default access to the form by specifying who can use it. Users can change the default form access when editing a template to create forms.

The access options are:

Public—Allows anyone to use the form. Authentication is required when a user submits the form from an untrusted portal and guest access is disabled.

Shared—Allows anyone to use the form, provided guest access is set up (the default). If guest access is disabled, user authentication is required.

Private—Allows only the form's owner to use the form. The owner must provide authentication.



***Note:** For more information on forms and when authentication is required, refer to the “FlowPort Security” appendix on page A-1.*

Creating a form template

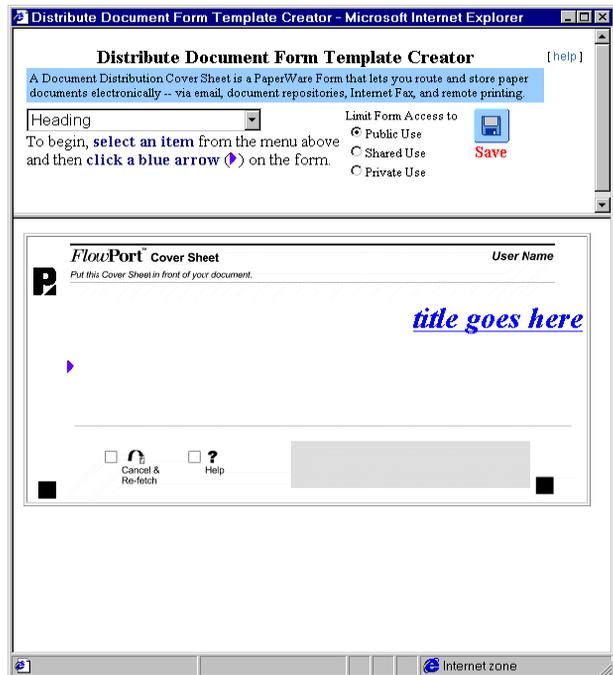
To create a form template:

- 1 Click the **Templates** button.

The **Form Templates** page displays the applications you can use to create form templates.

- 2 Click the **Create New Template** link under the application you want to use.

The Form Template Creator opens. The Distribute Document Form Template Creator is shown below.



- 3 Click ***title goes here*** and type a title for the form template in the **Title** box. Click **OK**.

- 4 From the menu, select an item.
- 5 Click the blue arrow on the form (to indicate the location of the checkbox label or text).

- 6 In the window, enter the information and then click **OK**.

For information about the options that appear in the window, refer to Table 4.1 on page 4-7.

The checkbox label or text display on the template. You can repeat steps 4 through 6 to add another checkbox label.

- 7 Under **Limit Form Access To**, click one of the following to specify who can use the form:

Public Use—Allows anyone to use the form. Authentication is required when a user submits the form from an untrusted portal and guest access is disabled.

Shared Use—Allows anyone to use the form, provided guest access is set up (the default). If guest access is disabled, user authentication is required.

Private Use—Allows only the form's owner to use the form. To use the form, the owner must provide authentication.



Note: Users can change the **Limit Form Access To** setting when they create forms based on this template.

- 8 Click the **Save** button.
- 9 Click the **Continue** button.

The template appears on the **Form Templates** page under the application you used to create it. The template is immediately available to users on the **Forms and Applications** page.

The following table describes the options that display when creating a form template.

Table 4.1 Form template options

If you selected this menu item:	These options display:
Heading	Heading —The heading text you want to appear on the form.
Email Recipient	<p>Email Address—The email address for an individual or a group. You can add more than one email address by separating each address with a comma.</p> <p>Checkbox Label—The text you want to appear on the template (usually the name of the individual or group).</p> <p>Send URL If Available—Click to email the document's URL, instead of emailing the actual document. To use this option, you must add a checkbox for the URL of a document repository on the form template.</p> <p>File Format for Scanned Documents—The file format of the document after it's scanned. TIFF allows users to perform OCR (optical character recognition) on the document. For all other formats, except PDF Image Only, FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.</p>
Internet Fax Recipient	<p>Internet Fax Address—The individual's Internet fax address.</p> <p>Checkbox Label—The text you want to appear on the template (usually the person's name).</p> <p>Send In Internet Fax Base Mode Format—Click to send the document in minimal fax mode, an Internet fax standard. To ensure the reliability of Internet fax receptions, it is recommended that you use this option.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
Remote Printer	<p>Printer Name—The fully qualified printer name (printer name and domain name), Internet fax address, or email address (when Email PDF File is the printer type).</p> <p>Printer Type—The type of printer specified.</p> <p>Checkbox Label—The text you want to appear on the template (usually the printer name).</p> <p>Network Accounting User ID—The User ID set for network accounting on a Xerox Document Centre. See your Document Centre administrator for the list of User IDs set up for the machine.</p> <p>Network Accounting Account ID—The Account ID set for network accounting on a Xerox Document Centre. See your Document Centre administrator for the Account IDs you can use to charge printing jobs.</p> <p> Note: <i>The Network Accounting IDs you specify for a remote printer override all Account IDs and User IDs set on other form templates (Network Accounting checkboxes on the Distribute Document Cover Sheet form template and on the Document Options form template) and for the user's Network Accounting application options.</i></p>
Document Management Field	<p>Checkbox Label—The text you want to display on the form (usually the field name).</p> <p>Field Name—The document management field name that you want to associate with the document stored in a repository. For information about the field names you can use for each repository, refer to Table 4.2 on page 4-17.</p> <p>Field Value—The value of the field specified above.</p> <p>Hidden—To automatically assign the name and value to each document stored in a repository. If you click Hidden, the checkbox label does not display on the form template. Therefore, you should provide a title for the form template that describes the form's use</p> <p>Handprint Region—To include a checkbox and a rectangular area in which to add a handwritten document management field to the document when it is stored in a DocuShare collection.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
Email Subject	<p>Subject—The subject text you want to appear on the template.</p> <p> Tip: You might include several subject checkboxes, from which a user can check the appropriate message subject.</p>
Network Accounting	<p>Checkbox Label—The text you want to display on the form (usually the account to charge).</p> <p>Network Accounting User ID—The User ID set for network accounting on a Xerox Document Centre. See your Document Centre administrator for the list of User IDs set up for the machine.</p> <p>Network Accounting Account ID—The Account ID set for network accounting on a Xerox Document Centre. See your Document Centre administrator for the Account IDs you can use to charge printing jobs.</p> <p> Note: The Network Accounting IDs you specify for a Network Accounting checkbox override the Account ID and User ID set for the user's Network Accounting application options.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
DocuShare Collection	<p>Checkbox Label—The text you want to appear on the template (usually the DocuShare collection name).</p> <p>URL for a DocuShare Collection—The complete URL of the collection.</p> <p> Tip: Open another browser window, go to the DocuShare collection you want to use, copy all of the text that appears in the Address (or Location) box, and paste it into the URL for a DocuShare Collection box.</p> <p>Login as: select a login credential to use for the specified DocuShare collection, or select Add new login to create a new login credential. If you choose to add a new login, enter a valid Docushare user name and password in the fields provided.</p> <p>If there are no existing login credentials, enter a name in the Name for these login credentials field, and enter a valid DocuShare user name, password, and Domain (if required - see online help) in the fields provided.</p> <p>File Format for Scanned Documents—The file format of the document after it's scanned. TIFF allows users to perform OCR (optical character recognition) on the document. For all other formats, except PDF Image Only, FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
FTP Directory	<p>Checkbox Label—The text you want to appear on the template (usually the directory name).</p> <p>FTP Host Name—The fully qualified name or IP address of the destination file server. For example: ftpserver.mycompany.com or 12.123.456.78.</p> <p>Name for a Remote FTP Directory—The directory path in which to store documents. For example: /ftp-public/mydocuments.</p> <p>Login as: select a login credential to use for the specified FTP server, or select Add new login to create a new login credential. If you choose to add a new login, enter a valid FTP user name and password in the fields provided.</p> <p>If there are no existing login credentials, enter a name in the Name for these login credentials field, and enter a valid FTP user name and password in the fields provided.</p> <p>File Format for Scanned Documents—The file format of the document after it's scanned. TIFF allows users to perform OCR (optical character recognition) on the document. For all other formats, except PDF Image Only, FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.</p>
Domino.Doc Repository	<p>Checkbox Label—The text you want to appear on the template (usually the repository name).</p> <p>URL for a Domino.Doc Library—The URL of the Domino.Doc library.</p> <p> Tip: In a browser window, go to the Domino.Doc library you want to use, and log in. Before opening a file cabinet in the library, copy all of the text that appears in the Address (or Location) box, and paste it into the URL for a Domino.Doc Library box.</p> <p>Login as: select a login credential to use for the specified Domino.doc repository, or select Add new login to create a new login credential. If you choose to add a new login, enter a valid Domino.doc user name and password in the fields provided.</p> <p>If there are no existing login credentials, enter a name in the Name for these login credentials field, and enter a valid Domino.doc user name and password in the fields provided.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
<p>Domino.Doc Repository (continued)</p>	<p>Domino.Doc File Cabinet Name—The name of the file cabinet in the library you specified.</p> <p> Tip: In a browser window, go to the Domino.Doc library you specified in the URL for a Domino.Doc Library box, and log in. Select a file cabinet in the library and, if prompted, log in. At the top of the Domino.Doc workspace, the name of the file cabinet displays to the right of the file cabinet icon. Copy the name into the Domino.Doc File Cabinet Name box. Do not copy the space at the end of the name.</p> <p>Domino.Doc Binder Name—The name of the binder within the file cabinet you specified.</p> <p> Tip: In a browser window, go to the Domino.Doc library you specified in the URL for a Domino.Doc Library box, and log in. Select the file cabinet you specified in the Domino.Doc File Cabinet Name box and, if prompted, log in. Select the binder you want to use. At the top of the Domino.Doc workspace, the name of the binder displays to the right of the binder icon. Copy the name into the Domino.Doc Binder Name box. Make sure you do not copy the space at the end of the name.</p> <p>Domino.Doc Profile Name—The Domino.Doc document profile, or type, to associate with a document when it is stored in the specified binder using a Distribute Document Cover Sheet.</p> <p> Tip: In a browser window, go to the Domino.Doc library you specified in the URL for a Domino.Doc Library box, and log in. Select the file cabinet you specified in the Domino.Doc File Cabinet Name box and, if prompted, log in. Select the binder you specified in the Domino.Doc Binder Name box. On the Actions sidebar, click the New Document button. Under Document Profile, select a document type from the menu. Enter the document type you selected in the Domino.Doc Profile Name box. On the Actions sidebar, click the Cancel button.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
Documentum Repository	<p>Checkbox Label—The text you want to appear on the template (usually the repository name).</p> <p>Documentum Doctype Name—The name of the Documentum doctype, or repository.</p> <p>Documentum Object ID—The 16-character combination of hexadecimal digits (0-9, A-F) that uniquely identifies the file or folder.</p> <p>Login as: select a login credential to use for the specified Documentum repository, or select Add new login to create a new login credential. If you choose to add a new login, enter a valid Documentum repository user name and password in the fields provided.</p> <p>If there are no existing login credentials, enter a name in the Name for these login credentials field, and enter a valid Documentum repository user name and password in the fields provided.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
<p>Microsoft Exchange 2000 Web Folder</p>	<p>Checkbox Label—The text you want to appear on the template (usually the repository name).</p> <p>URL for an Exchange Web Folder—The complete URL of the Web Folder. For example: http://hostname/public/foldername.</p> <p> Note: Open Windows Explorer or My Computer and double-click the Web Folders icon. Locate the folder you want to use, right-click on it, and then click Properties. Copy all of the text that appears after Location and paste it into the URL for an Exchange Web Folder box. Then type or copy and paste the folder name that displays at the top of the Properties window after the text in the URL for an Exchange Web Folder box.</p> <p>Login as: select a login credential to use for the specified Exchange web folder, or select Add new login to create a new login credential. If you choose to add a new login, enter a valid Exchange web folder user name and password in the fields provided.</p> <p>If there are no existing login credentials, enter a name in the Name for these login credentials field, and enter a valid Exchange web folder user name and password in the fields provided.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
Domino Repository	<p>Checkbox Label—The text you want to appear on the template (usually the repository name).</p> <p>Domino Server Name—The Domino server's Internet host name. For example: hostname.domainname.com.</p> <p> <i>Note: Do not enter the server's host name in Notes format (hostname/orgunit/org).</i></p> <p>Database Path—The pathname for the database. Use a forward slash (/) to separate directory names. For example: announcement.nsf or hr/resume.nsf.</p> <p> <i>Note: Do not include the data directory (for example, c:\lotus\domino\data\) in the pathname.</i></p> <p>Form Name—The name of the form to use when creating a document in the database. For example: Employee Profile.</p> <p> <i>Note: If the Domino form requires certain fields, then you must also include the corresponding Document Management Fields on the form template. Your Domino administrator can provide you with the list of any required fields.</i></p> <p>Login as: select a login credential to use for the specified Domino repository, or select Add new login to create a new login credential. If you choose to add a new login, enter a valid Domino repository user name and password in the fields provided.</p> <p>If there are no existing login credentials, enter a name in the Name for these login credentials field, and enter a valid Domino repository user name and password in the fields provided.</p>

Table 4.1 Form template options (continued)

If you selected this menu item:	These options display:
Windows Shared Folder	<p>Checkbox Label—The text you want to appear on the template (usually the repository name).</p> <p>UNC Directory Path—The UNC (Universal Naming Convention) directory path in which to store or retrieve documents. A UNC pathname begins with \\, indicating that the directory is located on a remote computer. For example: \\computername\sharename</p> <p>Login as: select a login credential to use for the specified Windows shared folder, or select Add new login to create a new login credential. If you choose to add a new login, enter a valid Windows shared folder user name and password in the fields provided.</p> <p>If there are no existing login credentials, enter a name in the Name for these login credentials field, and enter a valid Windows shared folder user name and password in the fields provided.</p> <p>File Format for Scanned Documents—The file format of the document after it's scanned. TIFF allows users to perform OCR (optical character recognition) on the document. For all other formats, except PDF Image Only, FlowPort performs OCR on the document using TextBridge from ScanSoft, Inc.</p>

The following table describes the field names that you can enter for each type of repository.

Table 4.2 Repository Field Names

Repository	Document Management Field
DocuShare Collection	<p>You can enter the following Field Names:</p> <p>Title—Lets you add a title field to the stored document (corresponds to the DocuShare Title property).</p> <p>Description—Lets you add a description field to the stored document (corresponds to the DocuShare Summary property).</p> <p>Abstract—Lets you add an abstract field to the stored document (corresponds to the DocuShare Description property). You can store more than one Abstract field with the document.</p> <p>Keywords—Lets you add a keyword field to the stored document (corresponds to the DocuShare Keywords property). You can store more than one Keywords field with the document.</p> <p>author—Lets you add an author field to the stored document (corresponds to the DocuShare author property). You must type author in lower-case letters.</p> <p>You can also enter the name of a DocuShare custom property. For example, your DocuShare administrator may have created a custom property to let users add a budget center or case number to stored documents. To include a custom property, you must type its name in the Field Name box exactly as it appears in the DocuShare Name box. To add custom properties, see your DocuShare administrator.</p>
FTP Directory	<p>You can enter the following Field Names:</p> <p>Title—Adds a title field to the stored document (corresponds to the Title property).</p> <p>Description—Adds a description field to the stored document (corresponds to the FTP Description property).</p>

Table 4.2 Repository Field Names *(continued)*

Repository	Document Management Field
Domino.Doc Repository	<p>You can enter the following Field Names:</p> <p>Title—Adds a title field to the stored document (corresponds to the Title property).</p> <p>Description—Adds a description field to the stored document, if the document's profile includes the field.</p> <p>You can also enter the name of a Domino.Doc custom field. For example, your Domino.Doc administrator may have created a custom property to let users add a budget center or case number to stored documents. To include a custom property, you must type its name in the Field Name box exactly as it appears in the Profile associated with the Domino.Doc binder in which the document is stored. To add custom properties, see your Domino.Doc administrator.</p>
Documentum Repository	<p>You can enter the following Field Names:</p> <p>Title—Adds a title field to the stored document (corresponds to the Documentum Title property).</p> <p>Description (or Subject)—Adds a description/subject field to the stored document (corresponds to the Documentum Subject property).</p> <p>Keywords—Adds keywords to the stored document (corresponds to the Documentum Keywords property). Separate individual keywords with a comma; do not include a space before or after the comma.</p> <p>Authors—Adds an authors field to the stored document (corresponds to the Documentum Authors property).</p> <p>You can also enter the names of any valid Documentum custom properties. If the custom property supports multiple values, you must enter a separate document management field for each custom property value.</p>

Table 4.2 Repository Field Names (continued)

Repository	Document Management Field
Microsoft Exchange 2000 Web Folder	<p>You can enter the following Field Names:</p> <p>Title—Adds a title field to the stored document.</p> <p>Description—Adds a description field to the stored document (corresponds to the Comments field in Outlook).</p> <p>Keywords—Adds a keyword field to the stored document. You can store more than one keywords field with the document.</p> <p>author—Adds an author field to the stored document.</p> <p>You can also enter the name of a Exchange custom field. For example, your Exchange administrator may have created a custom field to let users add a budget center or case number to stored documents. To include a custom field, you must type its name in the Field Name box exactly as it is defined by your administrator.</p> <p>Exchange custom field names often include a schema name, like "urn:schemas-microsoft-com:office:office." A full Exchange custom field name could be "urn:schemas-microsoft-com:office:office:Version" or "urn:schemas:contacts:callbackphone." To add custom fields, see your Exchange administrator.</p>
Domino Repository	<p>You can enter the following Field Names:</p> <p>Title—Lets you add a field named "Title" to the stored document.</p> <p>Description—Lets you add a field named "Description" to the stored document.</p> <p>You can also enter the name of a Domino custom field. For example, your Domino administrator may have created a custom field to let users add a budget center or case number to stored documents. To include a custom field, you must type its correct name in the Field Name box. Obtain the list of supported field names from the Domino administrator.</p>
Windows Shared Folder	<p>You can enter the following Field Name:</p> <p>Title—Lets you add a field named "Title" to the stored document.</p>

Editing a form template

To edit a form template:

- 1 Click the **Templates** button.
- 2 On the **Form Templates** page, click the checkbox for the form template that you want to edit.
- 3 Click the **Edit** button located under the template.
The template displays in the **Form Template Editor**.
- 4 On the form, click the link for the item you want to edit.
- 5 In the window that displays for the item, make the change you want and click **OK**.
- 6 You can repeat steps 4 and 5 to make more changes.
- 7 Click the **Save** button.
- 8 Click the **Continue** button.

If you changed the form template's title, FlowPort creates a new template and doesn't overwrite the previous template. If you didn't change the form template's title, FlowPort saves the original form template with your change; it does not create a new form template.

The new or revised form template appears under the application name on the **Form Templates** page, and is immediately available to users on the **Forms and Applications** page.

Deleting a form template

When you delete a form template, users will no longer be able to use the template to create their own forms. Any forms that users previously created based on the template are unaffected.

To delete a form template:

- 1 Click the **Templates** button.
- 2 On the **Form Templates** page, click the checkbox for the form template that you want to delete.
- 3 Click the **Delete** button located under the template.
- 4 On the confirmation page, click **OK**.
- 5 Click the **Continue** button.





Managing the FlowPort server

<i>Changing the server's configuration settings</i>	<i>5-2</i>
<i>Restarting and shutting down the FlowPort service</i>	<i>5-4</i>
<i>Starting the FlowPort service after a shutdown.....</i>	<i>5-5</i>
<i>Backing up and Restoring the FlowPort server files.....</i>	<i>5-5</i>
<i>Viewing administrative message</i>	<i>5-7</i>

This chapter describes the administrative tasks you may need to perform.

These tasks include the following:

- Changing the server's configuration settings
- Shutting down and starting the FlowPort service
- Backing up your FlowPort files.

Changing the server's configuration settings

To change the server's configuration settings:

- 1 Click the **System** button.
- 2 On the **System Configuration** page, enter the following information:

Administrator's Email Address (required)—FlowPort administrator's email address.

Mail Host (required)—Fully qualified name (mail server name and domain name) of the outgoing mail server, capable of receiving SMTP connections.

Default Printer (required)—The printer or Internet fax device on which to print PaperWare forms, or the email address to use when emailing PaperWare forms. The default printer you select automatically displays on the **Add New User** page when you create a new user account.

- For printers, specify the fully qualified printer name (for example, documentcentre1.bestcompany.com).



Note: FlowPort supports the Xerox Document Centre, any networked lpr-enabled printer, and a local PCL printer. To set up a user's account to print to a local printer, refer to the "Setting a local printer as the user's default printer" section on page 3-11.

- For Internet fax devices, specify the Internet fax address (for example, internetfax@bestcompany.com).
- For the **Email PDF File** printer type, specify the user's email address. PaperWare forms are emailed as PDF attachments, which allows the user to print forms outside a firewall.

Default Printer Type—Type of printer selected as the default printer.

Default Form Size—Paper size used to print PaperWare forms on the default printer. Options are **US Letter** and **A4**.

Font—Font used to print PaperWare forms. Options include the fonts installed on your computer.

Enable Document Tokens—Select this option to allow users to configure their own Create Document Tokens option. The user's Create Document Tokens option controls whether or not Document Tokens are created when storing documents to a repository. A user may change their Create Document Tokens option only if you select this option. Deselect the Enable Document Tokens option to turn off the creation of Document Tokens when FlowPort distributes documents to repositories, and to turn off all users' ability to select the Create Document Tokens option.

Locale—Language used to display the FlowPort Web Centre interface.

Proxy Host—Address of your proxy server, if one is used for communication with a FlowPort or DocuShare server outside of your corporate Intranet.

Proxy Port—Port number of the proxy server used (required if you specified a **Proxy Host**).

- 3** Click the **Apply** button.

Restarting and shutting down the FlowPort service

FlowPort runs as a Windows NT service on your server. You can restart or shut down the FlowPort service from the **Restart** page.

Figure 5.1 Restart page



To restart or shut down the FlowPort service:

- 1 Click the **Restart** button.
- 2 In the **Reason** box, type a brief explanation for the restart or shutdown.
- 3 Click the **Restart** button, or click the **Shutdown** button.

The service shuts down after two minutes or after all jobs are processed, if less than two minutes. Any incomplete jobs will restart after the service is running. While the service is shut down, it does not accept any new jobs.

Starting the FlowPort service after a shutdown

The FlowPort service restarts automatically after you restart the Windows NT server. However, if you shut down the FlowPort service and did not shut down the server, you need to restart the FlowPort service.

To restart the service after a shutdown:

- 1 Click the Windows NT **Start** button, point to **Settings**, and click **Control Panel**.
- 2 Double-click **Services**.
- 3 In the **Services** window, click **FlowPort Server** and then click the **Start** button.
- 4 Click the **Close** button.

Backing up and Restoring the FlowPort server files

FlowPort files are automatically backed up at the specific time or interval set on the System page. The default backup time is 1:00am every day.

To restore the FlowPort server files:

- 1 Ensure that FlowPort version 2.1.1 SP3 is currently installed in the directory to which you'll want to restore from your backup. (Installing FlowPort in a different directory than the original one from which the backup was created is allowed.)
- 2 Insert the current FlowPort Installation CD into a CD drive.
- 3 From a Command Prompt window, change to the drive letter of the CD drive, and then enter the command

```
cd Bin\Util
```

4 In the Command Prompt window, run the file RestoreFlowport.bat with these three parameters:

- the full path to the backup zip file,
- the name of the directory to which FlowPort is to be restored, and
- the FlowPort admin user's password.

Note: the pathnames must not contain any blanks.

For example:

```
RestoreFlowport.bat  
D:\Backup\FlowPort-2-2-0-79_Backup.zip  
C:\Xerox\Flowport adminpassword
```

Note: adminpassword is the current password for the FlowPort admin user.

5 Restart the FlowPort Server service.

Viewing administrative messages

The FlowPort server displays new administrative messages after you log in. Previous messages are stored in a file that you can view at any time.

To view administrative messages:

- 1** Click the **Messages** button.
- 2** Click the **Display** button located to the left of the message file you want to view.
- 3** Scroll to the bottom of the window to view the most recent messages in the file.





6

Managing applications and services

<i>Viewing the installed applications and services.....</i>	<i>6-2</i>
<i>Configuring applications and services.....</i>	<i>6-2</i>
<i>Configuring the Authentication Service.....</i>	<i>6-3</i>
<i>Configuring the Distribute Document application</i>	<i>6-4</i>
<i>Configuring the Internet Fax Receive Service.....</i>	<i>6-5</i>
<i>Configuring the Network Accounting application</i>	<i>6-6</i>
<i>Configuring the TextBridge OCR Service</i>	<i>6-7</i>
<i>Configuring the Xerox Network Scanning Service</i>	<i>6-7</i>
<i>Using Form Cleaner</i>	<i>6-8</i>
<i>Using Patch Manager.....</i>	<i>6-9</i>
<i>Installing new applications and services.....</i>	<i>6-10</i>

The FlowPort server includes a suite of applications and services. You can view the list of installed applications and services, install new ones, and configure certain applications and services. This chapter describes how to manage FlowPort applications and services.

Viewing the installed applications and services

To view the applications and services that are installed on the server:

- 1 Click the **Applications** button.

The applications installed on the FlowPort server are listed under **View Documentation for Installed Applications**; the installed services are listed under **View Documentation for Installed Services**.

Configuring applications and services

To configure applications and services:

- 1 Click the **Applications** button.
- 2 Under **Configure Applications and Services**, click the link for the application or service that you want to configure.
- 3 On the configuration page, set the options required for your site.
- 4 Click the **Submit Changes** button.

For information on how to configure individual applications, see the following sections.

Configuring the Authentication Service

The Authentication Service enables you to determine the level of security needed for the FlowPort server. You can specify which input devices, or portals, the FlowPort server will accept jobs from, and the type of user authentication required when submitting PaperWare forms.

For more information on the user authentication that is required when submitting the different types of forms from trusted and untrusted portals, refer to the “FlowPort Security” appendix on page A-1.

To configure the Authentication Service:

- 1 Click the **Applications** button.
- 2 Under **Configure Applications and Services**, click the **Authentication Service** link.
- 3 Under **Portal Authentication Mode**, click one of the following to specify the FlowPort server’s access level:
 - Trust All Portals**—The FlowPort server accepts jobs from any Xerox Document Centre and Internet fax device.
 - Trust Only Listed Portals**—The FlowPort server accepts jobs from specified Xerox Document Centres.
 - Trust No Portals**—The FlowPort server doesn't accept jobs from any device.
- 4 Under **Default Form Authentication Mode**, click one of the following to specify the default access setting for form templates:
 - Public Use**—Allows anyone to use the form. Authentication is required when a user submits the form from an untrusted portal and guest access is disabled.
 - Shared Use**—Allows anyone to use the form, provided guest access is set up (the default). If guest access is disabled, user authentication is required.
 - Private Use**—Allows only the form's owner to use the form. The owner must provide authentication.

 **Note:** When creating a form template using the Form Template Creator, you can change this setting. Each form template you create can allow a different level of access.
- 5 If you clicked **Trust Only Listed Portals**, click the **Edit Portal List** button.

- 6 In the **Add a New Trusted Portal** box, type the Xerox Document Centre's fully qualified name.



Note: You cannot add an Internet fax machine to a list of trusted portals.

- 7 Click the **Add Portal** button.
- 8 Repeat steps 8 and 9 to add another Xerox Document Centre.
- 9 Click the **Continue** button.
- 10 On the Authentication Service page, click the **Continue** button.

Configuring the Distribute Document application

The Distribute Document application enables you to scan paper documents and distribute the resulting electronic documents through email, Internet fax, remote printing, or storage to a Web repository. The application uses a Cover Sheet that you place on top of your printed document before scanning it at a device.

To configure the application, you can change the email message text that is used when emailing a document or the URL of a document stored in a repository. You can also change the name of the Cover Sheet automatically provided to users and control the menu items that display when users create their own forms using the Cover Sheet Creator.

To configure the Distribute Document application:

- 1 Click the **Applications** button.
- 2 Under **Configure Applications and Services**, click the **Distribute Document** link.
- 3 In the **Email Message Text** box, change the message text sent with an attached image document to an email recipient. An email message is automatically sent when a Distribute Document Cover Sheet is used to email a scanned document.
- 4 In the **URL Email Message Text** box, change the message text sent with the URL of a document's location to an email recipient. An email message is automatically sent when a Distribute Document Cover Sheet is used to store a document in a repository and email the recipient without attaching the image document.

- 5 In the **Initial Form Title** box, change the title of the form automatically provided to new users. The default form title is **Scan to Myself**.
- 6 Under **Cover Sheet Creator/Editor Menu**, customize the menu available on the user's Cover Sheet Creator by clearing the checkbox corresponding to the menu item you want to remove.
- 7 Click the **Configure** button.

Configuring the Internet Fax Receive Service

The Internet Fax Receive Service provides the network capability to receive Internet faxes from a remote device and process the received documents.

To configure the Internet Fax Receive Service:

- 1 Click the **Applications** button.
- 2 Under **Configure Applications and Services**, click the **Internet Fax Receive Service** link.
- 3 Under **Internet Fax Mailbox Type**, click one of the following options:
 - Internet Fax SMTP Service Enabled**—Click to have FlowPort receive Internet faxes using its built-in SMTP mail server.
 - Internet Fax POP3 Mail Polling Enabled**—Click to have FlowPort receive Internet faxes by polling a POP3 mail server.
 - Internet Fax Disabled**—Click to not have FlowPort receive Internet faxes.
- 4 If you chose to enable the **Internet Fax SMTP Service**, enter the mail domain name of the SMTP mail server in the **FlowPort SMTP Server Mail Domain Name** box.
- 5 If you chose to enable **Internet Fax POP3 Mail Polling**, enter the following information:
 - Mailboxes Host Name**—Host name of the POP3 mail server.
 - Mailboxes Mail Domain Name**—Mail domain name of the POP3 mail server.
 - PaperWare Mailbox User Name**—Special Internet fax user name to which Internet fax devices can send documents. When FlowPort receives documents for the “PaperWare” user, it processes the document as a PaperWare job.

PaperWare Mailbox Password—Password assigned to the Internet fax user name specified above.

- 6 Click the **Apply** button.

Configuring the Network Accounting application

Network Accounting is an optional feature of the Xerox Document Centre. It provides the ability to track the machine's usage by having users enter a preset User ID and Account ID. If the feature is installed on the Document Centre, you can set up a default account for all FlowPort users to charge for their print jobs.

To configure the Network Accounting application:

- 1 Click the **Applications** button.
- 2 Under **Configure Applications and Services**, click the **Network Accounting** link.
- 3 On the **Network Accounting Configuration** page, set the following options:

Network Accounting Account ID (required)—The default account ID.

Network Accounting User ID (required)—The default user ID.



Note: The Account ID and User ID you specify must be set up on a network accounting system. See your Document Centre administrator.

- 4 Click the **Set Defaults** button

Configuring the TextBridge OCR Service

The TextBridge OCR Service enables the FlowPort Distribute Document application to convert scanned documents to editable formats, such as Microsoft Word and Adobe PDF. This service uses the TextBridge Pro 9.0 application from ScanSoft, Inc.

To configure the TextBridge OCR Service:

- 1 Click the **Applications** button.
- 2 Under **Configure Applications and Services**, click the **TextBridge OCR Service** link.
- 3 On the **TextBridge OCR Service Configuration** page, set the following options:

Temporary Files Directory (required)—Directory in which the TextBridge OCR service writes its temporary files. If you are using TextBridge to recognize large Microsoft Office documents, you may want to change the location as temporary copies of Office documents are also written to this directory.

Default Language?—Language in which FlowPort assumes documents are written.

- 4 Click the **Submit Changes** button.

Configuring the Xerox Network Scanning Service

This service is discussed in Appendix A. Please see “Xerox Network Scanning Service” section on page A-4.

1 On the **Xerox Network Scanning Service** page, set the following options:

Guest Username—Guest login name used at a Xerox Document Centre to send a job to the FlowPort server. The default username, **NSA**, allows any user to submit a job to the FlowPort server from a Xerox Document Centre.

Change Password—Click to change or delete the Guest Password.

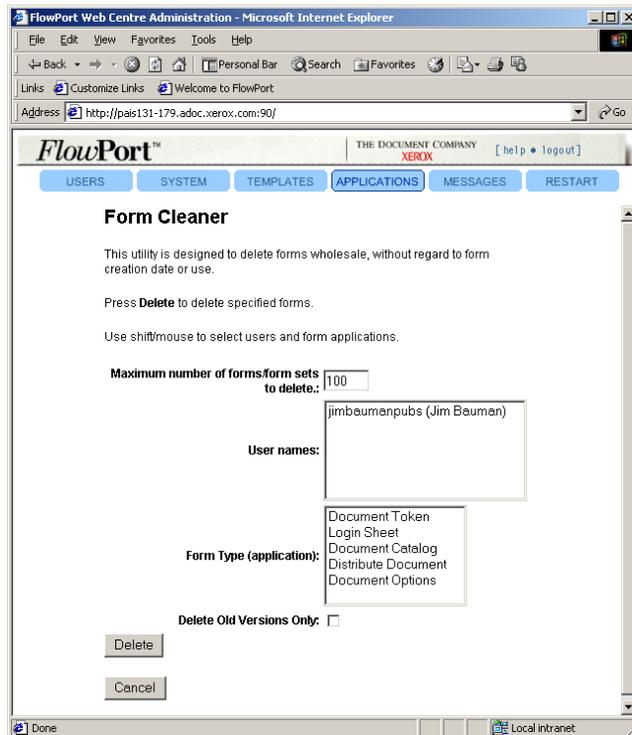
Guest Password and Password Again—Guest password used at a Xerox Document Centre. The default password, **nsa**, allows any user to submit a job to the FlowPort server from a Xerox Document Centre.

TCP/IP Port (required)—Port number used for the Xerox Network Scanning Service. You should keep the port set to **21**.

2 Click the **Submit Changes** button.

Using Form Cleaner

Form Cleaner is a utility used to delete large numbers of forms in one operation.



With Form Cleaner:

- You can set the maximum number of forms you want to delete.
- You can select one or more users whose forms you will delete, and you can select one or more types of forms to delete. More than one User and Form Type can be selected by using the Shift key.
- There is a check box if you want to delete Old versions only – in other words, keep the most recent version of any form.
- When you've made the selections, click Delete. A status report will display indicating how many forms were deleted.
- We recommend that this be done periodically for a number of reasons: backups will be faster, and the FlowPort database (MSDE) will not become too large.

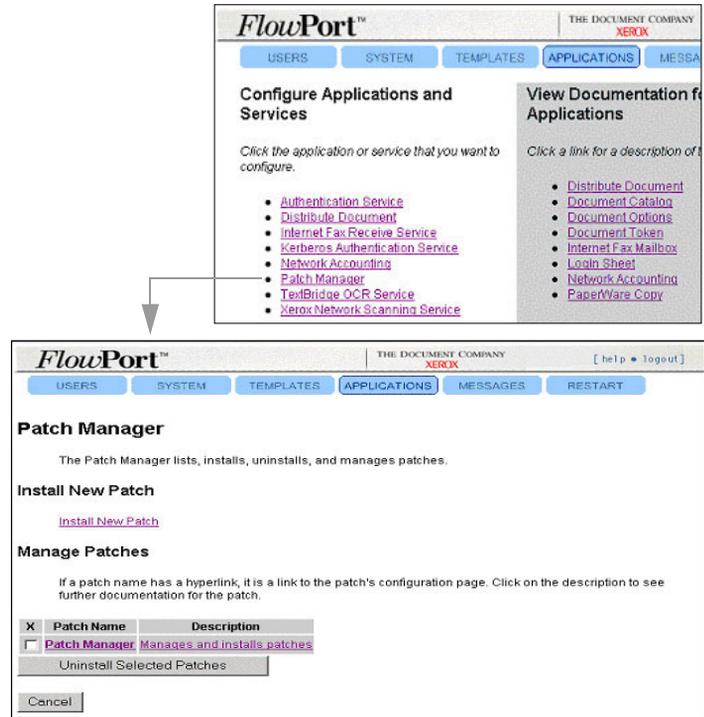
Using Patch Manager

Patch Manager, as the name implies, is used to install and uninstall patches, or view installed patches. Patches are typically fixes for problems reported by customers through the SPAR process. Not ALL FlowPort patches are designed to be installed with the Patch Manager. It is MANDATORY that you read the README file that is included with every patch.

As a rule, Patch Manager is used to install patches that are designed to be uninstalled (if so desired).

When a programmer gets a Java program development kit, a small program or utility called "jar" is included. The jar utility lets you create, list, and extract the individual files from a JAR file. Ordinarily, a browser user will not need to "open" or view a JAR file directly.

To run patch Manager, click on Patch Manager in the list of installed applications:



Installing new applications and services

FlowPort applications and services are installed as Java Archive (JAR) files on the FlowPort server. To install a new application or service, you import its JAR file.

To install new applications and services:

- 1 Click the **Applications** button.
- 2 Under **Install New Applications and Services**, click the **Install New Application or Service** link.
- 3 In the **Install Application or Service** window, enter the URL of the JAR file that you want to install.
- 4 Click the **Install Application or Service** button.



FlowPort Security

<i>Portal Security</i>	<i>A-2</i>
<i>Xerox Network Scanning Service</i>	<i>A-4</i>
<i>Xerox Network Scanning Directory Watching Service</i>	<i>A-5</i>

Portal Security

The FlowPort server's default security settings provide guest access to FlowPort and allow any device to submit jobs for processing. If appropriate, it is recommended that you use the default security setup and allow users to control access to their forms by making them private.

However, if you need to restrict access to the server, you can disable guest access or control the devices that can submit jobs to the FlowPort server. When you restrict access to the server, users are required to provide authentication before submitting a job.

If guest access is set up (the default), any user can submit a public or shared form to FlowPort without providing authentication. FlowPort requires authentication only when a user submits a private form.

Table A.1 Submitting jobs with guest access

Type of Portal Submitting Job	Public Form	Shared Form	Private Form
Trusted or Untrusted	Anyone can use the form to submit a job.	Anyone can use the form to submit a job.	Only the form's owner can use the form to submit a job. To use the form, the owner must provide authentication by scanning a Login Sheet or logging in at the Xerox Document Centre control panel.

If guest access is disabled, users submitting shared or private forms to FlowPort must provide authentication. Any user can submit a public form from a trusted portal.

Table A.2 Submitting jobs with guest access disabled

Type of Portal Submitting Job	Public Form	Shared Form	Private Form
Trusted	Anyone can use the form to submit a job.	Anyone who provides authentication can use the form to submit a job. To use the form, the user must provide authentication by scanning a Login Sheet or logging in at the Xerox Document Centre control panel.	Only the form's owner can use the form to submit a job. To use the form, the owner must provide authentication by scanning a Login Sheet or logging in at the Xerox Document Centre control panel.
Untrusted	Anyone who provides authentication can use the form to submit a job. To use the form, the user must provide authentication by scanning a Login Sheet or logging in at the Xerox Document Centre control panel.	Anyone who provides authentication can use the form to submit a job. To use the form, the user must provide authentication by scanning a Login Sheet or logging in at the Xerox Document Centre control panel.	Only the form's owner can use the form to submit a job. To use the form, the owner must provide authentication by scanning a Login Sheet or logging in at the Xerox Document Centre control panel.

You configure the Authentication Service to specify which input devices, or portals, the FlowPort server will accept jobs from, and the type of user authentication required when submitting PaperWare forms. Refer to the “Configuring the Authentication Service” section on page 6-3. You disable the guest access by configuring the Xerox Network Scanning Service. Refer to the “Configuring the Xerox Network Scanning Service” section on page 6-7.

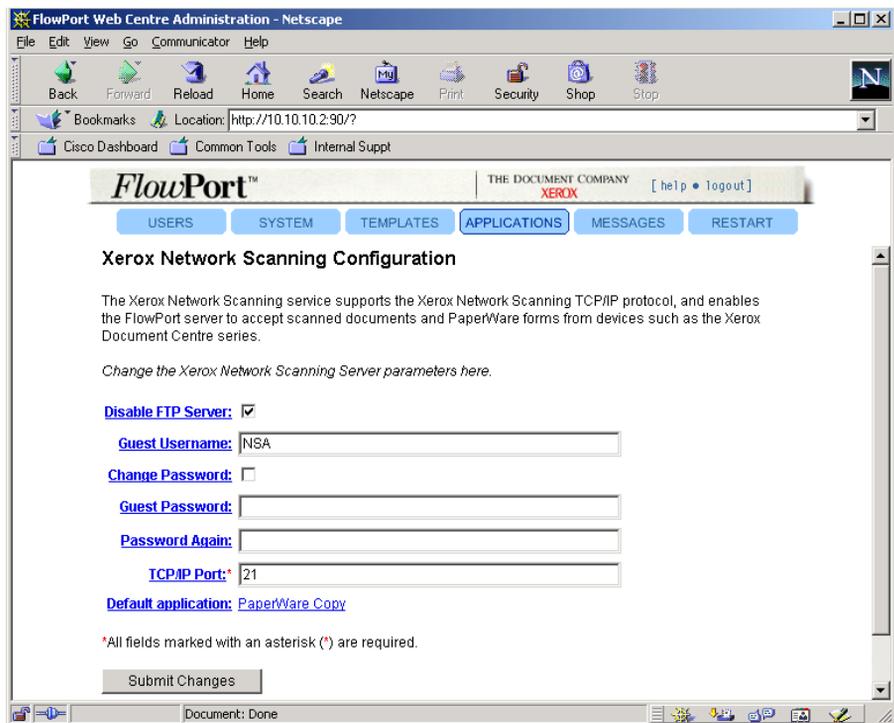
Xerox Network Scanning Service

The Xerox Network Scanning service supports the Xerox Network Scanning TCP/IP protocol, and enables the FlowPort server to accept scanned documents and PaperWare forms from devices such as the Xerox Document Centre series.

Most Xerox Document Centres use ftp to send jobs to FlowPort. If you disable the ftp server, FlowPort will still be able to process other jobs received through FlowPort's Internet Fax features or through the Xerox Network Scanning Directory Watching Service (see following page).

Disable FTP Server

On some networks, ftp servers are not allowed. Select the “Disable FTP Server” checkbox to disable FlowPort's ftp server. If you disable FlowPort's ftp server, then the remaining configuration options on this screen will not be used.

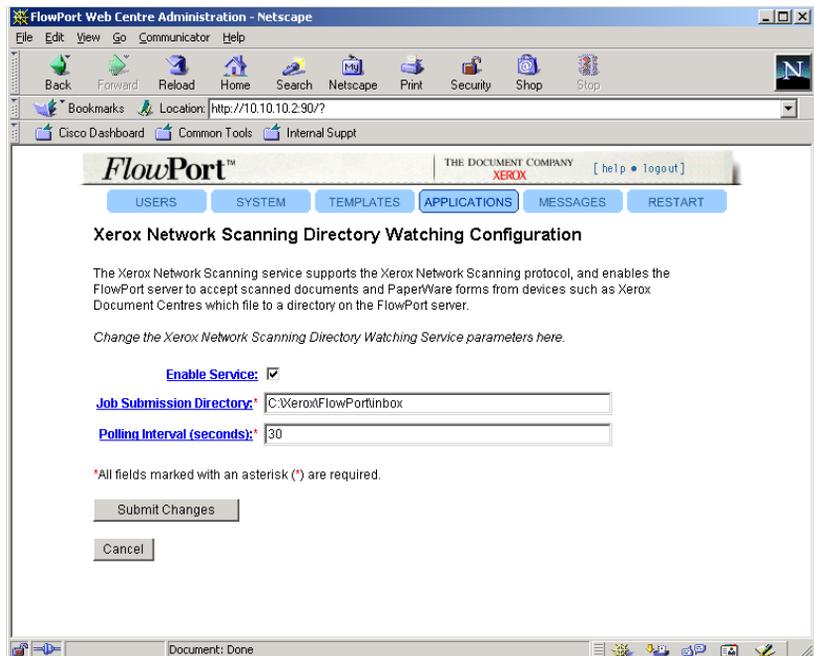


Xerox Network Scanning Directory Watching Service

Note: This service is not installed during FlowPort installation. You must install the “FileWatching.jar” application manually. See “Installing new applications and services” on page 6-10.

The Xerox Network Scanning Directory Watching service provides an alternative mechanism for submitting jobs to FlowPort by Document Centres which can use SMB instead of ftp, thus allowing FlowPort to operate in environments in which the ftp protocol is not used.

The Xerox Network Scanning Directory Watching service watches a specified directory, looking for files or folders representing FlowPort jobs which have arrived from Xerox Document Centres. When FlowPort finds that a FlowPort job exists in the watched Job Submission Directory, FlowPort processes the job. The FlowPort administrator can enable or disable the Xerox Network Scanning Directory Watching service. The directory in which FlowPort's Xerox Network Scanning Directory Watching service looks for these files and the time interval at which the directory is checked for these files is configurable.



You can change the following configuration options:

Enable Service

Select this checkbox to enable FlowPort's Xerox Network Scanning Directory Watching service. If you enable FlowPort's Xerox Network Scanning Directory Watching service, then FlowPort jobs sent to the directory configured as the Job Submission Directory get processed as FlowPort jobs. Such jobs can be sent by certain Xerox Document Centres using a mechanism such as SMB.

Your FlowPort server's processing of other jobs received through FlowPort's ftp server will not be affected by the setting of the "Enable Service" checkbox, as long as FlowPort's ftp server has not been disabled from the FlowPort admin user's Xerox Network Scanning Service configuration page.

FlowPort is installed with the ftp server enabled and the Xerox Network Scanning Directory Watching service disabled.

Your FlowPort server's processing of other jobs received through FlowPort's Internet Fax features will not be affected by the setting of the "Enable Service" checkbox.

Job Submission Directory

Specify the full pathname of the directory to be watched by the Xerox Network Scanning Directory Watching service for incoming jobs. The default directory is named "inbox". For example, if your FlowPort server is installed in C:\Xerox\FlowPort, then the default value of the path specified here would be "C:\Xerox\FlowPort\inbox".

Polling Interval (seconds)

Specify the time interval in seconds at which FlowPort's Xerox Network Scanning Directory Watching service checks the configured Job Submission Directory for new jobs to be processed by FlowPort. The default Polling Interval is set to the minimum allowed value of 5 seconds. The maximum allowed value is 120. Using a larger value reduces the time that FlowPort spends checking for jobs, but increases the overall time it takes for FlowPort to process a job, because processing of a job doesn't begin until after the Xerox Network Scanning Directory Watching service finds the job in the configured Job Submission Directory.