

Xerox Freeflow SMARTDocument Travel Version 4.51

Installation Instructions for SMARTDocument Travel v4.51



SMARTDocument Travel 4.51 Installation Instructions

Product Overview

Xerox Freeflow SMARTDocument Travel is a multi-threaded service that can be fully configured through an extensive, yet easy-to-use, graphical process designer. As a Microsoft Windows® service that is independent of any messaging system or database applications, this server simply acts as a portal through which documents can travel between a Multi-Functional device (MFD) and applications.

What does SMARTDocument Travel do?

By using SMARTDocument Travel, you can directly link digitized documents that were created by on-ramp devices, such as Xerox WorkCentre Pros, with line-of-business applications, such as Microsoft® SharePoint Portal Server (SPS), Microsoft Exchange, Lotus® Notes, and ODBC database. By using SMARTDocument Travel, you can also create their own customized workflows between the WorkCentre Pro and other applications.

SMARTDocument Travel can be configured to process documents through various filters, such as optical character recognition (OCR), field mapping, and image cleanup. After a document is processed through one of these filters, it is stored in a database. Another function of SMARTDocument Travel is the capability to route documents from file systems, data streams, POP3 email accounts, Windows desktops or SMTP streams through it's components to process them in a useful way to automate processes within a company. For example, this functionality can be used to create a full PDF server with SMARTDocument Travel, when capturing documents out of an email box, convert them into a PDF and send them back to the user.

How does SMARTDocument Travel work with Xerox Multifunctional Devices?

Use SMARTDocument Travel to create custom-defined scan templates for line-of-business programs, such as a Microsoft Exchange public folder database, a Lotus Notes database, or any other database. After you define the workflow in SMARTDocument Travel, a specially defined workflow template is automatically made available at all the Xerox MFDs you defined for the workgroup using that workflow. Simply go to the MFD, select the workflow template you want to execute and scan the document. SMARTDocument Travel routes the digitized images to folders and a variety of document management systems to meet your document management requirements.

Supported Xerox MFDs within SMARTDocument Travel

- WorkCentre Pro C2128/C2636/C3545
- WorkCentre Pro 35/45/55
- WorkCentre Pro 65/75/90
- WorkCentre Pro 165/175
- WorkCentre Pro 40/32 C
- DocumentCentre 535/545/555ST
- DocumentCentre 460/470/480/490ST
- DocumentCentre 425/432/440ST
- DocumentCentre 430ST
- DocumentCentre 332/340 ST

(Please note that the level of integration can vary for DocumentCentre devices)

How does SMARTDocument Travel work with other sources?

Within the SMARTDocument Travel server are modules to support the following sources:

- Folders
- Batches of scanned material
- POP3 email accounts
- SMTP data streams
- Windows Desktop via AutoCapture
- XML sources using the SMARTDocument Travel XML schema
- Other MFDs such as HP and Ricoh

Before You Begin

If you are using SMARTDocument Travel for any supported databases or line-of-business programs, make sure that the associated database or software program is installed and configured before you install and use SMARTDocument Travel. For example, if you want SMARTDocument Travel to work with Microsoft Share Point Portal server, first make sure that Microsoft SharePoint Portal Server is fully installed and configured.

If you are evaluating SMARTDocument Travel, you must purchase and install a license key within 30 days of installation. If you do not install the license key within 30 days, SMARTDocument Travel is no longer available. Any adjustment to computer dates or registries causes the SMARTDocument Travel licenses to expire automatically.

Recommended Minimum Requirements

Make sure that your system meets the following minimum requirements for installation:

Operating System

- Windows® 2000 Workstation with Service Pack 4 or
- Windows® 2000 Server with Service Pack 4 or
- Windows XP Professional or
- Windows 2003 Server

Hardware

- Intel Pentium® III processor, 600 megahertz (MHz) or faster
- At least 500 megabytes (MB) of dedicated random-access memory (RAM)
- At least 500 MB of available hard-disk space
- A properly installed and configured network interface with installed TCPIP protocol

Installation Steps

The following steps provide the short outline for installing the new SMARTDocument Travel 4.51 release. Read the outline below and look for detailed steps on the following pages:

➤ **STEP 1: Remove Existing Powered by AutoStore programs:**

You must completely remove any existing SMARTDocument Travel or powered by AutoStore programs from your computer before you install SMARTDocument Travel 4.51.

IMPORTANT NOTE: If you have not installed SMARTDocument Travel or powered by AutoStore programs on your server before, please skip this step and go to Step 2.

➤ **STEP 2: Install SMARTDocument Travel 4.51 release:**

Run the new SMARTDocument Travel installation executable and follow the steps outlined below on page 5 to complete your installation.

IMPORTANT NOTE: Installing SMARTDocument Travel 4.51 implies that you have read and agreed to the term stated within this document.

➤ **STEP 3: Perform component specific installation or upgrades**

Please follow the component installation and upgrade procedure outlined, starting on page 6, to complete your component specific steps OR convert any existing configuration file into the new AutoStore configuration file format.

STEP 1: Remove Existing Powered by AutoStore programs:

Prior to installation of SMARTDocument Travel 4.51, you must completely remove any existing SMARTDocument Travel or powered by AutoStore programs from your server. Please follow the instructions listed below to remove these programs. (In the following instructions, references to "AutoStore" refer to SMARTDocument Travel and any other program that is powered by AutoStore.)

1. **Stop the AutoStore Service and close all the AutoStore applications:** You must stop AutoStore services first before you perform the following installation procedures.
2. **Remove AutoStore:** Go to Start\Settings\Control Panel\Add/Remove Programs, select the appropriate AutoStore program from the currently installed programs list and click on Remove. Follow the instructions on screen to remove this program.
3. **Restart the server.**

STEP 2: Install SMARTDocument Travel 4.51 release

For new customers who have never installed SMARTDocument Travel before, to install SMARTDocument Travel 4.51 you must follow the instructions listed below:

1. **Go to the SMARTDocument Travel web site download page and register**
You must fill out the SMARTDocument Travel product registration form first, after you submitted your registration request, an email with a download link will be sent out to your email account that you provided in your registration form.
2. **Click on the download link and start the SMARTDocument Travel 4.51 download.**
Download SMARTDocument Travel 4.51 from the website. Run the SMARTDocument Travel installation executable and follow the instructions on your screen to complete the installation.

IMPORTANT NOTE: If you are planning to install **Lotus Notes or Domino Server** you must first install the Lotus Notes Client on the server prior to executing the SMARTDocument Travel setup.exe. Otherwise, **deselect Lotus Notes** from your component list during installation.

STEP 3: Updating Application Components

Application components may require additional installation steps or updates. The steps below are specific updates to application components and depending on your specific environment, you must follow the steps relating to your components.

Xerox WorkCentre Pro

Configuring Xerox WorkCentre Pro with SMARTDocument Travel

In order to use the Xerox component with SMARTDocument Travel, the SNMP component needs to be installed, and listed in your runtime path. These include the files: [mib.bin](#), [mgmtapi.dll](#) and [snmpapi.dll](#). These files are distributed with Windows NT 4.0 and up as part of the SNMP Service offering.

Windows NT 4.0 Installation:

Go to Control Panel, run the "Network" applet. From the "Services" tab, click on the "Add" button and select "SNMP Service".

Windows 2000/XP/Server 2003 Installation:

Go to the Control Panel and run the "Add/Remove Programs" applet. Select "Add/Remove Windows Components", "Management & Monitoring Tools", "Simple Network Management Protocol" and install it.

SMARTdocument Travel Add-Ons

Install Add-Ons for the SMARTdocument Travel version 4.51 on clients and/or server. To install any of the following Add-Ons on another PC, copy that folder to the PC and follow the setup instructions.

- **AutoCapture Client:**
 - Go to the Windows **Start Menu** and open **Programs\Xerox\SMARTdocument Travel\SMARTdocument Travel Add-Ons\AutoCapture\AutoCapture Client** folder.
 - Run **AutoCapture Client Setup.exe** file and follow the instructions on the screen to install this Client.
- **Exchange ABMSync Client:**
 - Go to the Windows **Start Menu** and open **Programs\Xerox\SMARTdocument Travel\SMARTdocument Travel Add-Ons\ABMSync\Exchange ABMSync Client** folder.
 - Run **ABMESC.exe** file and follow the instructions on screen to install this client.
- **Notes ABMSync Client:**
 - Go to the Windows **Start Menu** and open **Programs\Xerox\SMARTdocument Travel\SMARTdocument Travel Add-Ons\ABMSync\Notes ABMSync Client** folder.
 - Run **ABMLNC.exe** file and follow the instructions on screen to install this client.
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- **Ricoh GlobalScan Plugin:**
 - Go to the Windows **Start Menu** and open **Programs\Xerox\SMARTdocument Travel\SMARTdocument Travel Add-Ons\Ricoh GlobalScan Plugin** folder.
 - Run **NSiAutoStoreGS.exe** file and follow the instructions on screen to install that program.

- **Send to PC Client:**
 - Go to the Windows **Start Menu** and open **Programs\Xerox\SMARTdocument Travel\SMARTdocument Travel Add-Ons\Send to PC Client** folder.
 - Run **SendPCClient.exe** file and follow the instructions on screen to install this client.

- **SharePoint 2003 WebService:**
 - Go to the Windows **Start Menu** and open **Programs\Xerox\SMARTdocument Travel\SMARTdocument Travel Add-Ons\SharePoint 2003 WebService** folder.
 - Run **Setup.exe** file and follow the instructions on screen to install that program.

HummingBird 5.x

Configuring HummingBird 5.x with SMARTDocument Travel

If you are planning to configure HummingBird 5.x with SMARTDocument Travel, you must have HummingBird client installed on the same server as SMARTDocument Travel server. Otherwise, you can't complete your configuration with HummingBird 5.x.

Documentum ApplicationXtender™

Configuring Documentum ApplicationXtender™ with SMARTDocument Travel

If you are planning to configure Documentum ApplicationXtender™ with SMARTDocument Travel, you must have Documentum ApplicationXtender™ client installed on the same server as SMARTDocument Travel server. Otherwise, you can't complete your configuration with Documentum ApplicationXtender™.

SharePoint Portal 2003

Configuring SharePoint Portal 2003 with SMARTDocument Travel

In order to properly connect to a remote SharePoint Portal server from a client machine, you must run SP2003WebServiceSestup.msi file on the SharePoint server.

Copy the "WebService Installation" folder from **C:\Program Files\Xerox\SMARTDocument Travel\WebService Installation** to the machine which running SharePoint Portal 2003 server, and locate the **SP2003WebServiceSetup.msi** file inside this folder, run the set up and follow the instructions on your screen to complete the installation.

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