



# **GlobalScan NX**

**Operating Instructions** 

Administrator's Guide

## **Guides for This Solution**

The following guides are available for GlobalScan NX:

## GlobalScan NX Administrator's Guide (this guide, PDF)

This guide is intended for the Administrator. It explains how to utilize GlobalScan NX AdminTool to configure and manage settings and operations, for example, creation of Profiles, Groups/Projects, and Flows, as well as the selection of Services/Filters.

### GlobalScan NX Administrator's Quick Reference Guide (PDF)

This reference is intended for Administrators. It contains a summary of procedures outlined in the GlobalScan NX Administrator's Guide.

## GlobalScan NX Installation Guide (PDF)

This guide is intended for the Administrator and explains how to run the install/uninstall, activation, and modification programs available for the Serverless Edition and Server Edition of GlobalScan NX. Server and Site Certificate installation is covered as well, enabling secure communication between the computer/server (with AdminTool installed) and Web browser, and between the computer/server (with AdminTool installed) and the connected MFP(s).

### GlobalScan NX Installation Quick Reference Guide (PDF)

This reference is intended for the Administrator. It contains a summary of procedures outlined in the GlobalScan NX Installation Guide.

## GlobalScan NX User's Guide (PDF)

This guide is intended for the end user. It explains how to perform walk-up scan operations from the MFP display panel, for example, Send to Email, Send to Folder, and Send to FTP.

### GlobalScan NX User's Quick Reference Guide (PDF)

This reference is intended for the end user. It contains a summary of how to perform walk-up scan operations from the GlobalScan NX-enabled MFP.



• Acrobat Reader or Adobe Reader is required to view the PDF documentation.

## **Important**

- To the maximum extent permitted by applicable laws, in no event will the manufacturer be liable for any damages whatsoever arising out of failures of this product, losses of documents or data, or the use of this product and operation manuals provided with it.
- Make sure that you always copy or have backups of important documents or data. Documents or data might be erased due to your operational errors or malfunctions of the machine. Also, you are responsible for taking protective measures against computer viruses, worms, and other harmful software.
- In no event will the manufacturer be responsible for any documents created by you using this product or any results from the data executed by you.
- Some illustrations or explanations in this guide may differ from your product due to improvement or change in the product.
- Contents of this document are subject to change without notice.
- No part of this document may be duplicated, replicated, reproduced in any form, modified or quoted without prior consent of the supplier.

## **Trademarks**

Adobe, Acrobat, Acrobat Reader, Flash, Macromedia, and Reader are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

Microsoft, Windows, and Windows Server are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Novell and eDirectory are registered trademarks or trademarks of Novell, Inc. in the United States.

Domino is a registered trademark of IBM Corporation and Lotus Development Corporation.

Other product names used herein are for identification purposes only and might be trademarks of their respective companies. We disclaim any and all rights to those marks.

# **TABLE OF CONTENTS**

Guides for This Solution	1
Important	2
Trademarks	3
1. INTRODUCTION	
How to Read This Guide	11
Symbols	11
Abbreviations	11
GlobalScan NX Feature Highlights	13
2. ABOUT GLOBALSCAN NX	
GlobalScan NX Features Summary	17
GlobalScan NX Editions	19
Serverless Edition	19
Server Edition	20
Key Terms (When Using the Standard Operation Panel)	21
System Setting Terms	21
MFP Configuration Terms	25
Key Terms (When Using the Smart Operation Panel)	33
System Setting Terms	33
MFP Configuration Terms	36
3. QUICK START	
Performing Initial Setup	43
Step 1: AdminTool Login	44
About Login Status	46
Step 2: Add a Profile	48
Step 3: Add a Group	52
Step 4: Add a Project	56
Step 5: Add a Service/Create a Flow	61
Step 6: Configure the Service	64
Step 7: Configure the MFPs	69
Adding MFPs	72
4. ADMINTOOL CONFIGURATION	
Configuring GlobalScan NX Parameters	
About Profile Settings	80

Editing Profile Properties	80
Importing/Exporting Profiles	86
Deleting a Profile	88
Copying and Converting Profiles	89
About Group Settings	92
Group/Project Screen Overview	93
Changing a Group Name	99
Changing Group Display Order	100
Adding a New Screen Page (Standard Operation Panel only)	101
Deleting a Screen Page (Standard Operation Panel only)	102
Hiding a Group	103
Deleting a Group	104
About Project Settings	107
Editing Project Properties	108
Moving a Project Button	113
Resizing a Project Button	115
Adding Text to a Group Screen	118
Changing Project Button Display Order	121
Moving a Project to Another Screen Page	121
Moving a Project to Another Group	122
Importing Profile/Project Icons	124
Deleting a Project	129
About Flows	131
Working with Services/Filters in the Flow	134
About Services	140
Service Summary	141
Accessing Property Settings Screens	142
Service Properties	147
Send to Email Service	148
Send to Folder Service	163
Send to FTP Service	178
Send to Printer Service	186
Send to WebDAV Service	189

Service Folder and File Naming Rules	200
Specifying Folder and File Names Using Metadata	200
Other File Naming Conditions	203
About Filters	205
Filter Summary	206
Accessing Property Settings Screens	208
Filter Properties.	213
PDF Converter Filter	215
Enhanced PDF Converter Filter (Server Edition Only)	222
Image Converter Filter	230
Image Correction Filter (Server Edition Only)	236
Archiver Filter (Server Edition Only)	242
OCR Filter (Server Edition Only)	244
Section Specify Filter (Server Edition Only)	248
Section Splitter Filter (Server Edition Only)	252
XML Transformer Filter	254
Flow Redirect Filter	257
Metadata Converter Filter	260
Metadata Replacement Filter	263
PDF Stamper Filter (Server Edition Only)	268
About Distribution Parameters	279
Distribution Parameter Screen Overview	279
Opening/Navigating Distribution Parameter Screens	282
Changing Display Position of a Distribution Parameter	289
Transferring a Distribution Parameter to Another Screen	290
Hiding a Distribution Parameter	291
Setting Email Distribution Parameters	292
Setting Folder Distribution Parameters	300
About One-touch Scan	304
About Scan Settings.	307
Scan Size	317
OCR Scanned PDF (Serverless Edition Only)	325
About Other Settings	327

About Metadata	334
Changing Input Component Display Order	342
Hiding an Input Component	343
Deleting an Input Component	344
About Device Properties	345
Editing Device Properties	345
Deleting an MFP	347
Changing MFP's Profile and/or Project	347
Synchronizing the Device	349
Importing/Exporting the Device List	351
About Inbound FAX Transfer	356
Localizing the AdminTool	363
Configuring Projects for Use on 4-Line LCD Display Panel MFPs	365
5. MANAGING LOGS	
System Log	
System Log Settings	370
Job Log	372
6. MANAGING JOBS	
Job Queue	
Error Queue	383
Job Settings	388
7. MAINTENANCE SETTING	
System Control Settings (Server Edition Only)	393
Stop/Start Service	393
Setting Server Disk Space	395
Maintenance Settings	398
Performing a Manual Backup	401
Configuring Automatic Backups (Server Edition Only)	403
Downloading a Backup File	408
Uploading a Backup File	410
Restoring a Backup	411
Performing a Recovery (Server Edition Only)	413
Deleting a Backup File	415

Initializing the System	415
Batch Execution of Maintenance (Server Edition only)	418
8. SYSTEM CONFIGURATION	
General Settings	
Service Settings (Output Service/Filter Service)	423
Authentication Profile Settings	424
Adding Authentication Profile Settings	424
Setting Send to Home Folder/Send to Me Settings	434
Editing Authentication Profile Settings	436
Deleting an Authentication Profile	438
Setting a Default Authentication Profile	439
Using an MFP's User Authentication Function	440
Administrator Settings.	443
Set the Administrator using Authentication Profiles	443
Error Notification Email Address	446
Set Built-in Administrator's Password	449
About User Mode	451
Managing the Server Certificate	453
Obtaining and Installing a Server Certificate	454
IIS - SSL On/Off	461
Managing the Site Certificate	464
Managing the Private Keys	466
Replacement Table Settings	468
Adding a Replacement Table	469
Editing a Replacement Table	472
Managing Replacement Table Entries	473
Deleting a Replacement Table	475
Exporting/Importing a Replacement Table	475
Failover - Secondary Delivery Server (Server Edition Only)	480
Secondary Delivery Server Settings	480
Registering a Secondary Delivery Server	482
Removing a Secondary Delivery Server	484
Making a Secondary Delivery the Primary Delivery Server	485

Load Balancing (Enterprise Server Edition Only)	487
Load Balance Server Settings	488
Registering Load Balance Servers	489
Removing Load Balance Servers	491
Kerberos Option	493
Plug-in Information Menu	495
9. APPENDIX	
Active Directory Authentication	497
File Formats	498
Serverless Edition	498
Server Edition	498
Input/Output Formats for the Image Converter Filter (Server Edition)	500
Metadata Specifications	502
About Regular Expressions	509
Flow Examples	512
Include Document URLs in an Email	512
Creating Subfolders when Saving Scanned Files	514
Redirecting a Flow	517
Extracting and Saving Metadata as XML	520
Sending Metadata in an Email as HTML	521
Extracting Document Sections	522
Using the Image Converter Filter	525
List of TCP/UDP Ports	528
When Not Using SSL	528
When Using SSL	530
Ports for RMI	531
Ports for SNMP	532
Using Kerberos Authentication in a Multiple-Domain Environment	533
Obtaining the Configuration Tool	533
Adding Mappings for a Multiple Domain Environment	534
Deleting Mappings for a Multiple Domain Environment	535
Troubleshooting	537
Glossary of Terms	539

GlobalScan NX Feature Comparison	.542
Template	.545
INDEX	.547

## 1. INTRODUCTION

This guide provides instructions on the administration of GlobalScan NX, a powerful scanning solution that enables connected multifunctional devices (MFPs) to seamlessly and securely merge paper documents into an electronic workflow.

## How to Read This Guide

In order to familiarize yourself with the many capabilities of GlobalScan NX, we recommend that you read this guide in its entirety. You will then be prepared to design and administer workflows that enable your MFP users to address their document processing needs.



• Keep the GlobalScan NX Installation media in a safe place for future reference.

## **Symbols**

The following symbols are used in the guide to help you to identify content guickly.



This symbol indicates points to pay attention to when using the application.

## Note

This symbol indicates supplementary information that you may find helpful, but not essential to completing a task.

## ■ Reference

This symbol indicates where you can find further relevant information.

## Limitation

This symbol indicates numerical limits, functions that cannot be used together, or conditions in which a particular function cannot be used.

## []

This symbol indicates the name of buttons and tabs displayed on the computer screen or keys on the MFP control panel.

## **Abbreviations**

The following abbreviations are used in this guide to shorten content.

Product/Name	Abbreviation
GlobalScan NX	GSNX or gsnx
Multifunctional Device	MFP or device

# GlobalScan NX Feature Highlights

GlobalScan NX is a software solution designed to enable connected MFPs to join in network scanning operations. As a fully-scalable solution, GlobalScan NX seamlessly integrates with your network to cost-efficiently capture, index, manage, and distribute large volumes of business documents. With the connected MFPs providing high-speed network scanning capabilities, paper documents are quickly converted into easily shared digital files. Once in electronic form, the file(s) can be distributed to destinations around the corner or around the globe.

Feature	Description	
Serverless Edition		
MFP Support	Supports control of connected MFPs without the need for a dedicated Server PC.	
Easy-to-Use AdminTool	The Administrator controls all Service, Filter, and MFP settings through the flexible AdminTool utility, which is accessed using a standard Web browser.	
Flexible Flow	The Administrator can freely construct a Flow to address specific document processing needs. In addition, using the Flow Redirect Filter, it is possible to transfer a job to the Document Distribution Flow of another Project.	
Simple User Interface	The straightforward graphical user interface (UI) reduces steps taken to complete tasks, allowing for fast, intuitive MFP operation.	
Customizable MFP Display Panel	UI button size, position, labels, and icons are all fully customizable through the AdminTool. In addition, specify which Distribution Parameters should be hidden or read-only.	
Network Authentication	Supports Active Directory and LDAP authentication methods. When enabled, the user must log in at the MFP display panel before access to GlobalScan NX functions is granted.	
SSL (Secure Sockets Layer) Support	By installing a Server Certificate from a trusted Certificate Authority (CA), and Site Certificate, the data path between the GlobalScan NX AdminTool (Web browser) and MFP is secured (encrypted). The document data path between the MFP and remote destination is also protected, further ensuring that confidential information stays that way.	

Feature	Description
Send to Email	Sends scanned images to one or more email addresses. Includes Send to Me, a feature whereby the scanned image is automatically sent to the logon user's email address.
Send to Folder	Sends scanned images to one or more local and/or network folder(s)/subfolder(s). Includes Send to Home, a feature whereby the scanned image is automatically sent to the logon user's Home directory.
Send to FTP	Sends scanned images to one or more network folders on an FTP server, which is ideal for on-demand file sharing in mixed Operating System environments, for example, Windows and Unix.
Send to Printer	Sends scanned images to the printers installed on the server and print them.  JPEG (file extension jpeg, jpg, or jpe) and TIFF (file extension tif or tiff) files can be printed. Files are printed according to the default driver settings of each selected printer.
Send to WebDAV	Sends scanned image to one or more specified WebDAV sites, which enables authorized users to more easily collaborate by enabling document check-in/out. Versioned document can be shared with others.
One-touch Scan	Creates a Project with predefined Distribution Parameters. This enables the user to execute a job at the touch of a button, for example, scan invoices, employment applications, etc., to a network folder.
Email/Folder Search	Users can search the LDAP/LDAPS server for specific addresses, or all addresses, saving time over manual entry. Folder search is also supported, returning either specific or all folder destinations.
Metadata Entry	GlobalScan NX uses Metadata, also called document information, to classify documents for indexing and subsequent searching/retrieval purposes. As a document management tool, Metadata is used within Services/Filters to capture user-relevant information (in XML format). In addition, Metadata can be pre-set for each Project and automatically added to documents.  Furthermore, Filters can perform replacement task, for example changing numeric Metadata input into a company/department name.

Feature	Description
File Formats	Supports the following file formats:
	Color: JPEG, PDF
	B&W: TIFF, PDF
Filters	Offers additional Filters.
Server Edition supports all Serverle	ss Edition features, plus the following:
MFP Support	Supports up to 750 MFPs (for the Enterprise Server Edition) or 32 MFPs (for the Business Server Edition).
File Formats	Supports the following file formats:
	Color: TIFF, JPEG, PDF, BMP, GIF, PNG
	B&W: TIFF, TIFF-F, PDF, BMP, GIF, PNG
Image Processing	Supports additional image processing features, such as Auto Orientation.
Server Management	Supports Error Notification (via email), Data Backup/Restore, System Initialization, etc.
Failover	Automatically switches processing from the Primary Delivery Server to the specified Secondary Delivery Server in the event that the Primary Delivery Server fails.
Load Balancing	Distributes the job workload among several servers in order to increase processing efficiency. (Enterprise Server Edition only)

• Feature support is dependent on settings configured by the Administrator.

## 2. ABOUT GLOBALSCAN NX

GlobalScan NX bridges the gap between hardcopy and electronic workflows by enabling a network-connected MFP to convert paper documents, such as contracts, invoices, and brochures, into easily shared digital images. Once in electronic form, the file can be delivered to customers, clients, and colleagues, either around the corner or around the globe. GlobalScan NX can process and deliver documents scanned by the MFP and documents received by fax.

# GlobalScan NX Features Summary

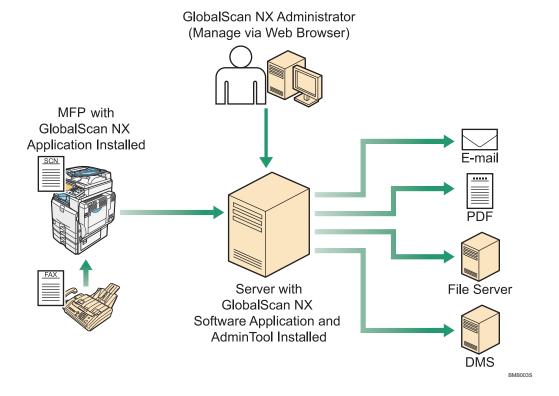
The high-quality images can be distributed using a variety of Services, including Send to Email, Send to Folder, Send to FTP, Send to Printer, and Send to WebDAV, even indexed and linked to a back-end Document Management System (DMS). In doing so, the device running the GlobalScan NX application leverages your network to achieve important business goals, namely:

- Maximizing your investment in technology by integrating scan functionality on an accessible copier platform, streamlining workflow and enhancing productivity.
- Improving overall business processes by creating an efficient digital workflow for the conversion of paper-based documents into easily distributed electronic files.
- Facilitating secure, paperless communication. Recipients view, archive, or distribute electronic files, reducing the volume of paper on the desktop, saving storage space, and reducing supply costs.
- Reducing turnaround time when responding to those who require time-sensitive documents.
- Eliminating the need for individual desktop scanners.

## Mportant !

MFPs' Auto-Off Timer needs to be set to 5 minutes or longer as long as GlobalScan NX is installed.
This limitation is caused by the way applications are loaded on an MFP. If an MFP enters sleep
mode before an application and its associated software finish starting up, the MFP might not work
correctly.

Fig.: GlobalScan NX Workflow



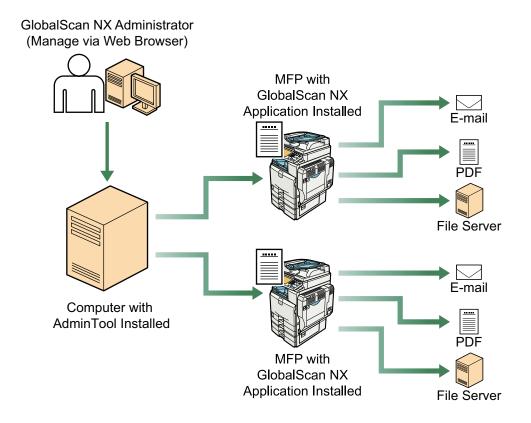
## **GlobalScan NX Editions**

Designed as a pluggable and scalable software solution, GlobalScan NX is available in Serverless and Server Editions, allowing you to implement a document management solution that fits your organization's system integration and budgetary requirements.

## Serverless Edition

GlobalScan NX Serverless Edition enables control of connected MFPs without the need for a dedicated Server PC, thus there is no overhead associated with network server integration. All Services and related processes necessary for document distribution are performed within the MFP(s).

Fig.: Serverless Edition System Structure



DMZ151



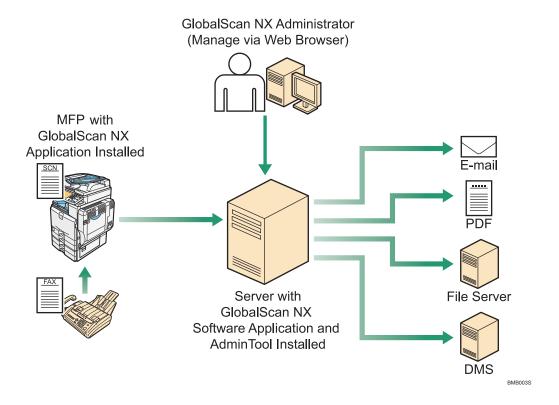
Please note that a single AdminTool can control a maximum of 750 MFPs.

## Server Edition

GlobalScan NX Server Edition supports the configuration and management of up to 750 MFPs (for the Enterprise Server Edition) or 32 MFPs (for the Business Server Edition). The Server Edition offers the most advanced feature set for document capture and distribution, including additional Filters and file formats, as well as value-added options that are not supported by the Serverless Edition.

The Server Edition requires a dedicated Server PC to maintain all the system settings and data necessary for document indexing and distribution. All Services and related processes necessary for document distribution are performed by the Server PC.

Fig.: Server Edition System Structure



# Key Terms (When Using the Standard Operation Panel)

In this section, terms specific to GlobalScan NX are divided into two categories, System Settings Terms and MFP Configuration Terms.

## System Setting Terms

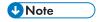
The following terms apply to GlobalScan NX functions that control system-wide functionality.

#### AdminTool

The AdminTool is a software utility that enables the GlobalScan NX Administrator to establish all network and MFP configuration and management settings. This easy to use, Web-based application allows for creation of Profiles, Groups/Projects, and Delivery Flows, as well as the selection and configuration of Services/Filters. Once configured, GlobalScan NX-enabled MFPs can join in network-scanning operations.

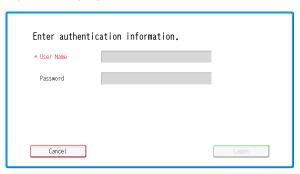
### **Authentication**

GlobalScan NX supports Active Directory and LDAP authentication. Under authentication, when the MFP user presses a Project button, log-in is required. After entry of the required credentials, the user presses [Login], and authentication is executed.



- Each Project can be defined by its own authentication method.
- Depending on the Service/Filter, additional authentication information may be required. For example, a Service that stores scanned documents on an external file system may require additional authentication information.
- When GlobalScan NX and Card Authentication Package are used at the same time, you can
  log in to the Project using a card. However, you cannot use the card in the following cases:
  - The MFP does not support this function.
  - The MFP's user authentication is off.
  - User Code Authentication is set as the MFP's user authentication.
  - The user is not registered as a shared user on both the GlobalScan NX and Card Authentication Package authentication servers.

Fig.: MFP Display Panel



#### Service

A Service represents a distribution method used during document processing. For example, if a user is sending a scanned image to an email address, he/she selects the Project button containing the Send to Email Service.

The Administrator adds Services to a Project in order to design a particular document distribution task. Services added to a Project are then displayed as buttons on the MFP display panel. The user simply selects the desired button to open the associated Service, and then sets the necessary Distribution Parameters. Note that if the selected Project contains only one Service, the Service Menu screen automatically displays.

Fig.: Send to Email Service Menu Screen



#### Service Menu

A Service Menu is displayed on the MFP display panel. The user selects a Service by pressing the desired button. The available Services, as well as Service button labels and display sequence, are configured by the Administrator.

2

Fig.: Service Menu Layout - MFP Display Panel

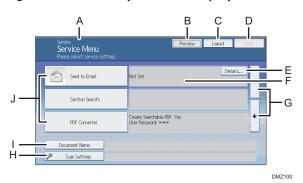


Table: Service Menu Screen Overview

	ltem	Description
A	Application Bar	The Project Name, Screen Title, and operational tips appear here. It is also possible to import a custom icon to appear in the upper left-hand corner, for example, a company logo.
В	[Preview]	Displays the scanned images so that you can confirm the contents before starting delivery.
С	[Project]	Returns to the Group/Project Screen.
D	[Back]	This button is only enabled if Metadata exists. In that case, press this button to open the Metadata screen.
Е	[Details]	Displays the list of currently selected addresses. After pressing [Details], a list of all selected destinations displays. Press [Summary] to return to the Service Menu screen.
F	Selected Destinations	Displays the number of selected addresses, along with addresses that have been entered/selected.
G	[↑][↓]	Scrolls up/down through available Services.
Н	[Scan Settings]	Provides access to Scan Settings, Scan Size, and if applicable, Filter settings. Scan presets will then display in the Scan Settings field, as space allows.  Note
		To display items in the [Scan Settings] field, you must first move the items to the [Selected Item(s) List] field on the [Other Settings] screen, which is accessed from the Project settings screen. For details, see page 327 "About Other Settings".

	ltem	Description
1	[Document Name]	Opens the letter keys on the display panel for file name entry. The entered Document Name identifies the image, whether the destination is email or a folder. The Administrator can set a default Document Name, if necessary. If the user does not enter a Document Name, the system will automatically affix the date/time of scanning as the Document Name.  Note  Depending on Administrator settings, this button may be disabled (grayed out) on the MFP display panel.
J	Service Buttons	Allows access to available Send-to functions.  Among the Service buttons, Filter buttons are also displayed in the Service Menu screen. Just press the button of the filter that you want to change the settings.  Note  If the Service is marked with an asterisk (*), it has been set as a "Required Entry". As such, the user must set the Distribution Parameters before scanning can take place.

## Filter

A Filter represents a set of criteria that defines input/output, controlling how the document is processed. For example, if the PDF Converter Filter - which supports searchable, password protected PDF creation - is added to a Project's Flow, the resulting file will be rendered in PDF format.



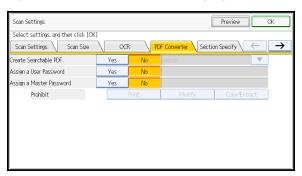
 When a Filter is added to a Project, it is necessary to establish settings specific to that Filter, via the AdminTool. In addition, some Filters may require user input from the MFP display panel.

## Reference

• See page 205 "About Filters".

2

Fig.: PDF Converter Filter - MFP Display Panel

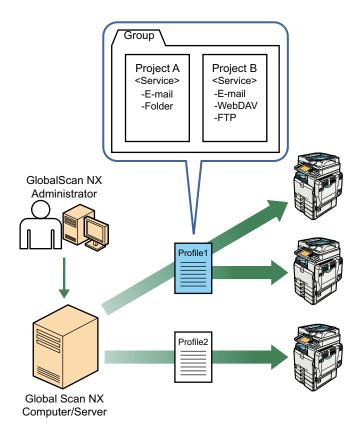


## **MFP Configuration Terms**

## **Profile**

A Profile is a set of parameters that are applied to the MFP. Using the AdminTool, the Administrator configures a Profile and associates it with an MFP. Once a Profile is associated with an MFP, the Groups/Projects created within the Profile are available to the user. Group tabs and Project buttons provide access to Services, such as Send to Email and Send to Folder. The relationship among Profiles, Projects, and Services is illustrated in the figure as follows:.

Fig.: Profile > Project > Service Workflow



DMZ150

## Group

A Group allows the Administrator to group Projects registered with a Profile. You can add Groups to a Profile by creating a new Group or editing an existing Group, according to application needs. For example, you can group the Projects of a Profile based on their job type, names, etc. This Group will be useful when a Profile has multiple registered Projects. Groups are displayed as tabs on the MFP display panel.

2

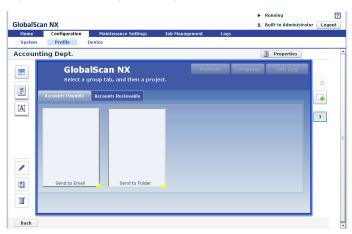


Fig.: AdminTool Project/Group Screen

#### **Project**

A Project refers to a document distribution task and is configured by the Administrator to address specific application needs. For example, the Sales Department sends proposals to prospective clients using the Send to Email Service. The Legal Department archives briefs and depositions, using the Send to Folder Service. Depending on the task, the user presses the associated Project button on the MFP display panel.

For each Project, the Administrator specifies the Distribution Parameters, including the distribution method (Send to Email/Folder, etc.), file format (TIFF, JPEG, PDF, etc.), resolution (200dpi, 300dpi, etc.), and so on. The scanned document will be sent with these settings to the specified destination(s). Depending on system configuration, some settings may be changed by the user prior to transmission. For instance, if the user wants to change the file format from TIFF to PDF, the file format is changed within the Scan Settings screen on the MFP display panel.

After selecting a Project button from the Project Menu (Fig. "Project Menu - MFP Display Panel"), the MFP's display panel reflects the available Services (Fig. "Service Menu - MFP Display Panel").



 If Authentication is enabled, the user must log in to the Project by entering a user name/ password, etc., via the letter keys on the display panel (figure "Letter Keys on the MFP Display Panel").

Fig.: Project Menu - MFP Display Panel



Fig.: Service Menu - MFP Display Panel

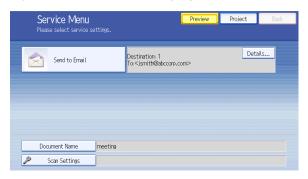
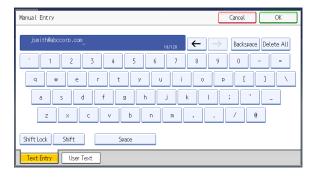


Fig.: Letter Keys on the Display Panel



## **One-touch Scan**

A One-touch Scan is a Project in which all document Distribution Parameters are pre-defined by the Administrator. For example, individual Projects for each user in the workgroup, can be created. The user in the marketing department, for instance, selects a Project button to open the Send to Email Service. Another user in the accounting department selects a Project button to open the Send to Folder Service, and so forth.

When Distribution Parameters, such as the destination email address and/or folder, file format, etc., are predefined, the user is not required to select/enter settings; the Service Menu buttons are disabled (grayed-out), as shown in the figure below. As such, the user simply places the document

on the Automatic Document Feeder (ADF) or Exposure Glass, and then presses the [Start] key; scanning is initiated.

Note that use of the One-touch Scan function is intended for tasks in which the parameters for document distribution remain the same, for example, the email address and/or folder destination remain the same. Any Project can be set as a One-touch Scan.

Fig.: Service Menu for One-touch Scan - MFP Display Panel



#### **Distribution Parameter**

A Distribution Parameter is a parameter that is set to a Service/Filter and is used for document distribution. Distribution Parameters are configurable using the AdminTool and/or MFP display panel.

For example, with the AdminTool, you can predefine Send to Email Distribution Parameters with a default [To] address and file format, while leaving [Cc] and [Subject] lines available for the user to define from the device display panel. This enables users to select a Project button and scan directly to a predefined destination, a feature called One-touch Scan.

Thus, if the user often sends itemized bills to accounting, the administrator can specify the email address of the accounting department manager as a predefined Distribution Parameter. This means that users will not have to enter the address at the MFP prior to scanning - saving time and effort.

#### Flow

The AdminTool is used to create a Flow for a Project. A Flow represents a document distribution process and is required in order to direct GlobalScan NX's job processing order.

By establishing the correct Flow, GlobalScan NX can efficiently and accurately perform the requested conversions. For instance, users have the flexibility to perform a single scan operation, with the resulting files sent to, for example, email and folder destinations - in that order; the target destination can receive a TIFF file by email and also receive the same document as a PDF file deposited directly to the specified folder.

Fig.: Delivery Flow



29

#### Metadata

GlobalScan NX uses Metadata to classify documents for indexing and subsequent searching/retrieval tasks. As a document management tool, Metadata is used within Services/Filters to capture user-relevant information (in XML format).

GlobalScan NX supports two kinds of Metadata, also called document information, basic and custom.

Basic Metadata

Standard document information is automatically captured by GlobalScan NX during the scanning process. This process occurs in the background, i.e., user input is not generally required.

Custom Metadata

The document information is designed/added to a Project by the Administrator, using various input field types, such as text boxes and/or drop-down lists. The user, from the MFP display panel, can enter certain values prior to scanning the document.



 During design of custom Metadata fields, the input value can be left blank, allowing for user input, or set as a default value via the AdminTool, though the user is free to change the entry.

In the figure below, the administrator has predefined four Metadata fields, Company Name, Index, Report Date, and Report Type. The button label, for example, Company Name, and predefined text, for example, ABC Corporation, is set via the AdminTool. This document information can be edited by the user, if necessary, and then captured and indexed along with the scanned file, allowing the user to more efficiently archive/retrieve files.

Fig.: Metadata - MFP Display Panel



#### Section

When a multi-page document is scanned at the MFP, each resulting document page is called a Section. For example, when the Section Specify Filter has been added to a Project, the target is a "Section", not a "page". As such, each "Section" is a separate file; each file can consist of any number of pages.

## • Example 1 (Single-Page TIFF)

When a five-page document is scanned and distributed in the Single-Page TIFF file format, the resulting document will have five Sections.

Fig.: Document Sections - Single-Page TIFFs



BMB016S

## • Example 2 (Multi-Page TIFF)

When a five-page document is scanned and distributed in the Multi-Page TIFF file format, the resulting document will have just one Section.

Fig.: Document Section - Multi-Page TIFF



BMB017S

## • Example 3 (Multiple Filters in Flow)

If Filters are used, and there is more than one Section in the resulting file, each Section can have a different file format.

2

Fig.: Document Sections - Different File Formats



BMB018S

# Key Terms (When Using the Smart Operation Panel)

In this section, terms specific to GlobalScan NX are divided into two categories, System Settings Terms and MFP Configuration Terms.

## **System Setting Terms**

The following terms apply to GlobalScan NX functions that control system-wide functionality.

#### AdminTool

The AdminTool is a software utility that enables the GlobalScan NX Administrator to establish all network and MFP configuration and management settings. This easy to use, Web-based application allows for creation of Profiles, Groups/Projects, and Delivery Flows, as well as the selection and configuration of Services/Filters. Once configured, GlobalScan NX-enabled MFPs can join in network-scanning operations.

#### **Authentication**

GlobalScan NX supports Active Directory and LDAP authentication. Under authentication, when the MFP user presses a Project button, log-in is required. After entry of the required credentials, the user presses [Login], and authentication is executed.



- Each Project can be defined by its own authentication method.
- Depending on the Service/Filter, additional authentication information may be required. For example, a Service that stores scanned documents on an external file system may require additional authentication information.
- When GlobalScan NX and Card Authentication Package are used at the same time, you can
  log in to the Project using a card. However, you cannot use the card in the following cases:
  - The MFP does not support this function.
  - The MFP's user authentication is off.
  - User Code Authentication is set as the MFP's user authentication.
  - The user is not registered as a shared user on both the GlobalScan NX and Card Authentication Package authentication servers.

Fig.: MFP Display Panel

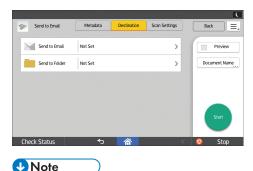


#### Service

A Service represents a distribution method used during document processing. For example, if a user is sending a scanned image to an email address, he/she selects the Project button containing the Send to Email Service.

The Administrator adds Services to a Project in order to design a particular document distribution task. Services added to a Project are then displayed as buttons on the MFP display panel. The user simply selects the desired button to open the associated Service, and then sets the necessary Distribution Parameters.

Fig.: Send to Email Service Menu Screen



• If the selected Project contains only one Service and metadata entry is not required, the Service Menu screen is automatically displayed.

## Service Menu

A Service Menu is displayed on the MFP display panel. The user selects a Service by pressing the desired button. The available Services, as well as Service button labels and display sequence, are configured by the Administrator.

2

Fig.: Service Menu Layout - MFP Display Panel

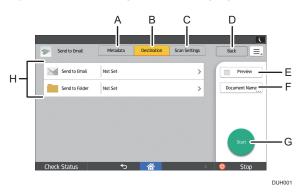


Table: Service Menu Screen Overview

	ltem	Description
A	[Metadata]* 1	This button is enabled only when Metadata entry is required. Pressing this button opens the Metadata screen.
В	[Destination]	Displays the Service Menu screen.
С	[Scan Settings]	Displays the Scan Settings screen. In the Scan Settings screen, you can specify the Scan Settings, Scan Size, and if applicable, Filter settings.
D	[Top]	Logs out of the Project and returns to the Group/Project screen.
Е	[Preview]	Select the check box for [Preview] before pressing [Start] to display print previews of the scanned image before sending it.  Note  • [Preview] is not available for some MFPs.
F	[Document Name] *1	Opens the letter keys on the display panel for file name entry. The entered Document Name identifies the image, whether the destination is email or a folder. The Administrator can set a default Document Name, if necessary. If the user does not enter a Document Name, the system will automatically affix the date/time of scanning as the Document Name.
G	[Start]	Start scanning.
Н	Service Buttons	Allows access to available Send-to functions.

ltem	Description
	<ul> <li>• If the Service is marked with an asterisk (*), it has been set as a "Required Entry". As such, the user must set the Distribution Parameters before scanning can take place.</li> </ul>

\*1 Depending on the settings established by the Administrator, this button might be grayed out on the MFP display panel.

### **Filter**

A Filter represents a set of criteria that defines input/output, controlling how the document is processed. For example, if the PDF Converter Filter - which supports searchable, password protected PDF creation - is added to a Project's Flow, the resulting file will be rendered in PDF format.

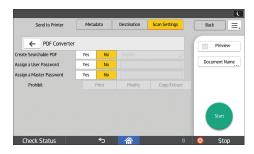


 When a Filter is added to a Project, it is necessary to establish settings specific to that Filter, via the AdminTool. In addition, some Filters may require user input from the MFP display panel.

# Reference

• See page 205 "About Filters".

Fig.: PDF Converter Filter - MFP Display Panel

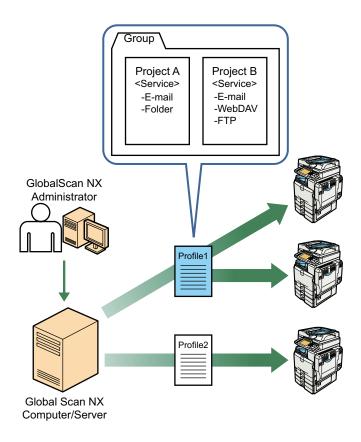


## **MFP Configuration Terms**

### **Profile**

A Profile is a set of parameters that are applied to the MFP. Using the AdminTool, the Administrator configures a Profile and associates it with an MFP. Once a Profile is associated with an MFP, the Groups/Projects created within the Profile are available to the user. Groups and Projects provide access to Services, such as Send to Email and Send to Folder. The relationship among Profiles, Projects, and Services is illustrated in the figure as follows:.

Fig.: Profile > Project > Service Workflow

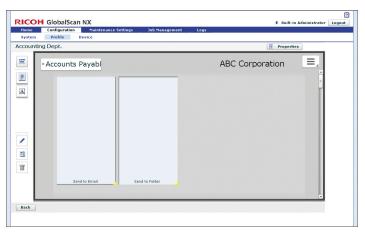


DMZ150

### Group

A Group allows the Administrator to group Projects registered with a Profile. You can add Groups to a Profile by creating a new Group or editing an existing Group, according to application needs. For example, you can group the Projects of a Profile based on their job type, names, etc. This Group will be useful when a Profile has multiple registered Projects. Groups are displayed in a list on the MFP display panel.





### **Project**

A Project refers to a document distribution task and is configured by the Administrator to address specific application needs. For example, the Sales Department sends proposals to prospective clients using the Send to Email Service. The Legal Department archives briefs and depositions, using the Send to Folder Service. Depending on the task, the user presses the associated Project button on the MFP display panel.

For each Project, the Administrator specifies the Distribution Parameters, including the distribution method (Send to Email/Folder, etc.), file format (TIFF, JPEG, PDF, etc.), resolution (200dpi, 300dpi, etc.), and so on. The scanned document will be sent with these settings to the specified destination(s). Depending on system configuration, some settings may be changed by the user prior to transmission. For instance, if the user wants to change the file format from TIFF to PDF, the file format is changed within the Scan Settings screen on the MFP display panel.

After selecting a Project button from the Project Menu (Fig. "Project Menu - MFP Display Panel"), the MFP's display panel reflects the available Services (Fig. "Service Menu - MFP Display Panel").



 If Authentication is enabled, the user must log in to the Project by entering a user name/ password, etc., via the letter keys on the display panel (figure "Letter Keys on the MFP Display Panel").

Fig.: Project Menu - MFP Display Panel



Fig.: Service Menu - MFP Display Panel

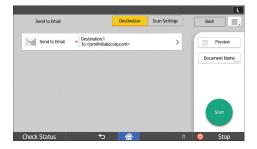


Fig.: Letter Keys on the Display Panel



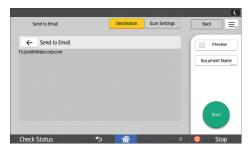
### **One-touch Scan**

A One-touch Scan is a Project in which all document Distribution Parameters are pre-defined by the Administrator. For example, individual Projects for each user in the workgroup, can be created. The user in the marketing department, for instance, selects a Project button to open the Send to Email Service. Another user in the accounting department selects a Project button to open the Send to Folder Service, and so forth.

When Distribution Parameters, such as the destination email address and/or folder, file format, etc., are predefined, the user is not required to select/enter settings. As such, the user simply places the document on the Automatic Document Feeder (ADF) or Exposure Glass, and then presses [Start]; scanning is initiated.

Note that use of the One-touch Scan function is intended for tasks in which the parameters for document distribution remain the same, for example, the email address and/or folder destination remain the same. Any Project can be set as a One-touch Scan.

Fig.: Service Menu for One-touch Scan - MFP Display Panel



### **Distribution Parameter**

A Distribution Parameter is a parameter that is set to a Service/Filter and is used for document distribution. Distribution Parameters are configurable using the AdminTool and/or MFP display panel.

For example, with the AdminTool, you can predefine Send to Email Distribution Parameters with a default [To] address and file format, while leaving [Cc] and [Subject] lines available for the user to define from the device display panel. This enables users to select a Project button and scan directly to a predefined destination, a feature called One-touch Scan.

Thus, if the user often sends itemized bills to accounting, the administrator can specify the email address of the accounting department manager as a predefined Distribution Parameter. This means that users will not have to enter the address at the MFP prior to scanning - saving time and effort.

### Flow

The AdminTool is used to create a Flow for a Project. A Flow represents a document distribution process and is required in order to direct GlobalScan NX's job processing order.

By establishing the correct Flow, GlobalScan NX can efficiently and accurately perform the requested conversions. For instance, users have the flexibility to perform a single scan operation, with the resulting files sent to, for example, email and folder destinations - in that order; the target destination can receive a TIFF file by email and also receive the same document as a PDF file deposited directly to the specified folder.

Fig.: Delivery Flow



### Metadata

GlobalScan NX uses Metadata to classify documents for indexing and subsequent searching/retrieval tasks. As a document management tool, Metadata is used within Services/Filters to capture user-relevant information (in XML format).

GlobalScan NX supports two kinds of Metadata, also called document information, basic and custom.

### Basic Metadata

Standard document information is automatically captured by GlobalScan NX during the scanning process. This process occurs in the background, i.e., user input is not generally required.

#### Custom Metadata

The document information is designed/added to a Project by the Administrator, using various input field types, such as text boxes and/or drop-down lists. The user, from the MFP display panel, can enter certain values prior to scanning the document.



During design of custom Metadata fields, the input value can be left blank, allowing for
user input, or set as a default value via the AdminTool, though the user is free to change
the entry.

In the figure below, the administrator has predefined the "Date" field. Labels such as "Company Name" and "Dept. Code" and predefined text such as "Urgent" are set via the AdminTool.

This document information can be edited by the user, if necessary, and then captured and indexed along with the scanned file, allowing the user to more efficiently archive/retrieve files.

Fig.: Metadata - MFP Display Panel



#### Section

When a multi-page document is scanned at the MFP, each resulting document page is called a Section. For example, when the Section Specify Filter has been added to a Project, the target is a "Section", not a "page". As such, each "Section" is a separate file; each file can consist of any number of pages.

Example 1 (Single-Page TIFF)

When a five-page document is scanned and distributed in the Single-Page TIFF file format, the resulting document will have five Sections.

### Fig.: Document Sections - Single-Page TIFFs

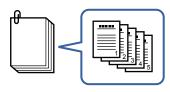


BMB016S

• Example 2 (Multi-Page TIFF)

When a five-page document is scanned and distributed in the Multi-Page TIFF file format, the resulting document will have just one Section.

Fig.: Document Section - Multi-Page TIFF



BMB017S

• Example 3 (Multiple Filters in Flow)

If Filters are used, and there is more than one Section in the resulting file, each Section can have a different file format.

Fig.: Document Sections - Different File Formats



BMB018S

# 3. QUICK START

This chapter is a quick tutorial on how to configure GlobalScan NX's AdminTool, specifically, you will learn how to establish system and MFP settings that enable the connected device(s) to perform network scanning operations.

# **Performing Initial Setup**

You must complete the following seven steps, in sequence:

- Step 1: AdminTool Login
- Step 2: Add a Profile
- Step 3: Add a Group
- Step 4: Add a Project
- Step 5: Add a Service/Create a Flow
- Step 6: Configure the Service
- Step 7: Configure the MFPs

After successfully completing these steps, you will gain an understanding of how the GlobalScan NX system works. You are then prepared to explore the next chapter, page 79 "ADMINTOOL CONFIGURATION", to learn how to configure settings that further enhance MFP functionality.

## **Important**

- GSNX functions correctly even if the status of GSNX is indicated as Suspend on the Extended Feature Settings screen in the Startup Setting tab on the MFP display panel.
- Note that some settings are established on the System Level or Profile Level. Settings created on the
  System Level are automatically copied to each new Profile, saving time. If the settings are changed
  at the Profile Level, they will be unique to that specific Profile, for instance, one user group may
  require authentication (login), while another does not.

# Reference

• See page 79 "ADMINTOOL CONFIGURATION".

# Step 1: AdminTool Login

The AdminTool is a Web-based software utility that enables the GlobalScan NX Administrator to establish all network and MFP configuration and management settings. This easy-to-use application allows for creation of Profiles, Groups/Projects, and Delivery Flows, as well as the selection of Services/Filters. Once configured, GlobalScan NX-enabled MFPs can join in network-scanning operations.



- To log in the AdminTool, you must use either a Built-in administrator account or any admin account created through the AdminTool privileges.
- General users, those without administrative privileges, can log in to the AdminTool in User Mode.
   However, users can only access/move between his/her own jobs and logs, i.e., all, completed or error Job Logs. Other capabilities of the AdminTool are not available.
- You cannot log in as Administrator while another user is already connected to the server using the administrative privilege.
- If you refresh (typically by pressing the F5 key) or close the browser window without first logging out, you will have to wait three minutes or restart the GlobalScan NX service before you can log in again.

## Reference

- See page 424 "Authentication Profile Settings".
- See page 449 "Set Built-in Administrator's Password".

To log in to the GlobalScan NX AdminTool, proceed as follows:

- 1. Open your Web browser, for example, Internet Explorer.
- 2. Enter AdminTool URL, for example, http://IP address:8080/gsnx/.



- The URL will vary based on software type and connection settings, as follows:
  - HTTP

Enter the IP address (as noted below), or host name, along with the port number (default: 8080) and virtual directory (default: gsnx) specified during installation of the AdminTool software.

HTTPS

For secure communication, enter the IP address (as noted below), or host name, along with the port number (default: 8443) and virtual directory (default: gsnx) specified during installation of the AdminTool software. To enable HTTPS, you must register a Certificate. For details, see page 464 "Managing the Site Certificate".

IP Address/Host Name:

3

• Serverless Edition

Enter the IP address or host name of the computer on which the AdminTool software is installed.

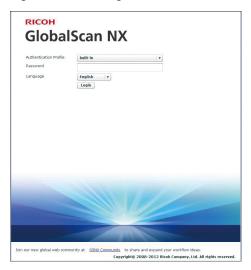
Server Edition

Enter the IP address or host name of the Server on which the AdminTool software is installed.

3. Press ENTER or click [Go].

The AdminTool Login Page displays.

Fig.: AdminTool Login Screen



4. Select an Authentication Profile and enter the password. The password is the same one you entered during installation of GlobalScan NX software.



- Login credential will vary depending on the Authentication Profile used.
- For domain name selection, a drop-down list shows the available domain names; manual entry is not supported.

# Reference

- See page 424 "Authentication Profile Settings".
- 5. Select the Language from the drop-down list.



 By default, the Operating System language of a computer which is running the Web Browser is used.

- **■** Reference
  - See page 363 "Localizing the AdminTool".
- 6. Click [Login]. The AdminTool Home Page displays.

### Fig.: AdminTool Home Page



- **U** Note
  - To return to GlobalScan NX's Home Page from any screen, click the [Home] tab.
  - If the display reads, "Login failed", click [OK], and then select/enter valid login credentials.

## **About Login Status**

The upper right corner of the AdminTool screen displays important information regarding login status.

### Fig.: Login Status



Please review the table below to learn about each item, and the related function.

### **Table: Login Status**

	Item	Description
А	Server Status*1	Displays the current state of the GlobalScan NX Server, either [Running] or [Suspended]. Click, [Running] to display the System Control screen. Here, you can start/stop the GlobalScan NX Server

	ltem	Description
		from processing distribution jobs. The system itself is not stopped, processing of distribution jobs is just temporarily stopped. Incoming jobs are held in the Waiting queue. They will not be processed until you restart job processing.  • Note  • Unavailable in User Mode.  • Reference  • See page 393 "System Control Settings (Server Edition Only)".  • See page 451 "About User Mode".
В	? Manual	Displays the GlobalScan NX Administrator's Guide in PDF format.
С	[Logout]	Logs out of the AdminTool.
D Built-in Dis Administrator Se		Displays the login user's name. By default, the login name is "Built-in Administrator". Click the icon/name to display the Administrator Settings screen.  • Note  • Unavailable in User Mode.  • See page 449 "Set Built-in Administrator's Password".  • See page 451 "About User Mode".

<sup>\* 1</sup> Server Edition only.

# **■** Reference

• See page 443 "Administrator Settings".

# Step 2: Add a Profile

A Profile defines the document distribution Flow of an MFP. Operation of the GlobalScan NX-enabled MFP is controlled by the Profile, thus identifies the specific Groups, Projects, and Services for the device, in short, which Send-to features and associated functions are available to the user at the MFP display panel.

In this step, you will create a Profile called "Accounting Dept.". To do so, proceed as follows:

1. Click [Home], and then the [Profile] shortcut.

### Fig.: AdminTool Home Page



The Profile List displays.

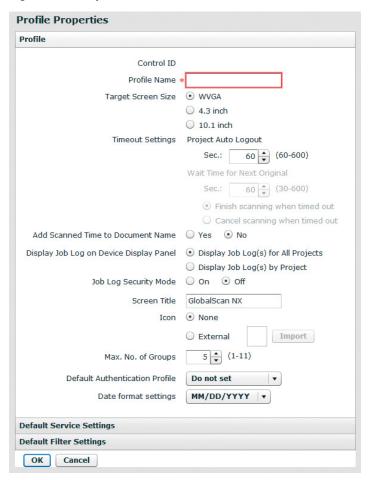
Fig.: Profile List



3

### 2. Click [Create]. The Profile Properties screen displays.

Fig.: Profile Properties Screen



Required items are indicated by a red asterisk (\*).

If you did not enter the required settings, and then click [OK], the associated fields will appear in red highlight.

3. Enter the Profile Name, for example, "Accounting Dept.".



• A Profile Name that is already in use can be entered.



• The maximum length of the Profile Name is 128 characters.

4. Enter a Screen Title for display on the Application Bar. This entry displays on the MFP display panel. In the figure below, the Screen Title is ABC Corporation.

Fig.: MFP Display panel (Standard Operation Panel)



Fig.: MFP Display panel (Smart Operation Panel)





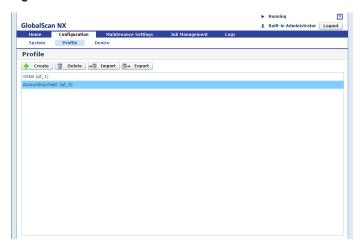
 When customizing the Application Bar, check that the MFP display panel displays the Screen Title as you wish.

# Limitation

• The maximum length of the Screen Title is 50 characters.

5. Click [OK]. The Profile List displays, along with the newly-created Profile, "Accounting Dept.".

Fig.: Profile List



You have successfully created a Profile. Please proceed to Step 3: Add a Group.



• For additional details about Profile settings, see page 80 "About Profile Settings".

# Step 3: Add a Group

A Group is a way to organize Projects within a Profile. Adding Projects to each Group and selecting the Group with Projects you want to use, you can access them quickly.

In this step, you will create two Groups within the "Accounting Dept." Profile: "Accounts Payable" and "Accounts Receivable". To do so, proceed as follows:

- 1. On the Profile List, double-click the Profile Name, for example, "Accounting Dept.". The Group/Project screen displays.
- 2. Click the New Group button.

Fig.: New Group (Standard Operation Panel)



Fig.: New Group (Smart Operation Panel)



The Group Properties screen displays.

3

Fig.: Group Properties Screen



3. Enter the Group Name, for example, "Accounts Payable".



• The maximum length of a Group Name is 128 characters.

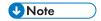
Fig.: Group Properties Screen



4. Select the [Display] status. For example, select [On] to display the Group on the MFP display panel. Select [Off] to hide the Group; it will not be visible to the user.



- See page 103 "Hiding a Group".
- 5. Click [OK] to save the settings.



• Click [Cancel] to exit, without saving the settings.

The Group screen now displays a tab for "Accounts Payable". When Smart Operation Panel is used, "Accounts Payable" is displayed in the Group list.



Fig.: Group List (Smart Operation Panel)



6. Repeat 2 - 5 to add another Group. The Group "Accounts Receivable" is added.

Fig.: Group Tab (Standard Operation Panel)



Fig.: Group List (Smart Operation Panel)



You have successfully added two Groups. Please proceed to Step 4: Add a Project.

Mportant !

• For additional details about Group settings, see page 80 "About Profile Settings".

# Step 4: Add a Project

A Project refers to a document distribution task and is configured by the Administrator to address application needs of a specific user group. Projects display on the MFP display panel, enabling the user to select the desired Service, for instance, Send to Email.

In this step, you will add two Projects, one called "Send to Email" will be added to the "Accounts Payable" Group, another called "Send to Folder" will be added to the "Accounts Receivable" Group. To do so, proceed as follows:

 Click the New Project button, and then drag and drop to the "Accounts Payable" Group/ Project screen.

Fig.: New Project (Standard Operation Panel)



Fig.: New Project (Smart Operation Panel)



The Project Properties screen displays (Fig. "Project Properties Screen").

3



- The GlobalScan NX system will not allow you to add a Project unless you first create a Group. If you attempt to do so, an error symbol displays.
- You can add up to 500 Projects for the Server Edition and 100 for the Serverless Edition to a
  Profile.
- MFPs that have a 4-line display panel only support Profiles that contain 100 or fewer Projects.
   Do not assign any Profiles that contain more than 100 Projects to a 4-line display panel MFP.

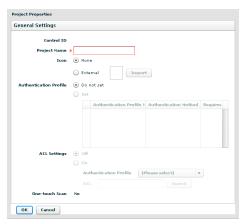
### Fig.: Project Error



## Reference

• See page 52 "Step 3: Add a Group".

### Fig.: Project Properties Screen



2. Enter the Project Name, for example, "Send to Email".



 Projects can be named as you wish, so while this example uses "Send to Email" and "Send to Folder" as Project names, you may use, for example, a department, individual or workgroup name. 3. Click [OK]. A "Send to Email" button displays.

Fig.: "Send to Email" button (Standard Operation Panel)



Fig.: "Send to Email" button (Smart Operation Panel)



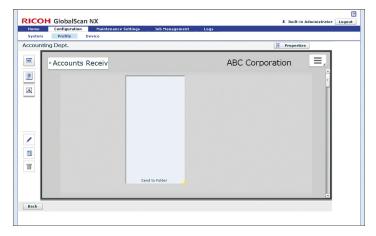
4. Click (select) the "Accounts Receivable" Group tab. When Smart Operation Panel is used, click (select) "Accounts Receivable" from the Group list.

5. Repeat 1 - 3, using "Send to Folder" as the Project Name. A "Send to Folder" button displays.

Fig.: "Send to Folder" button (Standard Operation Panel)



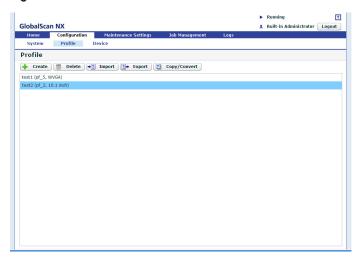
Fig.: "Send to Folder" button (Smart Operation Panel)



The "Accounts Receivable" Group screen now includes a Project button called "Send to Folder".

6. Click [Back], and return to the Profile list screen.

Fig.: Profile List



You have successfully added two Projects. Please proceed to "Step 5: Add a Service/Create a Flow".



• For additional details, see page 80 "About Profile Settings".

# Step 5: Add a Service/Create a Flow

A "Flow" represents a document distribution process for a Project. Each Project must have a Flow containing the required Services for the Project.

### Flow Rules

- A Flow must contain at least one Service or the Flow Redirect Filter.
- A Flow can have multiple Services, which are performed one by one, i.e., from the beginning of the Flow to the end.
- A Flow must end with a Service, not a Filter, with the exception of the Flow Redirect Filter.

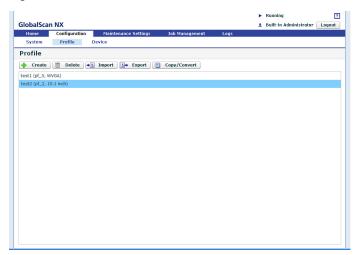


• See page 205 "About Filters".

In this step, you will create a Flow containing the Email Service required to run the Project called "Send to Email". To do so, proceed as follows:

1. On the Profile list, double-click the Profile Name.

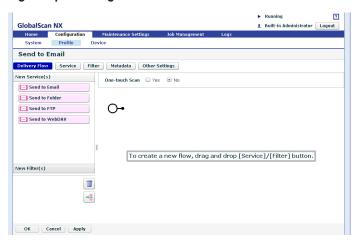
Fig.: Profile List



2. If necessary, click (select) the "Accounts Payable" Group tab. When Smart Operation Panel is used, click (select) "Accounts Payable" from the Group list.

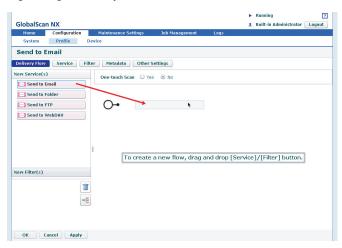
Double-click on the "Send to Email" Project button. The Project Configuration screen displays.

Fig.: Project Configuration Screen



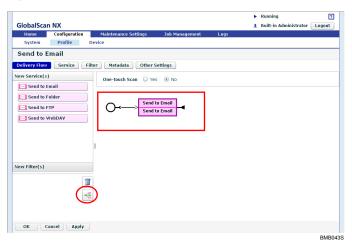
4. Drag and drop the Send to Email Service to the Flow Editor screen by clicking [Send to Email] and positioning the Service as shown below.

Fig.: Drag and Drop Service to Flow Editor screen



The Send to Email Service is added to the Flow Editor screen.

Fig.: Send to Email Added to Flow





• To automatically align the Service(s) in the Flow Editor screen, click the Alignment button (circled above).

You have successfully added a Service to the Flow. Please proceed to Step 6: Configure the Service.



For additional details about Service/Flow settings, see page 131 "About Flows" and page 140
"About Services".

# Step 6: Configure the Service

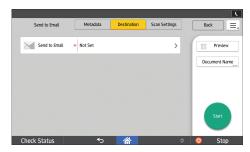
A Service represents a document distribution method and is added to a Project. Users can then select the Project from the MFP display panel by simply selecting the desired Project button, which then opens the associated Service Menu. See the figures below.

The Send to Email Service, for example, allows the MFP user to send scanned images directly to one or more email addresses as an attachment. During scanning, the paper-based document is digitized and converted to the selected file format, for instance, TIFF, JPEG, PDF, etc. The email recipients can view, print, forward, archive or delete the attached files.

Fig.: Service Menu Display - MFP Display Panel (Standard Operation Panel)



Fig.: Service Menu Display - MFP Display Panel (Smart Operation Panel)



In this step, we will establish the Send to Email settings on the Profile Level. As mentioned, some settings are established on the System Level or Profile Level. Settings created on the System Level are automatically copied to each new Profile, saving time. If the settings are changed at the Profile Level, they will be unique to that specific Profile, for instance, one user group may require authentication (login), while another does not.

# ■ Reference

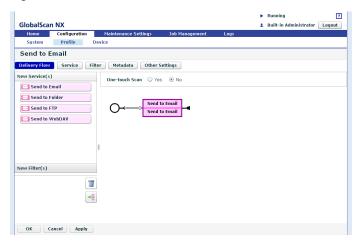
• See page 79 "ADMINTOOL CONFIGURATION".

To configure the Send to Email Service, proceed as follows:

3

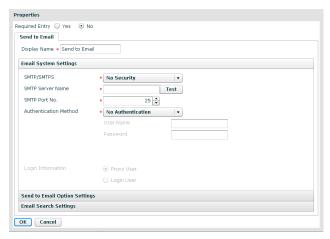
1. Double-click the Send to Email Service on the Flow Editor screen.

Fig.: Send to Email Service



The Send to Email Properties screen displays.

Fig.: Send to Email Properties Screen



2. In the Display Name field, specify the name of the Service. This entry will appear on the MFP display panel.



- The maximum length of the Display Name is 30 characters.
- 3. Select/enter the following settings:
  - SMTP/SMTPS

Select one of the following encryption methods to use with the SMTP server.

- [No Security]
- [SMTPS (SMTP over SSL)]

• [SMTPS (StartTLS)]

The following explains the procedures when selecting [No Security].

For details about configuring the [SMTPS (SMTP over SSL)] or [SMTPS (StartTLS)] setting, see page 148 "Send to Email Service".

• [SMTP Server Name]

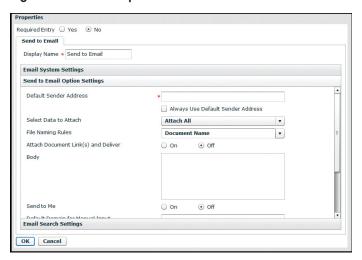
Enter the IP address or host name of the SMTP(S) Server.

• [SMTP Port No.]

Specify the port number of the SMTP Server. The default value is 25.

 Click the Send to Email Option Settings accordion button (bottom of screen). The Option Settings screen displays.

Fig.: Send to Email Option Screen



5. Specify the Default Sender Address.



- This is the default email address of the sender which is set to the "From" field as the sender's
  address. If the email address of the sender can be obtained from the login information for the
  Project, i.e., the email address of the sender is registered with the user profile of the
  Authentication Server (LDAP and Active Directory only), the obtained email address will be
  automatically set as the email address of the sender.
- When [Always Use Default Sender Address] is checked, the "Default Sender Address" is always used, even if the user's e-mail address is retrieved from the authentication server.
- 6. Next, scroll down to display the Option Settings check boxes. Select one or more of the following boxes:
  - [Show Cc]

Enables users to specify a Courtesy Copy destination.

• [Show Bcc]

Enables users to specify a Blind Courtesy Copy destination.

• [Show ReplyTo]

Enables users to specify a ReplyTo address.

• [Enable Manual Address Entry]

Enables users to input a destination via the letter keys on the display panel.

This action enables both the AdminTool's Output Services screen (Fig. "Send to Email Main Screen - Admin Tool") and MFP display panel (Fig. "Send to Email Main Screen - MFP display panel") with the selected features.

Fig.: Send to Email Main Screen - AdminTool

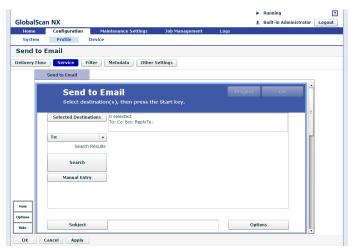


Fig.: Send to Email Main Screen - MFP Display Panel (Standard Operation Panel)

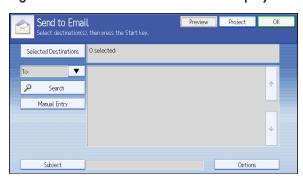


Fig.: Send to Email Main Screen - MFP Display Panel (Smart Operation Panel)





- If you do not enable these settings, the AdminTool and MFP display panel only display the
  [To] destination, i.e., [Cc]/[Bcc]/[ReplyTo] selections do not display in the drop-down, and
  [Manual Entry] is grayed out when the Standard Operation Panel is used, and is not
  displayed when the Smart Operation Panel is used.
- With [Manual Entry] disabled, the user can only search the corporate address book (via an LDAP server) for the destination email address. To enable the Search function, establish the necessary Email Search Settings.

## Reference

- See page 131 "About Flows", page 140 "About Services".
- See page 279 "About Distribution Parameters".
- 7. Click [OK] to save the settings, and return to the Delivery Flow screen.

You have successfully completed the basic settings for the Send to Email Service. Please proceed to page 69 "Step 7: Configure the MFPs".

# 

For additional details about Service/Flow settings, see page 131 "About Flows", page 140
 "About Services".

# Step 7: Configure the MFPs

You have completed configuration of basic AdminTool settings. The next step is to identify the MFPs that are to join in GlobalScan NX operations. For example, you will search for network devices to add to the Device List, or add them manually, as well as select each device's default Profile.

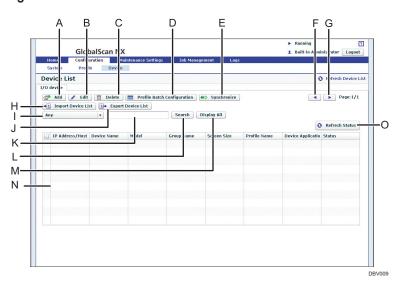
1. Click [Home], and then the [Device] shortcut.

Fig.: AdminTool Home Page



The Device List displays the settings of GlobalScan NX-enabled MFPs.

Fig.: Device List



# 2. Review the table below, and then proceed to page 72 "Adding MFPs".

**Table: Device List** 

	ltem	Description
А	[Add]	Adds new MFPs to the Device List, or search the network for all GlobalScan NX-enabled devices.
В	[Edit]	Edits the properties of the selected MFP.
С	[Delete]	Deletes the selected MFPs from the Device List.
D	[Profile Batch Configuration]	Changes the selected MFPs' Profile and Project.
E	[Synchronize]	<ul> <li>There are four conditions when you must synchronize the GlobalScan NX system with the connected MFPs.</li> <li>1. After software modification. For details, see the GlobalScan NX Installation Guide.</li> <li>2. After performing a Recovery.</li> <li>3. After the GlobalScan NX computer/server IP address is changed.</li> <li>4. After SSL Certificate settings are changed.</li> <li>Reference</li> <li>See page 349 "Synchronizing the Device".</li> </ul>
F	Previous Page	Go to previous page of the device list view.
G	Next Page	Go to next page of the device list view.
Н	[Import Device List]	Imports the Device List.
I	Field Selection	Select a field for searching.  Candidate items:  Any  IP Address/Host Name  Device Name  Model  Device Group  Screen Size

	Item	Description
		<ul><li> Profile Name</li><li> Device Application Ver.</li></ul>
J	[Export Device List]	Exports the Device List.  Click [Export Device List], and select the character encoding methods you require from the drop-down list.  The following character encoding methods are supported:  UTF-8  Latin-1
K	Search Entry	Enter a Keyword for searching.
L	[Search]	Search device(s) under certain conditions.
М	[Display All]	Display all devices.
N	Device List	The Device List shows a list of GlobalScan NX-enabled MFPs. By default, this list is ordered by IP address. The list contains the following data:  IP Address/Host Name  Device Name  Model  Screen Size  Profile Name  Status  Device Application Ver.  Indicates the version of GlobalScan NX ESA application that is installed on the MFP. It will be updated whenever any of the following is executed in the Device List screen:  [Add], [Refresh], [Edit], [Profile Batch Configuration], [Synchronize], [Import]  Note  If one of the following is true, [Add], [Edit], [Profile Batch Configuration], [Synchronize], or [Import] of device will fail.  Device Application is newer than computer Application.

	ltem	Description
		The version of Device Application is V1.0.x.x or V1.1.x.x.
0	[Refresh Status]	Updates the Device List.

## **Adding MFPs**

Use one of the following two methods to enable MFPs to join in GlobalScan NX operations.

- Manually Adding MFPs
- Searching for Connected MFPs

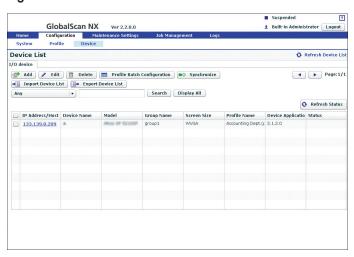
### Manually Adding MFPs

In this procedure, you will add an MFP to the system by entering the MFP's IP Address or Host Name

1. Click [Home], and then the [Device] shortcut.

The Device List displays.

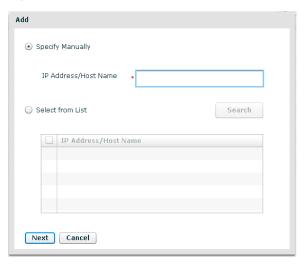
#### Fig.: Device List



2. To add an MFP, click [Add].

The Add Device screen displays.

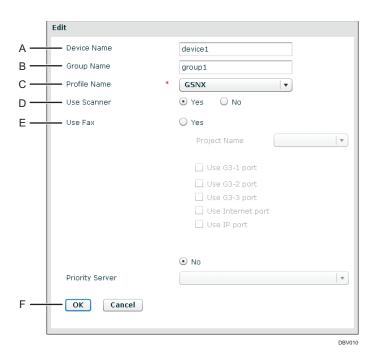
Fig.: Add Device Screen



- 3. With [Specify Manually] selected, enter the IP address or host name of the MFP you wish to add.
- 4. Click [Next].

If the connection is confirmed, the Property screen of the MFP displays.

Fig.: Device Properties Screen



### 5. Specify the Device Properties, as outlined in the table below.

#### **Table: Device Properties**

	Field	Description
A	[Device Name]	Specify the name of the MFP. This entry will appear in the [Device Name] column of the Device List.  Limitation  • The maximum length of the Device Name is 128 characters.
В	[Group Name]	Specify the group name.
С	[Profile Name]	Specify the Profile Name which the MFP will use.
D	[Use Scanner]	Specify whether or not to use GlobalScan NX for scan and distribution. (Default: [Yes])
Е	[Use Fax]	Specify whether or not to use the FAX function. (Default: [No]).  Reference  See page 356 "About Inbound FAX Transfer".  See page 304 "About One-touch Scan".
F	[OK]	Saves settings.
	[Cancel]	Exits, without saving settings.

#### 6. Click [OK] to save the settings.

If a failure has occurred in adding an MFP, a message indicating the failure will display. Click [OK], and then make sure the target MFP is turned on, and that the MFP has the GlobalScan NX MFP application installed.



• Click [Cancel] to exit, without saving the settings.

# **Searching for Connected MFPs**

The search is performed within the subnet of the computer/server.

1. If necessary, click [Home], and then the [Device] shortcut.

### 2. Click [Add]. The Add Device screen displays.

Fig.: Add Device Screen

d	
Specify Manually	
IP Address/Host Name	
O Select from List	Search
☐ IP Address/Host Name	
Next Cancel	

- 3. Select [Select from List].
- 4. Click [Search].

The display shows all GlobalScan NX-enabled MFPs.

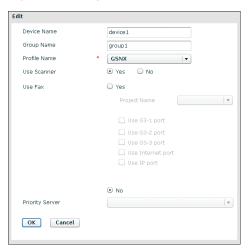
Fig.: Add Device Screen

	Specif	Specify Manually		
IP Address/Host Name				
. 9	Select	: from List	Search	
		IP Address/Host Name		
		192.168.8.234		
		192.168.8.241		
		192.168.8.62		
		192.168.8.65		

5. Select the check boxes of the MFPs you wish to add, and then click [Next].

The Properties screen of the selected MFPs will display.

#### Fig.: Device Properties Screen





- The content of the screen may vary. For example, if you select only one MFP, the screen contains the properties necessary for that MFP, according to the capabilities of that MFP. If you select more than one MFP, the screen contains all possible (necessary) properties for the selected MFPs. In that case, the values you provide on the screen will be set to the relevant properties of the selected MFPs. In other words, the Profile you select will be applied to all MFPs. Note, however, that the [Device Name] field will not display, as this field cannot be applied to multiple MFPs. To enter a Device Name, set properties to individual MFPs.
- If more than one MFP is selected, you must set values applicable to all MFPs. Using values that basically cannot be configured may cause undesired operation.
- 6. Specify the MFP settings.
  - **■** Reference
    - See table "Device Properties" above.
- 7. Click [OK] to save the settings.

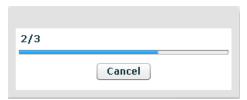


· Click [Cancel] to exit, without saving the settings.

A progress bar will display as the new MFPs are added (Fig. "Progress Bar"), after which the Device List screen displays, along with newly-added MFPs. If a failure has occurred in adding an MFP, a message indicating the failure will display.

3

Fig.: Progress Bar



The target MFPs are now ready to join in GlobalScan NX operations.



• For additional details about device settings, see page 345 "About Device Properties".

You have successfully completed the Quick Start procedures for GlobalScan NX.

# 4. ADMINTOOL CONFIGURATION

This chapter explains how to configure additional GlobalScan NX parameters, those that further enhance and customize GlobalScan NX to your specific application needs.

# **Configuring GlobalScan NX Parameters**

This chapter explains the following procedures.

- About Profile Settings
- About Group Settings
- About Project Settings
- About Flows
- About Services
- About Filters
- About Distribution Parameters
- About One-touch Scan
- About Scan Settings
- About Other Settings
- About Metadata
- About Inbound FAX Transfer
- Configuring Projects for Use on 4-Line LCD Display Panel MFPs

### Mportant !

• In order to follow the procedures outlined in this chapter, you should complete Steps 1-7; specifically you must be able to access a Profile, Group, and Project.

#### Reference

• See page 43 "QUICK START".

# **About Profile Settings**

As noted, a Profile defines the document distribution Flow of an MFP, i.e., identifies the Groups, Projects, and Services available to the user at the MFP display panel.

Unlike Groups and Projects, a Profile works in the background to control network scan operations, thus the user does not see or select a Profile at the MFP display panel.

The table below summarizes what is covered in this section.

#### **Table: Module Summary**

Module	Explains how to
Editing Profile Properties	Specify/edit default settings that control a Profile, for example Profile Name, Timeout Settings, Add Scanned Time to Document Name, Default Authentication Profile, etc.
Importing and Exporting Profiles	Import and export Profiles to and from other GlobalScan NX systems.
Deleting a Profile	Delete a previously-added Profile from the GlobalScan NX system.
Duplicating and Converting Profiles	Create new profiles by duplicating existing profiles. A profile for WVGA screen can also be converted to a whole new profile for 10.1 inch.

# Reference

• See page 48 "Step 2: Add a Profile".

# **Editing Profile Properties**

To edit Profile Properties, proceed as follows:

4

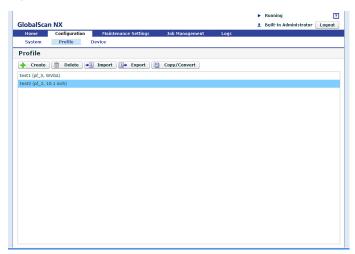
1. Click [Home], and then the [Profile] shortcut.

Fig.: Profile Properties Screen



The Profile List displays.

Fig.: Profile List



2. Double-click the Profile Name, for example "Accounting Dept.", and then click [Properties].

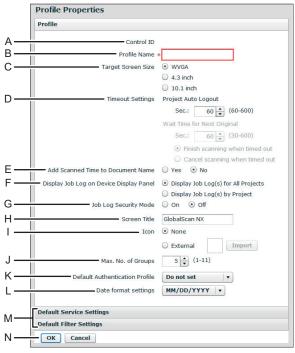
Fig.: Properties Button



The Profile Properties screen displays.

3. Specify the Profile settings, as outlined in the table below.

### Fig.: Profile Properties Screen



DMZ101

**Table: Profile Properties** 

	ltem	Description
А	[Control ID]	This is the system-assigned, read-only Profile ID.
В	[Profile Name]	Specify the Profile Name.  Note  A name that is already in use can be entered.  Limitation  The maximum length of the Profile Name is 128 characters.
С	[Target Screen Size]	Select the screen size (WVGA/4.3 inch/10.1 inch) that matches the MFP screen size.  Note  When the Smart Operation Panel is used, select 10.1 inch.

	ltem	Description
D	[Timeout Settings]	[Project Auto Logout]  Specify when the system logs out of the Project. If the MFP is idle for the specified period of time, 60 - 600 seconds, the user is automatically logged off. (Default: 60 seconds)
		[Wait Time for Next Original]  Specify how long the MFP waits for the next original to be placed when scanning by using the exposure glass or when scanning a large number of documents.
		You can also specify whether the MFP finishes or cancels scanning before a time-out occurs.
		When the Preview function is used, the MFP displays preview images for the time specified here, and then starts sending scanned documents or cancels sending, according to the setting.
		Note
		This setting is available only when [10.1 inch] is selected for [Target Screen Size].
Е	[Add Scanned Time to Document Name]	Specify whether or not to add a scanned time information to the Document Name, indicating the time scanning took place.
		• [Yes]
		A timestamp is added to the Document Name, for example, "Expense_Report_yyyymmddhhmmss".  • [No]
		A timestamp is not added to the Document Name.
F	[Display Job Log on Device Display Panel]	Specify which Job Logs the user can browse from the MFP display panel.
	(Standard Operation Panel only)	<ul><li> [Display Job Log(s) for All Projects]</li><li> [Display Job Log(s) by Project]</li></ul>
G	[Job Log Security Mode]	Specify whether or not to mask sensitive parts of the Job Log on the MFP display panel.  • [On]

	ltem	Description
		The Document Name and User Name are masked with asterisks (******).  • [Off]  All Job Log properties are unmasked (displayed).
Н	[Screen Title]	Specify text to display on the Application Bar, which appears on the MFP display panel.  Note  When customizing the Application Bar, check that the MFP display panel displays the text as you wish.  Limitation  The maximum length of the Screen Title is 50 characters.
I	[Icon]	Specify whether or not to apply an icon next to the Screen Title on the Application Bar, e.g., a company logo.  • [None]  An icon is not displayed.  • [External]  Click [Import] to browse to/select a file (icon image) to display on the Application Bar.    Reference    • See page 124 "Importing Profile/Project Icons".
J	[Max. No. of Groups] (Standard Operation Panel only)	Specify the number of Groups that displays on a single screen of the MFP display panel. (Default: 5, Minimum: 1, Maximum: 11)  • Note  • When the Standard Operation Panel is used and there are more Group tabs to display, horizontal scroll buttons display on the AdminTool and MFP display panel.  • When the Standard Operation Panel is used and a single screen has multiple Group tabs to display, the tab width will narrow, and the Group Name(s) may be truncated.

	ltem	Description
		• See page 52 "Step 3: Add a Group".
		See page 92 "About Group Settings".
К	[Default Authentication Profile]	If an Authentication Profile is registered with the system, click the drop-down list to select a default Authentication Profile. This Authentication Profile will be used by the Projects created under this Profile. As such, the MFP display panel will prompt the user to enter valid credentials.
		Specify [Do not set] if an Authentication Profile will not be used, thus there will no login screen displayed on the MFP display panel.
		<b>☐</b> Reference
		See page 424 "Authentication Profile Settings".
L	[Date format settings]	Specify the display format of the date to be applied to the MFP display panel.  • [MM/DD/YYYY]  • [DD/MM/YYYY]
		• [YYYY/MM/DD]
М	[Default Service Settings]	Use this accordion button to open the Default Output Service Settings screen.   Reference  • See page 131 "About Flows", page 140 "About
		Services".
	[Default Filter Settings]	Use this accordion button to display the Default Filter Service Settings.
		• See page 131 "About Flows", page 205 "About Filters".
N	[OK]	Saves screen settings.
	[Cancel]	Exits, without saving settings.

4. Click [OK] to save the Profile settings, and return to the Group/Project screen.



- Click [Cancel] to exit, without saving the settings.
- 5. Click [Back] to return to the Profile List.

## **Importing/Exporting Profiles**

You can export and import Profiles to and from other GlobalScan NX systems.



Only logging off is possible during Profile import/export. Do not attempt any other operations
while an import/export operation is in progress.

#### **Exporting a Profile**

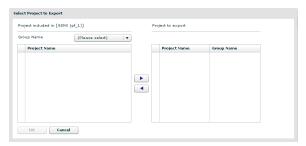
You can export a Profile for use in other GlobalScan NX systems. Use the following procedure to export a Profile.

- If necessary, click [Home], and then the [Profile] shortcut.
   The Profile List appears.
- 2. Click [Export].
- 3. Select an export method.



- [Export the Whole Profile]: Export all Groups and Projects contained in a selected Profile.
- [Specify Group/Project and Export]: Export specified Groups and Projects contained in a selected Profile (see step 5).
- 4. In [Profile Name], select the Profile you want to export, and then click [OK].

If you selected [Specify Group/Project and Export], use the following procedure to specify which Groups and Projects to export.



- 1. Select a Group from the drop-down list.
- Select the check boxes of the Projects you want to export, click [▶], and then click [OK].



- Repeat this procedure to add Projects from other Groups.
- If you selected [Export the Whole Profile], step 5 is omitted.
- 6. When the message confirming that you want to download the Profile appears, click [OK].
- Select a folder to save the exported Profile in, enter a name for the file, and then click [Save].

The exported data will be saved.

8. When the export completes, click [OK] on the confirmation window.

#### Importing a Profile

You can import the Profiles of other GlobalScan NX systems. Use the following procedure to import a Profile.



- Only Profiles from the same edition and version of GlobalScan NX can be imported.
- Do not import a Profile from a GlobalScan NX system that has different options installed. If you do, errors might occur when you send a document.
- If you want to import the data including an NT authentication profile, be sure to delete the NT authentication profile of the data beforehand. The NT authentication profile cannot be imported.
- You cannot import data which does not have a screen size item to a machine with a 4.3 inch screen.
- If necessary, click [Home], and then the [Profile] shortcut.
   The Profile List appears.

The import method selection window appears.



- 3. Select an import method, and then click [OK].
  - [Create as a New Profile]: Create a new Profile that contains the imported data.
  - [Add to Existing Profile]: Add the imported Groups and Projects to an existing Profile. To
    merge imported Groups and Projects into an existing Profile, specify the destination Profile in
    [Profile Name]. Groups and Projects merged into an existing Profile are added after the last
    Group contained in the destination profile. The properties of the imported Profile are not
    imported when you merge the Profile into an existing Profile.
- 4. Select the Profile data that you want to import, and then click [Open].
- 5. When the import completes, click [OK] on the confirmation window.



If the imported Profile contains Authentication Profiles or Replacement Tables that have the same
name as an Authentication Profile or Replacement Table that is already present in the import
destination, a number in parentheses (for example, "(1)") will be appended to the name of the
imported Authentication Profile or Replacement Table.

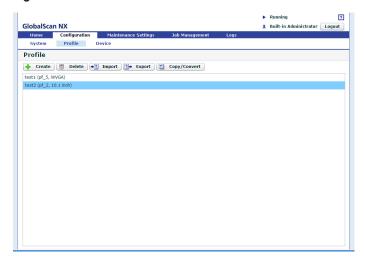
# **Deleting a Profile**

To delete a Profile from the GlobalScan NX system, proceed as follows:

1. If necessary, click [Home], and then the [Profile] shortcut. The Profile List displays.

2. Click the Profile Name. To select multiple items hold down the SHIFT or CTRL key, and then click the Profile Name.

Fig.: Profile List



- 3. Click [Delete]. A deletion confirmation message displays.
- 4. Click [OK] to delete the Profile.



- Click [Cancel] to exit, without deleting the Profile.
- If you delete a Profile associated with an MFP, the setting of MFP you established will no
  longer function correctly. (So before deleting it, please confirm the settings of MFP and
  Replacement Table, and write them down if needed.) In that case, associate the MFP with an
  enabled (existing) Profile in the Device Management Screen. Also, if Profiles used in the
  Replacement Table are deleted, it is necessary to re-assign Replacement Table items in the
  Replacement Table Setting screen.

# Reference

- See page 69 "Step 7: Configure the MFPs".
- See page 345 "About Device Properties".
- See page 468 "Replacement Table Settings".

# **Copying and Converting Profiles**

You can copy or convert up to 10 GlobalScan NX profiles at a time.

You can copy profiles using either of the following methods: copying the existing profiles or converting WVGA profiles to 10.1-inch screen profiles, and then copying the profiles.

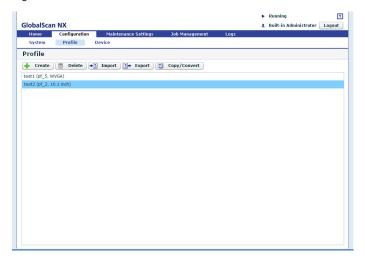
Convert profiles, for example, when replacing an MFP with a 10.1-inch screen for a machine with an WVGA screen, or when newly implementing an MFP with a 10.1-inch screen and applying the same configuration as the existing WVGA profile.

1. Select [Home], and then select [Profile].

The list of profiles appears.

2. From the list, select the name of the profile to be copied. To select one profile or more, select the profiles while pressing the [Shift] or [Ctrl] key.

Figure: Profile list



3. Select [Copy/Convert].

The screen for selecting the copy method appears.

Figure: Copy method selection screen



- [Copy profile without modifying it]
   Select this setting to copy the selected profiles without making any changes to their settings.
- [Copy WVGA profile and convert it to a 10.1 inch profile]
   Select this setting to convert the selected profile to a 10.1-inch profile, and then copy it. You can only convert WVGA profiles. You cannot convert 4.3-inch profiles.

#### 4

4. Select the copy method, and then select [OK].

The conversion process starts.



- Copied profiles are named in the format "Original profile name Copy (Profile ID, Screen size)".
- The setting of the conditional branching flow filter that is specified in [Default Filter Settings] of the profile will not be carried over to the copied/converted profile.
- When converting a profile that was created in GlobalScan NX version 2.3.X.X to a 10.1- inch profile, you need to open the converted profile, and then save it again.

# **About Group Settings**

As noted, a Group is a way to organize Projects within a Profile. Once added to the system, the Group appears as a tab or in a list on the MFP display panel. You add Projects to each Group according to your users' application needs.

Fig.: Group Tab - MFP Display Panel (Standard Operation Panel)

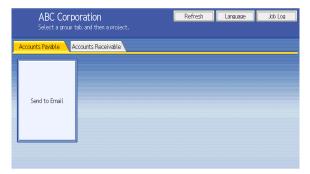


Fig.: Group List - MFP Display Panel (Smart Operation Panel)



The table below summarizes what is covered in this section.

Table: Module Summary

Module	Explains how to
Group/Project Screen Overview	Use the Function Pane to create GlobalScan NX building blocks - Groups and Projects.
Changing a Group Name	Change a Group Name that appears on the MFP display panel.
Changing Group Display Order	Place the Groups in the desired order, i.e., how they are to appear on the MFP display panel.
Adding a New Screen Page (Standard Operation Panel only)	Add a new page to the Group/Project screen, for example, when more space is required to display Projects.

Module	Explains how to
Deleting a Screen Page (Standard Operation Panel only)	Delete a screen page from the Group/Project screen.
Hiding a Group	Hide a Group, i.e., the Group works in the background to, for example, forward inbound fax messages.
Deleting a Group	Delete a Group from the GlobalScan NX system.



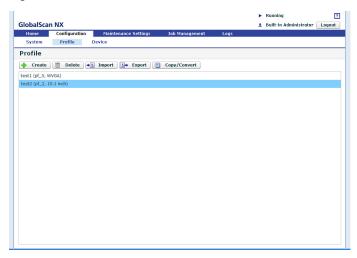
• See page 52 "Step 3: Add a Group".

# **Group/Project Screen Overview**

This section covers the layout and additional features associated with the Group/Project screen.

1. Click [Home], and then the [Profile] shortcut. The Profile List screen displays.

Fig.: Profile List



2. Double-click the Profile Name, for example, "Accounting Dept.". The Group/Project screen for the selected Profile displays.

3. Review the Group/Project screen layout/features, as outlined in the table below.

Fig.: Group/Project Screen (Standard Operation Panel)

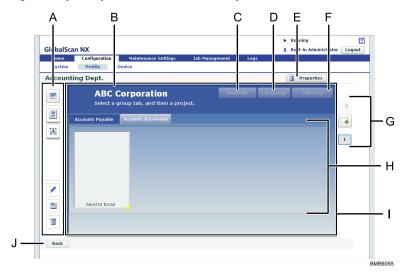


Table: Group/Project Screen (Standard Operation Panel)

	ltem	Description
A	Group/Project Function Buttons	Use these buttons to add, edit, copy, and delete Groups and Projects, as well as add explanatory text.
		For details about the buttons, see the following table, "Group/Project function buttons".
		<b>⊘</b> Important
		To view Tooltips, roll your mouse over the button.
		<ul> <li>To the right of the Group/Project Function Buttons is a scroll bar. If you make the window smaller, so some buttons are not displayed, use the scroll bar.</li> </ul>
		<ul> <li>If you copy the Project including an NT authentication profile, delete the NT authentication profile from the Project property screen.</li> </ul>
В	Application Bar	The Screen Title, and possibly imported icon appear on the Application Bar, which is visible on the MFP display panel.  These settings are customized via the Profile Properties screen.
		<b>☐</b> Reference
		See page 80 "About Profile Settings".

	ltem	Description
С	[Refresh] (Server Edition Only)	Displays on the MFP display panel and allows the user to update settings, for example, if changes to the Profile have been made by the Administrator.  This button, which displays on the MFP display panel, is not
		accessible from the AdminTool screen.
D	[Language]	Displays on the MFP display panel and allows the user to switch languages, for example, if you want to display the GlobalScan NX screens in Spanish, the user presses this button to choose that setting.
		This button, which displays on the MFP display panel, is not accessible from the AdminTool screen.  • Note
		When using Smart Operation Panel, use the language selection widget on the [Home] screen to change the display language.
Е	[Properties]	Displays the Profile Properties screen.
		<b>■</b> Reference
		See page 80 "About Profile Settings".
F	[Job Log]	Displays on the MFP display panel and allows the user to view job data, for example, whether a job is complete or an error occurred.
		This button, which displays on the MFP display panel, is not accessible from the AdminTool screen.
G	New Screen Page Button	If you plan to add more Projects to a Group than one screen can display, click the New Screen Page button to add a new screen. Each screen is listed numerically. To open a screen, click the button, for example, 1.
		<ul> <li>A maximum of 10 Screen Pages can be added to each Group.</li> </ul>
		<b>☐</b> Reference
		<ul> <li>See page 101 "Adding a New Screen Page (Standard Operation Panel only)".</li> </ul>

	ltem	Description
	Delete Screen Page Button	After two or more Screen Pages are added, the Delete Screen Page button displays directly above the New Screen Page button. Click (select) the Screen Page you would like to delete, and then click the Delete Screen Page button.  Reference  • See page 102 "Deleting a Screen Page (Standard Operation Panel only)".
Н	Group/Project Screen	This area displays Group tabs and Project buttons, as they are selected from the Group/Project Function buttons.
	Group Tab Scroll Buttons	If the number of Groups exceeds the screen capacity, tab scroll buttons display. Click either button to scroll right or left.
I	MFP Screen	This area emulates what the user will see on the MFP display panel.
J	[Back]	Click this button to save settings, and return to the Profile List screen. All settings are immediately applied to the Profile, and cannot be cancelled.

## Group/Project function buttons (Standard Operation Panel)

Button	Description
	Adds a new Group to the Group/Project screen.
New Group	
	Drag and drop to add a Project to the newly-added Group.
New Project	
<u>A</u>	Drag and drop to add a text box to the screen, for example to display text describing the Project.
New Text	
	Use to open a Group or Project Properties screen.

Button	Description
Edit	Select (click and hold) a Group tab or Project button, and then drag and drop to the Edit button, or
	You can also display a Group Properties screen by double-clicking the group name in the Group list.
	The selected Properties screen displays.
	Drag and drop the Project to copy onto this button.
	A duplicate Project button displays.
Сору	
mir	Drag and drop the Group, Project or text box to delete onto this button.
	After confirmation, the selected item is deleted.
Waste Basket	

Fig.: Group/Project Screen (Smart Operation Panel)

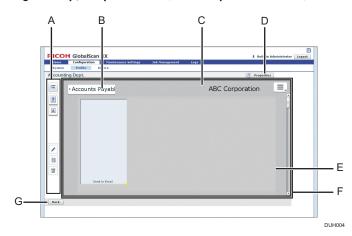


Table: Group/Project Screen (Smart Operation Panel)

	ltem	Description
A	Group/Project Function Buttons	Use these buttons to add, edit, copy, and delete Groups and Projects, as well as add explanatory text.
		For details about the buttons, see the following table, "Group/Project function buttons".
		<b>⊘</b> Important
		To view Tooltips, roll your mouse over the button.

	ltem	Description
		<ul> <li>To the right of the Group/Project Function Buttons is a scroll bar. If you make the window smaller, so some buttons are not displayed, use the scroll bar.</li> <li>If you copy the Project including an NT authentication profile, delete the NT authentication profile from the Project property screen.</li> </ul>
В	Group List	Click this item to display the list of group names. When a group is selected, the group is displayed on the Group/Project screen.
С	Application Bar	The Screen Title, and possibly imported icon appear on the Application Bar, which is visible on the MFP display panel. These settings are customized via the Profile Properties screen.  • Reference  • See page 80 "About Profile Settings".
D	[Properties]	Displays the Profile Properties screen.  Reference  • See page 80 "About Profile Settings".
E	Group/Project Screen	This area displays the Project buttons as you select them from the Group/Project Function buttons.  You can place project buttons for up to ten screens vertically.
F	MFP Screen	This area emulates what the user will see on the MFP display panel.
G	[Back]	Click this button to save settings, and return to the Profile List screen. All settings are immediately applied to the Profile, and cannot be cancelled.

### Group/Project function buttons (Smart Operation Panel)

Button	Description	
	Adds a new Group to the Group/Project screen.	
New Group		

Button	Description
	Drag and drop to add a Project to the newly-added Group.
New Project	
<u>A</u>	Drag and drop to add a text box to the screen, for example to display text describing the Project.
New Text	
Edit	<ul> <li>Use to open a Group or Project Properties screen.</li> <li>Select (click and hold) a Group or a Project button, and then drag and drop it onto the Edit button, or</li> <li>You can also display a Group Properties screen by double-clicking the group name in the Group list.</li> <li>The selected Properties screen displays.</li> </ul>
Сору	Drag and drop the Project to copy onto this button.  A duplicate Project button displays.
Waste Basket	Drag and drop the Group, Project or text box to delete onto this button.  After confirmation, the selected item is deleted.

# **Changing a Group Name**

To edit the Group name, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Double-click the Group tab. When using Smart Operation Panel, double-click the group name in the Group list. The Group Properties screen displays.



 To open the Group Properties screen, you can also drag and drop the Group tab to the Edit button. When Smart Operation Panel is used, you can also open the Group Properties screen by dragging the group name from the Group list and dropping it onto the Edit button.

#### Fig.: Group Properties Screen



4. Edit the Group Name, and then click [OK].



Click [Cancel] to exit, without saving the setting.



• The maximum length of the Group Name is 128 characters.

# **Changing Group Display Order**

When two or more Groups are displayed, you can change the order of the Groups displayed on the MFP screen by drag and drop to place Group tabs or Group names in order of priority.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Select (highlight) the Group tab, and hold it. When Smart Operation Panel is used, select (highlight) the group name in the Group list, and hold it.
- 4. Drag and drop the Group tab to the position you want. When Smart Operation Panel is used, drag and drop the group name in the Group list to the position you want.

Fig.: Group Tab (Standard Operation Panel)



Fig.: Group List (Smart Operation Panel)



In the figure as follows, the display sequence was reversed, so "Accounts Receivable" displays first. The new Group tab sequence or the group name sequence in the Group list will be reflected on the MFP display panel.

Fig.: Group Tab (Standard Operation Panel)



Fig.: Group List (Smart Operation Panel)



# Adding a New Screen Page (Standard Operation Panel only)

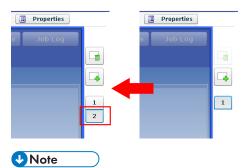
You can add up to 10 screens to each Group so that the user, at the MFP display panel, can scroll through the available Projects.

To add a new Screen Page, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, select the Group tab.

4. Click the New Screen Page button. A new screen page is added to the selected Group.

Fig.: New Screen Page Button



- After two or more pages are added, the Waste Basket button is enabled, allowing you to
  delete a page, as outlined in the next section.
- 5. Click [Back] to save the settings, and return to the Profile List.

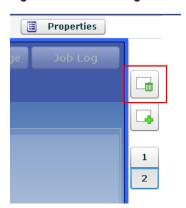
## Deleting a Screen Page (Standard Operation Panel only)

When two or more Screen Pages are added to the Group/Project screen, a Delete Screen Page button displays directly above the New Screen Page button.

To delete a Screen Page, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, select the Group tab.
- 4. Open the Screen Page you wish to delete, for example, click . The page number is highlighted.
- 5. Click the Delete Screen Page button.

Fig.: Delete Screen Page Button



Click [OK] to confirm the deletion. The selected Screen Page is deleted from the Group/ Project screen.



- Click [No] to exit, without deleting the Screen Page.
- If the Screen Page to be deleted contains Projects, the confirmation dialog will appear again, in order to prevent necessary Projects from being deleted.
- 7. Click [Back] to save the settings, and return to the Profile List.

### Hiding a Group

It is possible to hide a Group, which means that the Group will not display on the MFP's Project selection screen. Though the Group is not visible to the users, it is available to the GlobalScan NX system (internally) and the Administrator.

For example, a hidden Group can be used as the destination Project for the Flow Redirect Filter. Another example is if you create a Project for the purpose of forwarding fax messages received by the MFP. In either case, the user need not access the function from the MFP display panel.

## Reference

- See page 257 "Flow Redirect Filter".
- See page 356 "About Inbound FAX Transfer".
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- Double-click the Group tab. When using Smart Operation Panel, double-click the group name in the Group list. The Group Properties screen displays.



 Another way to open the Group Properties screen is to drag the Group tab or the group name from the Group list and drop it onto the Edit button.

Fig.: Group Properties Screen



4. Select [Off].

Fig.: Group Properties Screen



5. Click [OK] to save the setting, and return to the Group/Project screen.



• Click [Cancel] to exit, without saving the setting.



 "(Hide)" appears at the end of the Group tab label or the group name in the Group list, indicating that the Group display feature is set to [Off], thus the Group is not accessible from the MFP display panel.

Fig.: Group Tab (Standard Operation Panel)



Fig.: Group List (Smart Operation Panel)



6. Click [Back] to save the settings, and return to the Profile List.

## **Deleting a Group**

Deleting a Group erases the Group entirely. Any Projects, and special settings registered with the Group, are also deleted, and cannot be recovered.



- If the Group targeted for deletion contains one or more Projects or text boxes, a confirmation dialog will appear twice, offering an opportunity to exit the procedure, i.e., retain the Project(s).
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Click (select) the Group tab, and hold it. When Smart Operation Panel is used, click (select) the group name in the Group list, and hold it.
- 4. Drag the Group tab or the group name from the Group list and drop it onto the Waste Basket button.

Fig.: Group Tab (Standard Operation Panel)

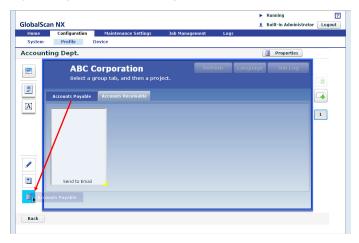


Fig.: Group List (Smart Operation Panel)



5. Click [OK] to confirm deletion. The Group is deleted, and the screen refreshes.



- Click [Cancel] to exit, without deleting the Group.
- Again, if one or more Projects exist within the Group, another confirmation dialog box displays to alert you that Project exists in the selected Group. Click [OK] to confirm the deletion, or [Cancel] to exit, without deleting the Group.
- 6. Click [Back] to save the settings, and return to Profile List.

#### 4

# **About Project Settings**

As noted, a Project refers to a document distribution task, for example, Send to Email, and is configured by the Administrator to address application needs of a specific user group.

Once added to the system, the Project appears as a user-selectable button on the MFP display panel.

Fig.: Project Button - MFP Display Panel (Standard Operation Panel)

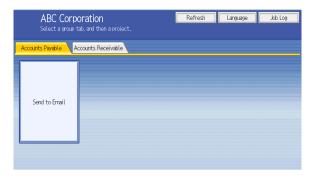


Fig.: Project Button - MFP Display Panel (Smart Operation Panel)



The table below summarizes what is covered in this section.

**Table: Module Summary** 

Module	Explains how to
Editing Project Properties	Specify/edit default settings that control a Project, for example, Project Name, Project Icon, Default Authentication Profile, etc.
Moving a Project Button	Position Project buttons correctly on the Group/Project screen.
Resizing a Project Button	Change the size of a Project button.
Adding Text to a Group Screen	Insert text boxes that provide user's with additional information about a Project.



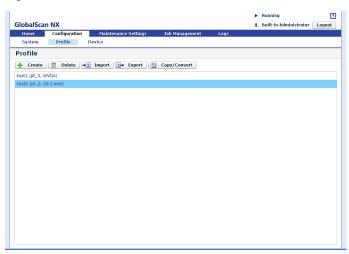
• See page 56 "Step 4: Add a Project".

## **Editing Project Properties**

To edit an existing Project Properties, proceed as follows:

1. Click [Home], and then the [Profile] shortcut. The Profile List screen displays.

## Fig.: Profile List

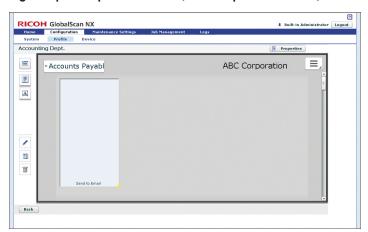


2. Double-click the Profile Name, for example, "Accounting Dept.". The Group/Project screen displays.

Fig.: Project Properties Screen (Standard Operation Panel)



Fig.: Project Properties Screen (Smart Operation Panel)



3. Click (select) the Project button, for example, "Send to Email", and hold it.

4. Drag and drop the Project button to the Edit button.

Fig.: Project Properties Screen (Standard Operation Panel)



Fig.: Project Properties Screen (Smart Operation Panel)

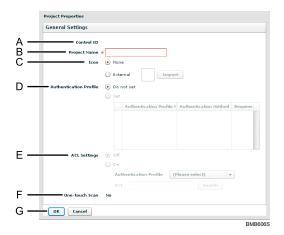


The Project Properties screen displays.

Δ

5. Specify the Project settings, as outlined in the table below.

Fig.: Project Properties Screen



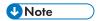
**Table: Project Properties** 

	ltem	Description
Α	[Control ID]	This is the system-assigned Project ID, which is read-only.
В	[Project Name]	Specify the Project Name. This text appears as the Project button label on the MFP display panel.  Note  A name that is already in use can be entered.  Limitation
С	[lcon]	<ul> <li>The maximum length of the Project Name is 128 characters.</li> <li>Specify whether or not to use a custom icon, for example, a company logo that will display on the Project button along with the Project Name.</li> <li>[None] No icon is displayed. </li> <li>[External] Click [Import] to browse to/select a file (icon image) to display on the Project button. </li> <li>[Project Icons]</li> </ul>

	ltem	Description
D	[Authentication Profile]	Specify whether or not to control access to the Project by applying authentication.
		<ul> <li>If an Authentication Profile is registered to the system, select [Set], and then select the check boxes of the Authentication Profiles you want to use for the Project. You can select multiple Authentication Profiles. You can also specify whether or not the selected Authentication Profiles are required. If you enable authentication, a logon screen will appear on the MFP display, and users will be required to enter authentication credentials.</li> </ul>
		<ul> <li>Specify [Do not set] if an Authentication Profile will not be used, thus there will no login screen displayed on the MFP display panel.</li> </ul>
		Note
		<ul> <li>All items necessary for enforcing the selected Authentication Profiles are displayed on the login screen. To log in, users must be successfully authenticated by all the required Authentication Profiles.</li> </ul>
		<ul> <li>If no Authentication Profile is specified as required, the user must be authenticated by at least one selected Authentication Profile.</li> </ul>
		<b>■</b> Reference
		<ul> <li>See page 424 "Authentication Profile Settings".</li> </ul>
E	[ACL Settings] (Server Edition Only)	If an Authentication Profile has been specified as required, you can create an ACL (Access Control List) for the Project.
		If you use an ACL with the Project, only the users in the selected Group will be able to use the Project.
		To create an ACL for the Project, select [On], select an authentication method from the drop-down list, and then specify a Group by using [Search].
		On the Search screen, you can select the domain from the drop-down list and enter the search string. After you select a Group from the search results, the selected domain name and Group name display in the text box.

	ltem	Description
		<ul> <li>• When you click [Search], a login dialog will display if authentication is required.</li> <li>• Limitation</li> <li>• A maximum of 100 Groups can be displayed in the search results.</li> <li>• Reference</li> <li>• See page 424 "Authentication Profile Settings".</li> </ul>
F	[One-touch Scan]	This read-only field indicates either [Yes] or [No], indicating whether or not the Project has been set as a One-touch Scan.  • See page 304 "About One-touch Scan".
G	[OK]	Saves settings.
	[Cancel]	Exits, without saving settings.

6. Click [OK] to save the settings, and return to the Group/Project screen.



- Click [Cancel] to exit, without saving the settings.
- 7. Click [Back] to return to the Profile List.
- \* 1 If there are trusted domains associated with the Authentication Profile, these domain names can also be selected from the drop-down list. You can also manually enter the name of a Group in one of the trusted domains. The form for entering such a Group is: "Domain Name\Group Name"

## Moving a Project Button

If adding more than one Project to a Group, it is important that the Project buttons do not overlap, as each newly-added Project will automatically display on the left side of the screen. If the Project buttons are not arranged properly, the settings cannot be saved.



If the Project buttons do overlap, the Project can still be saved. However, the MFP display panel
will not display the buttons correctly. Care should be taken to ensure that the buttons display on the
MFP as you wish.

To move a Project button, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Click (select) the Project button, and hold it.
- 5. Drag and drop the Project button to the position you want.



• The two figures below illustrate incorrect and correct Project button placement.

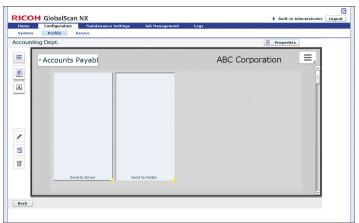
#### Fig.: Incorrect Project Button Placement



#### Fig.: Correct Project Button Placement (Standard Operation Panel)





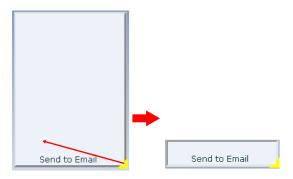


## Resizing a Project Button

To change the size of the Project button, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Resize the Project button by dragging from the lower right-hand corner.

Fig.: Resize Project Button



The number of Project buttons that will display on a single Screen Page is dependent on the size of the button. Review the table below for more information.

Button Size	Screen Page Capacity	Icon Support
Large	1 × 4: One row of up to four buttons	Yes
Medium	2 × 4: Two rows of up to four buttons	Yes
Small (Standard Operation Panel)	4 × 4: Four rows of up to four buttons	No
Small (Smart Operation Panel)	4 × 4: Four rows of up to four buttons	Yes



- The Administrator has full control over button size, so the screen layouts described in the table above are just suggested guidelines. In other words, you can place various size buttons on a single Screen Page.
- When using the MultiLink-Panel, you can place project buttons for up to 10 screens vertically.

## Reference

• See page 124 "Importing Profile/Project Icons".

Fig.: 1 × 4: One row of up to four buttons (Standard Operation Panel)



Fig.: 1 × 4: One row of up to four buttons (Smart Operation Panel)



Fig.: 2 × 4: Two rows of up to four buttons (Standard Operation Panel)



Fig.: 2 × 4: Two rows of up to four buttons (Smart Operation Panel)

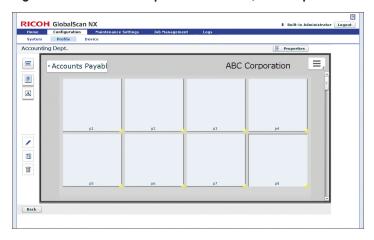


Fig.: 4 × 4: Four rows of up to four buttons (Standard Operation Panel)



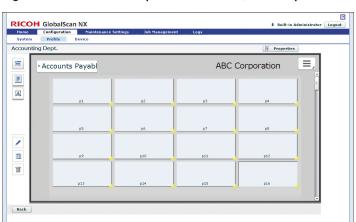


Fig.: 4 × 4: Four rows of up to four buttons (Smart Operation Panel)

When finished arranging the buttons, click [Back] to save the settings, and return to the Profile List.

## Adding Text to a Group Screen

Text can be added to a Group screen, for example, you can insert additional information about a Project, which displays on the MFP display panel, perhaps instructions to assist the user.

## Limitation

- The maximum text box entry is 100 characters.
- Within the text box, changing of font size, color, etc., is not supported.
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.

4. Drag and drop the New Text button to the Group/Project screen, specifically, to the left or right side of the Project button.

Fig.: Add Text to Project Button (Standard Operation Panel)

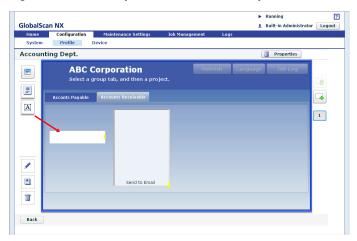
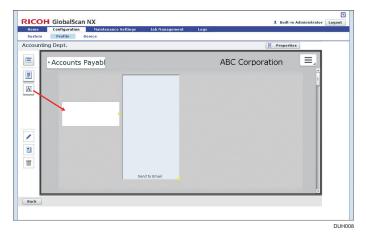


Fig.: Add Text to Project Button (Smart Operation Panel)



5. Type the text.



- The text box, when displayed on the MFP display panel, does not support line feed, i.e., longer strings of text should be divided into separate text boxes in order to display correctly.
   As such, it is recommended that you repeat 4 - 5 to enter individual lines. See Fig. "Correct Text Box Entry".
- The text box should not overlap the Project button, as this layout will not display correctly on the MFP display panel. See Fig. "Incorrect Text Box Placement".



Fig.: Correct Text Box Entry (Smart Operation Panel)



Fig.: Incorrect Text Box Placement





- To change the display position of the text box, click (select) the box, and hold, then drag and drop to another location on the screen.
- The appearance of the Group/Project screen may be different from the appearance of target MFP display panel, thus, when adding text, confirm that the text is displayed on the MFP as you wish.
- To delete a text box, click (select) the text box, and hold, then drag and drop to the Waste Basket button.
- To edit text box entries, click on the text box and edit, as needed.
- To resize a text box, click the yellow area, and hold, then drag to the right or left.

## **Changing Project Button Display Order**

It is possible to change the display order of Project buttons. The button sequence should be based on which functions are used most often. For instance, if users are more often scanning document to email, you can place the "Send to Email" Project button first, i.e., to far left.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Click (select) the Project button, and hold it.
- 5. Drag and drop the Project button to the position you want.
- 6. Click [Back] to save the settings, and return to the Profile List.

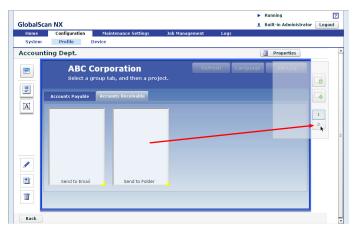
#### Moving a Project to Another Screen Page

To move a Project from one Screen Page to another, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab.
- 4. Click (select) the Project button, and hold it.

Drag and drop the selected Project button to the desired Screen Page.

#### Fig.: Move a Project to Another Screen Page



The selected Project moves to the target Screen Page. The selected Screen Page opens, displaying the repositioned Project.



- After moving the Project to a new Screen Page, confirm that the Project/text does not overlap.
- 6. Click [Back] to save the settings, and return to the Profile List.



• When using the MultiLink-Panel, you can also place project buttons on other pages, by scrolling vertically.

## Moving a Project to Another Group

It is possible to move a Project from one Group to another. Again, this is helpful if, for example, you wish to associate a Project with another Group, within the same Profile. To do so, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Click (select) the Project button, and hold it.

5. Drag and drop the Project button to the target Group tab. When Smart Operation Panel is used, with group names listed in the Group list, select the Project button, and then drag and drop the project onto the destination group name.

Fig.: Moving a Project to Another Group (Standard Operation Panel)

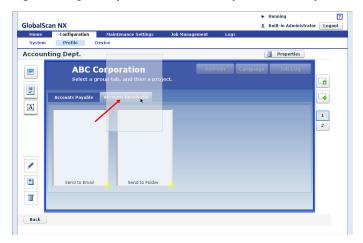
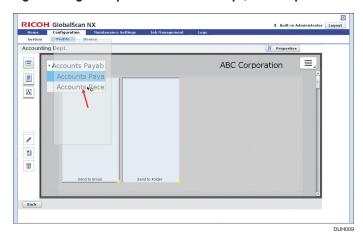


Fig.: Moving a Project to Another Group (Smart Operation Panel)



The Project disappears from the current Group and appears in the new Group.



- After moving the Project to a new Screen Page, confirm that the Project/text does not overlap.
- 6. Click [Back] to save the settings, and return to the Profile List.



 When using the MultiLink-Panel, you can also place project buttons on other pages, by scrolling vertically.

## **Importing Profile/Project Icons**

The GlobalScan NX Installation media contains built-in icons for use within Profiles and Projects, adding color and interest to the AdminTool and MFP display panel. You can also import an icon of your choice, for example, a company logo, provided the image meets the specification requirements listed in table "Profile/Project Icon Specification Requirements" at the end of this module.

Profile icons display on the Application Bar, adjacent to the Screen Title (Fig. "Profile/Project Icons - AdminTool"). Project icons display on the Project button itself (Fig. "Profile/Project Icons - MFP Display panel").

Fig.: Profile/Project Icons - AdminTool (Standard Operation Panel)



Fig.: Profile/Project Icons - MFP Display Panel (Standard Operation Panel)



Fig.: Profile/Project Icons - AdminTool (Smart Operation Panel)

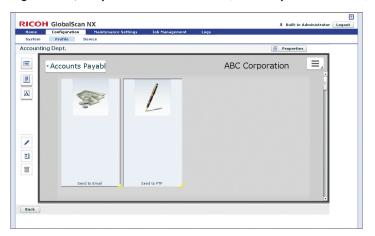


Fig.: Profile/Project Icons - MFP Display Panel (Smart Operation Panel)



## 

- The built-in icons are available in two sizes:
  - 128 × 128 pixels
     Use for Projects.
  - 64 × 64 pixels
     Use for Profiles/Projects.
- If the Project button itself is too small, an icon cannot be applied to it. See table "Project Button/ Icon Support".

## Reference

- See page 115 "Resizing a Project Button".
- See table "Profile/Project Icon Specification Requirements".

#### Table: Project Button/Icon Support

Button Size	Screen Page Capacity	Icon Support	
Large	1 × 4: One row of up to four buttons	Yes	

Button Size	Screen Page Capacity	Icon Support
Medium	2 × 4: Two rows of up to four buttons	Yes
Small (Standard Operation Panel)	4 × 4: Four rows of up to four buttons	No
Small (Smart Operation Panel)	4 × 4: Four rows of up to four buttons	Yes

To import an icon of your choice, proceed as follows:

- Insert the GlobalScan NX Installation media into the computer/server running GlobalScan NX.
- 2. Create a new Profile/Project, or edit an existing Profile/Project.
  - Reference
    - See page 48 "Step 2: Add a Profile" or page 56 "Step 4: Add a Project".
    - See page 80 "About Profile Settings" or page 107 "About Project Settings".

4

3. Open the Profile's Properties screen or the Project's Properties Screen.

Fig.: Profile Properties Screen

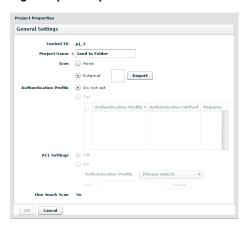


Fig.: Project Properties Screen



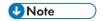
4. For the [Icon] setting, select [External].

Fig.: Project Properties Screen



- 5. Click [Import].
- 6. Browse to the following folder on the GlobalScan NX Installation media.

X:\Samples\Icons\



- "X" is the drive letter of the installation media.
- 7. Select an icon and click [Open].
- 8. Click [OK].
- The image automatically displays. If necessary, repeat this procedure for another Profile/ Project.

Table: Profile/Project Icon Specification Requirements

able: Frome/Froject icon Specification Requirements	
File Format	JPEG (.jpeg, .jpg), PNG(.png)
Size	Profile
	Minimum Height: 16 pixels; Width: 16 pixels
	<ul> <li>Maximum Height: 64 pixels; Width: 64 pixels</li> </ul>
	Project
	<ul> <li>Minimum Height: 32 pixels; Width: 32 pixels (4.3 inch)</li> </ul>
	<ul> <li>Maximum Height: 64 pixels; Width: 64 pixels (4.3 inch)</li> </ul>
	<ul> <li>Minimum Height: 64 pixels; Width: 64 pixels (WVGA)</li> </ul>
	<ul> <li>Maximum Height: 128 pixels; Width: 128 pixels (WVGA)</li> </ul>
	<ul> <li>Minimum Height: 48 pixels; Width: 48 pixels (10.1 inch)</li> </ul>
	Maximum Height: 180 pixels; Width: 180 pixels (10.1 inch)

File Format	JPEG (.jpeg, .jpg), PNG(.png)	
	<ul> <li>Note</li> <li>If the above icon size conditions are not met, the image cannot be imported.</li> </ul>	
Color	<ul> <li>24-bit colors</li> <li>Note</li> <li>If you specify an icon image with more than 24-bit colors, the image will still be displayed in 24-bit colors.</li> </ul>	
Background Color	For a custom icon, specify to match the button background color (seen in MFP display panel) as follows:  • Profile  RGB (64, 90, 167)  • Project  RGB (236, 242, 248).	



An imported original icon will not be retained on the system persistently. If [Built-in] for not using an
icon is specified after importing an original icon, the imported original icon will be removed from
the system.

## **Deleting a Project**

To remove a Project from the Group, proceed as follows:



- This procedure will erase the Project entirely; the Project cannot be recovered.
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Click the Project button, and hold it.

Fig.: Deleting a Project (Standard Operation Panel)

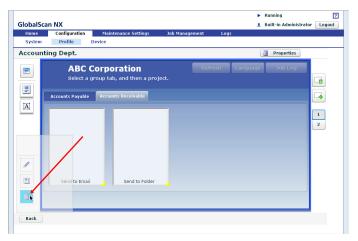
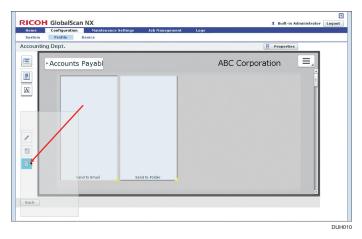


Fig.: Deleting a Project (Smart Operation Panel)



6. Click [OK] to confirm the deletion.



- Click [Cancel] to exit, without deleting the Profile.
- 7. Click [Back] to save the settings, and return to the Profile List.

Δ

### 4

# **About Flows**

Flows specify how a document is processed and distributed after it has been scanned. Filters in a Flow modify the data by converting it, modifying Metadata, and performing other functions. Services define how and where data is distributed. Possible destinations include network folders or sending the data by email.

The figure shows the Project Configuration Screen, where you can design a Flow for a Project.

Fig.: Project Configuration Screen

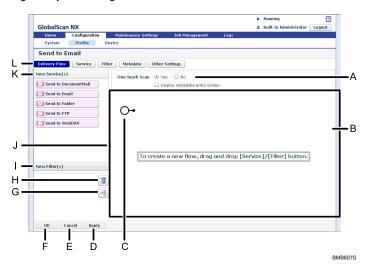


Table: Delivery Flow

. 4.5.6. 2	Delivery flow		
	ltem	Description	
А	One-touch Scan	To set the Project as a One-touch Scan, select Yes. If you select Yes, it is necessary to preset all parameters from the AdminTool.	
		If you select [Yes], a check box for specifying whether to display the Metadata entry screen will appear. If you select this check box and Metadata entry is set for the Project, the Metadata entry screen will appear on the MFP display panel when a user selects One-touch Scan Project.	
		• See page 304 "About One-touch Scan".	
В	Flow Editor Screen	This area is where the Project's Flow is created by dragging and dropping Services and Filters from the New Output Services and New Filter Services lists.	

	ltem	Description
С	Start Position	This symbol indicates the start position of the Flow, which progresses from left to right. Each Flow can contain one or more Services and Filters.
D	[Apply]	Saves only.
Е	[Cancel]	Exits, without saving settings.
F	[OK]	Saves settings, and return to the Group/Project screen.
G	Alignment	Automatically arranges the Services/Filters in an orderly manner.
Н	Waste Basket	To remove Services/Filters, select the item and drag and drop to the Waste Basket button.
I	New Filter(s)	Use these buttons to select a Filter. This list will collapse when the New Output Services tab is selected. Toggle back and forth, as needed.  • Note  • The listed items depends on your GlobalScan NX configuration, i.e., whether or not custom or optional Filters have been installed.
		• See page 205 "About Filters".
J	Split Bar	Drag this bar left or right to change the size of the Flow Editor screen.
К	New Service(s)	Use these buttons to select a Service. This list will collapse when the New Filter Services list is selected. Toggle back and forth, as needed.  • The listed items depends on your GlobalScan NX configuration, i.e., whether or not custom or optional plugins
		(for example RightFax) have been installed.

	ltem	Description
		<b>☐</b> Reference
		See page 140 "About Services".
L	Setting Buttons	Delivery Flow
		Configure the Delivery Flow for the Project by adding, configuring and removing Services and Filters.
		Service
		Configure settings for Services in the Delivery Flow.
		<b>■</b> Reference
		See page 140 "About Services".
		See page 279 "About Distribution Parameters".
		Filter
		Configure settings for Filters in the Delivery Flow, as well as settings for the file format, resolution, document size, etc.
		<b>☐</b> Reference
		See page 205 "About Filters".
		See page 279 "About Distribution Parameters".
		Metadata
		Set fields that will provide additional information regarding the scan job.
		■ Reference
		See page 334 "About Metadata".
		Other Settings
		Set, for example, a default Document Name that will be applied to all scanned images.
		<b>☐</b> Reference
		See page 327 "About Other Settings".

## Working with Services/Filters in the Flow

You can add, move, delete and change the display names for Services and Filters in the Flow.

Flows can be linear or tree-structured. Linear Flows contain no branches; the scanned data is processed by every Service and Filter in the Flow. Fig. "Linear Flow" shows an example of a linear Flow. Tree-structured Flows contain branches; the scanned data is processed separately for each branch, and the resulting data will be different for each branch. Fig. "Tree-structured Flow" shows an example of a tree-structured Flow.

Fig.: Linear Flow

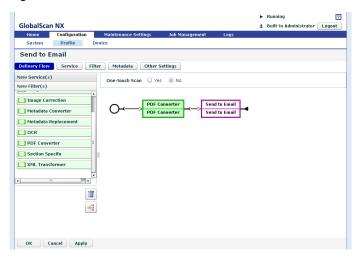
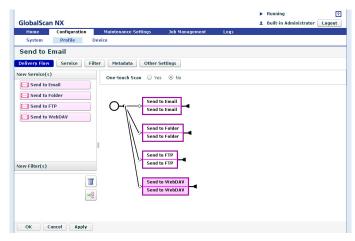


Fig.: Tree-structured Flow





The Flow cannot be saved if it ends with a Filter, with the exception of the Flow Redirect Filter. A
caution icon will display. A Service must be present after a Filter.

 Adding a Service or Filter may not be possible, depending on the Service/Filter you wish to add, or the structure of the Flow.



• Up to 10 items can be added to a Project.

## Reference

- See page 140 "About Services".
- See page 205 "About Filters".

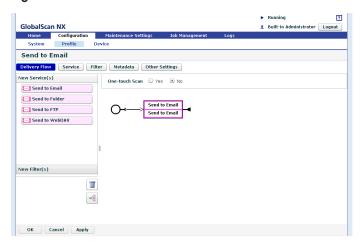
#### Adding a Service/Filter to the Flow

This section describes the various ways to add a new Service/Filter to a Flow.

#### To add a Service/Filter to a blank Flow

Drag the Service or Filter that you want to add to the Flow from the left pane and drop it in the Flow Editor Screen. A new branch will be added from the Start Position.

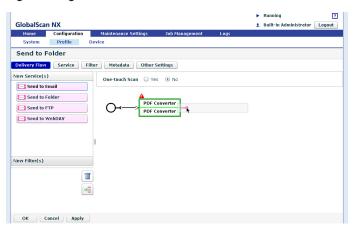
Fig.: One Service in a Flow



#### To add a Service/Filter to the end of a Flow

Drag a Service or Filter from the left pane and drop it on the connector coming out of the last Service/Filter in the flow.

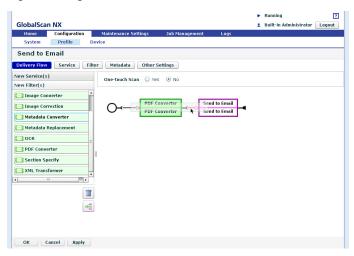
Fig.: Adding a Service to the End of a Flow



#### To add a Service/Filter to the middle of a Flow

Drag a Service or Filter from the left pane and drop it on the connector that connects the two items between which you want to add the Service/Filter.

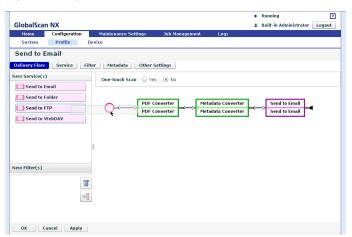
#### Fig.: Inserting a Filter into a Flow



#### To add a Service/Filter as a new branch

Drag a Service or Filter from the left pane and drop it on top of the Service/Filter from which you want to create a branch.

Fig.: Creating a New Branch





- Dropping a Service/Filter on a blank area creates a new branch from the Start Point.
- If Services/Filters become hidden or overlap when adding new Services/Filters, click the Alignment button to arrange them in an orderly manner.

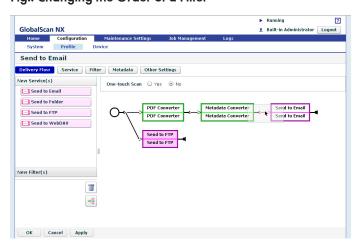
## Changing Display Position of a Service/Filter

This section describes how to rearrange Services/Filters in a Flow.

#### To change the order of Services/Filters

Drag a Service/Filter in the Flow and drop it on the connector that connects the two items between which you want to add the Service/Filter. To move the Service/Filter to the end of a Flow, drop it on the connector coming out of the last Service/Filter in the Flow.

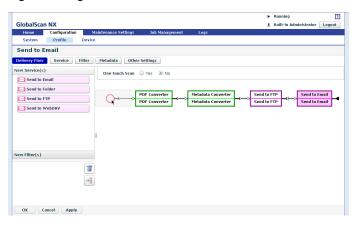
Fig.: Changing the Order of a Filter



## To move a Service/Filter and create a new branch

Drag a Service or Filter in the Flow and drop it on top of the Service/Filter from which you want to create a branch.

#### Fig.: Creating a New Branch





• If Services/Filters become hidden or overlap when moving Services/Filters, click the Alignment button to arrange them in an orderly manner.

## Removing a Service/Filter

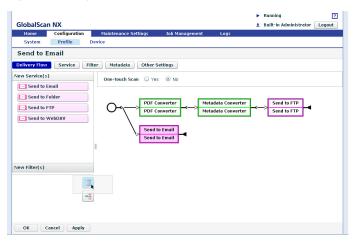
This section describes how to remove a Service/Filter from a Flow.

When deleting a Service/Filter from the Flow, the Services/Filters that are present before and after the Service/Filter are automatically connected.

#### To remove a Service/Filter from a Flow

Drag the Service/Filter that you want to remove to the Waste Bucket icon.

Fig.: Removing a Service/Filter



Alternately, you can click a Service/Filter to select it, and then click the Waste Bucket icon.

A dialog displays to confirm the deletion. Click [Yes] to delete the Service/Filter. Click [Cancel] to cancel the operation.

#### Changing a Service/Filter's Display Name

To make GlobalScan NX operation intuitive for the user, the Service/Filter Display Name that appears on the MFP display panel can be modified. For instance, you may wish to change a Service's Display Name from "Send to Email" to "Email" or "Marketing Email".

- 1. Click the Service/Filter to select it.
- 2. Click the Display Name of the Service/Filter. The Display Name will become editable.
- 3. Type a new display name.
- 4. Press ENTER.
- **∩** Limitation
  - The maximum length of a Service/Filter's Display Name is 30 characters.



- The text at the upper portion of the Service/Filter box is the Display Name; the text in the lower portion is the Service/Filter type. Only the Display Name can be modified.
- The Display Name can also be changed through the Service/Filter Properties screen.

## **About Services**

Services can be used to specify how and where documents are saved. For example, documents can be saved on an FTP server with the Send to FTP Service. This section describes the different Services and how to configure them.



• If you have configured properties for Services at the system or profile level, those properties will be used as the default values for any Services you add to a flow.

# **Service Summary**

The following table provides an overview of each Service.

Service Name	Description
Send to Email	Enables MFP users to send scanned documents to specified recipients via email.
Send to Folder	Enables MFP users to save scanned documents to shared network folders. In server edition, you can also save documents locally on the server. You specify destination folders by using the AdminTool.
Send to FTP	Enables MFP users to upload scanned documents to FTP servers. You specify FTP servers and folders by using the AdminTool.
Send to Printer	Enables MFP users to print data using the printers installed on the server.  JPEG (file extension jpeg, jpg, or jpe) and TIFF (file extension tif or tiff) files can be printed. Files are printed according to the default driver settings of each selected printer.
	() Limitation
	<ul> <li>A printer driver must be installed in the computer/server that the Server Edition is installed.</li> </ul>
Send to WebDAV	Enables MFP users to upload scanned documents to WebDAV folders. You specify WebDAV folders by using the AdminTool.

## **■** Reference

- See page 148 "Send to Email Service".
- See page 163 "Send to Folder Service".
- See page 178 "Send to FTP Service".
- See page 186 "Send to Printer Service".
- See page 189 "Send to WebDAV Service".

# **Accessing Property Settings Screens**

There are 3 levels at which you can configure the properties for Services: the System Level, Profile Level, and Project Level. This section explains how to access the properties for each level. This section also explains how to access the Output Service Properties screens for Services.

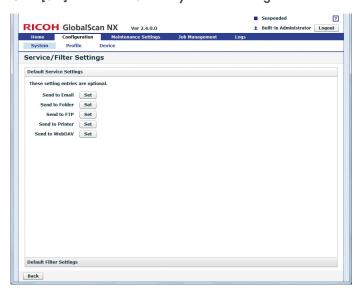
#### **Entering/Editing Service Properties for the System**

- 1. Click [Home], and then click the [System] shortcut.
- 2. Click [Services/Filters].

Fig.: System Settings Screen



3. Click [Set] next to the Service you want configure.



- 4. Edit the properties as desired.
- 5. Click [OK] to save the settings.
- 6. Click [Back] to save the settings and return to the System Settings screen.

### **Entering/Editing Service Properties for a Profile**

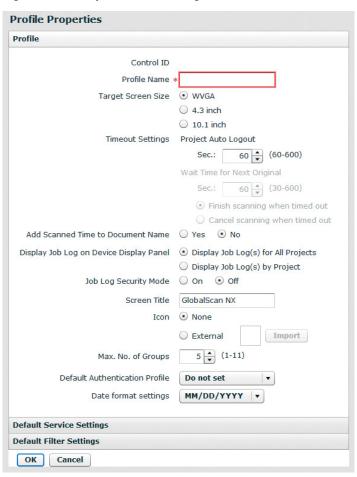
- 1. Click [Home], and then click the [Profile] shortcut.
- 2. Double-click the desired Profile.
- 3. Click [Properties] in the upper-right corner of the screen.

#### Fig.: Properties Button



4. Click the [Default Service Settings] accordion button.

Fig.: Default Output Service Settings



4

5. Click [Set] next to the Service you want to configure.

Fig.: Set Button



- 6. Edit the properties as desired.
- 7. Click [OK] to save the settings and return to the Group/Project screen.

#### Entering/Editing Service Properties for a Project

- From the Profile screen, double-click the desired Profile, select the desired Group within the Profile, and then double-click the desired Project. The Flow screen displays.
- 2. Double-click the lower half of a Service. The Properties screen will display.
- 3. Edit the properties as desired.
- 4. Click [OK] to save the settings and return to the Flow Editor screen.

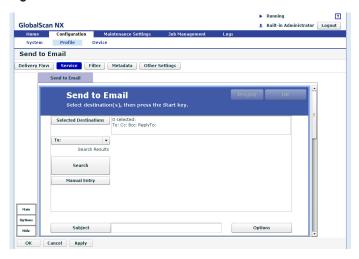


 See page 135 "Adding a Service/Filter to the Flow" and page 137 "Changing Display Position of a Service/Filter".

#### **Entering/Editing Output Services**

In a Project, click [Service]. The Service screen will display.
 The Service tabs are automatically added when a Service is added to the Flow.

Fig.: Service Screen



- 2. Click the tab for the Service you want to edit.
- 3. Configure and move the Distribution Parameters as desired.
- 4. Click [OK] to save the settings and return to the Group selection screen.



• For details about the Distribution Parameters, see page 279 "About Distribution Parameters".

#### 4

# **Service Properties**

This section explains the details about the various Services and properties of each Service. Properties must be set for the Service before it is operational within the Flow.



• For an overview of each Service Type, see page 141 "Service Summary".

## Send to Email Service

The Send to Email Service can be used to send scanned documents to recipients via email.

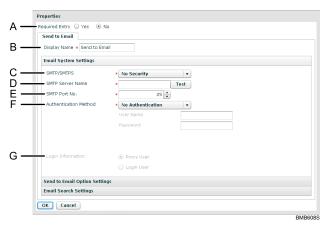
The Send to Email Service settings are divided into 3 screens. Use the accordion buttons to access the different settings.

- [Email System Settings]
   Configure SMTP server settings.
- [Send to Email Option Settings]
   Configure email message settings, such as what data to attach, the message body, etc.
- [Email Search Settings]
   Configure LDAP server settings to allow MFP users to use the address book.

#### **Configure Email System Settings**

In the Email System Settings screen, configure the SMTP server settings. For details about the settings, see the table below.

Fig.: Email System Settings Screen



**Table: Email System Settings** 

	Item	Description
А	[Required Entry] (Project settings only)	Select whether to require that this Service be used.  • [Yes]
		When scanning, at least one email address must be specified in the recipient list.
		• [No]
		Allows the flow to continue even if no email addresses are specified in the recipient list. However,

	ltem	Description
		if the setting is required for the subsequent process, it will be defined as required on the MFP's operation panel.
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
C	SMTP/SMTPS	Select the security method to use when connecting to the SMTP server.  • [No Security]  Uses a standard SMTP connection (no encryption).  • [SMTPS (SMTP over SSL)]  Uses secure SMTP over an SSL connection.  • [SMTPS (StartTLS)]  Uses secure SMTP using TLS.  * Important  • For [SMTPS (SMTP over SSL)], the Certificate you are using must be registered with the system beforehand. (See page 464 "Managing the Site Certificate".) If not, an error will occur during email transmission.  • For [SMTPS (StartTLS)], the SMTP server you are using must support StartTLS. If not an error will occur
<u></u>	[CAATD C NI]	during email transmission.
D	[SMTP Server Name]	Enter the IP address or host name of the SMTP(S) Server.  Click [Test] to test the connection to the SMTP server you have specified.
Е	[SMTP Port No.]	Enter the port number to use.  Note  The default port number for non-secure SMTP is 25. The default port number for SMTPS (SMTP over SSL) is 465.
F	[Authentication Method]	Select the authentication method to use from the following.  • [No Authentication]

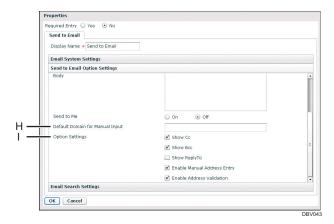
	ltem	Description
		Authentication is not used.
		• [SMTP-AUTH]
		Authenticates with the SMTP server. Enter the account information in [User Name] and [Password] for authentication with the SMTP server.
		[POP before SMTP]
		Authenticates with a POP server. Enter the POP server information in [POP Server Name] (IP address or host name) and [POP Port No.] (default 110), and account information in [User Name] and [Password] for authentication with the POP server. Click [Test] to test the connection to the POP server you have specified.
G	[Login Information]	Select the type of account that is used to log in to the SMTP server when using [SMTP-AUTH] or [POP before SMTP] for authentication. Select from the following:
		• [Proxy User]
		Uses the login information entered in [User Name] and [Password] for authentication.
		• [Login User]
		Uses the login information for the Project for authentication.
		UNote
		If you are using passwordless authentication, we recommend that you not use [Login User] as the authentication type. If you do, authentication with the server might not be possible because the user's password cannot be obtained from the login information.

### **Configure Send to Email Option Settings**

In the Send to Email Option Settings screen, configure settings such as the content of email messages and options to permit or forbid certain operations on the MFP display panel. For details about the settings, see the table below.

Fig.: Send to Email Option Settings Screen





**Table: Send to Email Option Settings** 

	ltem	Description
A	[Default Sender Address]	Enter the default email address of the sender. This address will be set as the sender of the email message if the MFP user's email address cannot be obtained.
		When using LDAP or Active Directory authentication, if the email address of the MFP user can be obtained from the login information for the Project, then that email address will be set as the sender. The email address of the user must be registered with the user profile on the Authentication Server.
В	[Always Use Default Sender Address]	If checked, the "Default Sender Address" is always used, even if the user's email address is retrieved from the authentication server.

	ltem	Description
С	[Select Data to Attach]	Select the data to attach to the email message.  • [Attach All]  • [Attach First Page Only]  • [Do Not Attach]
D	[File Naming Rules]	Specify the file name of the attachment. You can specify the name of the file using the following methods:  • Directly enter the desired file name.  • Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only major Metadata items can be selected in the drop-down list.  E Reference  • For details about File Naming Rules, see page 200 "Specifying Folder and File Names Using Metadata".
Е	[Attach Document Link(s) and Deliver]	Select whether or not to include URLs to the locations where the document was saved by other Services (for example, Send to FTP).  • [On]  Adds URLs to the body of the email message.  • [Off]  Does not add URLs to the email message.  • In order to use this setting, you must add at least one of the Send to Folder, Send to FTP, or Send to WebDAV Services to the flow before the Send to Email Service.  • If you use the Send to Folder Service, see the Send to Folder StartPoint Path Settings for details about creating URLs instead of file paths for the documents' locations.
F	[Body]	Enter the email body text you would like delivered with each scanned document. For example, "This email is from ABC Corporation".

	ltem	Description
		UNote
		If you do not enter any text in this field, no text will be used as the mail body. In this case, the mail body is empty if there's no "resultURL" part.
		Metadata of the scanned file, except for "resultURL", can be used as the body text of e-mail.
		■ Reference
		See page 502 "Metadata Specifications" for details of Metadata items.
G	[Send to Me]	Select whether the MFP user is added to the recipient list.  • [On]
		If the MFP user's email address can be obtained from the login information for the Project, "Send to Me" will be automatically added to the "To" field of the initial recipient list.
		The user's email address can be obtained under the following conditions:
		<ul> <li>The Project uses Active Directory Authentication or LDAP Authentication with [Active Directory] specified in the [Server Type] setting.</li> </ul>
		<ul> <li>The email address of the user is registered with the User Profile in the Authentication Server.</li> </ul>
		• [Off]
		The email address of the MFP user will not be added to the destination addresses.
		() Limitation
		This feature only functions when Active Directory or LDAP is used as the Project authentication method. If you are using a different authentication method, even if you select this feature it will not function.
Н	[Default Domain for Manual Input]	Enter the default email domain name to append to manually entered email addresses.
		Example:
		Default Domain: GSNXCorp.com
		User Input: john

	ltem	Description
		Result email address: john@GSNXCorp.com  If the MFP user enters an email address including the domain name, the default domain will not be appended.  • Note  • You can enter the domain name with or without the "@" mark.
I	[Option Settings]	Select additional options.  • [Show Cc]  Allows MFP users to enter addresses in the CC field.  • [Show Bcc]  Allows MFP users to enter addresses in the BCC field.  • [Show ReplyTo]  Allows MFP users to enter a Reply-to address.  • [Enable Manual Address Entry]  Allows MFP users to manually enter email addresses.  If not selected, [Manual Entry] on the Send to Email  Output Service screen will be grayed out on the  Standard Operation Panel, and will not be displayed on the Smart Operation Panel.

### Reference

- See page 163 "Send to Folder Service".
- See page 178 "Send to FTP Service".
- See page 189 "Send to WebDAV Service".
- See page 502 "Metadata Specifications".

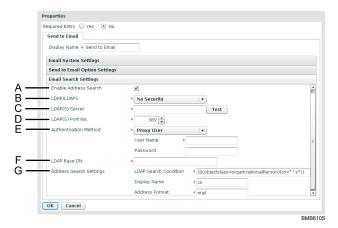
#### **Configure Email Search Settings**

In the Email Search Settings screen, configure LDAP server settings to allow MFP users to search an LDAP address book. For details about the settings, see the table below.



• Configuration of the LDAP server settings is only necessary if you want to allow the user to search and display the address book on the MFP display panel.

Fig.: Email Search Settings



**Table: Email Search Settings** 

	ltem	Description
Α	[Enable Address Search]	Select this option to enable MFP users to search for email addresses in the address book stored on an LDAP server.
В	[LDAP/LDAPS]	Select the security method to use when connecting to the LDAP server.  • [No Security]  Uses a standard LDAP connection (no encryption).  • [LDAPS (LDAP over SSL)]  Uses secure LDAP over an SSL connection.  • [LDAPS (StartTLS)]  Uses secure LDAP using TLS.
		<ul> <li>For [LDAPS (LDAP over SSL)], the Certificate you are using must be registered with the system beforehand. (See page 464 "Managing the Site Certificate".) If not, an error will occur when trying to obtain the address book.</li> <li>For [LDAPS (StartTLS)], the LDAP server you are using must support StartTLS. If not an error will occur when trying to obtain the address book.</li> </ul>
С	[LDAP(S) Server]	Enter the IP address or host name of the LDAP server.

	ltem	Description
		Click [Test] to test the connection to the LDAP server you have specified.
D	[LDAP(S) Port No.]	Enter the port number to use.  Note
		<ul> <li>The default port number for LDAP is 389. The default port number for LDAPS (LDAP over SSL) is 636.</li> </ul>
E	[Authentication Method]	Select the type of account that is used to log in to the LDAP server. Select from the following:
		• [Login User]
		Project login information is used for authentication.
		• [Proxy User]
		Uses the login information entered in [User Name] and [Password] for authentication.
		[No Authentication]
		Authentication is not used.
		<b>◆</b> Note
		<ul> <li>To view the address book via AdminTool, [User Name] and [Password] must be entered even if [Login User] is selected.</li> </ul>
F	[LDAP Base DN]	Enter the Base DN.
		Entry Example: cn=users, dc=ricoh, dc=co, dc=jp
G	[Address Search	Configure the criteria for searching the address book.
	Settings]	[LDAP Search Condition]
		Specify the LDAP search syntax. The default value is:
		(&(objectclass=organizationalPerson)(cn=*^s*) (mail=*)).
		"^s" is replaced with the specified keyword.
		For examples of how to specify search conditions, see "LDAP Search Condition Examples" below.
		• [Display Name]
		Specify the LDAP attribute for the display name of each item in the address list.

ltem	Description
	The LDAP attributes which are separated by a "," mark can be entered such as sn,givenName,mailaddress.
	The default attribute is "cn" (common name).
	• [Address Format]
	Specify the LDAP attribute for the email address of each item in the address list. The default value is "mail".

#### **LDAP Search Condition Examples**

The following are examples of using the wildcard character, "\*", to modify the search condition.

- 1. If cn=\*^s\* is used, a search for "les" matches:
  - charles smith
  - lester frank
  - Lorraine Lester
  - Steven Morales

The search string ("les") can appear anywhere in the name.

- 2. If cn=^s\* is used, a search for "les" matches:
  - lester frank
  - Lester, lorraine

The search string ("les") may only appear at the beginning of the name.

- 3. If cn=\*^s is used, a search for "les" matches:
  - Smith, charles
  - steven morales

The search string ("les") may only appear at the end of the name.

#### MFP Configuration Screen - Send to Email Service

On this screen, you can configure the appearance of the MFP display panel, and preset email recipients and other information for the Send to Email Service. You can also limit which items are available to MFP users.

### Reference

 For details about configuring and limiting the settings on the MFP display panel, see page 279 "About Distribution Parameters".

Fig.: MFP Configuration Screen - Send to Email Service

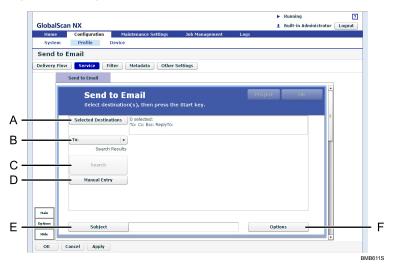


Table: MFP Configuration Screen - Send to Email Service - General

	Item	Description
A	[Selected Destinations]	Displays a list of the email destinations currently selected. You can click addresses in this list to remove them. Click [Reset All] to clear all selected addresses.
		<b>♣</b> Note
		If the Send to Me feature is enabled, the [Selected Destinations] list will display "Send to Me". This means that the scanned document will be delivered to the user's email address, as well as any other selected destinations.
В	[To]/[Cc]/[Bcc]/ [ReplyTo]	Select the destination type for email addresses. And then enter/select email addresses that will be added to the field next to [Selected Destinations].
		Use [ReplyTo] to specify the address you want replies to be sent to, if it is different from the sender.
С	[Search]	Searches the Email Address List for the destination email addresses.
		Any names that match the specified search string can be searched.
		Examples
		The following are examples of using the wildcard character, "*".

	ltem	Description
	Item	<ol> <li>A search for "*les*" matches:         <ul> <li>charles smith</li> <li>lester frank</li> <li>Lorraine Lester</li> <li>Steven Morales</li> </ul> </li> <li>The search string ("les") can appear anywhere in the name.</li> <li>A search for "les*" matches:         <ul> <li>lester frank</li> <li>Lester, lorraine</li> </ul> </li> <li>The search string ("les") may only appear at the</li> </ol>
		beginning of the name.  3. A search for "*les" matches:  • Smith, charles  • steven morales  The search string ("les") may only appear at the end of the name.  • Note  • [Enable Address Search] must be selected in the Email Search Settings screen to use this function. See table "Email Search Settings" above.
D	[Manual Entry]	Click this button to manually enter an email address to add to the recipient list  Note  • [Enable Manual Address Entry] must be selected in the Send to Email Option Settings screen.  • If you entered a domain name in [Default Domain for Manual Input] in the Send to Email Option Settings screen, that value will be appended to addresses entered without a domain. This feature is convenient if most recipients have the same domain (for example, recipients within the same company).

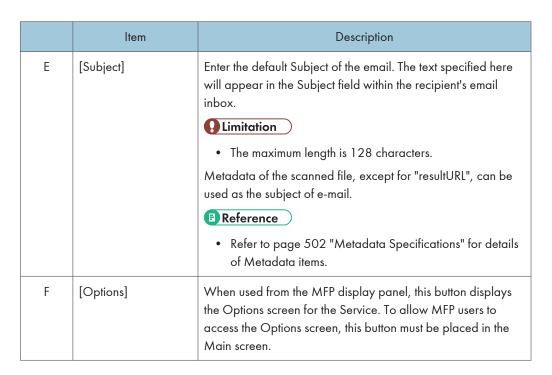


Fig.: MFP Configuration Screen - Send to Email Service - Option

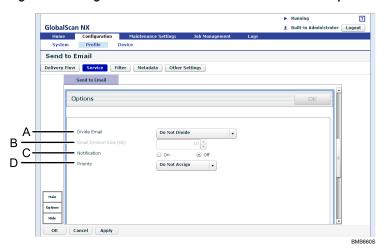


Table: MFP Configuration Screen - Send to Email Service - Options

		Item	Description
,	Α	[Divide Email]	Select a method for dividing the email.
			• [Do Not Divide]
			Sends all scanned data in one email.
			• [Page Divide]

	ltem	Description
		Sends each page of the scanned data as multiple emails.  • [Size Divide]  Divides the scanned data into parts so that they do not exceed the size specified in [Email Division Size (KB)] and send them as multiple emails. The received divided data will be restored if the email software supports this data restoring function.  • Note  • This option will be unavailable if [Do Not Attach] is selected for the [Select Data to Attach] item in the Email Option Settings screen.
В	[Email Division Size (KB)]	Enter the size to split documents into when dividing email using the [Size Divide] method.  Note  This option is only available when [Size Divide] is selected for [Divide Email].
С	[Notification]	Selects whether or not to use receipt notification that To/Cc/Bcc destinations received the email. This function only works when the mail server of the destination supports receipt notification.  • [On]  Makes To/Cc/Bcc destinations send a receipt notification that they received the email.  • [Off]  Disables receipt notification.  The notification is sent as follows:  1. The GlobalScan NX attempts to send the notification to the MFP user.  2. If the MFP user's email address is not available, the GlobalScan NX attempts to send the notification to the Administrator. The Administrator's email address is set in the Administrator Settings screen. See page 446 "Error Notification Email Address".  3. If the Administrator's email address is not available, the GlobalScan NX attempts to send the notification to the

	Item	Description
		default sender specified in [Default Sender Address] in the Send to Email Option Settings screen.
D	[Priority]	Select the priority to assign to the email from the following:  • [Do Not Assign]  • [1 (High)]  • [2]  • [3 (Standard)]  • [4]  • [5 (Low)]

#### 4

# Send to Folder Service

The Send to Folder Service allows MFP users to send scanned documents directly to a selected folder on a network device.

MFP users can perform the following operations through the Send to Folder Service:

• Send to Folder

The user can save documents on shared network folders.

Send to Home

If Active Directory is used as the Project authentication method, the user can save documents in his/her home directory using the Send to Home function.



- The following types of shared folders can be set as destinations:
  - Shared folders on computers running Windows.
  - UNIX operating system run by Samba supporting NTLM v2.
  - Local folders of the server PC (Server Edition only).

The Send to Folder Service settings are divided into 2 screens. Use the accordion buttons to access the different settings.

• [Add/Delete StartPoint Path]

Add, edit, and delete StartPoint Paths (root folders).

• [Send to Home Folder]

Enable or disable the Send to Home Folder function.

#### Add/Delete StartPoint Path

Add, edit and delete StartPoint Paths (root folders). For details about the settings, see the table below.

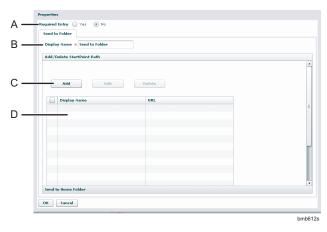


Table: Add/Delete StartPoint Path Settings

	ltem	Description
A	[Required Entry] (Project settings only)	Select whether to require that this Service be used.  • [Yes]  When scanning, at least one destination folder must be specified in the destinations list.  • [No]  Allows the flow to continue even if no destination folders are specified in the destinations list.
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
С	[Add]/[Edit]/ [Delete]	Use these buttons to add new root folders, edit existing root folders, and delete root folders.  • [Add]  Adds a new root folder.  • [Edit]  Modifies the settings of the selected root folder.  • [Delete]  Deletes all selected root folders.
D	Root Folder List	Displays a list of the registered root folders.

ltem	Description
	Use the check boxes to select root folders to edit or delete root folders. Select the check box on the first row/column to select all root folders.

### **Configure StartPoint Path Settings**

When you click [Add] or [Edit] on the Add/Delete StartPoint Path screen, the [General Settings] screen displays. For details about the settings, see the table below.

Fig.: Add/Edit StartPoint Path Screen - General Settings

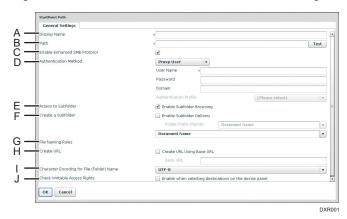


Table: Add/Edit StartPoint Path Settings - General Settings

	ltem	Description
А	[Display Name]	Enter a display name for the folder.
		<b>Q</b> Limitation
		The maximum length is 128 characters.
В	[Path]	Enter the path of the destination folder in UNC format.
		Example: \\192.168.1.1\SharedFolderName
		All folders contained in the path you enter will be available as destinations.
		Click [Test] to test the connection to the folder you have specified.
		UNote
		<ul> <li>When using Server Edition, local folders can be specified as the destination folders. When entering local folders, use the absolute paths for each platform.</li> </ul>
		Example

C		2.5
		Windows: C:\LocalFolder
C	[Enable Enhanced SMB Protocol]	Displayed when Server Edition is used.  When this check box is selected, the highest version of SMB supported by both environments shown below is used.  • The environment of the computer using GlobalScan NX  • The environment of the computer to which the folder at the remote destination belongs
		If this check box is not selected, SMB1.0 is used.  •• Note
		This check box is not displayed for Serverless Edition. The SMB version used for Serverless Edition is the version supported in the computer environment to which the destination folder belongs.
		<ul> <li>For the following MFP models, SMB 1.0 is used: Aficio MP 4000/4000B/5000/5000B/LD040/LD040B/ LD050/LD050B/9040/9040b/9050/9050b, Aficio MP 2550/2550B/3350/3350B/LD425/LD425B/LD433/ LD433B/9025/9025B/9033/9033B, Aficio MP C6000/C7500/LD260c/LD275c/C6055/C7570, Aficio MPW5100en/W7140en/en5100WD/en7140WD/ LW5100en/LW7140en, Aficio MP C6501/C7501/ LD365C/LD375C/C9065/C9075, Aficio MP C2800/ C3300/LD528C/LD533C, Aficio MP C4000/C5000/ LD540C/LD550C, Aficio MP C2050/C2550/LD520C/ LD525C, Aficio MP C3001/C3501/LD630C/LD635C/ C9130/C9135, Aficio MP C4501/C5501/LD645C/ LD655C/C9145/C9155, Aficio MP C2051/C2551/ LD620C/LD625C/C9120/C9125, Aficio MP C300/ C400/LD130C/LD140C, Aficio MP 6001/7001/8001/9001/LD360/LD370/LD380/ LD390/9060/9070/9080/9090, Aficio MP 6001SP/ 7001SP/8001SP/9001SP/LD360sp/LD370sp/ LD380sp/LD390sp/9060sp/9070sp/9080sp/9090sp, Aficio MP 171SPF/LD117SPF/917SPF, Aficio MP 201SPF/LD220SPF/920SPF, Aficio MP 4001/5001/ LD140/LD150/9240/9250, Aficio MP 2851/3351/</li> </ul>

	ltem	Description
		W5100/W7140/GWD5100/GWD7140/LW5100/ LW7140/5100WD/7140WD, Aficio MP W2401/ W3601/GWD3006/LW426/3406WD
		To use an SMB Protocol of a higher version than SMB1.0 when this check box is selected, install the following:
		.NET Framework 4 or later
		<ul> <li>Visual C++ Redistributable for Visual Studio 2015</li> </ul>
		<ul> <li>To perform authentication using a Kerberos ticket when this check box is selected, specify the path to be entered in the [Path] column, using the FQDN.</li> </ul>
		<ul> <li>To use the [Proxy User] authentication type using a Kerberos ticket when this check box is selected, specify the domain to which the user belongs in [Domain].</li> </ul>
		<ul> <li>When this check box is selected, the ticket received on Kerberos authentication is authenticated as the priority, regardless of the Kerberos Option.</li> </ul>
		<ul> <li>To perform authentication using a Kerberos ticket when the domain of the user is different from the domain of the folder at a remote destination, configure the settings by using a tool. For details, see page 533 "Using Kerberos Authentication in a Multiple-Domain Environment".</li> </ul>
D	[Authentication Method]	Select the authentication method to use. The information specified here is used to access the destination folder and save scanned documents:
		• [Proxy User]
		Uses the information specified in [User Name], [Password], [Domain], and [Authentication Profile] for authentication.
		• [Login User]
		Uses the login information for the Project for authentication.
		<b>◆</b> Note
		Even if you select [Login User], enter [User ID] and [Password] in order to browse folders via the AdminTool.
		If you are using passwordless authentication, we recommend that you not use [Login User] as the authentication type. If you do, authentication with the server might not be possible

	Item	Description
		because the user's password cannot be obtained from the login information.  • If the [Enable Enhanced SMB Protocol] check box is selected, [Authentication Profile] cannot be selected. Instead, specify the domain to which the user belongs to, in [Domain].
Е	[Access to Subfolder]	Select the [Enable Subfolder Browsing] check box to allow MFP users to browse subfolders and select them as destinations.
F	[Create a Subfolder]	Select the [Enable Subfolder Delivery] check box to create a subfolder under the destination folders.  • When Selected  A folder is automatically created under the destination folder, and scanned documents are stored in that subfolder(s).  • When not Selected  No subfolder is created. Scanned documents are sent to and stored directly under the specified destination folder(s).  If you select this check box, you must configure additional settings. For details, see "Additional Settings for [Create a Subfolder]" below.

	ltem	Description
G	[File Naming Rules]	Specify the file name of the file to save in the destination folder. You can specify the file name using the following methods:
		Directly enter the desired file name.
		<ul> <li>Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only major Metadata items can be selected in the drop-down list.</li> </ul>
		■ Reference
		<ul> <li>For details about file naming rules, see page 200</li> <li>"Specifying Folder and File Names Using Metadata".</li> </ul>
Н	[Create URL]	Select the [Create URL Using Base URL] check box to create a URL pointing to the document file of scanned documents. The URL is added to the "resultURL" Metadata item of the document information.
		When Selected
		A unique URL is created for a scanned document and added to the "resultURL" Metadata item. You must enter the base URL in [Base URL]. For example:
		URL in StartPoint: \\192.168.1.1\targetPath
		Destination folder: \\192.168.1.1\targetPath\myfolder
		File name: doc.tif
		Base URL: http://samplemyurl.com/path1
		Result URL: http://samplemyurl.com/path1/myfolder/ doc.tif
		<b>↓</b> Note
		<ul> <li>If [Create a Subfolder] is selected, the URL of the created subfolder will be added to the "resultURL" Metadata. If [Create a Subfolder] is not selected, the URLs of all Sections (files) of a scanned document are added to "resultURL".</li> </ul>
		When not Selected
		The "resultURL" Metadata item will be added to the document information. For example:
		Result URL: \\192.168.1.1\targetPath\myfolder\doc.tif

	ltem	Description
I	[Character Encoding for File (Folder) Name]	Select the character encoding methods from the drop-down list.  The following character encoding methods are supported:  • UTF-8  • Latin-1
J	[Check Writable Access Rights]	Select this check box to confirm write-access privileges for the destination folder when selecting destinations on the MFP display panel.

#### Additional Settings for [Create a Subfolder]

• [Folder Prefix (Name)]

Specify the name of the subfolder. It is possible to create nested subfolders by including the path separator. For instance, if you enter "abc\xyz", then the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this case, scanned documents are saved in "xyz".

• [Add Suffix to Folder Name]

Select this option to add a suffix to the subfolder if one already exists with the same name. The suffix will be a number from 1 to 9999. The suffix is incremented until a unique file name is found. If the suffix exceeds 9999, an error will occur.

If this option is not selected and a subfolder already exists with the same name, then no subfolder is created, and scanned documents are saved in the existing folder.

You can specify the name of a subfolder you create using the following methods:

- Directly enter the desired folder name.
- Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only
  major Metadata items can be selected in the drop-down list.

### Reference

- For details about folder naming rules, see page 200 "Specifying Folder and File Names Using Metadata".
- For details about Metadata, see page 502 "Metadata Specifications".

#### **Configure Send to Home Folder Settings**

Click [Send to Home Folder] at the bottom of the screen to open the Send to Home Folder screen.

### Limitation

This feature only functions when Active Directory is used as the Project authentication method.
 If you are using a different authentication method, even if you select this feature it will not function.

 Send to Home Folder is always available when LDAP authentication is used even if Active Directory is not selected as [Server Type].



• The attribute for Home Folder must be "homeDirectory".

If the Project uses passwordless authentication, GlobalScan NX will use the proxy user information specified in the Authentication Profile settings, not the user's login information, to access the folder and distribute the documents.



• If the Project uses LDAP passwordless authentication, the user name that is used to access the folder is the first element of the proxy user's DN.

Fig.: Send to Home Folder Screen

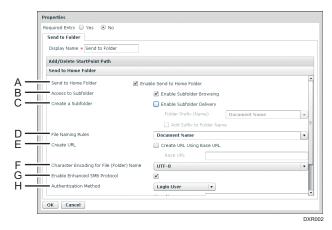


Table: Send to Home Folder Settings

	ltem	Description
A	[Send to Home Folder]	Select the [Enable Send to Home Folder] check box to enable distribution of scanned documents to the MFP user's home folder.
		If the home folder information of the user can be obtained from the Authentication Server, "Send to Home" will be automatically added to the initial Selected Destination list.
		The Send to Home Folder function uses the user's login information to distribute documents to the user's home folder.  A distribution error will occur if the user is not granted write access to his/her home folder.

	ltem	Description
В	[Access to Subfolder]*1	Select the [Enable Subfolder Browsing] check box to allow MFP users to browse subfolders and select them as destinations.
C	[Create a Subfolder]*1	Select the [Enable Subfolder Delivery] check box to create a subfolder under the destination folders.  • When Selected  A folder is automatically created under the destination folder, and scanned documents are stored in that subfolder(s).  • When not Selected  No subfolder is created. Scanned documents are sent to and stored directly under the specified destination folder(s).  If you select this check box, you must configure additional settings. For details, see "Additional Settings for [Create a Subfolder]" below.

	ltem	Description
D	[File Naming Rules]*1	Specify the file name of the file to save in the destination folder. You can specify the file name using the following methods:
		Directly enter the desired file name.
		Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only major Metadata items can be selected in the drop-down list.
		<b>☐</b> Reference
		<ul> <li>For details about file naming rules, see page 200</li> <li>"Specifying Folder and File Names Using Metadata".</li> </ul>
Е	[Create URL]*1	Select the [Create URL Using Base URL] check box to create a URL pointing to the document file of scanned documents. The URL is added to the "resultURL" Metadata item of the document information.
F	[Character Encoding for File Folder (Name)] *1	Select the character encoding.
G	[Enable Enhanced SMB Protocol]	Displayed when Server Edition is used.
		When this check box is selected, the highest version of SMB supported by both environments shown below is used.
		The environment of the computer using GlobalScan NX
		The environment of the computer to which the home folder belongs
		If this check box is not selected, SMB1.0 is used.
		<b>◆</b> Note
		<ul> <li>This check box is not displayed for Serverless Edition. The SMB version used for Serverless Edition is the version supported in the computer environment to which the destination folder belongs.</li> </ul>
		<ul> <li>For the following MFP models, SMB 1.0 is used:         Aficio MP 4000/4000B/5000/5000B/LD040/         LD040B/LD050/LD050B/9040/9040b/         9050/9050b, Aficio MP 2550/2550B/         3350/3350B/LD425/LD425B/LD433/LD433B/         9025/9025B/9033/9033B, Aficio MP C6000/</li> </ul>

Item	Description
	C7500/LD260c/LD275c/C6055/C7570, Aficio MPW5100en/W7140en/en5100WD/en7140WD/ LW5100en/LW7140en, Aficio MP C6501/C7501/ LD365C/LD375C/C9065/C9075, Aficio MP C2800/C3300/LD528C/LD533C, Aficio MP C4000/C5000/LD540C/LD550C, Aficio MP C2050/C2550/LD520C/LD525C, Aficio MP C3001/C3501/LD630C/LD635C/C9130/C9135, Aficio MP C4501/C5501/LD645C/LD655C/ C9145/C9155, Aficio MP C2051/C2551/LD620C/ LD625C/C9120/C9125, Aficio MP C300/C400/ LD130C/LD140C, Aficio MP 6001/7001/8001/9001/LD360/LD370/LD380/ LD390/9060/9070/9080/9090, Aficio MP 6001SP/7001SP/8001SP/9001SP/LD360sp/ LD370sp/LD380sp/LD390sp/9060sp/9070sp/ 9080sp/9090sp, Aficio MP 171SPF/LD117SPF/ 917SPF, Aficio MP 201SPF/LD220SPF/920SPF, Aficio MP 4001/5001/LD140/LD150/9240/9250, Aficio MP 2851/3351/LD528/LD533/9228/9233, Aficio SP 5200S/5210SF/5210SR, Aficio MP 2352SP/ 2852SP/3352 SP, Aficio MP W5100/W7140/ GWD5100/GWD7140/LW5100/ LW7140/5100WD/7140WD, Aficio MP W2401/ W3601/GWD3006/LW426/3406WD
	<ul> <li>To use an SMB Protocol of a higher version than SMB1.0 when this check box is selected, install the following:         <ul> <li>.NET Framework 4 or later</li> </ul> </li> </ul>
	Visual C++ Redistributable for Visual Studio 2015
	To perform authentication using a Kerberos ticket when this check box is selected, specify the path to the home folder, using the FQDN.
	To use the [Proxy User] authentication type using a Kerberos ticket when this check box is selected, specify the domain to which the user belongs in [Domain].
	When this check box is selected, the ticket received on Kerberos authentication is authenticated as the priority, regardless of the Kerberos Option.

	ltem	Description
		To perform authentication using a Kerberos ticket when the domain of the user is different from the domain of the home folder, configure the settings by using a tool. For details, see page 533 "Using Kerberos Authentication in a Multiple-Domain Environment".
Н	[Authentication Method]	Select the authentication method to use. The information specified here is used to access the destination folder and save scanned documents:  • [Proxy User]  Uses the information specified in [User Name], [Password], [Domain], and [Authentication Profile] for authentication.
		• [Login User]
		Uses the login information for the Project for authentication.
		<b>↓</b> Note
		<ul> <li>Even if you select [Login User], enter [User ID] and [Password] in order to browse folders via the AdminTool.</li> </ul>
		If you are using passwordless authentication, we recommend that you not use [Login User] as the authentication type. If you do, authentication with the server might not be possible because the user's password cannot be obtained from the login information.
		<ul> <li>If the [Enable Enhanced SMB Protocol] check box is not selected, [Login User] can be selected.</li> </ul>
		If the [Enable Enhanced SMB Protocol] check box is selected, both [Proxy User] and [Login User] can be selected.

<sup>\* 1</sup> These items are enabled only when [Enable Send to Home Folder] is checked in the screen.

With these settings, you can specify Home Folder in more detail such as browsing sub folders from MFP or file naming rules, just as with a usual StartPoint Path.



• These settings become effective only when the login user's home folder is obtained.

#### MFP Configuration Screen - Send to Folder Service

On this screen, you can configure the appearance of the MFP display panel and preset destination folders for the Send to Folder Service. You can also limit which items are available to MFP users.

### ■ Reference

 For details about configuring and limiting the settings on the MFP display panel, see page 279 "About Distribution Parameters".

Fig.: MFP Configuration Screen - Send to Folder Service

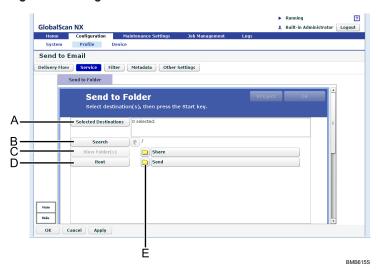


Table: MFP Configuration Screen - Send to Folder Service

	ltem	Description
А	[Selected Destinations]	Displays a list of the destination folders currently selected. You can click folders in this list to remove them.
В	[Search]	Searches for destination folders.  Any destination folders that match the specified search string can be searched.
		Example
		A search for " <b>s</b> " matches:
		Share Folder
		Send folder
		Folder Sales
		If you enter a space, all folders will be searched for.
С	[View Folder(s)]	Returns to folder view after performing a search.

	ltem	Description
D	[Root]	Returns to the screen displaying the root folders.
Е	Folder Browser	Click folders displayed in the browser to add them to the Selected Destinations list.  The buttons in the browser have the following meanings:  Displays the folders on the upper location. This button is disabled in root folder view.  The folder contains subfolders. Click this button to view the subfolders.  The folder does not contain any subfolders.

# **Send to FTP Service**

The Send to FTP Service allows MFP users to send scanned documents to one or more specified FTP servers.

Once a document is uploaded to the FTP server, anyone with access to the FTP server can access the files. Storing files on an FTP server enables geographically dispersed workgroups to easily collaborate with colleagues, and allows businesses to easily share information with employees, clients, vendors, etc.



- SFTP (SSH2) is supported.
- Scanned documents are named using specific naming conventions. See page 200 "Service Folder and File Naming Rules".



To use a private key to establish a secure connection with the Send to FTP Service, see page 466
 "Managing the Private Keys".

The Send to FTP Service settings are set via the Add/Delete StartPoint Path, where you can add, edit, and delete StartPoint Paths (root folders).

#### Add/Delete StartPoint Path

Add, edit and delete StartPoint Paths (root folders). For details about the settings, see the table below.

#### Fig.: Add/Delete StartPoint Path Screen

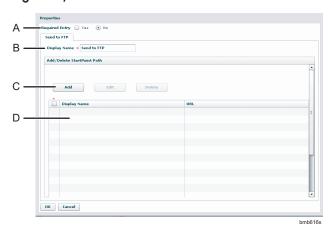


Table: Add/Delete StartPoint Path Settings

	ltem	Description
Α	[Required Entry]	Select whether to require that this Service be used.
	(Project settings only)	• [Yes]

	ltem	Description
		When scanning, at least one FTP folder must be specified in the destinations list.  In [No]  Allows the flow to continue even if no FTP folders are specified in the destinations list.
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
С	[Add]/[Edit]/ [Delete]	Use these buttons to add new root folders, edit existing root folders, and delete root folders.  • [Add]  Adds a new root folder.  • [Edit]  Modifies the settings of the selected root folder.  • [Delete]  Deletes the selected root folders.
D	Root Folder List	Displays a list of the registered root folders.  Use the check boxes to select root folders to edit or delete root folders. Select the check box on the first row/column to select all root folders.

## **Configure StartPoint Path Settings**

When you click [Add] or [Edit] on the Add/Delete StartPoint Path screen, the [General Settings] screen displays. For details about the settings, see the table below.

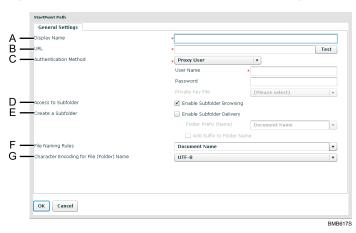
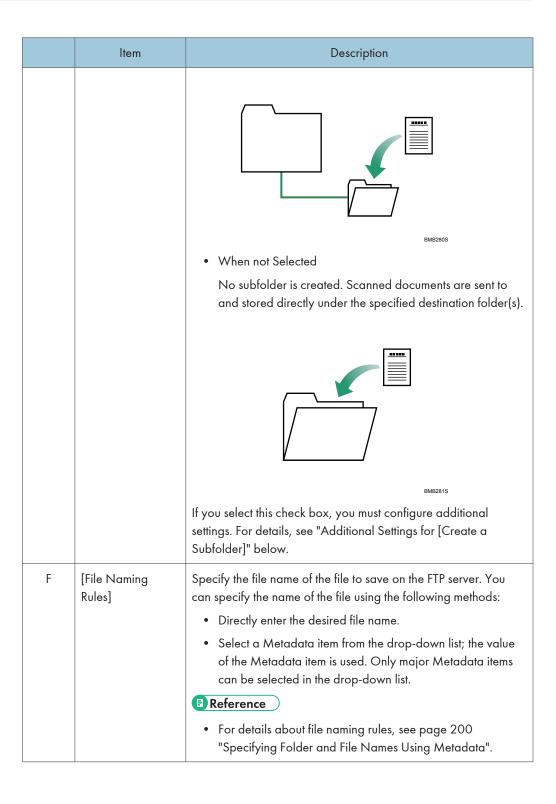


Table: Add/Delete StartPoint Path Settings-General Settings

	ltem	Description
A	[Display Name]	Enter the display name for the root folder.  Limitation  The maximum length is 128 characters.
В	[URL]	Enter the path to the FTP destination folder.  Examples  • ftp://ftp.gsnxcorp.net/  • ftp://192.168.1.1:21/home/user/  • sftp://ftp.gsnxcorp.biz/data/ (for secure FTP)  Click [Test] to test the connection to the folder you have specified.
С	[Authentication Method]	Select the authentication method to use from the following:  • [Proxy User]  Uses the information specified in [User Name] and [Password] for authentication.  • Important  • If the FTP server is managed by a domain user under IIS, the user name for the proxy user must be entered as " <domain>\<user name="">".  • [Login User]  Uses the login account for the Project for authentication.</user></domain>

	ltem	Description
	IIEM	<ul> <li>[Use Certificate] (for SFTP only) A certificate is automatically selected from the registered certificates. For this setting, the following information must be specified: <ul> <li>[User ID]</li> <li>[Password]</li> <li>Enter the password for Private Key File.</li> <li>[Private Key File]</li> </ul> </li> <li>[Anonymous] <ul> <li>Depending on FTP server settings, the password may be required. If a password is required for Anonymous authentication in the FTP server settings, enter the password in this field. If a password is not required, leave this field blank.</li> </ul> </li> <li>Breference <ul> <li>For details about using Private Key files, see page 466 "Managing the Private Keys".</li> </ul> </li> <li>Note <ul> <li>SSH DSS and SSH RSA are supported for the key type.</li> <li>If you are using passwordless authentication, we recommend that you not use [Login User] as the authentication type. If you do, authentication with the server might not be possible because the user's password cannot</li> </ul> </li> </ul>
D	[Access to Subfolder]	be obtained from the login information.  Select the [Enable Subfolder Browsing] check box to allow MFP users to browse subfolders and select them as destination folders.
E	[Create a Subfolder]	Select the [Enable Subfolder Delivery] check box to create a subfolder under the destination folders.
		<ul> <li>When Selected         A folder is automatically created under the destination folder(s), and scanned documents are stored in that subfolder.     </li> </ul>



	ltem	Description
G	[Character Encoding for File (Folder) Name]	Select the character encoding methods you require from the drop-down list.  The following character encoding methods are supported:  • UTF-8  • Latin-1

#### Additional Settings for [Create a Subfolder]

• [Folder Naming Rules]

Specify the name of the subfolder. It is possible to create nested subfolders by including the path separator. For instance, if you enter "abc/xyz", then the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this case, scanned documents are saved in "xyz".

• [Add Suffix to Folder Name]

Select this option to add a suffix to the subfolder if one already exists with the same name. The suffix will be a number from 1 to 9999. The suffix is incremented until a unique file name is found. If the suffix exceeds 9999, an error will occur.

If this option is not selected and a subfolder already exists with the same name, then no subfolder is created, and scanned documents are saved in the existing folder.

You can specify the name of a subfolder you create using the following methods:

- Directly enter the desired folder name.
- Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only
  major Metadata items can be selected in the drop-down list.

# Reference

 For details about folder naming rules, see page 200 "Specifying Folder and File Names Using Metadata".

#### MFP Configuration Screen - Send to FTP Service

On this screen, you can configure the appearance of the MFP display panel and preset destination folders for the Send to FTP Service. You can also limit which items are available to MFP users.

# ■ Reference

• For details about configuring and limiting the settings on the MFP display panel, see page 279 "About Distribution Parameters".

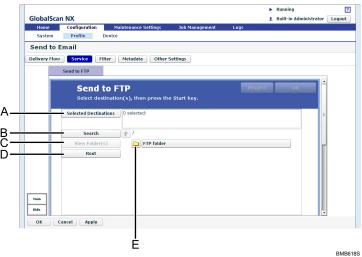


Table: MFP Configuration Screen - Send to FTP Service

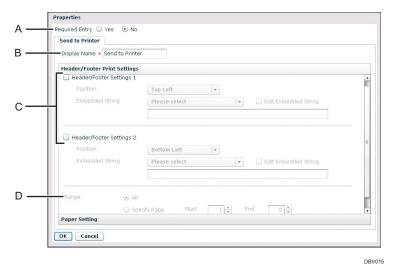
	Item	Description
А	[Selected Destinations]	Displays a list of the destination folders currently selected. You can click folders in this list to remove them.
В	[Search]	Searches for destination folders.  Any destination folders that match the specified search string can be searched.  Example  A search for "s" matches:
		<ul> <li>Share Folder</li> <li>Send folder</li> <li>Folder Sales</li> <li>If you enter a space, all folders will be searched for.</li> </ul>
С	[View Folder(s)]	Returns to folder view after performing a search.
D	[Root]	Returns to the screen displaying the root folders.
Е	Folder Browser	Click folders displayed in the browser to add them to the Selected Destinations list.  The buttons in the browser have the following meanings:

ltem	Description
	Displays the folders on the upper location. This button is disabled in root folder view.
	The folder contains subfolders. Click this button to view the subfolders.
	The folder does not contain any subfolders.

# **Send to Printer Service**

On the Send to Printer Service Settings screen, configure the settings for the header/footer as necessary.

Fig.: Send to Printer Service Settings Screen



Required Entry O Yes	● No
Send to Printer	
Display Name * Send	to Printer
Header/Footer Print	Settings
Paper Setting	
Paper Size	Comply with printer driver settings

Table: Send to Printer Service Settings Screen

	ltem	Description
А	[Required Entry]	Select whether to require that this Service be used.
	(Project settings only)	• [Yes]

DBV016

	ltem	Description
		When scanning, the MFP user must select a printer to print to.  • [No]  Allows the flow to continue even if no printer is selected.
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
С	[Header/Footer Settings 1]/[Header/ Footer Settings 2]	Select the appropriate check boxes to configure the first and/or second header/footer setting. When you select a check box, the following settings become available:  • [Position]  Select the position of the header/footer from the following: [Top Left], [Top Center], [Top Right], [Bottom Left], [Bottom Center], and [Bottom Right]  • [Embedded String]  Specify the header/footer text using one of the following methods:  • Select the [Edit Embedded String] check box and enter the text of the header/footer directly in the text box.  • Select a Metadata item from the drop-down list. This value will be used when printing. Only major Metadata items are available in the list. For details about Metadata, see page 502 "Metadata Specifications".  • Note  • You cannot specify the same header/footer position for both [Header/Footer Settings 1] and [Header/Footer Settings 2].
D	[Range]	Specify the pages on which the header/footer text will be embedded.  • [All]  Embed the header/footer on all pages.  • [Specify Page]

Item

Description

## 4

# Send to WebDAV Service

The Send to WebDAV Service allows MFP users to send scanned documents to one or more specified WebDAV servers.

If your organization currently utilizes a third-party Document Management System (DMS) that supports WebDAV, the Send to WebDAV Service allows MFP users to save scanned documents directly to the repository.



- HTTP and HTTPS are supported.
- Scanned documents are named using specific naming conventions. See page 200 "Specifying Folder and File Names Using Metadata".

The Send to WebDAV Service settings are divided into 2 screens. Use the accordion button to access the different settings.

- [Add/Delete StartPoint Path]
   Add, edit, and delete StartPoint Paths (root folders).
- [HTTP Proxy Server]

#### Add/Delete StartPoint Path

Add, edit and delete StartPoint Paths (root folders). For details about the settings, see the table below.

Configure proxy server settings if you are accessing the WebDAV folder through a proxy server.

Fig.: Add/Delete StartPoint Path Screen

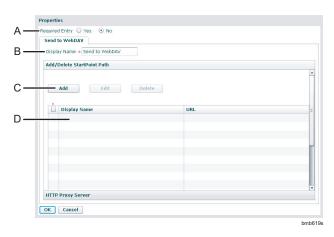


Table: Add/Delete StartPoint Path Settings

		ltem	Description
ľ	Α	[Required Entry]	Select whether to require that this Service be used.

	ltem	Description
	(Project settings only)	<ul> <li>[Yes] When scanning, at least one WebDAV folder must be specified in the destinations list.</li> <li>[No] Allows the flow to continue even if no WebDAV folders are specified in the destinations list.</li> </ul>
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
С	[Add]/[Edit]/[Delete]	Use these buttons to add new root folders, edit existing root folders, and delete root folders.  • [Add]  Adds a new root folder.  • [Edit]  Modifies the settings of the selected root folder.  • [Delete]  Deletes all selected root folder.
D	Root Folder List	Displays a list of the registered root folder.  Use the check boxes to select root folders to edit or delete root folders. Select the check box on the first row/column to select all root folders.

## **Configure StartPoint Path Settings**

When you click [Add] or [Edit] on the Add/Delete StartPoint Path screen, the WebDAV Folder Settings screen displays. For details about the settings, see the table below.

Fig.: Add/Edit StartPoint Path Screen - WebDAV Folder Properties

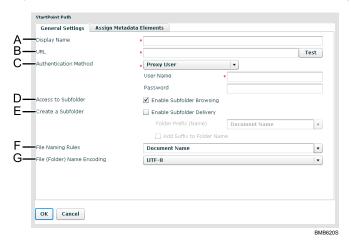


Table: Add/Edit StartPoint Path Settings-WebDAV Folder Properties

	ltem	Description
A	[Display Name]	Enter the display name of the root folder.  Limitation  The maximum length is 128 characters.
В	[URL]	Enter the path to the WebDAV destination folder.  Examples  • http://webdav.gsnxcorp.com/  • http://192.168.1.1:8080/john/docs/  • https://webdav.gsnxcorp.biz/users/jane (for SSL connection)  Click [Test] to test the connection to the folder you have specified.
С	[Authentication Method]	Select the authentication method to use from the following:  • [Proxy User]  Uses the information specified in [User Name], [Password], and [Authentication Profile] for authentication.  • Note  • Kerberos option is necessary to use [Authentication Profile].

	ltem	Description
		<ul> <li>Important</li> <li>If the WebDAV server is managed by a domain user under IIS, the user name for the proxy user must be entered as "<domain>\<user name="">".</user></domain></li> <li>If the password contains more than 14 characters,</li> </ul>
		an error will occur and the document will not be sent.
		• [Login User]
		Uses the login account for the Project for authentication.
		• [Anonymous]
		Uses an anonymous account.
		●Note
		<ul> <li>If you are using passwordless authentication, we recommend that you not use [Login User] as the authentication type. If you do, authentication with the server might not be possible because the user's password cannot be obtained from the login information.</li> </ul>
D	[Access to Subfolder]	Select the [Enable Subfolder Browsing] check box to allow MFP users to browse subfolders and select them as destination folders.
Е	[Create a Subfolder]	Select the [Enable Subfolder Delivery] check box to create a subfolder under the destination folders.
		When Selected
		A folder is automatically created under the destination folder(s), and scanned documents are stored in that subfolder.

	ltem	Description
		When not Selected No subfolder is created. Scanned documents are sent to and stored directly under, the specified destination folder.  If you select this check box, you must configure additional settings. For details, see "Additional Settings for [Create a Subfolder]" below.
F	[File Naming Rules]	Specify the file name of the file to save in the destination folder. You can specify the file name using the following methods:  • Directly enter the desired file name.  • Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only major Metadata items can be selected in the drop-down list.    Reference
G	[File (Folder) Name Encoding]	"Specifying Folder and File Names Using Metadata".  Select the character encoding methods on the drop-down list.  The following character encoding methods are supported:

ltem	Description
	• UTF-8
	• Latin-1

### Additional Settings for [Create a Subfolder]

When this option is selected, configure the following settings:

• [Folder Prefix (Name)]

Specify the name of the subfolder. It is possible to create nested subfolders by including the path separator. For instance, if you enter "abc/xyz", then the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this case, scanned documents are saved in "xyz".

• [Add Suffix to Folder Name]

Select this option to add a suffix to the subfolder if one already exists with the same name. The suffix will be a number from 1 to 9999. The suffix is incremented until a unique file name is found. If the suffix exceeds 9999, an error will occur.

If this option is not selected and a subfolder already exists with the same name, then no subfolder is created, and scanned documents are stored in the existing folder.

You can specify the name of a subfolder you create using the following methods:

- Directly enter the desired folder name.
- Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only
  major Metadata items can be selected in the drop-down list.



 For details about folder naming rules, see page 200 "Specifying Folder and File Names Using Metadata".

### **Configure Metadata Elements**

On the [Assign Metadata Elements] tab, you can create a mapping between document Metadata items and WebDAV properties. For details about the settings, see the table below.



 Depending on the destination server's specifications, metadata assignment might not work properly.

4

Fig.: Add/Edit StartPoint Path Screen - Assign Metadata Elements

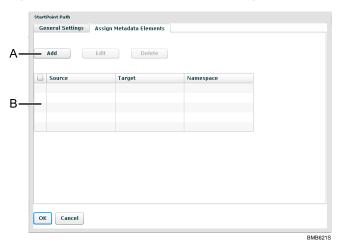


Table: Add/Edit StartPoint Path Screen - Assign Metadata Elements

	ltem	Description
A	[Add]/[Edit]/[Delete]	Use these buttons to add new Metadata mappings, edit existing Metadata mappings, and delete Metadata mappings.  • [Add]  Creates a new mapping.  • [Edit]  Modifies the settings of the selected mapping.  • [Delete]  Deletes all selected mappings.
В	Metadata Mapping List	Displays a list of the assigned Metadata mappings.  Use the check boxes to select mappings to edit or delete mappings. Selecting the check box in the title row selects all mappings.

## Add/Edit Metadata Elements

When you click [Add] or [Edit] on the Assign Metadata Elements tab, the [Add Assigned Metadata Elements] screen displays. For details about the settings, see the table below.

## Fig.: Add/Edit Assigned Metadata Elements Screen



Table: Add/Edit Assigned Metadata Elements

	ltem	Description
A	[Source]	Select a document Metadata item from the drop-down list, or enter one manually.
В	[Target]	Enter the name of the corresponding WebDAV property.
С	[Namespace]	Enter the namespace of the WebDAV property.

### Mapping Example

For this example, assume that the document name is "Document 1.tif".

- [Source]: Document Name (selected from the drop-down list)
- [Target]: doc\_name
- [Namespace]: ns1

The document information will be set in the WebDAV server as follows:

<ns1:doc\_name>Document1.tif</ns1:doc\_name>



If a scanned file is successfully stored on the WebDAV server, then the job is regarded as a
successful, even if Metadata assignment fails. Therefore, no retry is attempted for such a job.
However, the Metadata assignment failure will be logged in the System Log.

# **■** Reference

• See page 502 "Metadata Specifications".

### **Configure HTTP Proxy Server Settings**

If you are using a proxy server to access a WebDAV folder that is outside your company's firewall, enter the proxy server's information. All items are required when using a proxy server. For details about the settings, see the table below.

Fig.: HTTP Proxy Server Screen

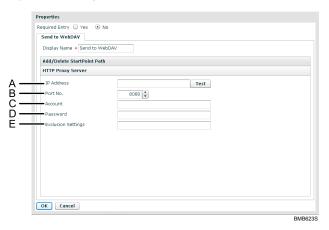


Table: HTTP Proxy Server Settings

	Item	Description	
Α	[IP Address]	Enter the IP address or host name of the proxy server.	
		Click [Test] to test the connection to the proxy server you have specified.	
В	[Port No.]	Enter the port number to use.	
		<b>↓</b> Note	
		The default port is 8080.	
С	[Account]	Enter the login account that is used to log in to the proxy server.	
D	[Password]	Enter the account password.	
Е	[Exclusion Settings]	Enter any IP address and domain names for which the proxy server is not used. Separate each entry with a semicolon (;).	
		You can specify classes of IP addresses and domain names by using as asterisk (*).	
		Examples	
		*.gsnxcorp.com (addresses such as www.gsnxcorp.com, ftp.gsnxcorp.com, etc.)	
		• 192.168.*.*	
		*.gsnxsample.* (addresses such as ftp.gsnxsample.net, www.gsnxsample.biz, etc.)	

### MFP Configuration Screen - Send to WebDAV Service

On this screen, you can configure the appearance of the MFP display panel and preset destination folders for the Send to WebDAV Service. You can also limit which items are available to MFP users.



 For details about configuring and limiting the settings on the MFP display panel, see page 279 "About Distribution Parameters".

Fig.: MFP Configuration Screen - Send to WebDAV Service

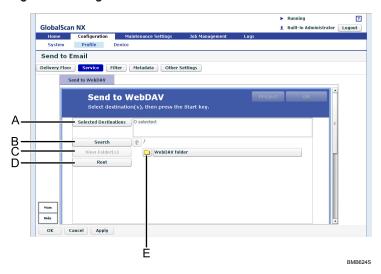


Table: MFP Configuration Screen - Send to WebDAV Service

	ltem	Description
A	[Selected Destinations]	Displays a list of the destination folders currently selected. You can click folders in this list to remove them.
В	[Search]	Searches for destination folders.
		Any destination folders that match the specified search string can be searched.
		Example
		A search for "s" matches:
		Share Folder
		Send folder
		Folder Sales
		If you enter a space, all folders will be searched for.

	ltem	Description
С	[View Folder(s)]	Returns to folder view after performing a search.
D	[Root]	Returns to the screen displaying the root folders.
Е	Folder Browser	Click folders displayed in the browser to add them to the Selected Destinations list.
		The buttons in the browser have the following meanings:
		•
		Displays the folders on the upper location. This button is disabled in root folder view.
		The folder contains subfolders. Click this button to view the subfolders.
		The folder does not contain any subfolders.

# **■** Reference

• See page 279 "About Distribution Parameters".

# Service Folder and File Naming Rules

This section explains how to specify names for files and folders.

## Specifying Folder and File Names Using Metadata

You can use Metadata, such as the date the file was created or the user who created the document, in the names of files and folders.

The simplest way of specifying a file or subfolder name is by entering a literal file name or basic Metadata item on the settings screen for each Service (Send to E-mail, Send to Folder/FTP/WebDAV). Alternatively, you can use one of the following more advanced methods:

- Enter a custom Metadata item
  - Enclose the Metadata item name (ID) in curly brackets ("{", "}"). Use this method to enter Metadata items that are not available in the drop-down list of basic Metadata items.
- Combine literal character strings with Metadata

Enter a file name that consists of a combination of literal character strings and Metadata. Enclose the names of Metadata items in curly brackets ("{", "}").

For example, if you enter "Report({userName})", and the value of the Metadata item "userName" is "john", then the resulting file name will be "Report(john)".



• If you want to include curly brackets in the file name, use double brackets.

For example, if you enter "file { draft} } ", the resulting file name will be "file { draft} }".

# Reference

• For details about Services, see page 140 "About Services".

## Formatting numbers in Metadata

Items of numerical Metadata, such as the page count and horizontal resolution, can be formatted if you include them in file names. You can specify the number of spaces (the padding) a number occupies, and whether the padding is space-padded or 0-padded.

# Limitation

 Only whole numbers can be formatted. If a number includes a decimal point, the numbers following the decimal point will be omitted.

The following table explains how to format numbers.

Input Example	Explanation
{tagName:Nxx}	Display the number so that it occupies at least xx spaces. If xx is greater than the number of digits in the number, the extra space is space-padded.
	Example:
	Input: "file{page:N3}"
	Where the value of "page" is 12.
	Output: "file 12.tif"
{tagName:N0xx}	Display the number so that it occupies at least xx spaces. If xx is greater than the number of digits in the number, the extra space is 0-padded.
	Example:
	Input: "{page:N05}_file"
	Where the value of "page" is 12.
	Output: "00012_file.tif"

The following table shows several examples of output for various values of the hypothetical tag "metatag". (Underscores represent blank spaces.)

Value of "metatag"	Input	Output
12	{metatag:N4}	12
	{metatag:NO4}	0012
123456	{metatag:N4}	123456
	{metatag:NO4}	123456
-12	{metatag:N4}	12
	{metatag:NO4}	-012
abcde	{metatag:N4}	0
	{metatag:NO4}	0000
123abcde	{metatag:N4}	_123
	{metatag:NO4}	0123
123.45	{metatag:N4}	_123

Value of "metatag"	Input	Output
	{metatag:NO4}	0123
1 2	{metatag:N4}	1
(space between 1 and 2)	{metatag:NO4}	0001



- Any blank spaces before or after a Metadata value are automatically trimmed. For example, "123
   "(blank space before and after the number) is treated as "123".
- If the format specification contains a letter other than N, for example {x:Cxx}, the Metadata is treated as if no format were specified.
- If the format for a number format is incorrect, for example {x:Nabcde} or {x:N}, the number is treated as if "N04" were specified.

## Reference

• For details about Metadata items, see page 502 "Metadata Specifications".

## Formatting dates in Metadata

Metadata, such as "generationEpoch" and "registrationEpoch" that reports dates expressed in milliseconds can be formatted into human-readable dates when used in file names.

The following table explains how to format dates:

Input Example	Explanation
{tagName:Dxxxx}	Display the date using the local time zone set on your computer, in the format specified by xxxx.
{tagName:Uxxxx}	Display the date using UTC (universal coordinated time) in the format specified by xxxx.

"xxxx" is a string of characters that specify how to format the date. The following table explains the available characters:

Character	Meaning
У	Year
М	Month
d	Day of the month

Character	Meaning
h	Hour in the 12-hour system
Н	Hour in the 24-hour system
m	Minute
s	Second
S	Milliseconds

#### Example:

If the date and time represented in the hypothetical Metadata item "metatag" is "Thursday October 30, 2008 2:37 PM Eastern Standard Time", the following formats produce the given result.

Format	Result
{metatag:DyyyyMMdd}	20081030
{metatag:DddMMyyyyHHmm}	301020081437
{metatag:UddMMyyyyHHmm}	301020081837
{metatag:DMMddyyhhmmss}	103008023700



- Any numerical value can be converted into a date using the above method.
- If the format specification contains a letter other than D or U, for example {x:Cxx}, the Metadata is treated as if no format were specified.
- If the format for a date format is incorrect, for example {x:Uaabb}, the output is undefined.

# Reference

For details about Metadata items, see page 502 "Metadata Specifications".

# Other File Naming Conditions

Depending on certain conditions, a suffix might be appended to the output file name.

The following rules determine when and how a suffix is appended:

 If a document contains multiple Sections, a four-digit, zero-padded suffix indicating the Section is appended to the file name. The format becomes "basename\_XXXX", where XXXX is the Section number.

#### Example

If a document contains three Sections and its basename is "FileName", the following files will be created:

FileName\_0001.tif, FileName\_0002.tif, FileName\_0003.tif



- If a document contains more Sections than can be expressed using four digits, the entire Section number is appended.
- If a file with the same name already exists in the destination folder, a bracketed suffix is added to the file name. For example: FileName\_0001(1).tif; FileName\_0001(2).tif.

The suffix is incremented until a unique file name is found. If the suffix exceeds 9999, an error will occur.



 This process requires time, and the time required increases as the number of files with the same name increases. For this reason, for best performance, you should avoid using duplicate names.

## 4

# **About Filters**

A Filter represents a set of criteria that defines input/output, controlling how the document is processed, thus extending GlobalScan NX functionality. The PDF Converter Filter, for example, can be added to a Project's Flow in order to convert a scanned image into a PDF file. This section describes the different Filters and how to configure them.



• If you have configured properties for Filters at the system or profile level, those properties will be used as the default values for any Filters you add to a flow.

# Filter Summary

The following table provides an overview of each Filter and GlobalScan NX support by Edition.

Filter Name	Description	Serverless Edition	Server Edition
PDF Converter	Converts the scanned image to a PDF.	Supported	Supported
Enhanced PDF Converter Filter	Converts the scanned image to a PDF.		Supported
Image Converter	Converts a document into a different file format data specified by the Administrator or user.	Supported	Supported
Image Correction	Performs image correction operations on scanned documents.		Supported
Archiver	Archives scanned documents in the specified format.		Supported
OCR	Converts scanned data into text files using OCR software. Also supports auto orientation and the creation of a file name.		Supported
Section Specify	Extracts any Sections from a Document.		Supported
Section Splitter	Split a job including multiple sections into jobs including sections specified for "Number of Sections" on the MFP's control panel.		Supported
XML Transformer	Extracts the document Metadata information as XML data.	Supported	Supported
Flow Redirect	Transfer a job from a certain document distribution flow of a Project to another Project.	Supported	Supported
Metadata Converter	Converts the value of the specified Metadata item of the input document, and changes the value a Metadata item based on the value of a different Metadata item.	Supported	Supported

Filter Name	Description	Serverless Edition	Server Edition
Metadata Replacement	Validates the value of specified Metadata of the input document and modifies certain parts of the value of a Metadata item.	Supported	Supported
PDF Stamper	Converts the scanned image to a PDF with the specified text or image embedded.		Supported

### Reference

- See page 279 "About Distribution Parameters".
- See page 215 "PDF Converter Filter".
- See page 222 "Enhanced PDF Converter Filter (Server Edition Only)".
- See page 230 "Image Converter Filter".
- See page 236 "Image Correction Filter (Server Edition Only)".
- See page 242 "Archiver Filter (Server Edition Only)".
- See page 244 "OCR Filter (Server Edition Only)".
- See page 248 "Section Specify Filter (Server Edition Only)".
- See page 252 "Section Splitter Filter (Server Edition Only)".
- See page 254 "XML Transformer Filter".
- See page 257 "Flow Redirect Filter".
- See page 260 "Metadata Converter Filter".
- See page 263 "Metadata Replacement Filter".
- See page 268 "PDF Stamper Filter (Server Edition Only)".

# **Accessing Property Settings Screens**

There are 3 levels at which you can configure the properties for Filters: the System Level, Profile Level, and Project Level. This section explains how to access the properties for each level. This section also explains how to access the Filter Service Properties screens for Filters.

#### **Entering/Editing Filter Properties for the System**

- 1. Click [Home], and then click the [System] shortcut.
- 2. Click [Services/Filters].

Fig.: System Settings Screen



- 3. Click [Default Filter Settings].
- 4. Click [Set] next to the Filter you want configure.



- 5. Edit the properties as desired.
- 6. Click [OK] to save the settings.
- 7. Click [Back] to save the settings and return to the System Settings screen.

## Entering/Editing Filter Properties for a Profile

- 1. Click [Home], and then click the [Profile] shortcut.
- 2. Double-click the desired Profile.
- 3. Click [Properties] in the upper-right corner of the screen.

### Fig.: Properties Button



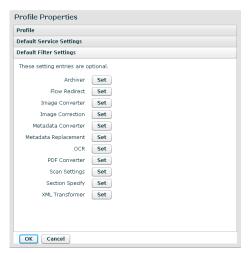
4. Click the [Default Filter Settings] accordion button.

Fig.: Default Filter Service Settings



5. Click [Set] next to the Filter you want to configure.

Fig.: [Set] Buttons



- 6. Edit the properties as desired.
- 7. Click [OK] to save the settings, and click [OK] return to the Group selection screen.

#### **Entering/Editing Filter Properties for a Project**

- From the Profile screen, double-click the desired Profile, select the desired Group within the Profile, and double-click the desired Project. The Flow Editor screen displays.
- 2. Double-click the lower half of the Filter. The properties screen will display.
- 3. Edit the properties as desired.
- 4. Click [OK] to save the settings and return to the Flow Editor screen.

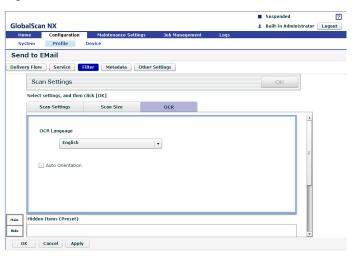


 See page 135 "Adding a Service/Filter to the Flow" and page 137 "Changing Display Position of a Service/Filter".

#### **Entering/Editing Filter Services**

In a Project, click [Filter]. The Filter Service screen will display.
 The Filters tabs are automatically added when a Filter is added to the Flow.

## Fig.: Filters Screen



- 2. Click the tab for the Filter you want to edit.
- 3. Configure and move the Distribution Parameters as desired.
- 4. Click [OK] to save the settings and return to the Group selection screen.
- Reference
  - For details about the Distribution Parameters, see page 279 "About Distribution Parameters".

#### 4

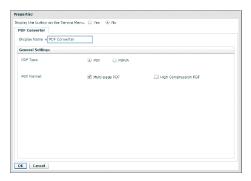
# **Filter Properties**

This section explains the details about the various Filters and properties of each Filter. Properties must be set for the Filter before it is operational within the Flow.

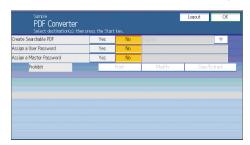
Displaying Filter Buttons on the MFP Service Menu Screen (Standard Operation Panel Only)

The following is the Filter Properties Screen.

Fig.: Filter Properties Screen



When [Yes] is selected for [Display the button on the Service Menu.], the filter's button is displayed on the MFP Service Menu screen, allowing the users to directly move to the filter's setting screen.



When [No] is selected for [Display the button on the Service Menu.], the users press the Scan Settings button appeared at the bottom of the Service Menu screen to move to the filter list screen and select the filter to change the settings.



**U** Note

The two methods (conventional and new) cannot be specified at a time.

Δ

• No filter button will be displayed for One-touch Scan Project regardless of the setting.



• For an overview of each Filter Type, see page 206 "Filter Summary".

# **PDF Converter Filter**

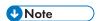
The PDF Converter Filter can be used to convert the scanned image into a PDF file.

### Supported Formats (Input Data)

The following file formats are supported as input data by the PDF Converter Filter.

File Format	Serverless Edition	Server Edition
TIFF	Supported * 1	Supported
TIFF-F		Supported
DCX		Supported
ВМР		Supported
JPEG	Supported	Supported
PNG		Supported
GIF		Supported

<sup>\* 1</sup> The Serverless Edition supports only the TIFF (MMR, single-page) format.



• If a document in an unsupported format is passed to this Filter, the conversion process will fail and an error will be generated.

### Convertible Formats (Output Data)

The following file formats are supported as output data by the PDF Converter Filter.

File Format	PDF version	Serverless Edition	Server Edition
Image PDF	1.3		Supported
	1.4	Supported	
High Compression PDF	1.3		Supported
Searchable PDF	1.3		Supported
Password-protected PDF	1.4	Supported	Supported



• When you select several output formats listed above together into one PDF file, the PDF file version conforms to the higher version. For example, the PDF version of a searchable PDF that is password protected will be 1.4.

### PDF Converter Filter Properties Screen (Serverless Edition)

The following is the PDF Converter Filter Properties screen (Serverless Edition).

Fig. PDF Converter Filter Properties Screen (Serverless Edition)

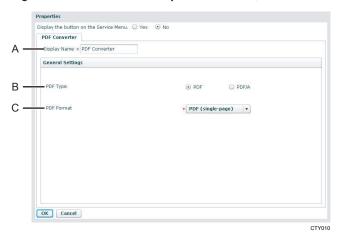


Table: PDF Converter Filter Properties (Serverless Edition)

	ltem	Description
Α	[Display Name]	Enter the display name for the Filter.
	(Project Settings only)	() Limitation
		The maximum length is 30 characters.
В	[PDF Type]	Select the PDF type.
		• PDF
		• PDF/A
		() Limitation
		If PDF/A is selected as the PDF type, MFP users can create only image PDFs. MFP users cannot create searchable PDFs or assign passwords to PDFs.
		<b>♣</b> Note
		If PDF/A is selected as the output format, all settings on the [PDF Converter] tab will be unavailable on the MFP display panel.

	ltem	Description
С	[PDF Format]	Select [PDF Format] to create a multi-page PDF.
		If selected, the scanned document will be converted into a multi-page PDF file.
		If not selected, the scanned document will be converted into single-page PDF files.
		() Limitation
		With Serverless Edition, when creating a multi-page PDF file from a document of more than 100 pages, file separation is automatically performed every 100 pages, and thus more than one multi-page PDF file will be produced.

### PDF Converter Filter Properties Screen (Server Edition)

The following is the PDF Converter Filter Properties screen (Server Edition)

### PDF Converter Filter Properties Screen (Server Edition)

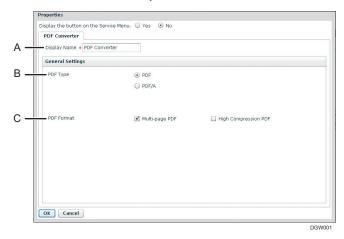
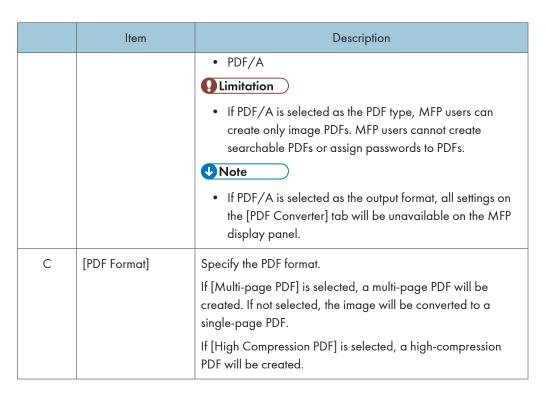


Table: PDF Converter Filter Properties (Server Edition)

	ltem	Description
А	[Display Name] (Project Settings	Enter the display name for the Filter.  ! Limitation
	only)	The maximum length is 30 characters.
В	[PDF Type]	Select the PDF type.
		• PDF



### MFP Configuration Screen - PDF Converter Filter

On this screen, you can configure the appearance of the MFP display panel and preset PDF settings for the PDF Converter Filter. You can also limit which items are available to MFP users.



 For details about configuring and limiting the settings on the MFP display panel, see page 279 "About Distribution Parameters".

Fig.: MFP Configuration Screen - PDF Converter Filter

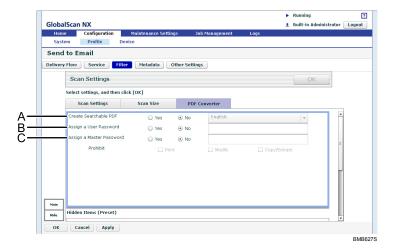


Table: MFP Configuration Screen - PDF Converter Filter

	ltem	Description
А	[Create Searchable	Allows the user to create a Searchable PDF.
	PDF]	If [Yes] is selected, the text data will be extracted from the document, and the document will be converted to a Searchable PDF file (with text data). In addition, it is necessary to select the language for the text extraction from the drop-down list:
		[English], [German], [French], [Italian], [Spanish], [Dutch], [Danish], [Portuguese], [Norwegian], [Russian], [Simplified Chinese], [Traditional Chinese], [Japanese], [Korean (Hangul)]
		If [No] is selected, the scanned document will be converted to an Image PDF file (with no text data).
		<b>↓</b> Note
		This field appears on the Server Edition only.
В	[Assign a User Password]	Allows the user to create a PDF that requires a password to open.
		If the user selects [Yes], he/she must enter a password in the adjacent field.
		() Limitation
		The maximum length is 32 characters.
С	[Assign a Master Password]	Allows the user to restrict others from printing, modifying, or copying text and graphics from the PDF file by assigning a password.
		If the user selects [Yes], he/she must enter a password in the adjacent field. And then, select the items next to [Prohibit] to require the PDF reader to enter the master password to use those functions.
		• [Print]
		• [Modify]
		• [Copy/Extract]
		<b>Q</b> Limitation
		The maximum length of the password is 32 characters.

If you assign both a user password and a master password, the passwords must be different.
 If the passwords are the same, an error will occur.

The following attributes can be set for PDF passwords:

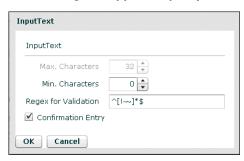
ltem	Description
[Max. Characters]	Maximum length of a password. Fixed to 32 characters.
[Min. Characters]	Minimum length of a password. Select from 0 to 32 characters.
[Regex for Validation]	Regular expression to be used to check the password entered.  • Note  • ^[!-~]*\$ is set by default, indicating alphanumeric characters and symbols can be used for a password.
[Confirmation Entry]	Specify whether or not to enable confirmation entry of password to prevent incorrect input.  When selected, the user must enter their password twice when scanning a document.

Follow the instructions below:

- 1. Open the MFP Configuration screen for PDF Converter filter from AdminTool.
- Double click the textbox of the password that you want to set the attributes, [Assign a User Password] or [Assign a Master Password].



3. In the dialog that appears, specify each item appropriately and click the [OK] button.



#### **PDF Converter Filter Process Conditions**

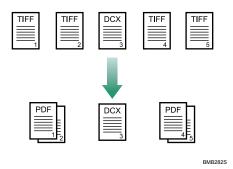
• When input data consists of unprocessable data only:

The data is not converted and is passed to the next step in the flow. An error is not generated.

• When input data contains some files with unprocessable data:

The unprocessable data is not converted into the PDF file and remains in the output document as it is. For example, when you want to convert the 4 single-page TIFF files and 1 DCX file into 1 multi-page PDF file, the result will be as follows.

Fig.: PDF Converter Filter Example



• When an internal error occurs:

The conversion process fails and the remaining part of the Flow cannot be executed.

If a document in an unsupported format is passed to this Filter:

The conversion process will fail and an error will be generated.



The original scanned data will be deleted when the conversion is completed successfully.

# Enhanced PDF Converter Filter (Server Edition Only)

The PDF Converter Filter can be used to convert the scanned image into a PDF file.

### Supported Formats (Input Data)

The following file formats are supported as input data by the Enhanced PDF Converter Filter.

File Format
TIFF
TIFF-F
DCX
ВМР
JPEG
PNG
GIF
PDF



- If a document in an unsupported format is passed to this Filter, the conversion process will fail and an error will be generated.
- PDF can be input only via HotFolder Plug-in.
- BMP (OS/2) V1 and BMP (OS/2) V2 are not supported.
- TIFF-F (32-bit) is not supported.
- Although all documents scanned with MFP are supported, the conversion process will fail if the documents are input via HotFolder Plug-in.

### Convertible Formats (Output Data)

The following file formats are supported as output data by the Enhanced PDF Converter Filter.

File Format	PDF version
Image PDF	1.3
	1.4

File Format	PDF version
High Compression PDF	1.3
Searchable PDF	1.3
Password-protected PDF	1.4



• When you select several output formats listed above together into one PDF file, the PDF file version conforms to the higher version. For example, the PDF version of a searchable PDF that is password protected will be 1.4.

### PDF Converter (Enhanced) Properties Screen

The following is the PDF Converter (Enhanced) Properties screen.

### PDF Converter (Enhanced) Properties Screen

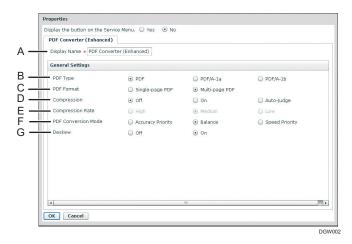


Table: PDF Converter (Enhanced) Properties

	piot 1 pr convenier ( Limitance a) 1 reported	
	ltem	Description
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[PDF Type]	Select the PDF type.  • PDF  • PDF/A-1a  • PDF/A-1b

	ltem	Description
		<ul> <li>Limitation</li> <li>If PDF/A-1a or PDF/A-1b is selected as the PDF type, MFP users can create only image PDFs. MFP users cannot assign passwords to PDFs.</li> <li>Note</li> <li>If PDF/A-1a or PDF/A-1b is selected as the output format, all settings on the [PDF Converter (Enhanced)]</li> </ul>
С	[PDF Format]	tab will be unavailable on the MFP display panel.  Specify the PDF format.  If [Single-page PDF] is selected, a single-page PDF will be created.  If [Multi-page PDF] is selected, a multi-page PDF will be created.
D	[Compression]	Specify the compression setting.  If [Off] is selected, a PDF will be created without a compression.  If [On] is selected, a compression PDF will be created according to the setting specified for [Compression Rate].  If [Auto-judge] is selected, whether or not to compress a PDF will be determined by the original content.
E	[Compression Rate]	Specify the ratio of the compression.  • [High]  • [Medium]  • [Low]  • Limitation  • This setting is available if [On] or [Auto] is selected for [Compression].
F	[PDF Conversion Mode]	Specify the PDF conversion mode.  • [Accuracy Priority]  • [Balance]  • [Speed Priority]

	ltem	Description
		<b>♣</b> Note
		<ul> <li>The effect may not work depending on an original content although the setting is specified.</li> </ul>
G	[Deskew]	Specify the skew correction setting.
		If [On] is selected, a PDF will be created with the skew correction applied.
		The size of the output image will be larger than the original document size.
		If the image is rotated by applying the skew correction process, the resulting margins will be filled in with black.
		If [Off] is selected, a PDF will be created without any skew correction applied.

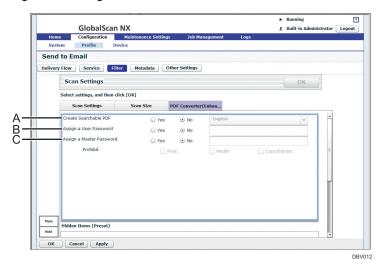
### MFP Configuration Screen - Enhanced PDF Converter Filter

On this screen, you can configure the appearance of the MFP display panel and preset PDF settings for the Enhanced PDF Converter Filter. You can also limit which items are available to MFP users.



• For details about configuring and limiting the settings on the MFP display panel, see page 279 "About Distribution Parameters".

Fig.: MFP Configuration Screen - Enhanced PDF Converter Filter



	ltem	Description
A	[Create Searchable PDF]	Allows the user to create a Searchable PDF.  If [Yes] is selected, the text data will be extracted from the document, and the document will be converted to a Searchable PDF file (with text data). In addition, it is necessary to select the language for the text extraction from the drop-down list:
		[English], [German], [French], [Italian], [Spanish], [Dutch], [Danish], [Portuguese], [Norwegian], [Russian], [Simplified Chinese], [Traditional Chinese], [Japanese], [Swedish] *1 [Polish] *1, [Hungarian] *1, [Czech] *1, [Finnish] *1, [Thai] *1, [Greek] *1, [Korean (Hangul)] *1, [Catalan] *1, [Turkish] *1, [Arabic] *2 (Optional), [Hebrew] *2
		(Optional), [Vietnamese] *2 (Optional)  *1 To display the language, double-click the drop-down list, and then specify the language which you want to display.  *2 This feature requires activation for the GlobalScan NX
		Additional OCR Language Option.  If [No] is selected, the scanned document will be converted to an Image PDF file (with no text data).
В	[Assign a User Password]	Allows the user to create a PDF that requires a password to open.  If the user selects [Yes], he/she must enter a password in the adjacent field.  Limitation
С	[Assign a Master Password]	<ul> <li>The maximum length is 32 characters.</li> <li>Allows the user to restrict others from printing, modifying, or copying text and graphics from the PDF file by assigning a password.</li> <li>If the user selects [Yes], he/she must enter a password in the adjacent field. And then, select the items next to [Prohibit] to require the PDF reader to enter the master password to use those functions.</li> <li>[Print]</li> <li>[Modify]</li> <li>[Copy/Extract]</li> </ul>

ltem	Description
	() Limitation
	The maximum length of the password is 32 characters.



• If you assign both a user password and a master password, the passwords must be different. If the passwords are the same, an error will occur.

The following attributes can be set for PDF passwords:

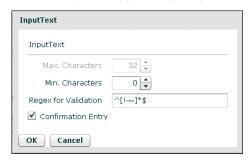
ltem	Description
[Max. Characters]	Maximum length of a password. Fixed to 32 characters.
[Min. Characters]	Minimum length of a password. Select from 0 to 32 characters.
[Regex for Validation]	Regular expression to be used to check the password entered.  Note
	<ul> <li>^[!-~]*\$ is set by default, indicating alphanumeric characters and symbols can be used for a password.</li> </ul>
[Confirmation Entry]	Specify whether or not to enable confirmation entry of password to prevent incorrect input.  When selected, the user must enter their password twice when scanning a document.

Follow the instructions below:

1. Open the MFP Configuration screen for Enhanced PDF Converter filter from AdminTool.



3. In the dialog that appears, specify each item appropriately and click the [OK] button.



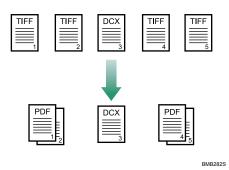
#### **Enhanced PDF Converter Filter Process Conditions**

When input data consists of unprocessable data only:
 The data is not converted and is passed to the next step in the flow. An error is not generated.

• When input data contains some files with unprocessable data:

The unprocessable data is not converted into the PDF file and remains in the output document as it is. For example, when you want to convert the 4 single-page TIFF files and 1 DCX file into 1 multi-page PDF file, the result will be as follows.

Fig.: Enhanced PDF Converter Filter Example



When an internal error occurs:

The conversion process fails and the remaining part of the Flow cannot be executed.

4

If a document in an unsupported format is passed to this Filter:

The conversion process will fail and an error will be generated.

# Limitation

- It is not possible to deliver a PDF file created by PDF Converter (Enhanced) if GSNX performs Send to Email with Logical Division.
- Placing PDF Converter (Enhanced) and PDF Converter into the same delivery flow is not supported.
- Placing PDF Converter (Enhanced) and Image Correction into the same delivery flow is not supported.



• The original scanned data will be deleted when the conversion is completed successfully.

# **Image Converter Filter**

The Image Converter Filter can be used to convert a document into a different file format data.

# Supported Formats (Input Data)

The following file formats are supported as input data by the Image Converter Filter.

File Format	Serverless Edition	Server Edition
TIFF (MH, single-page)		Supported
TIFF (MR, single-page)		Supported
TIFF (MMR, single-page)	Supported	Supported
TIFF (Uncompressed, single-page)		Supported
TIFF (MH, multi-page)		Supported
TIFF (MR, multi-page)		Supported
TIFF (MMR, multi-page)		Supported
TIFF (Uncompressed, multi-page)		Supported
TIFF-F (MH, single-page)		Supported
TIFF-F (MR, single-page)		Supported
TIFF-F (MMR, single-page)		Supported
TIFF-F (MH, multi-page)		Supported
TIFF-F (MR, multi-page)		Supported
TIFF-F (MMR, multi-page)		Supported
DCX (single-page)		Supported
DCX (multi-page)		Supported
BMP (Uncompressed)		Supported
JPEG		Supported
PNG		Supported
GIF		Supported

# Convertible Formats (Output Data)

The following file formats are supported as output data by the Image Converter Filter.

File Format	Serverless Edition	Server Edition
TIFF (MH, single-page)		Supported
TIFF (MR, single-page)		Supported
TIFF (MMR, single-page)		Supported
TIFF (Uncompressed, single-page)		Supported
TIFF (MH, multi-page)		Supported
TIFF (MR, multi-page)		Supported
TIFF (MMR, multi-page)	Supported	Supported
TIFF (Uncompressed, multi-page)		Supported
TIFF-F (MH, single-page)		Supported
TIFF-F (MR, single-page)		Supported
TIFF-F (MMR, single-page)		Supported
TIFF-F (MH, multi-page)		Supported
TIFF-F (MR, multi-page)		Supported
TIFF-F (MMR, multi-page)		Supported
DCX (single-page)		Supported
DCX (multi-page)		Supported
BMP (Uncompressed)		Supported
JPEG		Supported
PNG		Supported
GIF		Supported
File Format selected on the MFP display panel by the user	Supported	Supported

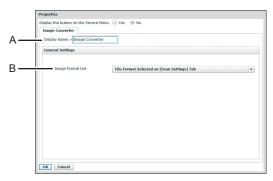
# **■** Reference

- For details about limitations for Input data/Output data (Server Edition only), see page 500
   "Input/Output Formats for the Image Converter Filter (Server Edition)" in the Appendix.
- For details on letting the user select the output format, see page 525 "Using the Image Converter Filter" in the Appendix.

### **Image Converter Filter Properties Screen**

The following is the Image Converter Filter Properties screen.

### **Image Converter Filter Properties Screen**



DMZ102

### **Table: Image Converter Filter Properties**

	ltem	Description	
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.	
В	[Image Format List]	Select the output format from the drop-down list.  Serverless Edition:  • [File Format Selected on [Scan Settings] Tab]  • [TIFF (MMR, multi-page)]  Server Edition:  • [File Format Selected on [Scan Settings] Tab]  • [TIFF (MH, single-page)]  • [TIFF (MR, single-page)]	
		<ul><li>[TIFF (Uncompressed, single-page)]</li><li>[TIFF (MH, multi-page)]</li></ul>	

l	Description
Item	Description
	• [TIFF (MR, multi-page)]
	• [TIFF (MMR, multi-page)]
	• [TIFF (Uncompressed, multi-page)]
	• [TIFF-F (MH, single-page)]
	• [TIFF-F (MR, single-page)]
	• [TIFF-F (MMR, single-page)]
	• [TIFF-F (MH, multi-page)]
	• [TIFF-F (MR, multi-page)]
	• [TIFF-F (MMR, multi-page)]
	• [DCX (single-page)]
	• [DCX (multi-page)]
	• [BMP (Uncompressed)]
	• [JPEG]
	• [PNG]
	• [GIF]
	<b>!</b> Limitation
	With Serverless Edition, when creating a multi-page PDF/TIFF file from a document of more than 100 pages, file separation is automatically performed every 100 pages, and thus more than one multi-page PDF/TIFF file will be produced.

# 

When you preset the output format, the format selection that the MFP user makes on the MFP
display panel is ignored. Therefore, it is recommended to hide the [File Format] component on
the [Scan Settings] tab by moving it to the [Hidden Items (Preset)] screen to not confuse the
user.

# Reference

• See page 525 "Using the Image Converter Filter" in the Appendix.

### MFP Configuration Screen - Image Converter Filter

There are no MFP configuration settings for this Filter.

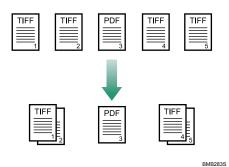
### **Image Converter Filter Process Conditions**

• When input data consists of unprocessable data only:

The data is not converted and is passed to the next step in the flow. An error is not generated.

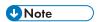
When input data contains some files with unprocessable data:

The unprocessable data cannot be converted into the specified format file and remains in the output document as it is. For example, when you want to convert the 4 single-page TIFF files and 1 PDF file into 1 multi-page TIFF file, the result will be as follows.



When an internal error occurs:

The conversion process fails and the remaining part of the Flow cannot be executed.



• The original data will be deleted when the conversion is completed successfully.

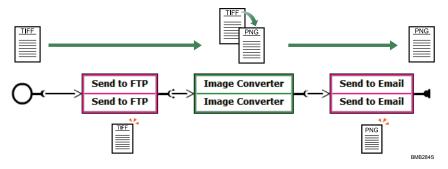
### About Document Formats and the Image Converter Filter

When the MFP scans a document, the initial format for the document is either TIFF or JPEG, depending on the scan settings of the MFP, as follows:

- Black & White: TIFF (MMR, single-page)
- Grayscale/Color: JPEG

The image is processed in these formats by all Services/Filters preceding an Image Converter Filter. If the Image Converter Filter is not in the Flow, the output will be in the default format (TIFF/ JPEG), regardless of the format that the MFP user selects. Figs. x-x shows the formats that are output with different Flows.

Fig.: Black & White, user selects PNG with Image Converter Filter



4

Fig.: Black & White, user selects PNG without Image Converter Filter

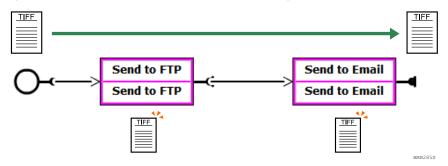


Fig.: Grayscale/Color, user selects GIF with Image Converter Filter

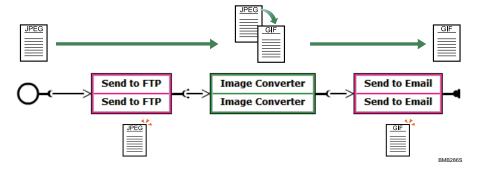
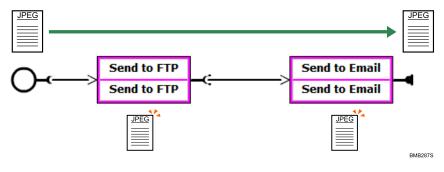


Fig.: Grayscale/Color, user selects GIF without Image Converter Filter



**Important** 

 When not using the Image Converter Filter, the format selection that the MFP user makes on the MFP display panel is ignored. Therefore, it is recommended to hide the [File Format] component on the [Scan Settings] tab by moving it to [Hidden Items (Preset)] to not confuse the user.

# **Image Correction Filter (Server Edition Only)**

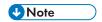
Using the Image Correction Filter, you can improve scanned images.

### Supported Formats (Input Data)

The following file formats are supported as input data by the Image Correction Filter.

File Format
TIFF (MH, single-page)
TIFF (MR, single-page)
TIFF (MMR, single-page)
TIFF (Uncompressed, single-page)
TIFF (MH, multi-page)
TIFF (MR, multi-page)
TIFF (MMR, multi-page)
TIFF (Uncompressed, multi-page)
TIFF-F (MH, single-page)
TIFF-F (MR, single-page)
TIFF-F (MMR, single-page)
TIFF-F (MH, multi-page)
TIFF-F (MR, multi-page)
TIFF-F (MMR, multi-page)
DCX (single-page)
DCX (multi-page)
BMP (Uncompressed)
JPEG
PNG
GIF





• If an unsupported file format is entered, the data is directly output without being processed by the Image Correction Filter.

### Convertible Formats (Output Data)

The following file formats are supported as output data by the Image Correction Filter.

File Format
TIFF (MH, single-page)
TIFF (MR, single-page)
TIFF (MMR, single-page)
TIFF (Uncompressed, single-page)
TIFF (MH, multi-page)
TIFF (MR, multi-page)
TIFF (MMR, multi-page)
TIFF (Uncompressed, multi-page)
DCX (single-page)
DCX (multi-page)
BMP (Uncompressed)
JPEG
PNG
GIF

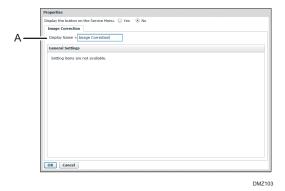


• TIFF-F format files are not supported for output data. If a TIFF-F format file is input, the output will be a TIFF format file.

# **Image Correction Filter Properties Screen**

The following is the Image Correction Filter Properties screen.

### Fig.: Image Correction Filter Properties Screen



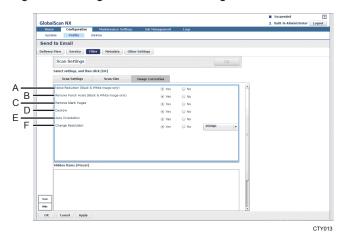
**Table: Image Correction Filter Properties** 

	ltem	Description
Α	[Display Name]	Enter the display name for the Filter.
	(Project Settings	Limitation
	only)	The maximum length is 30 characters.

### MFP Configuration Screen - Image Correction Filter

On this screen, you can configure the appearance of the MFP display panel and preset options. You can also limit which items are available to MFP users.

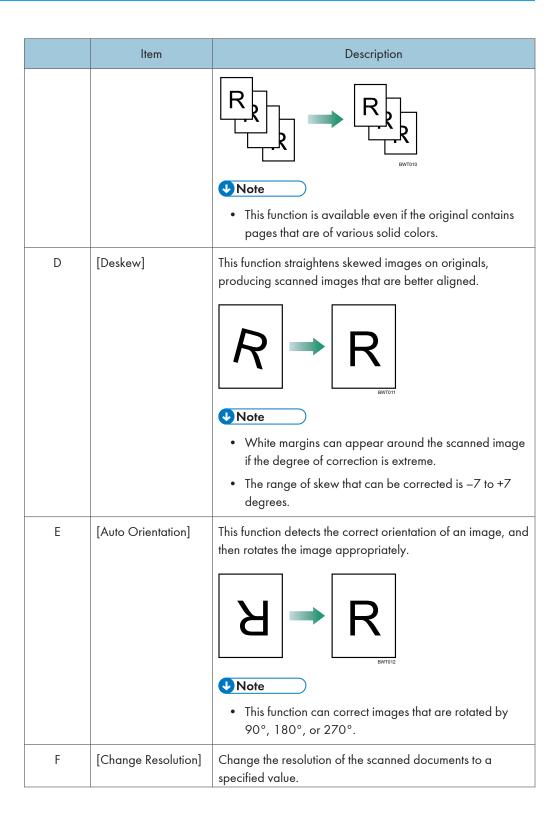
Fig.: MFP Configuration Screen - Image Correction Filter



4

Table: MFP Configuration Screen - Image Correction Filter

	ltem	Description
A	[Noise Reduction (Black & White image only)]	This function removes speckles and blemishes (noise) on the original document from the scanned image.  R  Note  If the file format ([Scan Type] when the Smart Operation Panel is used) in "Scan Settings" is a grayscale or color format, this function will not be applied, even if it is set to [Yes].
В	[Remove Punch Holes (Black & White image only)]	This function removes shadows from punch holes in the original document from the scanned image.  This function becomes available when the original being scanned has punch holes.  R  Note  If the file format ([Scan Type] when the Smart Operation Panel is used) in "Scan Settings" is a grayscale or color format, this function will not be applied, even if it is set to [Yes].  This function cannot prevent shadow from contoured or partial punch holes appearing on the scanned image.
С	[Remove Blank Pages]	This function prevents unwanted blank pages contained in multiple-page originals from being scanned. This function is helpful when scanning a multiple-page original containing a mixture of one- and two-sided pages.



ltem	Description
	Note
	The values you can specify are: 100 dpi, 200 dpi, 300 dpi, 400 dpi, and 600 dpi.
	<ul> <li>The resolution will not be changed if the resolution of the scanned document is less than the specified value.</li> </ul>



• The following table shows the relationship between the number of punch holes whose shadows can be removed, punch hole size, and paper size.

Punch holes	Pitch	Paper size
2	80 mm	A3, A4, A5, B4, B5, B6
3	108 mm	$8^{1}/_{2} \times 11$ inch, A4
	89 mm	7 x 9 inch
	70 mm	$6^{1}/_{2} \times 8^{1}/_{2}$ inch
4	57 mm	B5
	80 mm	A4
	20 mm, 70 mm	A4

# **Archiver Filter (Server Edition Only)**

The Archiver Filter can be used to archive scanned documents in the specified format. For example, if your organization must retain all email correspondence, each scanned document can be converted into a .zip or .tgz file.



• A document is archived into an archive file regardless of the number of Sections it has.

### Supported Formats (Input Data)

The Archiver Filter supports all formats that are supported by the GlobalScan NX.

### Convertible Formats (Output Data)

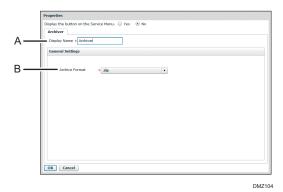
The following archive formats are supported as output data by the Archiver Filter.

- zip
- tgz (Tar compressed with gzip)

### **Archiver Filter Properties Screen**

The following is the Archiver Filter Properties screen.

### **Archiver Filter Properties Screen**



**Table: Archiver Filter Properties** 

	ltem	Description
Α	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[Archive Format]	Select the archive format from the drop-down list:  • zip  • tgz

#### 4

### MFP Configuration Screen - Archiver Filter

There are no MFP configuration settings for this Filter.

### **Archiver Filter Process Condition**

• When an internal error occurs:

The conversion process fails and the remaining part of the Flow cannot be executed.



• The original data will be deleted when the conversion is completed successfully.

# **OCR Filter (Server Edition Only)**

The OCR Filter converts scanned data into text data using OCR software. This Filter also supports auto orientation, and can create a file name for the document based on text extracted from the first page of the scanned data.

### Supported Formats (Input Data)

The following file formats are supported as input data by the OCR Filter.

- TIFF
- TIFF-F
- DCX
- BMP
- JPEG
- PNG
- GIF

### Convertible Formats (Output Data)

If you are converting the file into text, the following file formats are supported as output by the OCR Filter.

- RTF
- XIS
- XLSX
- DOCX

If you are only using the auto-orientation feature, the output format is the same as the input format.

# Limitation

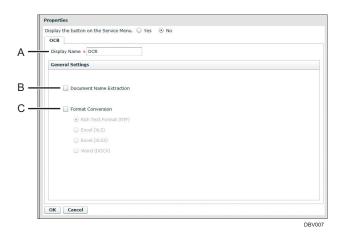
- When you use the format conversion function, if the input format of the file is not one of the supported input formats, the output format will be the same as the input format.
- When [Auto Orientation] is enabled and input data is TIFF-F format, the output data will be
  converted to TIFF format. However, the compression method (for example, MMR, MH, etc.)
  will be the same as the original input data.

### **OCR Filter Properties Screen**

The following is the OCR Filter Properties screen.

#### 4

# **OCR Filter Properties Screen**



**Table: OCR Filter Properties** 

	ltem	Description
Α	[Display Name]	Enter the display name for the Filter.
	(Project Settings	! Limitation
	only)	The maximum length is 30 characters.
В	[Document Name Extraction]	Select this option to use key words on the first page of the scanned document to create the file name.  ! Limitation
		The maximum length of the file name is 128 characters.
С	[Format Conversion]	Select this option to convert the file to the specified format. The output file contains the text extracted from the document.
		• [Rich Text Format (RTF)]
		Converts the file to Rich Text Format.
		• [Excel (XLS)]
		Converts the file to an Excel spreadsheet.
		• [Excel (XLSX)]
		Converts the file to an Excel 2007 XML-based file format (.xlsx).
		• [Word (DOCX)]
		Converts the file to a Word 2007 XML-based document format (.docx).

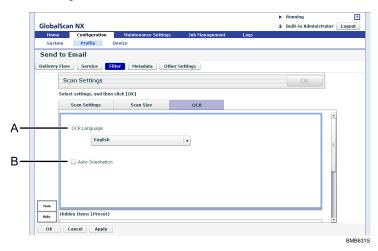
### MFP Configuration Screen - OCR Filter

On this screen, you can configure the appearance MFP display panel and preset the language and orientation detection for the OCR Filter. You can also limit which items are available to MFP users.



 For details about configuring and limiting the settings on the MFP display panel, see page 279 "About Distribution Parameters".

### MFP Configuration Screen - OCR Filter



### Table: MFP Configuration Screen - OCR Filter

	ltem	Description
Α	[OCR Language]	Select the language for OCR from the drop-down list:
		[English], [German], [French], [Italian], [Spanish], [Dutch], [Danish], [Portuguese], [Norwegian], [Russian], [Simplified Chinese], [Traditional Chinese], [Japanese], [Korean (Hangul)]
В	[Auto Orientation]	Select this option to enable the automatic orientation adjustment of the scanned data.

ltem	Description
	If selected, the OCR Filter determines the orientation of the scanned data based on the results of the OCR operation, and rotates it automatically.

#### **OCR Filter Process Conditions**

• When input data contains unprocessable data:

The OCR process is skipped and the remaining part of the Flow will be executed.

• When the input data contains some files with unprocessable data:

The files with unprocessable data are skipped.

• When an internal error occurs:

The OCR process fails and the remaining part of the Flow cannot be executed. The error will be logged in the Job Log.

# Section Specify Filter (Server Edition Only)

The Section Specify Filter can be used to extract any Sections from a Document. For example, it can be used when every received fax has a cover sheet on the first page, and you would like to send the document excluding the cover sheet. In addition, it is useful when you scanned a brochure and you would like to send the body page excluding its cover.

# Reference

• For details about Sections, see page 25 "MFP Configuration Terms".

### Supported Formats (Input Data)

The Section Specify Filter supports all formats that are supported by the GlobalScan NX.

### Convertible Formats (Output Data)

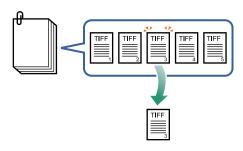
Output data format will be the same as the input data.

### **Target of Section Specify Filter**

The target of the Section Specify Filter is Sections, but not pages.

Example 1 (Multiple single-page Sections)

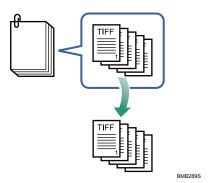
When a Document (Input Data) consists of 5 single-page TIFF files (5 Sections), and the specified target is the third Section of the Document, the third Section file will be extracted. The rest of the Sections will be deleted.



BMB288S

### Example 2 (One multi-page Section)

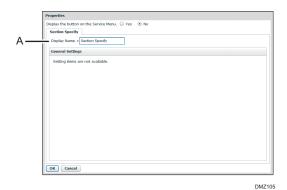
When a Document (Input Data) consists of 1 multi-page TIFF file (1 Section), and the specified target is the first Section of the Document, the first Section (not the first page) will be extracted.



### **Section Specify Filter Properties Screen**

The following is the Section Specify Filter Properties screen.

### **Section Specify Filter Properties screen**



**Table: Section Specify Filter Properties** 

Item	Description
(Project Settings	isplay name for the Filter.  ion  aximum length is 30 characters.

### MFP Configuration Screen - Section Specify Filter

On this screen, you can configure the appearance of the MFP display panel and preset the Sections to extract for the Section Specify Filter. You can also limit which items are available to MFP users.

Fig.: MFP Configuration Screen - Section Specify Filter

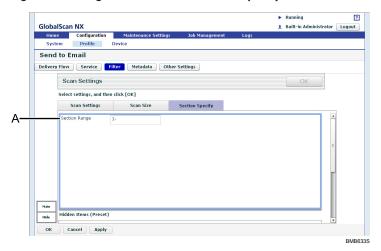


Table: MFP Configuration Screen - Section Specify Filter

	•	1 /
	Item	Description
Α	[Section Range]	Specify the target Sections to be extracted from the Document.  The default is "1-", i.e., all Sections.

### **Section Range Specification Examples**

It is necessary to input numbers in the adjacent field in order to specify the extracted Section.

The following examples are for a Document consisting of 5 Sections.

Entry Example	Result
No Entry	All Sections are extracted.
3	The third Section is extracted.
-3	The first through third Sections are extracted.
3-	The third through to fifth Sections are extracted.
1-4	The first through fourth Sections are extracted.
1,2	The first and second Sections are extracted.
1-2, 5	The first, second and fifth Sections are extracted.
(1,2)	Every second Section starting from the first Section is extracted (first, third and fifth Sections).

Entry Example	Result	
(2,3)	Every third Section starting from the second Section is extracted (second and fifth Sections).	
(2,2), 4	Every second Section starting from the second Section is extracted (second and fourth Sections).  • Note  • This entry specifies the fourth Section twice, but it is only extracted once.	
8-10	An error occurs, and the Flow fails.	
1-5, 10-	Sections 1-5 are extracted. "10-" is ignored, because these Sections do not exist.	
3-8	Sections 3-5 are extracted. Sections 6-8 are ignored because these Sections do not exist.	
5-1	Sections 1-5 are extracted.	
0-5	Sections 1-5 are extracted.	
(0,2)	Every second Section starting from zero is extracted (second and fourth Sections).	



• The rest of the Sections in the Document will be deleted when the conversion is completed successfully.

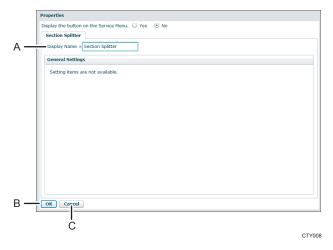
# Section Splitter Filter (Server Edition Only)

The Section Splitter Filter can be used to split a job including multiple sections into jobs including sections specified for "Number of Sections" on the MFP's control panel.

# **Section Splitter Filter Properties Screen**

The following is the Section Splitter Filter Properties Screen.

# Section Splitter Filter Properties Screen



# **Table: Section Splitter Filter Properties**

	ltem	Description
А	[Display Name]	Enter the display name.
В	[OK]	Save the settings and exit.
С	[Cancel]	Exit without saving the settings.

Λ

4

Fig.: MFP Configuration Screen - Section Splitter Filter

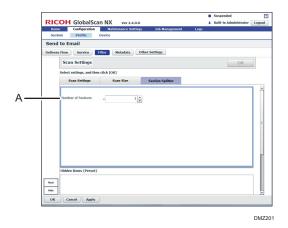


Table: MFP Configuration Screen - Section Splitter Filter

	ltem	Description
A	[Number of Sections]	Specify the number of sections for split between 1 and 500.

# **XML Transformer Filter**

The XML Transformer Filter can be used to extract the document Metadata information as XML data. An XSL file (a style sheet for XML) can be specified to convert the original Metadata of scanned documents to other formats such as HTML, CSV.

#### Supported Formats (Input Data)

• The XML Transformer Filter supports all formats that are supported by the GlobalScan NX.

#### Convertible Formats (Output Data)

- The output data format will be the same as the input data. In addition, the Metadata can be output to the following formats:
  - XML
  - The format targeted by the XSL file

# 

- To use the XML Transformer Filter, you must create an XSL file (style sheet for converting the XML file) in advance depending on the usage.
- You can use sample XSL files in the following folder of the GlobalScan NX Installation media.
   ("X" is the drive letter of the installation media.)
  - X: \samples\StyleSheets\
- This Filter converts the Metadata of the document only, not the original document.

# **♠** Limitation

- XSL style sheet files for the XML Transformer Filter must be saved using the UTF-8 character encoding method.
- The XSL file must be compliant with the following. Otherwise, the Flow will fail:
  - XSL Transformations (XSLT) Version 1.0
  - XML Path Language (XPath) Version 1.0

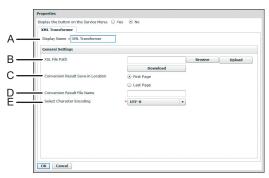
# Reference

 For details about the format of the Metadata (XML format), see page 502 "Metadata Specifications".

# XML Transformer Filter Properties Screen

The following is the XML Transformer Filter Properties screen.

# **XML Transformer Filter Properties Screen**



DMZ106

**Table: XML Transformer Filter Properties** 

	ltem	Description
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[XSL File Path]	Click [Browse] to select the XSL file to be used for the XML Transformer Filter. To apply the settings, click [Upload]. To download the XSL file, click [Download].  If no XSL file is specified, the original Metadata (XML) will be added to the document.  Important  Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.  Limitation
		<ul> <li>You can replace an existing XSL file by uploading a new one, but you cannot delete an XSL file from the Filter. If you want to remove the XSL file (so that Metadata is output in its native XML format), you must remove the Filter from the flow and add a new one.</li> <li>Note</li> <li>On the Properties screen of the XML Transformer Filter, when you click [Upload], the XSL file path field always displays the name "dest.xsl", instead of the actual name of the specified file.</li> </ul>

	Item	Description
С	[Conversion Result Save-in Location]	Select where to add the converted document information.  If [First Page] is selected, the converted document information will be added to the first Section of the document.  If [Last Page] is selected, it will be added to the last Section of the document.
D	[Conversion Result File Name]	Enter a file name for the converted document information. Make sure to add the extension at the end of the name.  If this field is left blank, the file name that the MFP user inputs on the MFP display panel will be used. If the user does not input a file name, the timestamp (yyyymmddhhmmss) will be used.  • If you do not include an extension in the file name, no extension is added. In addition, no extension is added when the user does not input a file name.
E	[Select Character Encoding]	Select the character encoding methods from the drop-down list.  The following character encoding methods are supported:  • UTF-8  • Latin-1

# MFP Configuration Screen - XML Transformer Filter

There are no MFP configuration settings for this Filter.

#### 4

# Flow Redirect Filter

The Flow Redirect Filter can be used to transfer a job from a certain document distribution flow of a Project to another Project. For example, it is useful if you want to distribute fax documents to different destinations depending on the TSI code of each fax document.

# Supported Formats (Input Data)

The Flow Redirect Filter supports all formats that are supported by the GlobalScan NX.

# Convertible Formats (Output Data)

Output data format will be the same as the input data.



- Flow Redirection can be used up to 10 times per job.
- Attempting to redirect more times than is supported causes the job to fail.
- To use the Flow Redirect Filter, Replacement Tables must be created in advance. See page 468
  "Replacement Table Settings".

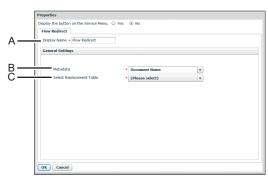
# ♠ Limitation

- The transfer destinations must be One-touch Scan Projects that are in the same Profile as the Flow Redirect Filter.
- A redirected Project cannot be redirected again to another Project.

#### Flow Redirect Filter Properties Screen

The following is the Flow Redirect Filter Properties screen.

#### Fig.: Flow Redirect Filter Properties Screen



DMZ107

#### Table: Flow Redirect Filter Properties

	ltem	Description
Α	[Display Name]	Enter the display name for the Filter.

	ltem	Description
	(Project Settings only)	<ul><li>Limitation</li><li>The maximum length is 30 characters.</li></ul>
В	[Metadata]	Select the target Metadata item from the drop-down list or enter an item name (ID) directly into the list box. This is used to compare the target Metadata item (for example, Document Name) of the document with the value of the [Comparison Target String] set in the Replacement Table.  • When you want to utilize a custom Metadata item or basic Metadata item that is not displayed in the dropdown list as the target Metadata item, you need to enter the item name (ID) of the Metadata item in the list box.
С	[Select Replacement Table]	Select the preset Replacement Table to be used for the flow redirection from the drop-down list.  This table decides which destination the document is to be transferred to.



- See page 502 "Metadata Specifications".
- See page 468 "Replacement Table Settings".

#### MFP Configuration Screen - Flow Redirect Filter

There are no MFP configuration settings for this Filter.

#### Flow Redirect Filter Process Conditions

 When the value of the target Metadata of the document does not match the settings of the selected [Comparison Target String]:

The flow redirection process fails, and the failure will be logged in the System Log.

 When the Flow contains a different distribution process in addition to the one that is followed by the Flow Redirect Filter, and the flow redirection process fails:

The different distribution process will be executed and the failure will be logged in the System Log.

• When a destination Project requires authentication login:

The login information of the original Project will be used for authentication login.

- If the original Project does not use authentication, the authentication information does not
  exist. Therefore, the flow redirection process fails and the failure will be logged in the
  System Log.
- If the authentication methods or authentication profiles used for the Projects are different,
  the Flow Redirect Filter tries authentication login. If authentication is denied, the flow
  redirection process fails and the failure will be logged in the System Log. For example,
  authentication will fail if the redirecting Project uses LDAP authentication and the
  destination Project uses Active Directory Authentication, because LDAP does not have the
  required domain information.
- If the authentication is accepted, but a destination Project contains features that are not authorized for the user, the flow redirection process fails and the failure will be logged in the System Log.
- · When a destination Project has been removed:

The flow redirection process fails and the failure will be logged in the System Log. Even if there is a new Project whose name is the same as the deleted one, the flow redirection process fails.

When the destination Project's name has been changed:

Flow redirection will complete successfully, even if the destination's name has been changed.

 When the destination Project contains the Image Converter Filter and [File Format Selected on [Scan Settings] Tab] is selected on the property screen of the Image Converter Filter:

The file format selected by the user on the MFP display panel will be the format to which the document is converted by the Filter.

# Reference

• For details about error logs, see page 367 "System Log".

# Metadata Converter Filter

The Metadata Converter Filter can be used to convert the value of a specified Metadata item of the input document, and to change the value of a Metadata item based on the value of a different Metadata item, using rules specified in a Replacement Table. For example, when the Metadata of the input document contains a department number of the Company, this Filter can convert the department number to a department name.

# Supported Formats (Input Data)

• The Metadata Converter Filter supports all formats that are supported by the GlobalScan NX.

# Convertible Formats (Output Data)

• The output data format will be the same as the input data.

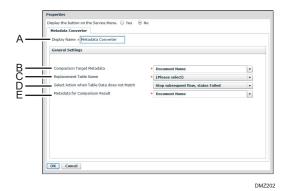


- To use the Metadata Converter Filter, Replacement Tables must be created in advance. page 468
   "Replacement Table Settings".
- This Filter only modifies document Metadata. It does not modify the contents of scanned images.

#### Metadata Converter Filter Properties Screen

The following is the Metadata Converter Filter Properties screen.

# Metadata Converter Filter Properties screen



**Table: Metadata Converter Filter Properties** 

	ltem	Description
Α	[Display Name]	Enter the display name for the Filter.
	(Project Settings	() Limitation
	only)	The maximum length is 30 characters.

	Item	Description
В	[Comparison Target Metadata]	Select the input target Metadata item from the drop-down list, or enter an item name (ID) directly into the list box. This is used to compare the target Metadata item (for example, Document Name) of the document with the value of [Comparison Target String] set in the Replacement Table
		<b>♣</b> Note
		<ul> <li>When you want to use a custom Metadata item or basic Metadata item that is not displayed in the drop-down list as the target Metadata item, you need to enter the item name (ID) of the Metadata item in the list box.</li> </ul>
		<ul> <li>An error will occur if a Metadata item with the specified item name (ID) does not exist in the document during distribution.</li> </ul>
С	[Replacement Table Name:]	Select the Replacement Table to be used for the Metadata Converter Filter from the drop-down list.
		This table determines how Metadata is changed.
D	[Select Action when Table Data does not Match]	Select the method of how to treat the Flow when the value of the target Metadata of the document does not match the settings of the selected Comparison Target String.
		• [Continue flow using default values]
		The target Metadata item will be replaced using the value of [Default Output] in the Replacement Table, and the flow will continue uninterrupted. If [Default Output] has not been set yet, the output value will be blank. The job will be logged as successful in the Job Log.
		<ul> <li>[Continue flow without performing replacement]</li> </ul>
		This option allows you to continue the Flow without replacing the value of Metadata items that do not match any entries in the Replacement Table.
		• [Skip subsequent flow, status Succeeded]
		The following remaining processes in the Flow will be skipped, and no error will be logged in the System Log. The job will be logged as successful in the Job Log.
		If there is a branch in the Flow before the Metadata Converter Filter, the data will be processed normally in the other branches.
		• [Stop subsequent flow, status Failed]

	Item	Description
		The Flow fails.
Comparison  Result]  enter an item name (ID) directly into the list box. This is u the value of the target Metadata item (for example, Doc with the value of the output Metadata (for example, Use		'
		When you want to use a custom Metadata item or basic     Metadata item that is not displayed in the drop-down list as the     target Metadata item, you need to enter the item name (ID) of the     Metadata item in the list box.
		<ul> <li>If a Metadata item with the specified item name (ID) does not exist, it will be added and its value will be set to the output value.</li> </ul>

# ■ Reference

- See page 502 "Metadata Specifications".
- See page 468 "Replacement Table Settings".

# MFP Configuration Screen - Metadata Converter Filter

There are no MFP configuration settings for this Filter.

#### **Metadata Converter Filter Process Conditions**

 When the Replacement Table is not specified or removed from the system, or the document does not have the specified Metadata items:

The conversion process fails and the failure will be logged in the System Log.

 When the value of the target Metadata of the document does not match the settings of the selected Comparison Target String:

The conversion process will be treated as the selected method in [Select Action when Table Data does not Match].

# Reference

• For details about error logs, see page 367 "System Log".

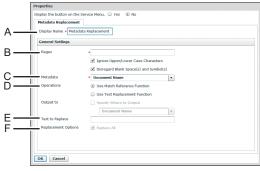
The Metadata Replacement Filter can be used to validate the value of specified Metadata of the input document and to modify certain parts of the value of a Metadata item. For example, it can be used to remove hyphens from a phone number, validate an email address, or change all uppercase letters in an item to lowercase. Unlike the Metadata Converter Filter, Replacement Tables are not necessary for this Filter.

# Metadata Replacement Filter Properties Screen

The following is the Metadata Replacement Filter Properties screen.

# Metadata Replacement Filter Properties screen

Metadata Replacement Filter



DMZ109

#### **Table: Metadata Replacement Filter Properties**

	Item	Description
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[Regex]	<ul> <li>Enter the regular expression for checking or replacing the value of the Metadata items.</li> <li>• [Ignore Upper/Lower Case Characters]  If enabled, a letter's case is ignored (for example, "a" is the same as "A").</li> <li>• [Disregard Blank Space(s) and Symbol(s)]  If enabled, spaces and unnecessary symbols in the Regex are not recognized.</li> </ul>
С	[Metadata]	Select the target Metadata item from the drop-down list or enter an item name (ID) directly into the list box. This is used to compare the

	Item	Description
		target Metadata item (for example, Document Name) of the document with the value of [Regex], and the value of the target Metadata item will be replaced.  • When you want to use a custom Metadata item or basic Metadata item that is not displayed in the drop-down list as the target Metadata item, you need to enter the item name (ID) of the Metadata item in the list box.
D	[Operations]	Select the operation for this Filter from the following:
		[Use Match Reference Function]
		The specified Metadata item's value is compared with the regular expression specified in [Regex].
		[Use Text Replacement Function]
		The specified Metadata item's value is compared with the regular expression specified in [Regex] and replaced with the value specified in [Text to Replace].
		<b>⊘</b> Important
		See "Notes on Metadata Replacement Filter Operation".
E	[Text to Replace]	Enter the text to replace the value of the target Metadata with.  Limitation
		<ul> <li>This feature is available when [Use Text Replacement Function] is selected.</li> </ul>
F	[Replacement Options]	Select [Replace All] to replace each text string that matches the regular expression.
		If not selected, only the first match is replaced.
		() Limitation
		This feature is available when [Use Text Replacement Function] is selected.

# Notes on Metadata Replacement Filter Operation

When [Use Match Reference Function] is selected
 Checks that the values specified for [Metadata] meet the requirements specified in [Regex]. If they do not, the distribution flow stops and the job is discarded. The subsequent filters and services are also canceled.

• When [Use Text Replacement Function] is selected

Checks that the values specified for [Metadata] meet the requirements specified in [Regex]. If they do, they are replaced with the values specified in [Text to Replace]. If they do not, the distribution flow continues without replacing values.

#### **Precaution**

When a distribution flow uses [Use Match Reference Function], a job that does not meet the requirements is discarded but recorded as successful in the job log. You cannot check its distribution result in the job log.



• See page 502 "Metadata Specifications".

# MFP Configuration Screen - Metadata Replacement Filter

There are no MFP configuration settings for this Filter.

#### Regular Expression Usage Examples

In addition to the regular expressions explained in page 509 "About Regular Expressions", the following special variables can be used for modification by the Metadata Replacement Filter.

	Variables	Description	
\$1, \$2, The part that matches a group in the r		The part that matches a group in the regular expression.	
\$& The whole part that matches the regular		The whole part that matches the regular expression.	

The followings are regular expression usages for checking and replacing the value of the target Metadata item.

• Example 1 (To check if a phone number in the document is valid)

It is assumed that valid phone numbers include the following:

0123-45-6789

301-555-2345

080-9999-4321

- [Regex]: \d{2,4}-\d{2,4}-\d{4}
- [Operations]: [Use Match Reference Function] is selected
- Example 2 (To remove hyphens from a telephone number)

It is assumed that telephone numbers have the following structure:

(2-4 digits)-(2-4 digits)-(4 digits)

For example, to remove all '-' from 0123-45-6789:

- [Regex]: -
- [Operations]: [Use Text Replacement Function] is selected

- [Text to Replace]: (blank)
- [Replace All]: selected

The converted results are as follows:

0123456789

Note that the above expression deletes not only hyphens in a telephone number but all hyphens in the specified range.

 Example 3 (To change a document's name from the format "yyyymmddhhmmss" to "yyyymmdd")

This example shows how to remove the portion of a file name that represents the time the file was created, and leave only the date portion.

For example, a file created on November 12, 2008, 4:41:00 PM might have the file name "20081112164100".

To truncate the time portion (164100), use the following settings:

- [Regex]: (.{8})(.\*)
- [Operations]: [Use Text Replacement Function] is selected
- [Text to Replace]: \$1
- [Replace All]: selected

The converted results are as follows:

20081112

• Example 4 (To extract a specific portion of a document name)

This example shows how to extract a specific portion of a document name.

For example, to extract the portion "2008" from a document whose name is

"extracted\_20081110135026", use the following settings:

- [Regex]: (.\*)(.{4})(.{10})
  - Select both [Ignore Upper/Lower Case Characters] and [Disregard Blank Space(s) and Symbol(s)].
- Operations: [Use Text Replacement Function] is selected
- [Text to Replace]: \$2
- [Replace All]: selected

The converted result are as follows:

2008



• See page 509 "About Regular Expressions" in the Appendix.

# **Metadata Replacement Filter Process Condition**

When the specified Metadata item does not exist in the Metadata of the input document:
 The conversion process will be skipped and the Flow will continue. The Job Log will indicate that processing was successful, but the System Log will indicate that this Filter was skipped.



• For details about error logs, see page 367 "System Log".

# PDF Stamper Filter (Server Edition Only)

The PDF Stamper Filter can be used to create a PDF file with the specified text or image embedded.

# Supported Formats (Input Data)

The following file formats are supported as input data for the PDF Stamper Filter.

File	Format
TIFF	
ВМР	
PDF	



- If an encrypted PDF file is passed to this Filter, the conversion process will fail and an error will be generated.
- If a document in an unsupported format is passed to this Filter, the process will be skipped.
- The following file formats are not supported by this filter:
  - BMP version 5
  - BMP (OS/2) V2
  - Encrypted PDF document
  - Tiff Image with compression and multiple strips
  - Tiff Image with tiles
  - Tiff image with more than 8 Bits per sample
  - TIFF 5.0-style LZW codes
  - TIFF image with extra samples
  - TIFF image with photometric 6
- If a PDF file is input via HotFolder Plug-in, the version and additional functions of the PDF file such as tagged PDF are removed.

# Convertible Formats (Output Data)

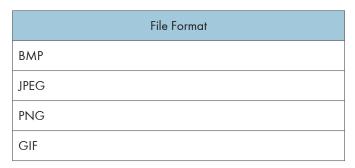
The following file formats are supported as output data by the PDF Stamper Filter.

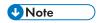
File Format	PDF version
PDF	1.4

#### Δ

# Supported Formats (Stamp Image)

The following file formats are supported as data to be registered to the PDF Stamper Filter.





• BMP version 5 is not supported.

#### **PDF Stamper Properties Screen**

Follow the instructions below:

1. Click [System] on the AdminTool Home Page.

Check GSNX server status on System Control screen. If the status is [Running], click [Switch Delivery Service Status] to switch the GSNX server status from [Running] to [Suspended].

2. Click [PDF Stamper] on the System Settings Screen.

The PDF Stamper Settings screen is displayed.

3. Click [Add] or [Edit] on the PDF Stamper Settings screen.

#### PDF Stamper Settings Screen (General Tab)

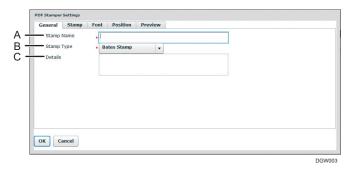


Table: PDF Stamper Settings (General Tab)

	Item	Description
Α	[Stamp Name]	Enter the display name for the Filter.

	ltem	Description
		<ul><li>Limitation</li><li>The maximum length is 128 characters.</li></ul>
В	[Stamp Type]	Select a stamp type to be embedded.  • [Bates Stamp]  A text stamp with counter.  • [Image Stamp]  An image stamp.  • [Text Watermark]  A text stamp as a watermark.  • [Image Watermark]  An image stamp as a watermark.
С	[Details]	Enter a description for this Filter.

# PDF Stamper Settings Screen (Stamp Tab for Bates Stamp)

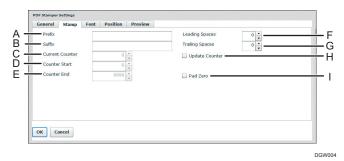


Table: PDF Stamper Settings (Stamp Tab for Bates Stamp)

	Item	Description
	nem	Description
A	[Prefix]	Enter the text to precede the counter number.
		Entry Example: Prefix
		Display Example: Prefix0001
		! Limitation
		The maximum length is 128 characters.
В	[Suffix]	Enter the text to follow the counter number.
		Entry Example: Suffix
		Display Example: Prefix0001Suffix

	ltem	Description
		() Limitation
		The maximum length is 128 characters.
С	[Current Counter] (Edit screen)	The current counter is displayed.  If "Update Counter" is selected, this will be editable.  Limitation
		If the number specified for "Current Counter" is not between the number specified for "Counter Start" and the number specified for "Counter End", you cannot save the setting.
D	[Counter Start]	Specify the counter start number.  Limitation
		The maximum counter value is 2147483646.
Е	[Counter End]	Specify the counter end number.  Limitation  The maximum counter value is 2147483646.
F	[Leading Spaces]	The number of spaces between the prefix and counter.  Limitation  The maximum value is 100.
G	[Trailing Spaces]	The number of spaces between the counter and suffix.  Limitation  The maximum value is 100.
Н	[Update Counter] (Edit screen)	If "Update Counter" is selected, "Current Counter" will be editable.
I	[Pad Zero]	If the "Pad Zero" check box is selected, zeros will be added to a counter number so that the number of digits becomes equal to the number of digits specified for "Counter End".  Example:  If this check box is selected and the number of the
		specified digits is 4:  1 will be shown as 0001.
		If this check box is not selected:

# PDF Stamper Settings Screen (Stamp Tab for Image Stamp)

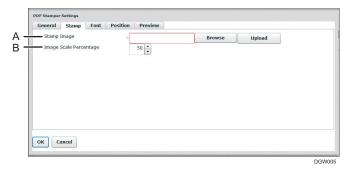


Table: PDF Stamper Settings (Stamp Tab for Image Stamp)

	ltem	Description
А	[Stamp Image]	Select an image file to be embedded.
В	[Image Scale Percentage]	Specify the magnification rate of the image file to be embedded.

# PDF Stamper Settings Screen (Stamp Tab for Text Watermark)

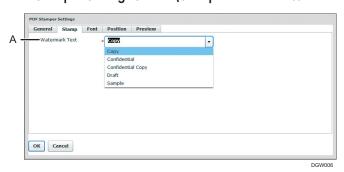
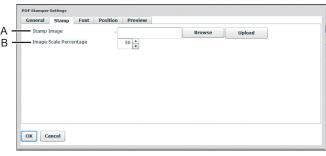


Table: PDF Stamper Settings (Stamp Tab for Text Watermark)

	ltem	Description
Α	[Watermark Text]	Select a watermark text from the following:
		• [Copy]
		• [Confidential]
		[Confidential Copy]
		• [Draft]

ltem	Description
	• [Sample]

# PDF Stamper Settings Screen (Stamp Tab for Image Watermark)



GW007

Table: PDF Stamper Settings (Stamp Tab for Image Watermark)

	ltem	Description
А	[Stamp Image]	Select an image file to be embedded.
В	[Image Scale Percentage]	Specify the magnification rate of the image file to be embedded as a watermark.

# PDF Stamper Settings Screen (Font Tab for Bates Stamp and Text Watermark)



DGW008

# Table: PDF Stamper Settings (Font Tab for Bates Stamp and Text Watermark)

	ltem	Description
Α	[Font Family]	Select a font family:
		• [Courier]
		• [Helvetica]
		• [Times Roman]

	ltem	Description
В	[Font Style]	Select a font style:
		• [Normal]
		• [Bold]
		• [Italic]
		• [Bold Italic]
С	[Font Size]	Specify a font size between 6 and 500.
D	[Font Color]	Select a font color.
Е	[Background Color] (for Bates Stamp)	Select a background color.
F	[Border Color] (for Bates Stamp)	Select a border color.
G	[Border Width] (for Bates Stamp)	Select a border width.

# PDF Stamper Settings Screen (Position Tab)

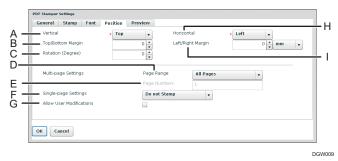


Table: PDF Stamper Settings (Position Tab)

	ltem	Description
A	[Vertical]	Select the vertical position of the image.  • [Top]
		• [Middle] • [Bottom]
		If [Middle] is selected, "Top/Bottom Margin" cannot be configured.

	ltem	Description
		If [Image Watermark] or [Text Watermark] is selected for the stamp type, this item cannot be configured.
В	[Top/Bottom Margin]	Enter the margin value up to 600 mm (25 inch).  If [Image Watermark] or [Text Watermark] is selected for the stamp type, this item cannot be configured.
С	[Rotation (Degree)]	Enter the rotation angle between 0 and 359 degrees.
D	[Page Range] (Multi-page Settings)	Specify the target pages to be stamped for the document:  • [All Pages]  • [Specified Pages]  • [First Page]  • [Last Page]  • [Even Pages]  • [Odd Pages]
Е	[Page Numbers] (Multi-page Settings)	Specify the pages to be stamped for the document.  This item can be configured only when [Specified Pages] is selected for "Page Range".  The following are entry examples:  Page Specification: 1,5,8  Range Specification: 1-3,5-9  Page and Range Specification: 2-5,9,13-20  Last Page Specification: -7  First Page Specification: 2-
F	[Single-page Settings]	Specify whether or not to embed a stamp into single page documents:  • [Do not Stamp]  • [Stamp All]
G	[Allow User Modifications]	Choose whether or not to allow users to edit the items of "Page Range" and "Page Numbers" on the MFP display panel.
Н	[Horizontal]	Select the horizontal position of the image.  • [Left]

	ltem	Description
		• [Center]
		• [Right]
		If [Center] is selected, "Left/Right Margin" cannot be configured.
		If [Image Watermark] or [Text Watermark] is selected for the stamp type, this item cannot be configured.
I	[Left/Right Margin]	Enter the margin value up to 600 mm (25 inch).  If [Image Watermark] or [Text Watermark] is selected for the stamp type, this item cannot be configured.

# PDF Stamper Settings Screen (Preview Tab)



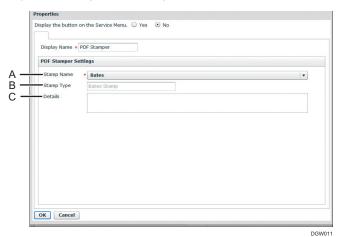
Table: PDF Stamper Settings (Preview Tab)

	ltem	Description
Α	[Page Size]	Select the preview paper size from the drop-down list.
В	[Page Orientation]	Select the preview paper orientation.
С	[Show Preview]	Display a preview of the scanned documents.

# **PDF Stamper Filter Properties Screen**

The following is the PDF Stamper Filter Properties screen.

Fig.: PDF Stamper Filter Properties Screen



**Table: PDF Stamper Filter Properties** 

	ltem	Description
А	[Stamp Name]	Select a stamp setting.
В	[Stamp Type]	This is displayed automatically if "Stamp Name" is specified.  The stamp type configured for the PDF Stamper Settings screen (General Tab) is displayed.
С	[Details]	This is displayed automatically if "Stamp Name" is specified.  The description entered for the PDF Stamper Settings screen (General Tab) is displayed.

# Limitation ■

- If you upload an image file as [Image Stamp] or [Image Watermark] and the size exceeds the specified size, you cannot upload it.
- The Bates stamp type is not supported by Load Balance Server or Secondary Delivery Server.

# **U** Note

- If you want to use PDF Stamper for color documents, you need to place PDF Converter (Enhanced) or PDF Converter prior to PDF Stamper.
- If you select [Bates Stamp], the sequential counter is assigned in accordance with the order of the jobs that are performed, instead of the order of the documents that are scanned.
- If jobs are printed from multiple MFPs, preparing multiple Bates stamp types for each usage is recommended.
- If the counter reaches the maximum value, an error occurs.

- If you export a profile with an embedded stamp, stamp settings of "System Settings" such as the current counter value are also exported.
- [Page Divide] and [Size Divide] functions in [Divide Email] are not supported for multiple page PDF.

#### 4

# **About Distribution Parameters**

This feature is used by the Administrator to control different aspects of the GlobalScan NX user interface, i.e., which settings are enabled (visible on the MFP display panel), and how the user accesses those settings.

Unless otherwise indicated, Distribution Parameter values must be entered within the following ranges:

- String
   Up to 1,000 characters.
- Number
   2147483648 to -2147483647
- Date/Time
   0000/01/01 00:00:00 to 9999/12/31 23:59:59
- Year/Month/Date Hour: Minute: Second

The date and time settings may be limited depending on the input item. For example, there may be an input item to which you cannot set seconds. If you set seconds to such an input item, the settings will be nullified, meaning that it will be accepted as "00".

These limitations are applied to input values specifiable within the GlobalScan NX AdminTool; the possible ranges of input values specifiable on the operation panel are different.

#### **Distribution Parameter Screen Overview**

This section is an overview of the AdminTool's Distribution Parameter screens, specifically, the General, Options Screen, and [Hidden Items (Preset)] screens. Each screen emulates what the user sees on the MFP display panel, making it easy to configure the system to address users' primary application needs.

#### Main Screen

This screen reflects the Service's main settings. In Fig. "Send to Email Main Screen - Admin Tool", for example, the Send to Email Main Screen offers destination entry, selection and search functions needed for email distribution. In Fig. "Send to Email Destination Selection Screen - MFP Display Panel", the MFP user sees the corresponding settings.

Fig.: Send to Email Main Screen - AdminTool

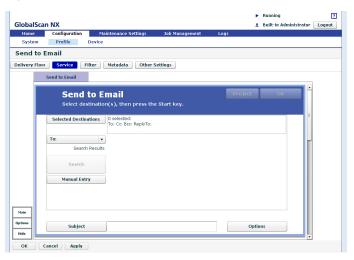


Fig.: Send to Email Destination Selection Screen - MFP Display Panel (Standard Operation Panel)

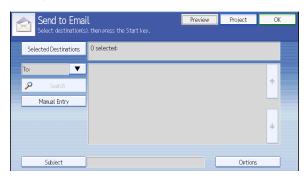


Fig.: Send to Email Destination Selection Screen - MFP Display Panel (Smart Operation Panel)



# **Options Screen**

This screen offers additional Send to Email Distribution Parameters, such as Error Notification and Priority Level, i.e., those used less often. [Options] is located on the lower right of the MFP display

4

panel (Fig. "Send to Email Options Screen - MFP Display Panel"). When the user presses this button, the AdminTool settings are reflected (Fig. "Send to Email Options Screen - AdminTool").

Fig.: Send to Email Options Screen - AdminTool



Fig.: Send to Email Options Screen - MFP Display Panel (Standard Operation Panel)



Fig.: Send to Email Options Screen - MFP Display Panel (Smart Operation Panel)



#### Hidden Items (Preset) Screen

This screen is used by the Administrator to hide Distribution Parameters, for instance, if you do not want users to modify an email Subject line, that field can be placed on the [Hidden Items (Preset)] screen.



# **Opening/Navigating Distribution Parameter Screens**

This section covers how to open/navigate the Distribution Parameter screens, and provides details regarding the General, Options Screen, and [Hidden Items (Preset)] screens.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- Double-click the Profile Name, for example "Accounting Dept.", to open the Group/ Project screen.
- 3. If necessary, click the Group tab or the group name in the Group list, such as "Accounts Payable", to open the Project(s) associated with the Group.

Fig.: Group/Project Screen (Standard Operation Panel)

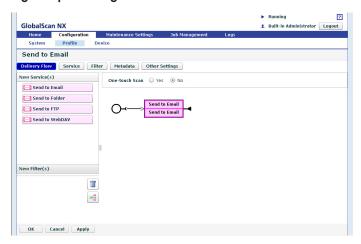


Fig.: Group/Project Screen (Smart Operation Panel)



- 4. Double-click the Project button.
- 5. Click [Service].

Fig.: Project Configuration Screen



The Send to Email Output Service Settings displays.

6. Review the Main Screen settings, as outlined in the table below.

Fig.: Send to Email Main Screen

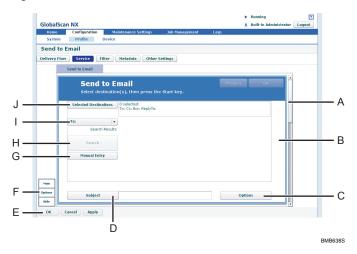


Table: Send to Email Main Screen

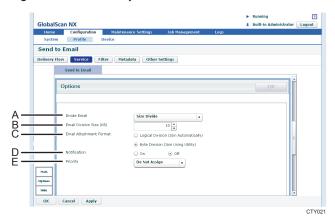
	ltem	Description
А	Scroll Bar	Displays the Options Screen and [Hidden Items (Preset)] screen.
В	Main Screen	This area emulates what the user will see on the MFP display panel, and can be customized to display/hide Distribution Parameters, as needed.
С	[Options]	When used from the MFP display panel, this button displays the Options screen for the Service. To allow MFP users to access the Options screen, this button must be placed in the Main Screen.
D	[Subject]	Enter the default Subject of the email. The text specified here will appear in the Subject field within the recipient's email inbox.  Limitation  The maximum length is 128 characters.
Е	[OK]	Saves settings, and return to the Group/Project screen.
	[Cancel]	Exits, without saving settings.
	[Apply]	Saves only.

	ltem	Description
F	Screen Component Transfer Zone	The Transfer Zone allows the user to move screen components between the General, Options Screen, and [Hidden Items (Preset)] screens. This zone remains visible at all times, regardless of scrolling action.
G	[Manual Entry] *1	Manually enter an email address to add to the recipient list  Note  • [Enable Manual Address Entry] must be selected in
		the Send to Email Option Settings screen.  If you entered a domain name in [Default Domain for Manual Input] in the Send to Email Option Settings screen, that value will be appended to addresses entered without a domain. This feature is convenient if most recipients have the same domain (for example, recipients within the same company).
Н	[Search]	Searches the Email Address List for the destination email addresses.  Note  Inable Address Search   must be selected in the Email Search Settings screen to use this function. See table "Email Search Settings" above.
I	[To]/[Cc] *1/[Bcc] *1/ [ReplyTo] *1	Select the destination type for email addresses. And then enter/select email addresses that will be added to the field next to [Selected Destinations].  Use [ReplyTo] to specify the address you want replies to be sent to, if it is different from the sender.
J	[Selected Destinations]	Displays a list of the email destinations currently selected. You can click addresses in this list to remove them. Click [Reset All] to clear all selected addresses.  • Note  • If the Send to Me feature is enabled, the [Selected Destinations] list will display "Send to Me". This means that the scanned document will be delivered to the user's email address, as well as any other selected destinations.

\* 1 This setting is enabled via the Email Properties screen. See page 148 "Send to Email Service".

# 7. Use Scroll Bar to display the Options Screen.

Fig.: Send to Email Options Screen



8. Review the Options Screen settings, as outlined in the table below.

Table: Send to Email Options Screen

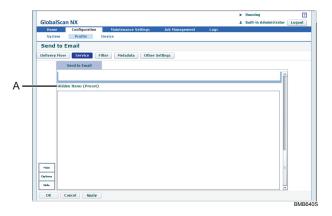
	ltem	Description
Α	[Divide Email]	Select a method for dividing the email.
		• [Do Not Divide]
		Sends all scanned data in one email.
		• [Page Divide]
		Sends each page of the scanned data as multiple emails.
		• [Size Divide]
		Divides the scanned data into parts so that they do not exceed the size specified in [Email Division Size (KB)] and send them as multiple emails. The received divided data will be restored if the email software supports this data restoring function.
		When [Size Divide] is selected for [Divide Email], data- heavy scan jobs will be divided into parts, each within the size specified in [Email Division Size (KB)]. Each part will then be sent as an attachment to an individual e- mail.

	ltem	Description
		() Limitation
		If you use [Divide Email], insert [Image Converter] or [PDF Converter] before [Send to Email] in the delivery flow.
		<ul> <li>The High Compression PDF and Searchable PDF functions are not available with Send to Email on the Serverless Edition.</li> </ul>
В	[Email Division Size (KB)]	Enter the size to split documents into when dividing email using the [Size Divide] method.
		<b>₩</b> Note
		This option is only available when [Size Divide] is selected for [Divide Email].
С	[Email Attachment Format]	When [Logical Division (Join Automatically)] is selected:
		Data-heavy scan jobs will be divided into several complete files that the recipient can open directly.
		Files that exceed the division size limit cannot be sent as attachments. Instead, if the MFP user's email address can be acquired from the authentication server, a failure notification will be sent to the MFP user. In this case, we recommend scanning the data again with a lower resolution setting to reduce the size of each file.
		<ul> <li>The e-mail address that the failure notification is sent to is the same address used for the Send to Me function.</li> </ul>
		When [Byte Division (Join Using Utility)] is selected:
		Data-heavy scan jobs will be divided into multiple incomplete parts that must be restored by the recipient's email application.
		Data-heavy scan jobs will always be divided into parts that are small enough to be sent as e-mail attachments.

	ltem	Description
D	[Notification]	Selects whether or not to use receipt notification that To/Cc/Bcc destinations received the email. This function only works when the mail server of the destination supports receipt notification.
		• [On]
		Makes To/Cc/Bcc destinations send a receipt notification that they received the email.
		• [Off]
		Disables receipt notification.
		The notification is sent as follows:
		The GlobalScan NX attempts to send the notification to the MFP user.
		<ol> <li>If the MFP user's email address is not available, the GlobalScan NX attempts to send the notification to the Administrator. The Administrator's email address is set in the Administrator Settings screen.</li> <li>See page 446 "Error Notification Email Address".</li> </ol>
		If the Administrator's email address is not available, the GlobalScan NX attempts to send the notification to the default sender specified in [Default Sender Address] in the Send to Email Option Settings screen.
E	[Priority]	Select the priority to assign to the email from the following:
		• [Do Not Assign]
		• [1 (High)]
		• [2]
		• [3 (Standard)]
		• [4]
		• [5 (Low)]

9. Use Scroll Bar to display the [Hidden Items (Preset)] screen.

Fig.: Hidden Items (Preset) Screen



10. Review the [Hidden Items (Preset)] screen settings, as outlined in the table below.

Table: Hidden Items (Preset) Screen

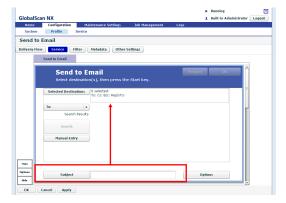
	ltem	Description
A	Hidden Items (Preset)	One or more Distribution Parameters that have been set, i.e., a value has been applied to the parameter, can be hidden from the users' view.

# Changing Display Position of a Distribution Parameter

In this section, you will learn how to change the display position of a Distribution Parameter, for example, take the Subject field and place it at the top of the Main Screen, for easy access by the user at the MFP display panel. In this way, you can change the display order of settings to streamline workflow.

From the Main Screen, select a setting, for example, the Subject field and drag and drop
it to the new position.

### Fig.: Main Screen



The Subject field is automatically placed in the new position on the Main Screen. The MFP display panel also reflects this new field position.



- This same procedure can be applied to any setting on the General, Options Screen, or [Hidden Items (Preset)] screen.
- To reverse this process, simply drag and drop back to its original position.

# Transferring a Distribution Parameter to Another Screen

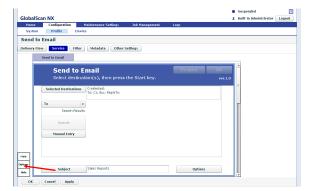
In this section, you will learn how to transfer a setting, for example, take a setting from the Main Screen and place it on the Options Screen. This enables the Administrator to establish setting priority. In other words, if access to a setting is not required, it can be placed on the Options Screen, thus is only visible to the user if he/she presses [Options] on the MFP display panel.



 The structure of the Screen Component Transfer Zone varies according to the screen format of the Service/Filter. If the Service/Filter has an Options screen, the Screen Component Transfer Zone will have a three-screen structure. If the Service/Filter does not have an Options screen, the Screen Component Transfer Zone will have a two-screen structure. But the Screen Component Transfer Zone of a BizForm will always have a two-screen structure.

From the Main Screen, select a setting. For example, you have predefined the Subject as
"Sales Reports", and the user need not view this setting. In that case, simply drag and
drop the setting to the Options Screen, via the Screen Component Transfer Zone.

Fig.: Main Screen



The Subject field is automatically transferred to the Options Screen.

Fig.: Options Screen



A user now accesses the Subject field through [Options] on the MFP display panel.

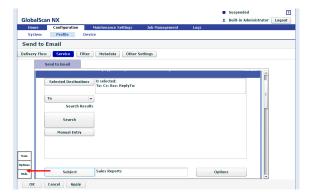
# Hiding a Distribution Parameter

In this section, you will learn how to hide a setting, for example, take a setting from the Main Screen and place it in the [Hidden Items (Preset)] screen. This enables the Administrator to predefine settings that cannot be modified by the user at the MFP display panel. For example, if the Subject field has a predefined as "Confidential", that field can be placed on the [Hidden Items (Preset)] screen, thus will not be visible to the user.

A warning message will display to notify you that the [Hidden Items (Preset)] screen contains some errors. Also, on the relevant [Hidden Items (Preset)] screen, the Screen Components containing errors will appear in red highlight.

- If the Project is a One-touch Project, be sure to pre-set the value of all Screen Components, not
  only those placed on the [Hidden Items (Preset)] screen.
- 1. Drag and drop, for example, a predefined Subject field to the [Hidden Items (Preset)] screen, via the Screen Component Transfer Zone.

Fig.: Main Screen



The Subject field is automatically transferred to the [Hidden Items (Preset)] screen.

This action will hide the setting, i.e., the field will not display on the MFP display panel.



- This same procedure can be applied to any setting on the Main Screen or Options Screen.
- To reverse this process, simply drag and drop the setting to the desired screen via the Screen Component Transfer Zone.

# Setting Email Distribution Parameters

If users often send emails to a specific destination, for instance, expense reports to the accounting department, the Administrator can specify the email address of the accounting manager, as a preset [To] Distribution Parameter. This means that users do not have to enter the address at the MFP display panel prior to scanning - saving time and effort.

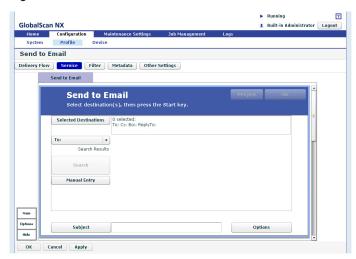
Likewise, you can set default subject text for the email as a preset Distribution Parameter. The specified text will appear in the Subject field within the recipient's email inbox, allowing him/her to quickly determine the attachment content. For instance, you may wish to identify each email message with a Subject field that reads, "Expense Report". The user can view or edit this default text from the MFP display panel, prior to scanning.

# Preset Email Destination(s)

1. Open the Project Configuration screen.

- 2. If necessary, click [Home], and then the [Profile] shortcut.
- 3. Double-click the Profile Name, for example "Accounting Dept.", to open the Group/ Project screen.
- 4. If necessary, click the Group tab (or the group name in the Group list when using Smart Operation Panel), for example "Accounts Payable", to open the Project(s) associated with the Group.
- 5. Double-click the Project button. For example "Send to Email".
- 6. Click [Service]. The Distribution Parameter screen displays.

Fig.: Send to Email Distribution Parameter Screen



7. To specify an email destination other than "To", click the [To] drop-down.

Fig.: Email Destination Drop-down List



**U**Note

 If [Cc], [Bcc], and/or [ReplyTo] do not appear in the drop-down, the selection(s) have not been enabled.

- Reference
  - See page 64 "Step 6: Configure the Service".
- 8. Enter the target destination email address using one of the following methods:
  - Search

If Email Search Settings are established, you have the ability to search your corporate address book for target destinations.



- See page 148 "Send to Email Service".
- 1. Click [Search]. The letter keys on the display panel displays.
- Enter search character(s), for example "sm" for "Smith". Note that if you do not enter anything on the letter keys on the display panel, the search will return all addresses on the LDAP server.
- 3. Click [OK].
- 4. Select one or multiple addresses in the list.

### Manual Entry

Key the email address in manually, via the letter keys on the display panel.

- 1. Click [Manual Entry].
- 2. Enter the email address, for example "jsmith@gsnxcorp.com".

Fig.: Email "To" Destination

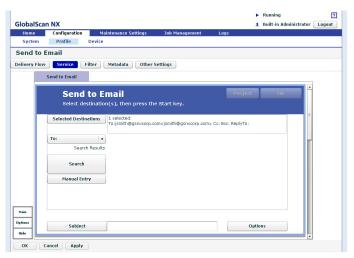


- 3. Click [OK].
- 4. Repeat 1-3 to enter another address, if necessary.

The selected/entered addresses appear in the [Selected Destinations] field.



Fig.: Selected Addresses



9. Repeat 7 - 8 to select another destination, for example a "CC" destination.

If you wish to preset Subject text, proceed. If not, click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

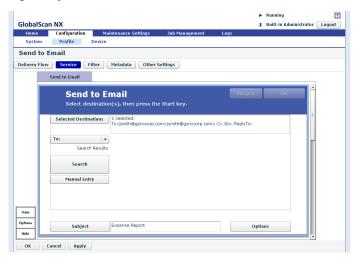
# **Predefining Email Subject Text**

The predefined Subject text will appear in the Subject field within the recipient's email inbox, allowing him/her to quickly determine the attachment content. The user can view or edit this default text from the MFP display panel, prior to scanning.

1. If necessary, scroll down to display the Subject field.

"Expense Report".

Fig.: Subject Field



2. Click on the Subject field, and then enter the default Subject text, for example,

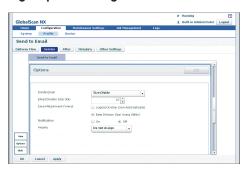
3. If you wish to set additional email Distribution Parameters for the Project, proceed. If not, click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

# **Specifying Option Settings**

The Option Settings screen displays additional Distributions Parameters, for example Priority, Notification, etc.

1. If necessary, scroll down to display the Options screen.

Fig.: Option Settings Screen



- 2. Specify the following settings:
  - [Divide Email]
  - [Email Division Size (KB)]
  - [Notification]
  - [Priority]



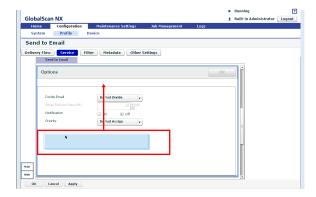
- For details on each setting, see page 148 "Send to Email Service".
- 3. To change display position of Distribution Parameters, proceed. If not, click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

### Changing a Distribution Parameter's Display Position

To move the Distribution Parameters within the Main Screen or Options Screen, proceed as follows:

- 1. Click (select) the Distribution Parameter.
- 2. Drag and drop the parameter to the position you want.

Fig.: Display Position of Distribution Parameter



The Distribution Parameter is displayed in the new position.

3. To prioritize MFP display panel components, proceed. If not, click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

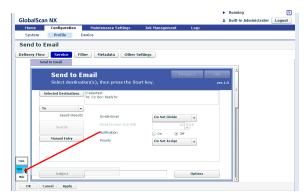
# **Changing Distribution Parameter Priority**

To place less frequently-used features on the Options Screen, proceed as follows:

1. Click (select) and hold the Distribution Parameter you wish to move.

2. Drag and drop the Distribution Parameter to the Options Screen using the Screen Component Transfer Zone.

Fig.: Screen Component Transfer Zone



3. If you wish to hide one or more Distribution Parameters, proceed. If not, click [Apply], or [OK], to return to the Group/Project screen.

### **Hiding a Distribution Parameter**

It is possible to hide a Distribution Parameter, such that the user cannot view the setting on the MFP display panel. The parameter will not display on the Main Screen or Options screen.

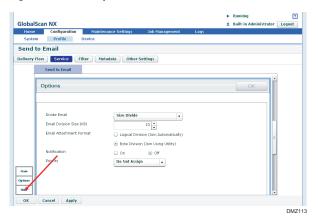
1. Set the value of the parameter you wish to hide.



- You must pre-set the value of any Distribution Parameter you place on the [Hidden Items (Preset)] screen. This value will be applied to all email messages executed using the Project.
- You cannot save the Project without first specifying the value, i.e., if you click [OK] or [Apply], an alert message will display.
- 2. Click (select) and hold the Distribution Parameter you wish to hide.

Drag and drop the Distribution Parameter to [Hide] in the Screen Component Transfer Zone.

Fig.: Screen Component Transfer Zone





- To return a Distribution Parameter to the Main Screen or Options Screen, use drag and drop to place the parameter on the appropriate screen, via the Screen Component Transfer Zone.
- If you place all the Distribution Parameters on the [Hidden Items (Preset)] screen, behavior of the Service/Filter on the MFP display panel will be as follows:

### Service

The Service button, for example Send to Email, on the Service Menu screen is grayed out on the Standard Operation Panel, and will not be displayed on the Smart Operation Panel. This means that the Destination Selection screen will not appear on the MFP's display panel, thus is not accessible to the user. The user can only check the preset destination addresses via the Summary screen and the Detail screen.

#### Filter

When the Standard Operation Panel is used, [Scan Settings] is grayed out. This means that all Distribution Parameters (for all Filters) are preset, thus are not accessible to the user.

When the Smart Operation Panel is used, you can display the Scan Settings screen, but all setting items are grayed out and you cannot change them.

4. Click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

# Setting Folder Distribution Parameters

If users often archive documents, such as vendor invoices, sales order forms, etc., the Administrator can predefine the folder destinations. This means that users will not have to select a folder at the MFP display panel prior to scanning - saving time and effort. The entered folder destinations automatically display on the MFP display panel, when the user selects the Send to Folder Service.

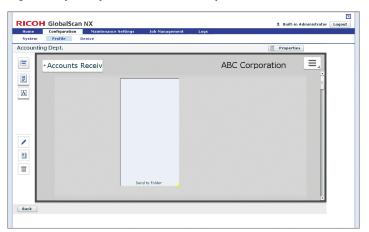
#### **Preset Folder Destinations**

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- Double-click the Profile Name, for example "Accounting Dept.", to open the Group/ Project screen.
- 3. If necessary, click the Group tab (or the group name in the Group list when using Smart Operation Panel), for example "Accounts Receivable", to open the Project(s) associated with the Group.

Fig.: Group/Project Screen (Standard Operation Panel)

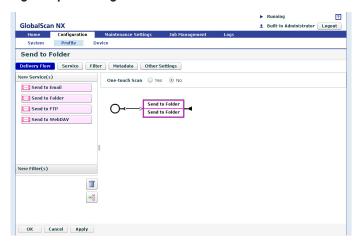






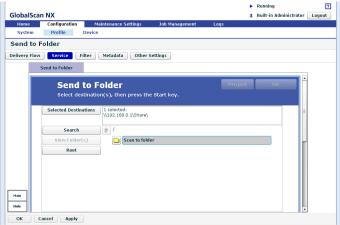
- 4. Double-click the Project button. In the figure above, the Project is called "Send to Folder".
- 5. Click [Service].

Fig.: Project Configuration Screen



The Services screen displays. If necessary, select the Send to Folder Service tab.

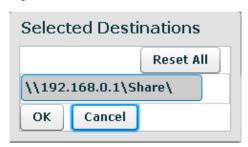
Fig.: Send to Folder Configuration Screen



- 6. Specify a default target folder destination(s).
- 7. Click [Search].
- Enter the name of the folder you want to search for. Note that if you do not enter
  anything on the letter keys on the display panel, the search will return all destination
  folders.
- 9. Click [OK].
- 10. Select one or multiple folders in the list.

The Selected Destination field displays predefined folder destinations.

Fig.: Selected Folder Destinations



To change display position of Distribution Parameters, proceed. If not, click [Apply], and then click [OK], to return to the Group/Project screen.

### **Hiding a Distribution Parameter**

It is possible to hide a Distribution Parameter, such that the user cannot view the setting on the MFP display panel. The parameter will not display on the Main Screen.

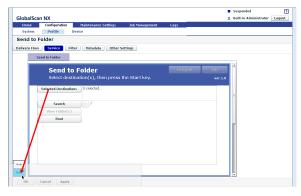
1. Click (select) the setting you wish to hide.

2. Set the value of the parameter you selected.



- You must pre-set the value of any Distribution Parameter you place on the [Hidden Items (Preset)] screen. This value will be applied to all scanned documents using the Project.
- You cannot save the Project without first specifying the value, i.e., if you click [OK] or [Apply], an alert message will display.
- 3. Drag and drop the Distribution Parameter to [Hide] in the Screen Component Transfer Zone.

Fig.: Screen Component Transfer Zone



- UNote
  - To return a Distribution Parameter to the Main Screen, use drag and drop to place the parameter on the appropriate screen via the Screen Component Transfer Zone.
  - If you place all the Distribution Parameters on the [Hidden Items (Preset)] screen, behavior of the Service/Filter on the MFP display panel will be as follows:

#### Service

The Service button, for example, Send to Folder, on the Service Menu screen is grayed out on the Standard Operation Panel, and will not be displayed on the Smart Operation Panel. This means that the Destination Selection screen will not appear on the MFP's display panel, thus is not accessible to the user.

#### Filter

When the Standard Operation Panel is used, [Scan Settings] is grayed out. This means that all Distribution Parameters (for all Filters) are preset, thus are not accessible to the user.

When the Smart Operation Panel is used, you can display the Scan Settings screen, but all setting items are grayed out and you cannot change them.

4. If you wish to make a Distribution Parameter uneditable, proceed. If not, click [Apply], or [OK], to return to the Group/Project screen.

# **About One-touch Scan**

One-touch Scan is a Project where all Distribution Parameters have been pre-defined by the Administrator. For example, individual Projects - one for each user or group of users - can be created. For instance, users in the marketing department can select a Project button to "Send to Email". Another user in the accounting department can select a Project button to "Send to Folder", and so forth.

When Distribution Parameters, such as the destination email addresses and/or folders, file format, etc., are predefined, the user cannot change settings. The scan job starts immediately. As such, use of a One-touch Scan is intended for tasks in which the parameters for document distribution do not change. However, you can still allow the user to enter Metadata. Any Project can be set as a One-touch Scan.

# Mportant !

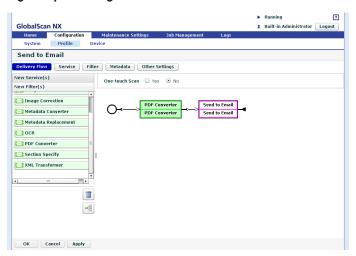
- One-touch Scan cannot be cancelled for the following types of Project:
  - Projects specified as a destination Project in a Replacement Table.
     The setting cannot be cancelled even if the Replacement Table is not specified in the Flow Redirect Filter.
  - Projects that are selected for processing inbound fax documents.

# Reference

- For details about Replacement Tables, see page 468 "Replacement Table Settings".
- For details about processing inbound faxes, see page 356 "About Inbound FAX Transfer".
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile name.
- If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.

4. Double-click the target Project button.

Fig.: Project Configuration Screen

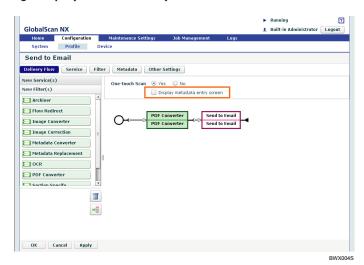


5. Click [Yes] adjacent to One-touch Scan.



- A message appears warning you that cancelling (reversing) this setting might not be possible.
   Click [OK] to make the setting, or [Cancel] to cancel it.
- If you try to cancel the One-touch Scan setting but the setting for the Project cannot be changed, a message notifying you of this will appear and the setting will remain set to [Yes].
- 6. If you want to allow the user to enter Metadata on the MFP display panel, select the [Display metadata entry screen] check box.

Fig.: Display metadata entry screen



7. Click [Apply] to save the settings, or [OK] to return to the Group/Project screen.



• The necessary parameters must be preset for a Project identified as One-touch Scan. If the parameters are not set, a warning message displays.

The Project is now available to the user as a One-touch Scan. He/she need only place the document on the MFP's Automatic Document Feeder (ADF), enter Metadata if enabled, and press the [Start] key. If authentication is required, the user needs to first log in to the Project.

# **About Scan Settings**

Scan settings include parameters that are applied to the image during document capture, for example, resolution, file format, simplex/duplex, etc. The settings you choose here appear on the MFP display panel by default. The user may choose to set a different setting than those available by default.



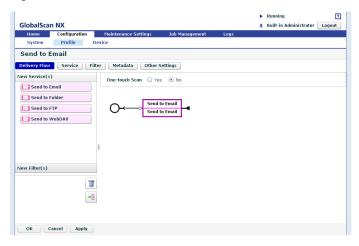
- The [Scan Settings] tab is automatically added to every new Project.
- Default Scan Settings can be set on the System or Profile Level.
- Using the AdminTool, it is possible to hide (or display in gray for the Smart Operation Panel) one or
  more Scan Setting. In that event, the user cannot adjust the scan parameters, i.e., default values set
  within the AdminTool are applied to the image. This may be useful if you wish to limit color or high
  resolution scanning.
- The available scan settings are dependent on the capabilities of the target device. For example, if
  the user chooses Color as the Scan Type, the device must support color scanning, otherwise the
  image is rendered in black & white.
- Unlike other Filters, at the Project level, no dialog appears even if the user double-clicks the tab of this Scan Settings screen (the Filters screen). However, at System/Profile level, a dialog (screen) appears that allows the user to set the default values of resolution, etc.

In this example, we will establish Scan Settings for the "Send to Email" Project within the "Accounts Payable" Group.

- 1. Click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name, for example "Accounting Dept.".
- Click the Group tab (or the group name in the Group list when using Smart Operation Panel), for example "Accounts Payable".
- 4. Double-click the Project button, for example "Send to Email".

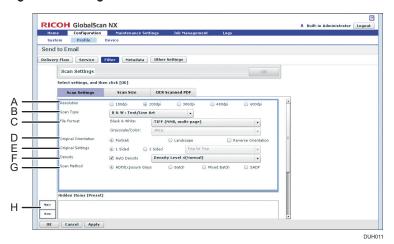
# 5. Click [Filter].

# Fig.: Filter Service



The Scan Settings screen for "Send to Email" displays.

Fig.: Scan Settings Screen

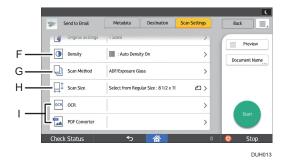


**U**Note

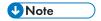
 When the Smart Operation Panel is used, scan settings parameters such as scan settings, scan size, and filters are all displayed in the Scan Settings screen, not in separate tabs as they appear in the AdminTool.

Fig.: Scan Settings Screen - MFP Display Panel (Smart Operation Panel)





6. Specify the Scan Settings, as outlined in the table below.



• If you specify a value that the MFP cannot support, the default value will be applied instead.

**Table: Scan Settings** 

	ltem	Description
А	[Resolution]	Specify the default resolution to display as the default on the MFP display panel, either 100dpi, 200dpi, 300dpi, 400dpi, or 600dpi.
		Specify 200dpi for most applications. The higher the resolution, the sharper the image. The higher the resolution, the larger the file size, so care should be taken when you specify resolution.
В	[Scan Type]	Specify the Scan Type to display on the MFP display panel from the following:
		• [Black & White: Text]
		• [Black & White: Text/Line Art]
		• [Black & White: Text/Photo]

	ltem	Description
		• [Black & White: Photo]
		• [Gray Scale]
		• [Full Color: Text/Photo]
		[Full Color: Glossy Photo]
		[Auto Color Select]
		<b>↓</b> Note
		The user can only select one mode (Black & White, Grayscale or Full Color) to apply to the document during scanning.
		<ul> <li>If [Auto Color Select] is selected, documents are automatically detected as black and white or color at scanning. If a document is detected as color, JPEG file is output. If a document is detected as black and white, TIFF file is output.</li> </ul>
		() Limitation
		Within the Scan Type properties, if you deselect all Black & White format check boxes, the Black & White File Format drop-down may still display Black & White settings on both the AdminTool and MFP display panel. This scenario also applies if you deselect all Color format check boxes. In that case, the Grayscale/Color File Format drop-down may still display Grayscale/Color settings on both the AdminTool and MFP display panel. To correct the above scenarios, it is suggested that you first select the [Scan Type] settings, either all Black & White check boxes or all Grayscale/Color check box, and then the associated File Formats will automatically populate the associated drop-down.
С	[File Format]	GlobalScan NX supports a variety of file formats, so to simplify the [Black & White:] and [Grayscale/Color:] dropdown lists, the default formats have been separated into visible and invisible groups. If you wish to add an invisible format to the visible list, double-click on the file format line, for example Black & White. The available settings display. To select/deselect a format, check/uncheck the associated box. Selected formats will automatically appear in the

	ltem	Description
		drop-down list within the Scan Settings screen in both the AdminTool and MFP display panel.  Reference
		See page 498 "File Formats".
D	[Original Orientation]	When using the ADF, specify the document orientation. Select [Portrait] or [Landscape]. Alternatively, select the [Reverse Orientation] check box.
		Standard Operation Panel
		[Portrait] is displayed as [Portrait/Readable] on the MFP display panel, and [Landscape] is displayed as [Landscape/Unreadable].
		You can select one of the following two options in the MFP display panel: [Portrait/Readable] and [Landscape/Unreadable].
		Smart Operation Panel
		[Portrait] is displayed as [Readable Direction] on the MFP display panel, and [Landscape] is displayed as [Unreadable Direction (90 Degrees Counterclockwise)].
		If the [Reverse Orientation] check box is selected, [Portrait] appears as [Unreadable Direction (180 Degrees)] and [Landscape] appears as [Unreadable Direction (90 Degrees Clockwise)].
		You can select one of the following four options in the MFP display panel: [Readable Direction], [Unreadable Direction (90 Degrees Counterclockwise)], [Unreadable Direction (180 Degrees)], and [Unreadable Direction (90 Degrees Clockwise)].
		<b> Note</b>
		Depending on the model, the image is not scanned upside down even if [Reverse Orientation] is selected. If you are using such a model, there are only two options available in the MFP display panel: [Readable Direction] and [Unreadable Direction (90 Degrees Counterclockwise)].

	ltem	Description
		When using Standard Operation Panel, [Reverse Orientation] is not displayed.
		To enable [Reverse Orientation] after importing an older version of a profile, or if an overwrite installation has been applied over an older version of the management tool, open the profile with this version and save it again.
		When distributing JPEG images with a project (Serverless), the image will not be scanned upside down even if [Reverse Orientation] is selected.
E	[Original Settings]	Select the type of original.
		-[1 Sided] = Simplex
		- [2 Sided] = Duplex
		When using the ADF, this setting ensures accurate image capture and later viewing of the scanned file.
		<b>U</b> Note
		<ul> <li>If [2 Sided] is selected, you must specify text orientation, [Top to Top] or [Top to Bottom], from the adjacent drop-down list. [Top to Top] means that text reads like pages in a book. [Top to Bottom] means that text reads like pages bound at the top.</li> </ul>
		<ul> <li>If selecting [1 Sided], or if [1 Sided] is the only available setting, it is not necessary to select [Top to Top] or [Top to Bottom].</li> </ul>
F	[Density]	Selecting [Auto Density] corrects scanning density to improve resolution of paper types such as non-white paper like newspaper or transparent originals.
		When [Density] is enabled, images within 10 mm from the edges of the original may appear faded.
G	[Scan Method] (for the Standard Operation Panel)	Specify the default Scan Method, or how the user will scan the original on the MFP. If you wish to limit selections, double-click on [Scan Method].
		[ADF/Exposure Glass]

	ltem	Description
		Normal scan operation from the Automatic Document Feeder or exposure glass.
		• [Batch]
		Scans multiple page originals as a single job.
		If [Batch] is selected, scanning starts after you place the additional originals and press the [Start] key. When all the originals have been scanned, press [#].
		Regardless of the default settings, MFP waits until additional originals are placed.
		• [Mixed Batch]
		Sends multiple-page original scanned with either the ADF or exposure glass as a single job.
		If [Mixed Batch] is selected, scanning starts after you place the additional originals and press the [Start] key. When all the originals have been scanned, press [#].
		Regardless of the default settings, the MFP will wait until additional originals are placed.
		[SADF] (Semi-automatic Document Feeder)
		Scans multiple page originals as a single file as described above for [Batch] scan.
		If [SADF] is selected, scanning starts as soon as you place additional originals in the ADF, i.e. you don't need to press the [Start] key like Batch scan, but need to place additions within 60 seconds. When all the originals have been scanned, press [#].
		Regardless of the default settings, MFP waits until additional originals are placed.
		Note
		If the maximum document volume exceeds the MFP's capacity, the documents are not sent.
G	[Scan Method] (for the Smart Operation Panel)	Specify the default Scan Method, or how the user will scan the original on the MFP. If you wish to limit selections, double-click on [Scan Method].
		• [ADF/Exposure Glass]

	ltem	Description
		Normal scan operation from the Automatic Document Feeder or exposure glass.
		• [Batch]
		Scans multi-page originals placed either on the ADF or on the exposure glass as a single job.
		If [Batch] is selected, scanning starts after you place additional originals and press [Continue]. When all the originals have been scanned, press [Finish].
		Regardless of the default settings, MFP waits until additional originals are placed.
		[SADF] (Semi-automatic Document Feeder)
		Scans multiple page originals as a single file as described above for [Batch] scan.
		If [SADF] is selected, scanning starts as soon as you place additional originals in the ADF, i.e. you don't need to press the [Continue] like Batch scan, but need to place additions within 60 seconds. When all the originals have been scanned, press [Finish].
		Regardless of the default settings, MFP waits until additional originals are placed.
		<b>↓</b> Note
		If the maximum document volume exceeds the MFP's capacity, the documents are not sent.
Н	Screen Component Transfer Zone	The Screen Component Transfer Zone allows the user to move screen components between the Main Screen and [Hidden Items (Preset)] screens. This zone remains visible at all times, regardless of scrolling action.

- 7. When finished, click [Apply] to save the settings.
- 8. If you would like to change the display position of a scan setting, proceed. If not, click [Apply], or [OK], to return to the Group/Project screen.

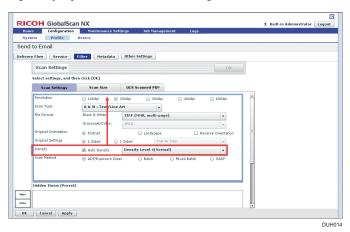
# Changing a Scan Setting's Display Position

To move a setting within the Main Screen, proceed as follows:

1. Click (select) the Scan Setting.

2. Drag and drop the setting to the position you want.

Fig.: Display Position of Scan Settings



The Scan Setting is displayed in the new position.

3. If you wish to hide one or more Scan Setting, proceed. If not, click [Apply], or [OK], to return to the Group/Project screen.

### Hiding a Scan Setting

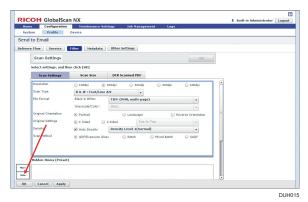
It is possible to hide a Scan Setting, such that the user cannot view or change the setting on the MFP display panel. The parameter is not displayed or grayed out.

- 1. Click (select) the Scan Setting you wish to hide.
- 2. Set the value of the parameter you selected.



- You must pre-set the value of any Scan Setting you place on the Hidden Items (Preset) screen. This value is then applied to all scanned documents using the Project.
- You cannot save the Project without first specifying the value, i.e., if you click [OK] or [Apply], an alert message displays.

# Fig.: Screen Component Transfer Zone



**U**Note

- To return a Distribution Parameter to the Main Screen, use drag and drop to place the parameter on the appropriate screen via the Screen Component Transfer Zone.
- If you place all the Distribution Parameters on the Hidden Items(Preset) screen, behavior
  of the Service/Filter on the MFP display panel is as follows:
  - Service

The Destination Selection screen will not appear on the MFP's display panel, thus is not accessible to the user. The user can only check the preset destination addresses via the Summary screen and the Detail screen.

Filter

When the Standard Operation Panel is used, the Scan Settings screen (a tab page) does not appear on the display panel. If there are no Scan Settings screens to display, i.e., if all the Distribution Parameters of all the Filters are preset, [Scan Settings] on the previous screen becomes invalid, indicating that there are no pages to display.

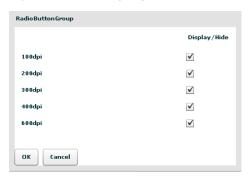
When the Smart Operation Panel is used, you can display the Scan Settings screen, but all setting items are grayed out and you cannot change them.

4. If you wish to make a Scan Setting uneditable, please continue. If not, click [Apply], or [OK], to return to the Group/Project screen.

#### Making a Scan Setting Uneditable

You can make Scan Setting uneditable, as needed. For instance, you can control which Resolution settings to display on the display panel. For instance, you may want to prevent use of low resolution (100dpi) or high resolution (600dpi) settings. In that event, simply click the [Filter] tab > [Scan Settings] tab, and then double-click [Resolution] to display the Property screen; select only the desired check boxes.

Fig.: Resolution Property Screen



- 1. To make this parameter uneditable, clear the check box, and then click [OK].
- 2. When finished with configuration of all Distribution Parameters, click [Apply] to save the settings, and then click [OK], to return to the Group/Project screen.

# Scan Size

The [Scan Size] tab is available through [Filter]. This setting enables you to select the original size, for example, [Auto Detect], [Mixed Sizes], etc. Like [Scan Settings], the [Scan Size] tab is automatically added to every new Project.



• A default Scan Size can be set on the System or Profile Level.

To select a default Scan Size on the MFP display panel, proceed as follows:

1. From the [Scan Settings] screen, click [Scan Size] tab. If necessary, see items 1 - 4 in the previous section.

The Scan Size screen displays.

Fig.: Scan Size Screen (Standard Operation Panel)

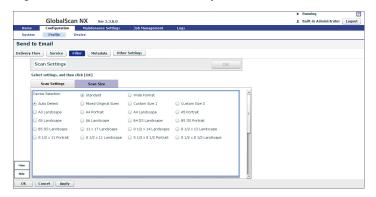
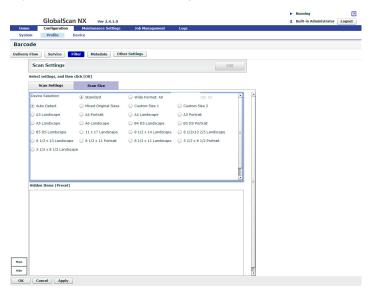


Fig.: Scan Size Screen (Smart Operation Panel)



Each scan size is displayed as a separate button on the MFP display panel. If another setting is not specified, the default setting is [Auto Detect].



- The scan sizes that can be specified may differ depending on the MFP. Select the profile that matches the MFP you are using.
- When [Target Screen Size] of the profile is [10.1inch], and [Standard] is selected in [Device Selection] of the project that is being applied to a wide-format machine, the paper sizes such as A2 and A1 that can only be used on wide-format machines will not be shown on the screen of the MFP.
- 2. When [Standard] is selected in [Device Selection], if you wish to change the default Scan Size, choose one of the following settings:

# **Standard Operation Panel**

[Mixed Original Sizes]	[B5 JIS Portrait]	
[Custom Size 1]	[B5 JIS Landscape]	
[Custom Size 2]	[11 × 17 Landscape]	
[A3 Landscape]	[8 1/2 × 14 Landscape]	
[A4 Portrait]	[8 1/2 × 13 Landscape]	
[A4 Landscape]	[8 1/2 × 11 Portrait]	
[A5 Portrait]	[8 1/2 × 11 Landscape]	
[A5 Landscape]	[5 1/2 × 8 1/2 Portrait]	
[A6 Landscape]	[5 1/2 × 8 1/2 Landscape]	

B4 JIS Landscape]	
-------------------	--

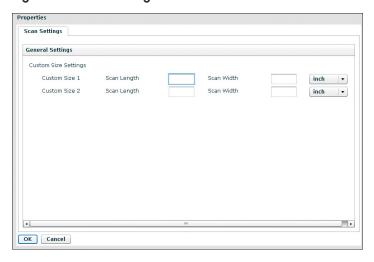
# **Smart Operation Panel**

[Mixed Original Sizes]	[B5 JIS Portrait]
[Custom Size 1]	[B5 JIS Landscape]
[Custom Size 2]	[11 × 17 Landscape]
[A3 Landscape]	[8 1/2 × 14 Landscape]
[A4 Portrait]	[8 1/2 × 13 2/5 Landscape] *1
[A4 Landscape]	[8 1/2 × 13 Landscape]
[A5 Portrait]	[8 1/2 × 11 Portrait]
[A5 Landscape]	[8 1/2 × 11 Landscape]
[A6 Landscape]	[5 1/2 × 8 1/2 Portrait]
[B4 JIS Landscape]	[5 1/2 × 8 1/2 Landscape]

<sup>\*1</sup> This item appears only when [Target Screen Size] of the profile is [10.1inch].

Double-clicking the [Scan Settings] or [Scan Size] tab displays a screen on which you can specify a custom size setting.

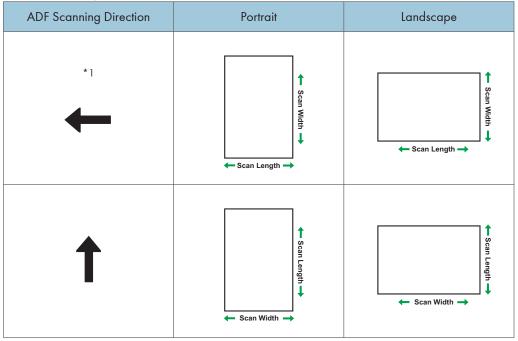
Fig.: Custom Size Settings Screen



If a value is specified for [Custom Size 1] or [Custom Size 2], the value will be displayed as the default scan size.

For details about the scan length and scan width for custom sizes, see the following table.

Table: Scan Length and Scan Width for Custom Sizes



<sup>\*1</sup> On Smart Operation Panel, scanning is always treated as if it is performed in this direction.

The orientation reference point for scanning custom size paper varies depending on whether scanning is performed using the Automatic Document Feeder (ADF) or Exposure Glass:

If the ADF you are using is adjustable for both scan length and width.: Middle of the original document in the left-right (landscape) orientation

If the ADF you are using is adjustable for either scan length or width.: Top left of the original document



• The landscape orientation of an original document is vertical to the scanning direction.

Exposure Glass: Top right of the original document

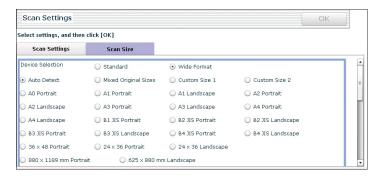
For details about the orientation reference point for scanning custom size paper, see the following table.

Table: Orientation Reference Points for Scanning Custom Size Paper

Scanning Method	Orientation Reference Point for Scanning Custom Size Paper (indicated with green arrow)
Exposure Glass	Original Document:

Scanning Method	Orientation Reference Point for Scanning Custom Size Paper (indicated with green arrow)
	R
	Original Document Set on the Exposure Glass:
If the ADF you are using is adjustable for both scan length and width.	→ R
If the ADF you are using is adjustable for either scan length or width.	R

3. When [Wide Format] is selected in [Device Selection], if you want to change the default Scan Size, choose one of the following settings (The available wide-format sizes differ according to the region.):

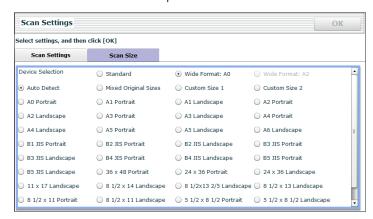


Standard Operation Panel

Mixed Original Sizes, Custom Size 1, Custom Size 2, A0 Portrait, A1 Portrait, A1 Landscape, A2 Portrait, A2 Landscape, A3 Portrait, A3 Landscape, A4 Portrait, A4 Landscape, B1 JIS Portrait, B2 JIS Portrait, B2 JIS Landscape, B3 JIS Portrait, B3 JIS Landscape, B4 JIS Portrait, B4 JIS Landscape, 36 × 48 Portrait, 24 × 36 Portrait, 24 × 36 Landscape, 880 × 1189 mm Portrait, 625 × 880 mm

Smart Operation Panel

Mixed Original Sizes, Custom Size 1, Custom Size 2, A0 Portrait, A1 Portrait, A1 Landscape, A2 Portrait, A2 Landscape, A3 Portrait, A3 Landscape, A4 Portrait, A4 Landscape, A5 Portrait, A5 Landscape, A6 Landscape, B1 JIS Portrait, B2 JIS Portrait, B2 JIS Landscape, B3 JIS Portrait, B3 JIS Landscape, B4 JIS Portrait, B4 JIS Landscape, B5 JIS Portrait, B5 JIS Landscape, 36 × 48 Portrait, 24 × 36 Portrait, 24 × 36 Landscape, 880 × 1189 mm Portrait, 625 × 880 mm Landscape



Standard Operation Panel

Mixed Original Sizes, Custom Size 1, Custom Size 2, 36 × 48 Portrait, 34 × 44 Portrait, 30 × 42 Portrait, 24 × 36 Portrait, 24 × 36 Landscape, 22 × 34 Portrait, 22 × 34 Landscape, 18 × 24 Portrait, 18 × 24 Landscape, 17 × 22 Portrait, 17 × 22 Landscape, 12 × 18 Portrait, 12 ×

18 Landscape, 11 × 17 Portrait, 11 × 17 Landscape, 8 1/2 × 14 Portrait, 8 1/2 × 14 Landscape, 9 × 12 Portrait, 9 × 12 Landscape, 8 1/2 × 11 Portrait, 8 1/2 × 11 Landscape, 5 1/2 × 8 1/2 Portrait, 5 1/2 × 8 1/2 Landscape

Smart Operation Panel

Mixed Original Sizes, Custom Size 1, Custom Size 2,  $36 \times 48$  Portrait,  $34 \times 44$  Portrait,  $30 \times 42$  Portrait,  $24 \times 36$  Portrait,  $24 \times 36$  Landscape,  $22 \times 34$  Portrait,  $22 \times 34$  Landscape,  $18 \times 24$  Portrait,  $18 \times 24$  Landscape,  $17 \times 22$  Portrait,  $17 \times 22$  Landscape,  $17 \times 18$  Portrait,  $18 \times 18$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$ 

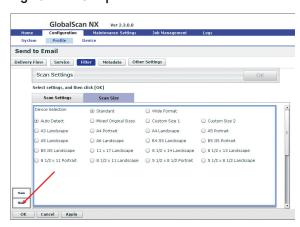


- When [Auto Detect] is enabled, the originals is scanned in the size of the first page that is detected, i.e., automatic size detection is performed for the first page only, and the detected size is used for all of originals to follow.
- When [Mixed Original Sizes] is enabled, automatic size detection is performed for each page of the original.
- If the paper size specified in the Project is not supported by the MFP, [Auto Detect] will be selected by default. However, with certain MFPs [A4 Landscape] will be selected instead.
- 4. If you wish to hide the all Scan Size settings, so the users cannot make a selection, please continue. If not, click [Apply], or [OK], to return to the Group/Project screen.

#### **Hiding All Scan Size Settings**

- 1. Set a Scan Size value, for example [Auto Detect]. A preset value must be selected.
- 2. Click on any setting within the [Scan Size] screen.
- 3. Drag and drop the screen to [Hide] via the Screen Component Transfer Zone.

Fig.: Screen Component Transfer Zone



The [Hidden Items (Preset)] screen is now blank. Scroll down to view all Scan Size settings in the [Hidden Items (Preset)] screen. If all settings are placed in the [Hidden Items (Preset)] screen, a tab will not be available to the user. Instead, these default values are applied to all scanned documents. To return the Scan Size settings back to the Main Screen, drag and drop the screen to [Main] in the Screen Component Transfer Zone.

4. If you wish to select individual Scan Size settings to display on the MFP display panel, please continue. If not, click [Apply], or [OK], to return to the Group/Project screen.

#### Selecting Individual Scan Size Settings

You can make a Scan Size setting visible or read-only, as needed. For example, you may wish to display only the [Auto Detect] setting and a few paper sizes supported by the MFP. To do so, proceed as follows:

1. Double-click on any Scan Size setting. The Scan Size Properties screen displays.



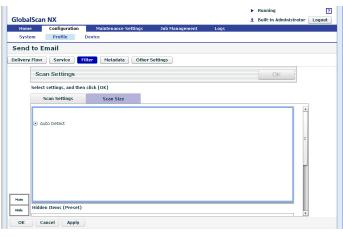


2. On the Scan Size Properties screen, clear the check boxes for scan sizes that you want to hide

#### 4

### 3. Click [OK].

Fig.: Scan Size Main Screen



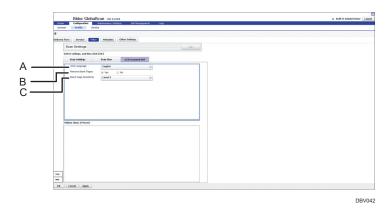
- **U**Note
  - To modify the Scan Size Properties again, double-click on a Scan Size to open the Properties screen.
- 4. When finished, click [Apply], or [OK], to save settings, to return to the Group/ Project screen.

## OCR Scanned PDF (Serverless Edition Only)

The [OCR Scanned PDF] tab is available through [Filter]. This setting enables you to create the OCR scanned PDF.

This function is available with MFP which supports the OCR function (OCR Unit).

Fig.: OCR Scanned PDF Screen



### **Table: OCR Scanned PDF**

	ltem	Description
А	[OCR Language]	You can select the language for OCR.
В	[Remove Blank Pages]	You can set whether or not to remove blank pages.
С	[Blank Page Sensitivity]	You can select the level for detecting the blank page. The followings are selectable:  • [Level 1] (Pure white paper becomes blank)  • [Level 2]  • [Level 3]  • [Level 4]  • [Level 5] (Dirty paper becomes blank)  • Link to Device Setting (Standard Operation Panel only)

#### 4

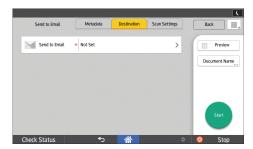
# **About Other Settings**

The Other Settings tab allows you to configure settings regarding the Document Name, Scan Settings (Standard Operation Panel only), and preview function.

Fig.: MFP Display Panel (Standard Operation Panel)



Fig.: MFP Display Panel (Smart Operation Panel)

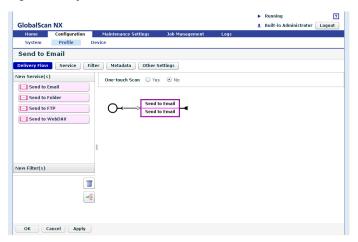


To preset a Document Name and Scan Settings screen preferences, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.

4. Double-click the Project button. The Delivery Flow screen displays.

Fig.: Delivery Flow



5. Click [Other Settings].

Fig.: Other Settings Screen (Standard Operation Panel)

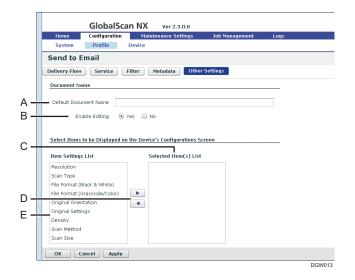
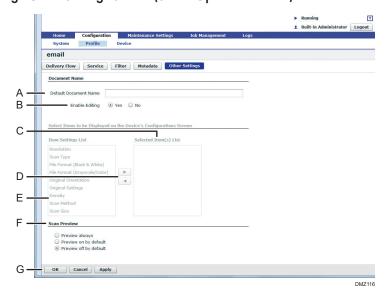




Fig.: Other Settings Screen (Smart Operation Panel)



6. Specify the Other Settings, as outlined in the table below.

**Table: Other Settings** 

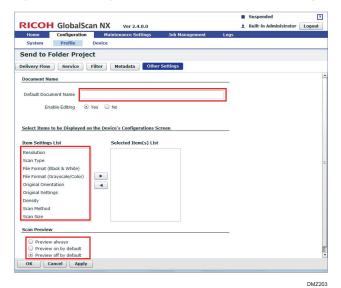
	ltem	Description
A	[Default Document Name]	Specify the default Document Name. The name you specify here is set to the "Document Name" property of each scanned document and used for the name of the created attached file (email distribution) and the created file (folder distribution). This entry will appear in the Document Name field on the MFP display panel.

	ltem	Description
		Note
		The Document Name is set as follows:
		<ul> <li>If the scanned time information is enabled, the Document Name is:</li> </ul>
		DocumentName_yyyymmddhhmmss
		<ul> <li>If a Document Name is not specified, the scan date is used as the Document Name, as follows:</li> </ul>
		yyyymmddhhmmss
		■ Reference
		• See page 48 "Step 2: Add a Profile".
		<ul> <li>Depending on the Service/Filter, it is possible to give a unique Document Name in the various setting screens, for example, within the [Document Name Extraction] property in the OCR Filter title export function and the Send to Folder Service.</li> </ul>
		Limitation
		The maximum length of a Document Name is 128 characters.
В	[Enable Editing]	Specify whether to allow the user to edit the document name.  • [Yes]
		When performing a scan, this field is active, thus the user can specify the Document Name via the MFP display panel.
		• [No]
		The default Document Name set via the AdminTool is used. As such, the Document Name field is grayed out on the Standard Operation Panel or not displayed on the Smart Operation Panel, thus the user cannot make changes.
С	[Selected Item(s) List]	Items that have been moved from the [Item Settings List] field to this field appear on the MFP display panel in the box to the right of [Scan Settings]. See [E] for a list of settings.
D	[▶]	Moves selected items from [Item Settings List] to [Selected Item(s)
	(Standard Operation Panel only)	List].

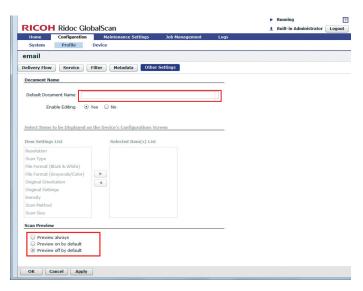
	ltem	Description	
	[◀] (Standard Operation Panel only)	Moves selected items from [Selected Item(s) List] to [Item Settings List].	
E	[Item Settings List] (Standard Operation Panel only)	Displays items available for display in the Scan Settings field on the MFP display panel, as follows:  • [Resolution]  • [Scan Type]  • [File Format (Black & White)]  • [File Format (Grayscale/Color)]  • [Original Orientation]  • [Original Settings]  • [Density]  • [Scan Method]  • [Scan Size]	
F	[Scan Preview]	Specify whether or not to display a preview of the scanned documents.  For profiles set for a machine with a 4.3 inch screen, GlobalScan NX does not support this function.  • [Preview always]  If [Preview always] is selected, a preview of the scanned documents will be displayed every time before the actual output.  If [Preview always] is selected, the preview setting cannot be changed on the MFP display panel.  • [Preview on by default]  If [Preview on by default] is selected, a preview of the scanned documents will be displayed every time before the actual output unless a user sets the [Preview] button to off.  • [Preview off by default]  If [Preview off by default] is selected, scanning will be performed without displaying a preview of the scanned documents unless a user sets the [Preview] button to on.	
G	[OK]	Saves settings, and return to the Group/Project screen.	

The figure below shows entered/selected items for both the Default Document Name and Selected Item(s) List (Standard Operation Panel only). The MFP's Service Menu will display these values.

Fig.: Other Settings Screen – AdminTool (Standard Operation Panel)



### Fig.: Other Settings Screen - AdminTool (Smart Operation Panel)





- Be careful to select the items in order of priority. This will ensure that the most important settings are visible on the MFP display panel. For example, if you select all settings, those that appear at the end may not be displayed.
- 7. When finished, click [Apply] to save the settings.
- 8. Click [OK] to return to the Group/Project screen.

## **About Metadata**

GlobalScan NX uses Metadata to classify documents for indexing and subsequent searching/retrieval tasks. As a document management tool, Metadata is used within Services/Filters to capture user-relevant information (in XML format).

GlobalScan NX supports two kinds of Metadata, also called document information, basic and custom.

#### Basic Metadata

Standard document information is automatically captured by GlobalScan NX during the scanning process. This process occurs in the background, i.e., user input is not generally required.

#### Custom Metadata

The document information is designed/added to a Project by the Administrator, using various input field types, such as text boxes and/or drop-down lists. The user, from the MFP display panel, can enter certain values prior to scanning the document.

### Reference

• See page 502 "Metadata Specifications".

The Administrator can create custom Metadata Input Components, such as text boxes and/or drop-down lists, for any Project.

To add Metadata Input Components to a Project, proceed as follows:

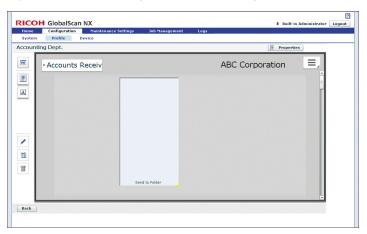
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.

In the example below, the Project is called "Send to Folder".

Fig.: Send to Folder Project Button (Standard Operation Panel)



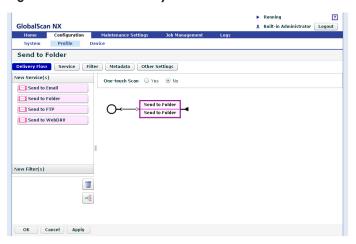
Fig.: Send to Folder Project Button (Smart Operation Panel)



### 4. Double-click [Send to Folder].

In this example, the Delivery Flow screen displays.

Fig.: Send to Folder Delivery Flow



### 5. Click [Metadata]. The Metadata Input Component screen displays.

#### Fig.: Metadata Input Component Screen



6. Specify the Input Components, as outlined in the table below.

The possible configuration settings for Metadata Input Components are as follows:

### Display position

Where to display the Input Component(s) on the computer screen. The order in which you click (select) the Input Components is how they will display on the MFP display panel. For instance, if you want to add a check box field, text field, and then Dropdown ListBox, click button E, A, and D, in that order.

### • Display/hide

Whether to display the Input Component(s) on the MFP display panel. If placed in the [Hidden Items (Preset)] section (see [H]), the user will not see the setting on the MFP display panel.

#### • Default value/preset value

If you wish to preset the value so that the user cannot change the field, drag and drop the Input Component, with preset value, in the [Hidden Items (Preset)] section (see [H]).

### **Important**

- To open a Metadata Properties dialog box, double-click the field label.
- For each Metadata, the [Tag Name on Metadata XML] field is required. Other Metadata rules are as follows:
  - Do not enter characters that are prohibited in XML, for example &%\$.
  - Do not use a Tag Name twice.
  - Do not use Metadata Tag Names, for example "name", "userName", etc., as these are utilized internally by GlobalScan NX.



• See page 502 "Metadata Specifications".

### Table: Metadata Input Components

Table	able: Metadata Input Components			
	Metadata Field	Description		
A	InputText	Use this component to add document information of string type. To this component, you can specify the following attributes:		
		Enable [Yes], [No]		
		Required Entry Item [Yes], [No]		
		Display Name (Maximum: 128 characters)		
		Tag Name on Metadata XML (Maximum: 128 characters)		
		Max. Characters (Default: 128)		
		Min. Characters (Default: 0)		
		Password [Yes], [No]		
		Regex for Validation (if the user inputs a string that does not match this regular expression, an error will occur. See page 509 "About Regular Expressions".)		
		<b>U</b> Note		
		If the [Required Entry Item] setting is [Yes], you cannot set Min. Characters and Max. Characters to zero.		
		To ensure users enter a value, select [Yes] for [Required Entry Item].		
В	NumberStepper	Use this component to add document information of numeric type (an integer). To this component, you can specify the following attributes:		
		Enable [Yes], [No]		
		Display Name (Maximum: 128 characters)		
		Tag Name on Metadata XML (Maximum: 128 characters)		
		Max. Value		
		Min. Value		
		<b>U</b> Note		
		If the field is left blank and if the range between the Min. Value and Max. Value includes zero, a zero will		

	Metadata Field	Description
		be specified as the value. If the range between the Min. Value and Max. Value does not include zero, the Min. Value or Max. Value, whichever is closer to zero, will be specified as the value.
C	DateField	Use this component to add document information of date type.  If you enter a date in this field, it will be used as the default date on the display panel.  To this component, you can specify the following attributes:  • Enable [Yes], [No]  • Display Name (Maximum: 128 characters)  • Tag Name on Metadata XML (Maximum: 128 characters)  • Start Date  • End Date  • Use date of operation as default value [Yes], [No]  • Note  • You can set the default date to display on the display panel as follows:  • To display a date that you specify as the default value:  Select [No] in [Use date of operation as default value], and enter the date on the Metadata Input Component screen.  • To display the date of operation of the MFP as the default value:  Select [Yes] in [Use date of operation as default value].
D	Dropdown ListBox	Use this component to add document information by using a drop-down list. To this component, you can specify the following attributes:  • Enable [Yes], [No]
		Display Name (Maximum: 128 characters)     Tag Name on Metadata XML (Maximum: 128 characters)

	Metadata Field	Description
		Options (add up to 50 option items to appear in the drop-down on the MFP display panel)
Е	Dropdown Listbox (File)	Use this component to add a drop-down list for selecting a value from a csv file.
	বে	Example uses: Document type, Subject, Company
		<ul> <li>Dropdown ListBox (search) retrieves its selections from a CSV file.</li> </ul>
		Users search the selected file to find a selection.
		The CSV file is specified using the "Refer to" field.
		GSNX does not display or access the content of the CSV file until the "Search" button has been pressed.
		<b> Note</b>
		The path and file name combined ("Refer to" field) cannot exceed 128 characters.
		Only the .csv and .CSV extensions are supported.
		<ul> <li>The file path must be local. If a failover or load balance server is used, each server must have the same CSV file in the same location.</li> </ul>
		The "Test" button only checks for the existence of the file, not its validity.
		The Search function can not be tested from the AdminTool.
		For details how to enter the CSV file, see "CSV Specification" below.
F	Check Box	Use this component to add document information by using a check box (On/Off). To this component, you can specify the following attributes:
		Enable [Yes], [No]
		Display Name (Maximum: 128 characters)
		Tag Name on Metadata XML (Maximum: 128 characters)
G	Waste Basket	To remove an Input Component, drag and drop the component to the Waste Basket button.

	Metadata Field	Description
		Reference
		See page 344 "Deleting an Input Component".
Н	Screen Component Transfer Zone	The Screen Component Transfer Zone allows the user to move screen components between the Main Screen and [Hidden Items (Preset)] screen. This zone remains visible at all times, regardless of scrolling action.
I	Hidden Items (Preset)	To hide an Input Component from the users' view, drag and drop the item either to the Preset button in the Screen Component Transfer Zone or to the Hidden Items (Preset) section of the screen.    Reference
J	[OK]	Saves settings, and return to the Group/Project screen.
	[Cancel]	Exits, without saving settings.
	[Apply]	Saves only.

### **CSV Specification**

- All the entries in a file will be available as a searchable selection.
- Character code: UTF-8 only.
- Delimiter: Comma (,) only.
- Line Feed: <CR><LF> only.
- Enclosure: With or without double quotations.
- To include a comma in an entry, enclose it with double quotations.
- To use double quotations in an enclosure, use an escape with double quotations.
- Comment line: Lines starting with "#" are handled as comments.



- In an unenclosed string, an solitary double quotation is displayed as-is.
- In an enclosed string, a solitary double quotation is parsed as a delimiter. For example, "A"AA" results in 2 entries, A and AA



- The ID (an XML tag) of each Input Component must be unique, i.e., you cannot specify a
  value that is already used by another Input Component. (See page 502 "Metadata
  Specifications" in the Appendix.)
- The MFP display panel can display a maximum of 7 Input Components, on one screen. On the AdminTool screen, separator lines are automatically added as necessary.
- Up to 50 input components can be placed in the Metadata screen. However, only 21 Input Components (for 3 screens, as a single screen can display a maximum of 7 input components) can be placed on the Main Screen.

Fig. "Metadata Input Components - AdminTool" shows entered Metadata Input Components created via the AdminTool. Fig. "Metadata Input Components - MFP Display Panel" shows how the MFP display panel will display those components.

Fig.: Metadata Input Components - AdminTool

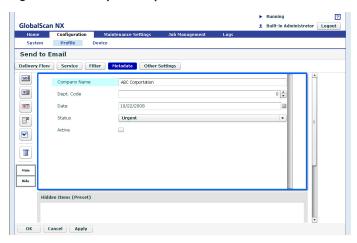


Fig.: Metadata Input Components - MFP Display Panel (Standard Operation Panel)

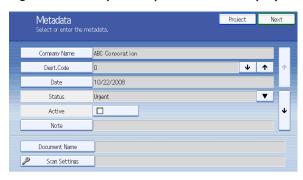


Fig.: Metadata Input Components - MFP Display Panel (Smart Operation Panel)



7. When finished, click [Apply], or [OK], to save the settings.

### **Changing Input Component Display Order**

To change the order in which the Input Components display on the MFP display panel, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Double-click the Project button.
- 5. If necessary, click the [Metadata] tab.
- Point to the Display Name of the Input Component, and then drag and drop into the position you want. See Fig. "Metadata Components - AdminTool (Correct Position)".



You can insert the Input Component at any location marked by a blue line, i.e., if a red "x" appears, the operation will fail. See Fig. "Metadata Components - AdminTool (Incorrect Position)".

Fig.: Metadata Input Components - AdminTool (Correct Position)

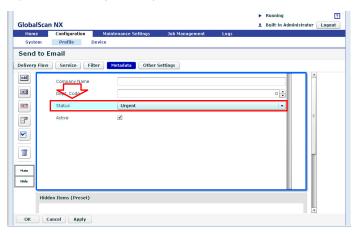
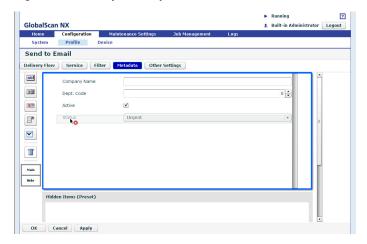


Fig.: Metadata Input Components - AdminTool (Incorrect Position)



7. When finished, click [Apply], or [OK], to save the settings.

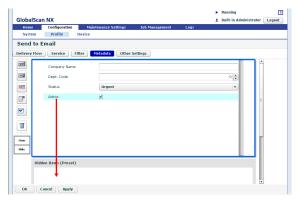
### **Hiding an Input Component**

It is possible to hide an Input Component from the users' view, with the value of the Input Component preset. For instance, you may wish to apply a department code to all scan jobs, and not let the user modify the value.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- Click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Double-click the Project button.

- 5. If necessary, click the [Metadata] tab.
- 6. Drag and drop the Input Component to the Hidden Items (Preset) section of the screen.

Fig.: Metadata Input Component Screen



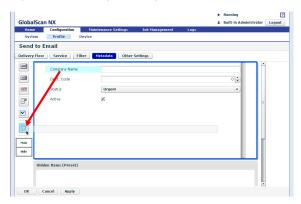


Placing Metadata fields on the [Hidden Items (Preset)] screen, via direct drag and drop or Transfer
Zone is supported. Fields placed on the [Hidden Items (Preset)] screen are not visible to the user at
the MFP display panel.

### **Deleting an Input Component**

- 1. If necessary, click [Home], and then the [Profile] shortcut. Double-click the Profile Name.
- Click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 3. Double-click the Project button.
- 4. If necessary, click the [Metadata] tab.
- 5. Drag and drop the Input Component to the Waste Basket button.

Fig.: Metadata Input Component Screen



# **About Device Properties**

After MFPs (devices) have been added to the GlobalScan NX system, you can edit device properties, change the Profile/Project setting(s) or delete one or more devices.

Within the Device List screen, there are a variety of functions to change the settings. Review the procedures in the table below, and then proceed to the corresponding section.

#### **Table: About Device Properties**

Button	Description
Edit	Change any settings related to the device(s).
Send Profile	Change only Profile or Project settings.
Synchronize	Update the current Profile/Project settings in the MFP(s).
Import Export	Import and export the Device List.



- If an MFP is managed by multiple GlobalScan NX systems, the latest settings from any of the systems will be applied to the MFP.
- If you select more than one target MFP and any of the devices fail to complete the process, the failed device(s) will be skipped. An error message will display upon completion of all the processes.
- The IP address (or host name) of an MFP on the Device List provides a link to the MFP's Web Image Monitor page.
  - Clicking an MFP's IP address launches Web Image Monitor for that MFP.

### **Editing Device Properties**

If you wish to change MFP properties, for example Device Name, Profile Name, Scan or Fax settings, proceed as follows:

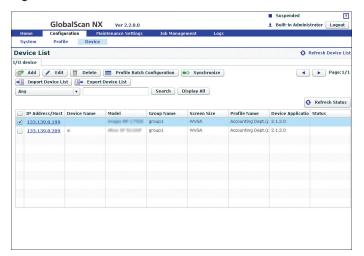


• In this procedure, if you select only one MFP, the Edit screen contains the properties necessary for that MFP, according to the capabilities of that MFP. If you select more than one MFP, the screen contains all possible (necessary) properties for the selected MFPs. In that case, the values you provide on the screen will be set to the relevant properties of the selected MFPs. Note, however, that the Device Name field will not display, as this field cannot be applied to multiple MFPs. To enter a Device Name, set properties to individual MFPs.

- When editing multiple MFPs at one time, the dialog will display all possible (necessary)
  configuration items. However, the editing process can fail depending on the capabilities of the
  target devices. If you delete devices processing or allocated with jobs, the jobs will not complete
  but result in an error.
- 1. Click [Home], and then the [Device] shortcut.

The Device List displays.

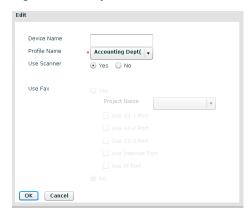
Fig.: Device List



- 2. Select the check box for the target MFP you wish to edit.
- 3. Click [Edit].

The Properties screen displays.

Fig.: Device Properties Screen



4. Edit the MFP settings, as needed.



- See page 69 "Step 7: Configure the MFPs".
- 5. Click [OK] to save the settings, and return to the Device List.

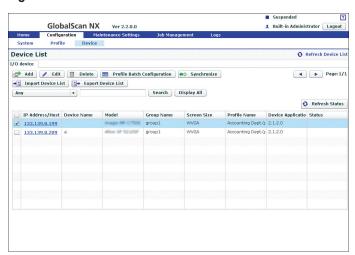


• Click [Cancel] to exit, without saving the settings.

### **Deleting an MFP**

1. Click [Home], and then the [Device] shortcut. The Device List displays.

Fig.: Device List



- 2. Select the check box(es) of the target MFP(s) you wish to delete.
- 3. Click [Delete].
- 4. Click [OK] to confirm deletion.



- Click [Cancel] to exit, without deleting the MFP.
- You can also delete all MFPs, select the check box on the first row/column, and then click [Delete].

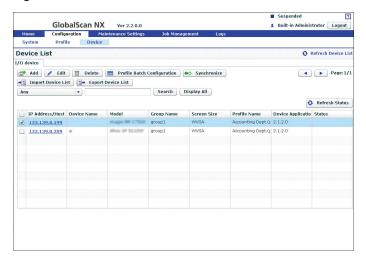
## Changing MFP's Profile and/or Project

If you wish to select a different Profile or Project for one or more MFPs, proceed as follows:

4

- 1. If necessary, click [Home], and then the [Device] shortcut.
- 2. Select the target MFP(s) check box(es).

Fig.: Device List



- 3. Click [Profile Batch Configuration].
- 4. The Selected Device Properties screen displays.

Fig.: Device Properties



- 5. From the Profile Name drop-down list, select the new Profile.
- 6. From the Project Name drop-down list, select the new Project.



• This is only necessary if you are creating a One-touch Scan Project with no authentication, thus the drop-down will only contain Projects that have been identified as such.



• See page 304 "About One-touch Scan".

### 7. Click [OK].



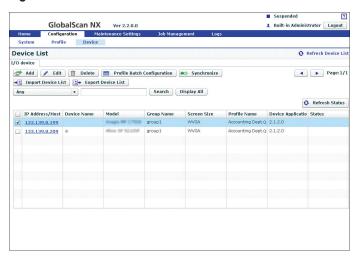
If GlobalScan NX cannot connect to the target device(s), an error message will display. Click
[OK], and then make sure the target MFP is turned on, and that the MFPs have the
GlobalScan NX MFP application installed.

### Synchronizing the Device

After editing Profile or Project, it is necessary to synchronize the associated MFP(s) with the Profile or Project as follows:

- 1. If necessary, click [Home], and then the [Device] shortcut.
- 2. Select the target MFP(s) check box(es).

Fig.: Device List



- 3. Click [Synchronize].
- 4. Click [OK] to confirm synchronizing.



- If an error occurs attempting to synchronize any of the devices, an error message will display upon completion of all the processes.
- To cancel synchronization, click [Cancel] under the Progress Bar.
- To determine the status of synchronization, check the System Log.
- If the screen size (WVGA/4.3 inch/10.1 inch) is set for a profile that does not match the
  actual screen size, an error occurs.

In the following occasions, it is necessary that the Administrator synchronize the GlobalScan computer/ server and connected MFP(s):

#### Software Installation Modification

After performing an Installation Modification, whereby you reinstall the GlobalScan NX software. This is necessary if you want change the Web Server, Port Number, and/or Virtual Directory.

### Reference

See GlobalScan NX Installation Guide.

### • System Recovery

After performing a Restore operation if a problem has occurred on the System. The target data here includes the content of the Job Queue and the distribution settings of the Profiles, Projects, etc. Interruption is not supported.

### Reference

• See page 413 "Performing a Recovery (Server Edition Only)".

### IP Address Change

If the IP Address of the GlobalScan NX computer/server has changed, you must synchronize the system.

#### SSL Setting Change

If any SSL certificate settings have changed, you must synchronize the system.

### ■ Reference

- See page 453 "Managing the Server Certificate".
- See page 464 "Managing the Site Certificate".

The current status of an MFP is indicated by a combination of an icon and a string.

The status is determined from the scanner status and the fax status as follows:

Status		Scanner Status		
		Ready	Error	Unknown
	Ready	READY	ERROR	UNKNOWN
FAX Status	Error	ERROR	ERROR	ERROR
	Unknown	UNKNOWN	ERROR	UNKNOWN
FAX is not Supported		READY	ERROR	UNKNOWN

The following table shows the details of the MFP status:

Status	Description	
Ready	The MFP is ready.	
Error	The MFP is not available due to some major problem.	
Unknown	The current status of the MFP is unknown because information can not be obtained for some reason.	

### Importing/Exporting the Device List

The Device List can be imported and exported as CSV (comma separated value) format file. You can use the import/export function to create backups of the Device List, move the Device List easily from one server to another, and add several devices to GlobalScan NX without having to go through the settings screens for each device.

You can also import Device List CSV files that were generated by Web SmartDeviceMonitor.

### Importing a Device List

To import a Device List, proceed as follows:

- 1. If necessary, click [Home], and then the [Device] shortcut.
- 2. Click [Import Device List].

The Import Device List screen displays.

Fig.: Import Device List Screen



#### 3. Click [Browse].

The [Open File] window displays. Select the CSV file you want to import, and then click [Open].

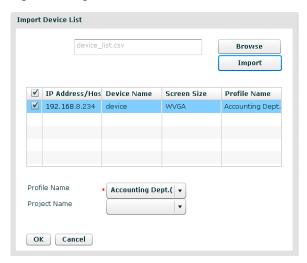
# 4. Click [Import].

The selected CSV file is read and, if no errors occur while reading the CSV file, the device list is displayed on the Import Device List screen.



- For details about errors that might occur while reading the CSV file, see "Import Conditions" on page 353 "CSV File Specifications".
- 5. Select the check box next to the devices that you want to import.

Fig.: Selecting Devices





- Select the check box in the column headings to select all devices.
- If the screen size (WVGA/4.3 inch/10.1 inch) is set for a profile that does not match the actual screen size, an error occurs.
- 6. In the [Profile Name] drop-down list, select the Profile that you want to assign to the selected devices.
- In the [Project Name] drop-down list, select the Project that you want to assign to the selected devices.
- 8. Click [OK].

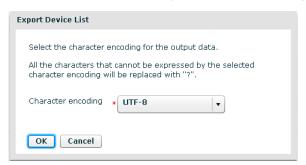
The devices you selected are registered in GlobalScan NX.

#### **Exporting the Device List**

To export the Device List, proceed as follows:

- 1. If necessary, click [Home], and then the [Device] shortcut.
- 2. Select the check boxes next to the devices you want to export.

- 3. Click [Export Device List].
- 4. Select the character encoding methods from the drop-down list.



- 5. Click [OK].
- 6. On the Save File dialog, select a folder to save the file in, enter a file name for the data, and then click [Save].



• See page 353 "CSV File Specifications".

### **CSV File Specifications**

This section explains the content of the device list CSV file.

The device list CSV file contains lists of device settings. Each line in the CSV file describes the settings of one device, and each setting (field) is separated by a comma.

This table explains the various fields that the device list CSV file contains.

Table: Device List CSV File Fields

Field	Data	Corresponding Device Property * 1
1	The IP address or host name of the device. This field is required.	[IP Address]
2	A "true" or "false" string indicating the device's use of the scan function.	[Use Scanner]
3	A "true" or "false" string indicating the device's use of the FAX function.	[Use Fax]
4	A "true" or "false" string indicating the device's use of the G3-1 port.	[Use G3-1 Port]

Field	Data	Corresponding Device Property * 1
5	A "true" or "false" string indicating the device's use of the G3-2 port.	[Use G3-2 Port]
6	A "true" or "false" string indicating the device's use of the G3-3 port.	[Use G3-3 Port]
7	A "true" or "false" string indicating the device's use of the Internet port.	[Use Internet Port]
8	A "true" or "false" string indicating the device's use of the IP port.	[Use IP Port]
9	The device name.	[Display Name]
10	The ID *2 of the Profile to assign to the device.	none
11	The name of the Profile to assign to the device.	[Profile Name]
12	The ID *2 of the Project to assign to the device.	none
13	The name of the Project to assign to the device.	[Project Name]
14	The size of the MFP panel screen.	none

<sup>\* 1</sup> The listed properties are the properties that can be set using the Device Properties screen.

### **Import Conditions**

- When you are editing an exported CSV file, do not edit the fields 9 through 14. If you edit
  these fields, an import error will occur.
- When you are creating a CSV file or adding new device information to a CSV file, leave fields 9 through 14 blank. If you edit these fields, an import error will occur.
- If the IP address or host name (field 1) is not specified, or if the IP address or host name is incorrect, an import error will occur.
- If a nonexistent Profile ID (field 10) is specified, an import error will occur. However, if you
  leave this field blank, no error will occur and the Profile selected on the Import screen will be
  automatically assigned to the device.
- If a nonexistent Profile ID (field 10) is specified and the Project ID is blank, one of the following will occur:
  - If the device does not have a FAX function, or the Use Fax field (field 3) is "false", no Project will be assigned to the device.

<sup>\*2</sup> If you are creating a CSV file, we strongly recommend that you leave these fields blank.

4

• If the device has a FAX function and the Use Fax field (field 3) is "true", an import error will occur.

# **About Inbound FAX Transfer**

GSNX Serverless and Server Edition both support Inbound FAX Transfer. In order to enable this feature, the MFP's Reception Settings function for facsimile must be set to "Store". For details, refer to the MFP model's Operating Instructions.

If "Store" is specified at the device's FAX transfer settings, the following will occur:

- 1. All inbound faxes from all ports will be stored in the MFP's document server and then delivered.
- 2. If the delivery is successful, the document will be automatically deleted from the MFP's document server.



- When using Server Edition, if an error occurs after the document has been transferred to the server PC, the job will be placed in the Error Queue. If the document could not be transferred to the server PC, the document will remain in the MFP's document server.
- If the transfer of a received fax document has failed, check the MFP's Document Server. If you
  cannot find it in the Document Server, try restarting the device, and then check the Document
  Server again.
- Documents that were not successfully transferred to the server PC are stored in the MFP's document server. Depending on the MFP's settings, documents stored in the MFP's document server may be deleted after a certain length of time, so make sure to check the document server periodically.
- If too many jobs accumulate in the Error Queue, the MFP's hard disk can fill up, causing the received documents to be printed out.



• The MFP can be configured to print faxes when they arrive, even if the MFP's fax transfer setting is "Store". For details, refer to the MFP model's Operating Instructions.

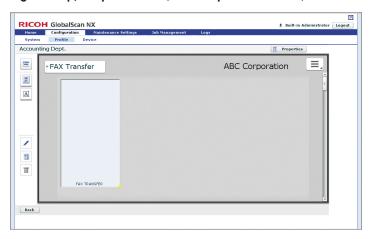
Additionally, to perform Inbound FAX Transfer, the GlobalScan NX AdminTool must be configured with a Project configured for the purpose. To create such a Project, proceed as follows:

 Within the GlobalScan NX AdminTool, create a Profile, Group, and Project for Inbound FAX Transfer.

Fig.: Group/Project Screen (Standard Operation Panel)



Fig.: Group/Project Screen (Smart Operation Panel)



- **■** Reference
  - See page 48 "Step 2: Add a Profile".
  - See page 52 "Step 3: Add a Group".
  - See page 56 "Step 4: Add a Project".

### **Important**

- The Inbound FAX Transfer function is only available to Projects without authentication.
- 2. Double-click on the Project button to open the Delivery Flow screen.

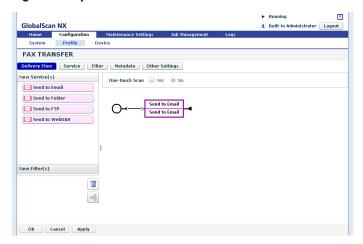
4

3. Select and configure the Service/Filter.



• See page 64 "Step 6: Configure the Service".

### Fig.: Delivery Flow Screen



- 4. Specify the target email destination(s), i.e., the "To" field as follows:
  - 1. Click [Service].
  - 2. Double-click [Manual Entry].
  - 3. Enter the email address.
  - 4. Click [OK].
  - 5. Repeat 2 4 to enter another address, if necessary.



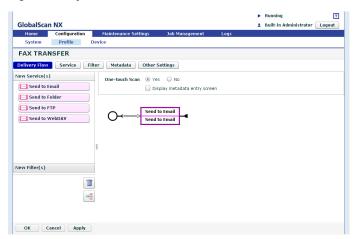
 If LDAP configuration settings are established, you have the ability to search your corporate address book for target destinations.

### Reference

- See page 148 "Send to Email Service".
- See page 279 "About Distribution Parameters".
- 5. Click [Delivery Flow].

#### 6. Now, identify the Project as a One-touch Scan by selecting [Yes].

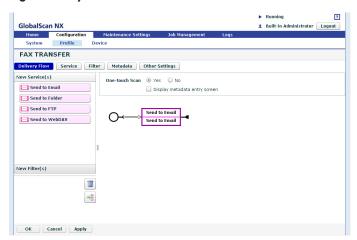
#### Fig.: Delivery Flow Screen



- **U**Note
  - A message appears warning you that cancelling (reversing) this setting might not be possible.
     Click [OK] to make the setting, or [Cancel] to cancel it.
  - After this Project has been selected for processing inbound FAX documents, the One-touch Scan setting cannot be cancelled.
- 7. Click [Apply], or [OK], to save the settings.
  - **U**Note
    - If any required settings are missing, for example the [To] destination was not entered/ selected, or the SMTP Server Name or Default Sender Address was not specified, an alert message displays.
  - Reference
    - See page 148 "Send to Email Service".
    - See page 279 "About Distribution Parameters".

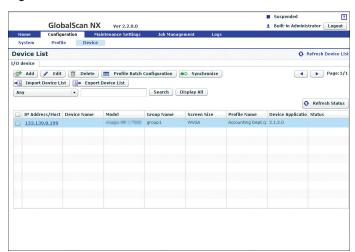
### 8. Click [Device].

### Fig.: Delivery Flow Screen



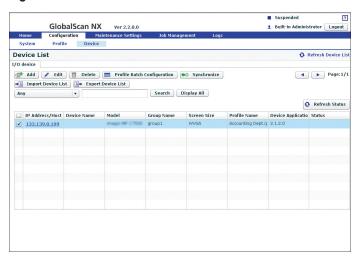
The Device List displays.

Fig.: Device List



Select the check box of the target device, i.e., the MFP that will perform the Inbound FAX Transfer function.

Fig.: Device List



- 10. Click [Edit] to open the MFP's Properties screen.
- 11. From the [Profile Name] drop-down list, select the Profile that contains the Project identified as a One-touch Scan. If necessary, scroll down to view the available Projects.



- See page 304 "About One-touch Scan".
- 12. Under [Use Fax], select [Yes].



- More than one Project identified as a One-touch Scan without authentication is required in order to select [Yes] under [Use Fax].
- Only Projects that meet the requirement display in the drop-down list.



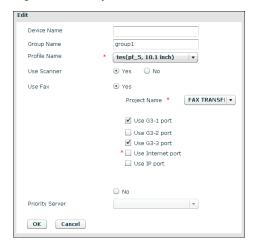
- If the entire [Use Fax] section of the screen is grayed-out, the target MFP does not support facsimile functions. For more information, contact your sales representative.
- 13. Select the Port(s) to perform the FAX transfer function.



- The MFP can be equipped with multiple ports, one or more of which can serve as a fax port.
   Unavailable ports will be disabled (grayed out).
- The [Use Internet Port] and [Use IP Port] check boxes never be grayed out because GSNX cannot acquire MFP's support function information.

- Following is a list of available ports. Note that some MFPs have multiple fax ports and unavailable ports will be grayed out.
  - G3-1
  - G3-2
  - G3-3
  - InternetFAX
  - Ipfax

Fig.: Device Properties Screen



#### 14. Click [OK] to save the settings.

The GlobalScan NX system is now ready to perform Inbound FAX Transfer functions. Again, make sure that the MFP's Reception Settings function for facsimile is set to "Store". For details, refer to the MFP model's Operating Instructions.

# Localizing the AdminTool

This section describes how to localize Profile, Group, and Project Display Names. Doing so will enable you to customize the MFP user interface to address language differences. For instance, if your organization has offices in Florida and Puerto Rico, you can create Profiles that address the language preferences of both user groups.

The GlobalScan NX settings that can be localized include the following:

- Document Name
- Profile Display Name
- Group Display Name
- Project Display Name
- Service/Filter Display Name
- Group/Project Screen Text Box
- Send to Email's Subject and Body Text
- Metadata Field Display Name
- Metadata Field Value for InputText



- The example to follow is just one implementation of localization. This same concept can be applied
  to any of the above listed settings. While this example uses Spanish as the localization target,
  GlobalScan NX also supports Italian, French, Dutch and German.
- 1. Open the AdminTool Login screen.

## Reference

- See page 44 "Step 1: AdminTool Login".
- 2. Select English from the Language drop-down list.
- 3. Create a Profile, for example, "Urgent Documents".

## Reference

- See page 48 "Step 2: Add a Profile".
- 4. Next, create a Group, for example, "Legal Dept".

## Reference

- See page 52 "Step 3: Add a Group".
- 5. Create a Project, for example, "Contract".

## **■** Reference

• See page 56 "Step 4: Add a Project".

- Log out of the AdminTool, and then log back in, selecting Spanish from the Language drop-down list.
- 7. Open the Profile Properties screen. You see that the Profile Name, "Urgent Documents", is in English. Retype the name in Spanish, "Ugente Documentos".
- 8. Double-click the Group tab to open the Group Properties screen. When the Smart Operation Panel is used, double-click the group name in the Group list to open the Group Properties screen. You see the Group Name, "Legal Dept", is in English. Retype the name in Spanish, "Dept. Juridico".
- 9. Open the "Contract" Project Properties screen (drag and drop to the Edit icon). Retype the Project Name in Spanish, "Contrato".
- 10. Create a second Project in Spanish, for example, "Informes", meaning "Reports".
- 11. Log out, and then log back in, selecting English from the Language drop-down list. You will see the Profile, Group and Project called "Contracts" in English, and the Project called "Informes" in Spanish. On the other hand, if you log out and log back in and select Spanish from the Language drop-down list, you will see all settings in Spanish. Whatever displays on the AdminTool Group/Project screen is what the user will see on the MFP display panel.

# Configuring Projects for Use on 4-Line LCD Display Panel MFPs

You can use GlobalScan NX on MFPs that have a 4-line display panel.

However, only Projects that meet the following conditions can be displayed or selected on such MFPs:

- One-touch Scan is enabled. (Metadata entry is allowed.)
- No authentication profiles are assigned to the Project.

The following items appear in the title banner of the display panel:

- Profile name
- Group names
- Project names

To display the full title, we recommend you limit the length of the title to 21 or fewer characters.

If the title exceeds 21 characters, the 21st character will be replaced with an ellipsis ("...") and additional characters will not be displayed.

Up to 26 characters of a text box label (for Metadata entry) can be displayed. However, an asterisk (\*) is included before required items, and this reduces the number of characters that can be displayed to 24.

## **∩** Limitation

 Only the text box Metadata input component can be used to enter Metadata on 4-line display panel MFPs. Other components, such as check boxes and date fields, are not supported.



- Projects appear on the display panel within their respective Groups, sorted in ascending order by
  Project name. The sorting order is based on the Unicode character ordering.
   Details about this ordering system, are available through the following URL:
  <a href="http://www.unicode.org/charts/">http://www.unicode.org/charts/</a>
- The following operations are not supported by MFPs with a 4-line display panel:
  - · Job Log display
  - Preview

## Reference

- For details about One-touch Scan, see page 304 "About One-touch Scan".
- For details about Authentication Profiles, see page 424 "Authentication Profile Settings".

# 5. MANAGING LOGS

This chapter explains how to, for example, view, search, export, and delete System and Job Logs.

# **System Log**

It is possible to view, search, delete and export the target MFP's System Log. To do so, proceed as follows:



- All system logs are displayed in a single page.
- 1. Click [Logs].
- 2. Click [System Log].

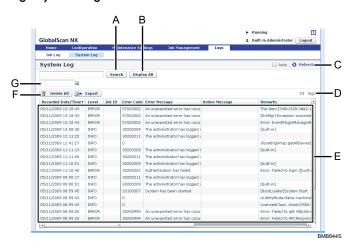
## Fig.: System Log Navigation



The System Log screen displays.

For Serverless Edition, the whole view is disabled (grayed out). Select the utility or an MFP from the list for which you want to display a summary list of Job Logs.

Fig.: System Log Screen



## 3. Navigate and manage the System Log, as outlined in the table below.

Table: System Log

Table: System Log		
	ltem	Description
A	[Search]	Performs a text search by keyword.  Refined search is supported. This means after the initial search is complete, [Search] reads [Narrow Search]. Enter the new keyword and click [Narrow Search].  As the keyword, you can use the specific entry in Log Data.
В	[Display All]	After performing a search, press this button to go back to the System Log.
С	[Refresh]	Refreshes the screen; the screen will be updated.  If you select the [Auto] check box, the latest information appears automatically when you display this screen.
D	x logs	Indicates the number of System Log entries.
E	Log Data	The following columns display the associated log data:  • [Recorded Date/Time]  • [Level] (INFO, WARN, ERROR)  • [Job ID] (unique alphanumeric string)  • [Error Code] (numeric reference)  • [Error Message] (detail of the error)  • [Action Message] (next step to take)  • [Remarks] (details for service analysis)  • [Source] (details for service analysis)  • [Position (Function Name, etc.)] (details for service analysis)  • Note  • To view additional column headings, use the scroll bar
		<ul> <li>To change the display order of the log columns, click on the column heading, and then drag and drop left or right.</li> <li>To sort the list, click the column heading of the item you wish to sort by.</li> </ul>

	ltem	Description
F	[Delete All]	Deletes the System Log.  Note  To prevent tampering with System logs, it is not possible to delete separate System logs, i.e., you can only delete
	[Export]	all logs at once.  Exports all the logs in CSV format. The CSV format file is useful if, for example, you want to import the log data into a spreadsheet or similar application.  Select the character encoding methods under the [Select
		Character Encoding] screen.  The following character encoding methods are supported:  UTF-8  Latin-1  Important  Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.  If you want to change the file name, download the file with the default name, and then rename it. Changing the
		file name beforehand may cause problems using the downloaded file.
G	Date Selection	Display the list of logs for a specific date. Click [¶] and/or [№] on the calendar to go backward/forward by month.  Click the date, and that selection will appear in the adjacent field.  • Note
		On the calendar, the dates that have logs will be highlighted.

# **System Log Settings**

To specify the maximum amount of Job Log data to retain, prior to automatic deletion, proceed as follows:

1. Click [Home], and then the [System] shortcut.

Fig.: AdminTool Home Page



2. Click [System Log].

Fig.: System Settings Screen



The System Log Settings screen displays.

Fig.: System Log Settings Screen

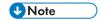


3. Specify the maximum size for log file storage.

Default storage size is 10240KB. System Logs are deleted automatically when the file size reaches the specified setting.



- If GlobalScan NX for Server Edition is upgraded from version 2.5.0 or earlier to version 2.5.1 or later, the initial value may be 634880KB (620MB), depending on the system log setting.
- If GlobalScan NX for Serverless Edition is upgraded from version 2.5.0 or earlier to version 2.5.1 or later, the maximum size of system log size stored in the MFP is as follows.
  - When the GlobalScan NX Application version installed in the MFP is 2.5.1 or later: The maximum size is 10240KB (10MB) regardless of the specified setting.
  - When the GlobalScan NX Application version installed in MFP is 2.5.0 or earlier:
     The maximum size is set to the value set before upgrading AdminTool.
- The specified setting must be a multiple of 64KB. Thus, the specified value will be
  automatically adjusted when [Apply] is clicked, though you can specify the value freely within
  the possible range, for example 2000KB > 2048KB.
- 4. Click [Apply] to save the settings.



Click [Back] to exit, without saving the setting.

## ■ Reference

• See page 367 "System Log".

# Job Log

To display the Job Log screen, proceed as follows:

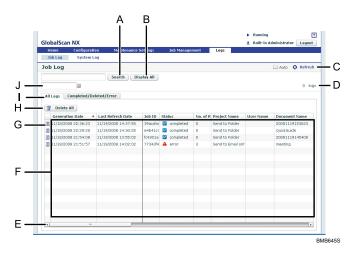
1. Click [Logs].

Fig.: Job Log Navigation



The Job Log screen displays. For Serverless Edition, the whole view is disabled (grayed out). Select an MFP from the list for which you want to display a summary list of Job Logs. Note that you enter this screen in the [All Logs] view, which displays all Job Logs. The [Completed/Deleted/Error] view displays those logs where the status is either completed, deleted, or an error occurred.

Fig.: Job Log Screen



2. Navigate and manage the Job Log, as outlined in the table below.

Table: Job Log

	ltem	Description
А	[Search]	Enter the search string in the space provided, and then click this button to perform a text search by keyword.
		Refined search is supported, which means after the initial search is complete, [Search] reads [Narrow Search]. Enter the new keyword and click [Narrow Search].
		As the keyword, you can use the specific entry in Log Data.

	ltem	Description
В	[Display All]	After performing a search, press this button to go back to the Job Log list.
С	[Refresh]	Refreshes the screen; the screen will be updated.  If you select the [Auto] check box, the latest information appears automatically when you display this screen.  • Note  • The [Auto] check box does not appear in user mode.
D	X Logs	Indicates the number of Job Log entries.
Е	Scroll Bar	Use this scroll bar to view column data.
F	Log Data	The following columns display the associated log data:  For a list of the columns that appear in the table, see "Log Data Column List" below.  Note  To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  To sort the list, click the column heading of the item you wish to sort by. (Please note that some items may not be sorted in ascending or descending order.)
G	Details III	Checks the details of the log you have specified. The Details view of the log will open as a tab screen. See figures "Detail Screen - Status: Succeeded" and "Detail Screen - Status: Failed". To exit the Details screen, click [Close].  Limitation  A maximum of five (5) tab screens can open at one time. If you click the Details button when five (5) tab screens are already open, the sixth tab screen will open after the first one closes.
Н	[Delete All]	Deletes the Job Log.  To delete Job logs whose status is [Error], you first need to delete the target jobs in the Error Queue screen.

	ltem	Description
		Error job logs cannot be deleted unless their status is changed to [Deleted].  •• Note
		To prevent tampering with Job logs, it is not possible to delete separate Job logs, i.e., you can only delete all logs at once.
		<ul> <li>Job logs whose state is Current, Wait, or Error cannot be deleted.</li> </ul>
I	[All Logs]	Displays the entire Job Log.
	[Completed/Deleted/ Error]	Displays the Job Logs whose status is Completed/ Deleted/Error.  Important  Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.
		If you want to change the file name, download the file with the default name, and then rename it.  Changing the file name beforehand may cause problems using the downloaded file.
J	Date Selection	Displays the list of logs for a specific date. Click [◀] and/or [▶] on the calendar to go backward/forward by month. Click the date, and that selection will appear in the adjacent field.
		<ul> <li>• On the calendar, the dates that have logs will be highlighted.</li> <li>• Text search within the list is supported.</li> </ul>



- On the Job Log screen, click the [Completed/Deleted/Error] tab, and then click [Export] to save the data as a CSV format file.
- The Export function will save all Job Logs regardless of the search results displayed in the list.
- On the [Select Output Object and Character Encoding] screen that appears when you click [Export], you can select the type of information to output and the character encoding method.
  - Output Object: Log per job, Detailed log

- Available encoding methods: UTF-8, Latin-1
- The upper entries in the exported CSV file contain the information displayed in Summary view, and the lower entries contain the information displayed in Detail view.

#### Log Data Column List

- [Generation Date]
- [Last Refresh Date]
- [Job ID]
- [Status] (see table "Status Icons" below)
- [No. of Retries]
- [Project Name]
- [User Name]
- [Document Name]
- [No. of Pages]
- [Document Size]
- [Job Type]
- [First Page Size]
- [First Page Resolution]
- [Device Name] (Device ID is also displayed)
- [Registration Date]
- [Generation Job ID]
- [No. of Scanned Page(s)]
- [MAC Address]
- [IP Address]
- [Added Device Name]

#### Table: Status Icons

Status	Description
[Waiting]	Indicates that the job is waiting in the queue, for example a new job or retry job.  Note  A failed job is first held in the waiting queue, and then automatically retried for the specified number of times. If retry is unsuccessful, job is passed from waiting queue to error queue.

Status	Description
[Processing]	Indicates that the job is being processed.
[Completed]	Indicates that the job is completed.
[Error]	Indicates that the job has failed after retries.
[Deleted]	Indicates that the job has been deleted that was in Waiting, Retry, or Error condition.
[Fatal error]	Indicates that an unrecoverable error occurred. For example, a Project was deleted.
	If this status displays, check the System Log for details.

Fig.: Detail Screen - Status: Succeeded

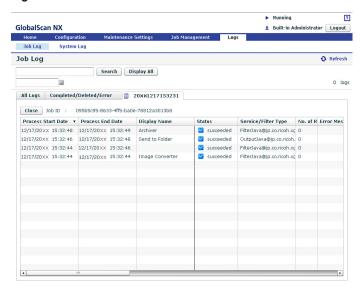


Fig.: Detail Screen - Status: Failed

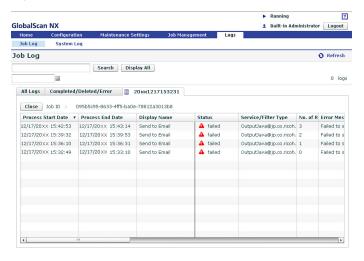


Table: Job Log Screen - Details

ltem	Description
[Process Start Date]	The date and time processing started.
[Process End Date]	The date and time processing finished.
[Display Name]	The display name for the Service/Filter in the delivery flow.
[Status]	The result of data processing
[Service/Filter Type]	The plug-in type
[No. of Retries]	The number of retries
[Error Message]	Error messages
[Action Message]	Action messages
[Destination Address]	The email addresses the data was sent to.
[No. of Destination Address(es)]	The number of addresses the data was sent to.
[Total No. of Deliveries]	The total number of items sent. For example, when using the divide email function, this will be the number of emails the data was divided into.
[Processed Size]	The size of the data processed by the plug-in. This is not the size of the data passed to the plug-in, but the size of the data processed

ltem	Description
	and output by the plug-in. For instance, if an email was sent with no attached data, this number will be zero.
[Processed Pages]	The number of pages processed by the plug-in. This is not the number of pages passed to the plug-in, but the number of pages processed and output by the plug-in. For instance, if an email was sent with no attached data, this number will be zero.

3. When finished, navigate to another screen or close your Web browser.

# 6. MANAGING JOBS

This chapter explains how to manage jobs that are in the Job or Error Queue, as well as establish settings that will control job retry interval, scheduled distributions, etc.

# Job Queue

The status of jobs in the Job Queue is either [Waiting] or [Processing]. To view the Job Queue, proceed as follows:

1. If necessary, click [Home], and then click [Job Queue] shortcut.

Fig.: AdminTool Home Page



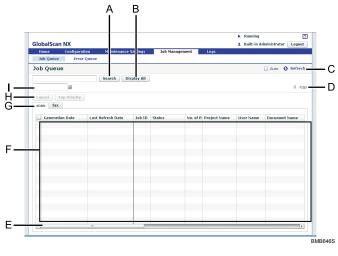
**U** Note

• You can also click the [Job Management] tab, and then [Job Queue].

Fig.: Job Queue Navigation



The Job Queue screen opens.



- Note
  - The Job Logs are displayed in chronological order. That is, they are displayed in the order in which they were accepted. The job that was last accepted will appear at the end of the list.
- 2. Navigate and manage the Job Queue, as outlined in the table below.

Table: Job Queue

	ltem	Description
А	[Search]	Enter the search string in the space provided, and then click this button to perform a text search by keyword.
		Refined search is supported. This means after the initial search is complete, [Search] reads [Narrow Search]. Enter the new keyword and click [Narrow Search].
		As the keyword, you can use the specific entry in Log Data.
В	[Display All]	After performing a search, press this button to go back to the job list.
С	[Refresh]	Refreshes the screen; the screen will be updated.
		If you select the [Auto] check box, the latest information appears automatically when you display this screen.
D	Job Count	Displays the number of jobs listed.
Е	Scroll Bar	Use this scroll bar to view column data.

	ltem	Description
F	Log Data	The following columns display the associated log data:  • [Generation Date]  • [Last Refresh Date]  • [Job ID]  • [Status]  • [No. of Retries]  • [Project Name]  • [User Name]  • [Document Name]  • [No. of Pages]  • [Document Size]  • [Job Type]  • [First Page Resolution]  • [Device Name]  • [Registration Date]  • [Generation Job ID]   Note  • To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  • Column order is maintained, even if you click the [Refresh] button.  • Sorting by clicking on a column heading is not supported.
G	[Scan]	Selects Scan job queue.
	[Fax]	Selects Fax job queue.
Н	[Cancel]	After selecting the job(s) to interrupt, click this button. The job(s) are cancelled and transferred to the Job Log.
	[Top Priority]	Moves a selected job to the top of the Job Queue.

3. When finished, navigate to another screen or close your Web browser.

#### Ö

# **Error Queue**

To view the Error Queue, proceed as follows:



- Jobs listed in the Error Queue are stored on the GlobalScan NX server (Server Edition only) and
  also on the MFPs (both Server and Serverless Editions). If too many jobs accumulate in the Error
  Queue, the server and/or MFPs' hard disks can fill up. To prevent this, periodically retry or
  download and then delete jobs from the Error Queue.
- 1. If necessary, click [Home], and then click [Error Queue] shortcut.

Fig.: AdminTool Home Page





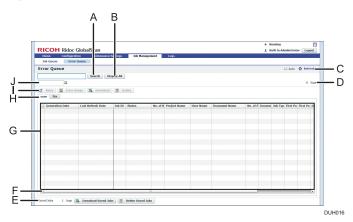
 You can also click the [Job Management] tab, and then [Error Queue] to open the Error Queue screen.

Fig.: Error Queue Navigation



The Job Logs held in the Error Queue are displayed.

Fig.: Error Queue Screen



2. Navigate and manage the Error Queue, as outlined in the table below.

Table: Error Queue

	Button	Description
A	[Search]	Enter the search string in the space provided, and then click this button to perform a text search by keyword.
		Refined search is supported. This means after the initial search is complete, [Search] reads [Narrow Search]. Enter the new keyword and click [Narrow Search].
		As the keyword, you can use the specific entry in Log Data.
В	[Display All]	After performing a search, press this button to go back to the job list.
С	[Refresh]	Refreshes the screen; the screen will be updated.
		If you select the [Auto] check box, the latest information appears automatically when you display this screen.
D	Job Count	Displays the number of jobs listed.
Е	Number of saved jobs	If an unexpected error occurs, it is recorded in the system log. The job is saved in the appropriate MFP folder but not displayed in the error job list.
		Displays the number of saved jobs, if any.
		<b>↓</b> Note
		If the failover feature is enabled, the total number of error jobs accumulated on the Primary and Secondary Delivery Servers and all of the Load Balance Servers is displayed.

	Button	Description
		If saved jobs are accumulated in the save folder, the message "An unspecified error has occurred. Check the saved jobs from the error queue screen on the AdminTool's job management screen" will be sent to the e-mail address specified in the error notification settings on the Administrator Settings screen.
	[Download Saved Jobs]	This button is displayed if there is a saved job.
		You can obtain information about the saved job by downloading it in ZIP format.
		<b>↓</b> Note
		If the failover feature is enabled, saved jobs accumulated on the Primary and Secondary Delivery Servers and all of the Load Balance Servers are downloaded.
	[Delete Saved	This button is displayed if there is a saved job.
	Jobs]	You can delete saved jobs.
		<b>◆</b> Note
		<ul> <li>If the failover feature is enabled, saved jobs accumulated on the Primary and Secondary Delivery Servers and all of the Load Balance Servers are deleted.</li> </ul>
F	Scroll Bar	Use this scroll bar to view column data.
G	Log Data	The following columns display the associated log data:
		[Generation Date]
		• [Last Refresh Date]
		• [Job ID]
		• [Status]
		• [No. of Retries]
		[Project Name]
		• [User Name]
		• [Document Name]
		• [No. of Pages]
		• [Document Size]
		• [Job Type]
		• [First Page Size]

	Button	Description
		<ul> <li>[First Page Resolution]</li> <li>[Device Name]</li> <li>[Registration Date]</li> <li>[Generation Job ID]</li> </ul>
		<ul> <li>To change the display order of the log columns, click on the column heading, and then drag and drop left or right.</li> <li>Column order is maintained, even if you click the [Refresh] button.</li> </ul>
Н	[Scan]	Opens the Scan error queue.
	[Fax]	Opens the Fax error queue.
ı	[Retry]	After specifying the Error jobs, click to retry.  The job(s) will be deleted from this view and transferred to the Job Queue, with a status of [Waiting].  Reference  • See page 379 "Job Queue".
	[Error Image]	Displays the first-page image of the Error job.  Important  Your browser requires a Plug-in to display TIFF files.
	[Download]	Multiple error jobs can be downloaded at once.  When downloading, you can choose to download a log file (in CSV format) in addition to the image data.  Important  Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.  If you want to change the file name, download the file with the default name, and then rename it. Changing the file name beforehand may cause problems using the downloaded file.

	Button	Description
		Before downloading, you can select which character encoding method to use for the log file.
	[Delete]	After specifying the Error jobs, click to delete. They will be deleted from this view and their status will be changed to [Delete]. (In the Job Log list, they will appear as Delete logs.)
J	Date Selection	Displays the error queue for a specific date. Click [¶] and/or [▶] on the calendar to go backward/forward by month. Click the date, and that selection will appear in the adjacent field.  •• Note
		<ul> <li>On the calendar, the dates that have logs will be highlighted.</li> <li>Text search within the list is supported.</li> </ul>

3. When finished, navigate to another screen or close your Web browser.

# **Job Settings**

To set Number of Retries, Retry Interval, Scheduled Delivery, and Auto Delete preferences, proceed as follows:



- Scheduled Delivery and Auto Log Deletion settings are supported by the Server Edition only.
- 1. Click [Home], and then the [System] shortcut.

Fig.: AdminTool Home Page



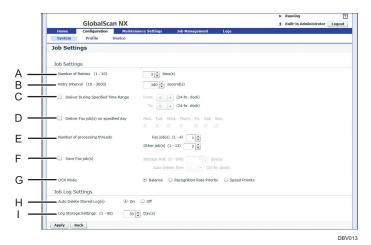
2. Click [Job Settings].

Fig.: System Settings Screen



The Job Settings screen displays.

Fig.: Job Settings Screen



3. Specify the Job settings, as outlined in the table below.

**Table: Job Settings** 

	ltem	Description
А	[Number of Retries]	Specify the number of retries performed for a failed job, in the range of 1-10. (Default: 3)
В	[Retry Interval] (10-3600)	Specify the retry interval for a failed job, in the range of 10-3600 seconds. (Default: 180 seconds)  Note  A failed job will be retried at the specified interval, i.e., a failed job will be added to the end of the queue after the time specified here has elapsed. So, if there are many jobs waiting in the queue, the actual retry intervals will be longer.
С	[Deliver During Specified Time Range] (Server Edition only)	Specify whether or not to enable Scheduled Delivery. If enabled, incoming document distribution jobs will be stored on the Server PC and performed on the specified time.  The user can set the Start and Stop time using the 24-hour clock. For example, if you set the Start time at "23" and the Stop time at "3", delivery will start at 11:00 p.m. and end at 3:00 a.m. If you set the same value (hour) to the Start time and Stop time, Scheduled Delivery will not start correctly.
D	[Deliver Fax job(s) on specified day]	Select this check box to specify on which days of the week fax jobs are processed. After you select this check box, select the

	ltem	Description
		days of the week on which to process fax jobs. (Default: not selected; fax jobs will be processed on every day of the week.)
		<b>◆</b> Note
		If both [Deliver During Specified Time Range] and [Deliver Fax job(s) on specified day] are enabled, fax jobs will be sent only during the specified time period on the specified days of the week. Jobs other than fax jobs will be sent during the specified time period on every day of the week.
E	[Number of processing threads]	Specify the maximum number of fax jobs and other job that can be processed simultaneously.
F	[Save Fax job(s)]	If you want to save received fax jobs, select this check box, and then specify [Storage limit] and [Auto Delete Time].
		<ul> <li>[Storage limit]: Specify the number of days that fax jobs are saved for. Enter a value from 0 to 999 days.</li> <li>(Default: 0 days.)</li> </ul>
		When the specified save period passes, the fax job data will be deleted automatically.
		[Auto Delete Time]: Specify the time of day at which fax jobs that have reached the storage period limit are deleted. (Default: 1:00 AM.)
G	[OCR Mode]	Determine the OCR engine's operation mode.
		[Balance] (Default)  The state of the s
		[Recognition Rate Priority]     [Speed Priority]
		◆ Note
		If you select [Speed Priority], the recognition rate decreases and the processing speed increases. If you select [Recognition Rate Priority], the processing speed decreases and recognition rate increases.
Н	[Auto Delete Stored Log(s)]	Specify whether or not to enable automatic deletion of the Job Logs.
	(Server Edition only)	

	ltem	Description
		<ul> <li>Note</li> <li>Job Logs whose status is [Error] cannot be deleted, i.e., they are excluded from the targets of this deletion.</li> </ul>
I	[Log Storage Settings]	Specify the number of days the Job Logs should be retained, from 1 day to 90 days. (Default: 30 days) After the specified number of days, the Job Log data is deleted.

4. When finished, click [Apply] to save the settings.



- If a message appears indicating that you must restart GlobalScan NX, restart the server that is running the GlobalScan NX service.
- Click [Back] to exit, without saving the setting.

## **■** Reference

• See page 372 "Job Log".

# 7. MAINTENANCE SETTING

This chapter explains how to manage the GlobalScan NX Server for maximum workflow efficiency.

# System Control Settings (Server Edition Only)

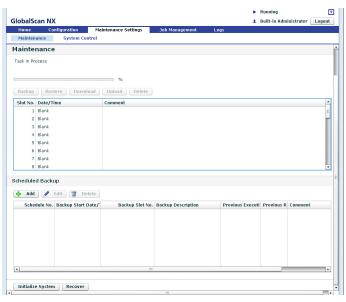
### Stop/Start Service

You can start/stop the GlobalScan NX Server from processing distribution jobs. The system itself is not stopped, processing of distribution jobs is just temporarily stopped. Incoming jobs are held in the Waiting queue. They will not be processed until you restart job processing.

To start/stop service, proceed as follows:

Click [Maintenance Settings], and then [System Control].

Fig.: Maintenance Settings



UNote

• You can also click [Running], in upper right corner, to enter the System Control screen.

Fig.: System Control



2. Specify the operational setting(s), as outlined in the table below.

**Table: System Control Settings** 

	ltem	Description
Α	[Delivery Service Status]	This is a read-only entry that indicates server status. Note that the header entry [F] changes to correspond to this setting.
	[Refresh]	Refreshes server status.  Note  This command will be executed immediately.
В	[Switch Delivery Service Status]	Toggles GlobalScan NX Server status from [Running] to [Suspended].  • This command will be executed immediately.
С	[Start delivery service automatically when starting the computer.]	Specify the startup mode of distribution jobs.  Istart  Processing of distribution jobs will start automatically after the Server PC has started.  Ipo not Start  Processing of distribution jobs will not start automatically after the server has started. As long as the processing of distribution jobs is stopped, no distribution jobs are processed, i.e., incoming distribution jobs are held in the Waiting queue.

/

	ltem	Description	
D	[Server Disk Space]	<b>■</b> Reference	
		See page 395 "Setting Server Disk Space".	
Е	[Apply]	Click to save settings.	
F	Server Status	This is a read-only entry that indicates GlobalScan NX Server status, [Running] or [Suspended].  •• Note	
		GSNX Serverless Edition does not utilize a Server PC for job processing; distribution tasks are handled by the MFP itself.  As such, the Serverless AdminTool will not display the Running/Suspended System Control screen settings or status header.	

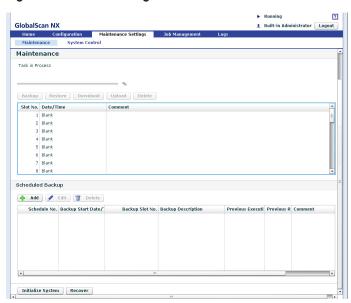
3. When finished, click [Apply] to save setting(s).

# **Setting Server Disk Space**

To set disk capacity alert/suspend settings, proceed as follows:

1. Click [Maintenance Settings], and then [System Control].

Fig.: Maintenance Settings



The System Control screen displays.

Fig.: System Control Screen



2. Specify Server Disk Space settings, as outlined in the table below.

**Table: Server Disk Space Settings** 

	ltem	Description	
A	[Server Disk Space]	The disk space of the GlobalScan NX Server is monitored. As such, if the free disk capacity becomes smaller than the specified size, an alert is logged to the System Log and the GlobalScan NX Server will be stopped automatically.	
		<b>◆</b> Note	
		When the Administrator's email address has been specified, and the notification setting has been enabled, notification will be sent to the Administrator. This requires that the Administrator's email address be specified, and the Notify setting has been enabled.	
		The user can specify the following settings:	
		• [Issue Alert at:]	
		Specify the alert size, in 50MB increments. The default/minimum size is 250MB.	
		When the free disk capacity drops to the specified size, a notification email will be sent to the Administrator alerting that the service could be stopped, again, provided that the address has been set properly.	
		• [Suspend at:]	
		Specify the suspend size, in 50MB increments. When the free disk capacity drops to this size, the service will be stopped.  The default/minimum size is 200MB.	

/

Item	Description
	■ Reference
	See page 443 "Administrator Settings".

3. When finished, click [Apply] to save setting(s).

# **Maintenance Settings**

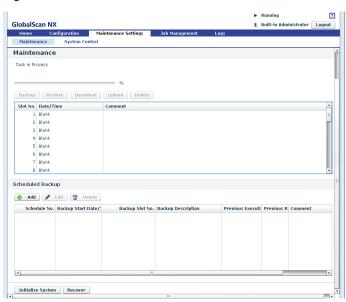
During maintenance, no distribution jobs can be performed on the MFP; the MFP display panel will be locked. Also, during maintenance, any other user cannot login to the AdminTool.

Note that Maintenance will proceed in the background even if the AdminTool is terminated in the middle of Maintenance.

To enter Maintenance Mode, proceed as follows:

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

Fig.: Maintenance Mode



2. Review the table below, the Maintenance Screen. Please do not execute any procedures until you have reviewed this information.

Fig.: Maintenance Mode

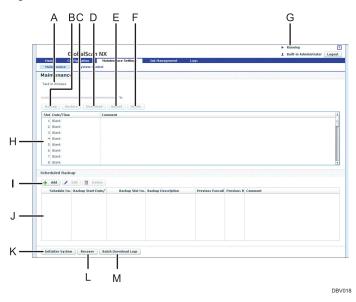


Table: Maintenance Mode

	ltem	Description	
Α	[Task in Process]	Gauges process of the requested task.	
В	[Backup]	Performs a backup of GlobalScan NX settings.  Server Edition: All the configuration data of the GlobalScan NX Server, excluding jobs, Job Logs, and System Logs, are backed up.	
		Serverless Edition: All configuration data of the GlobalScan NX computer/server is backed up. The data, for example settings, jobs, Job Log, System Logs, stored in the MFP is not backed up.    Reference	
С	[Restore]	Restores GlobalScan NX settings.  Important  You must reboot the GlobalScan NX computer/server after a restore operation.	

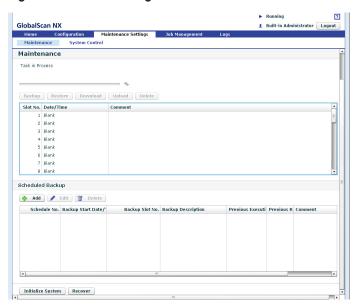
	ltem	Description			
		Reference			
		See page 411 "Restoring a Backup".			
D	[Download]	Downloads a backup file from GlobalScan NX to your computer.			
		Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.			
		<b></b> Reference			
		See page 408 "Downloading a Backup File".			
Е	[Upload]	Uploads a backup file from your computer to GlobalScan NX.			
		<b>∃</b> Reference			
		See page 410 "Uploading a Backup File".			
F	[Delete]	Deletes a backup file.			
		■ Reference			
		See page 415 "Deleting a Backup File".			
G	Server Status	Indicates the status of the GlobalScan NX Server.			
Н	Backup Data List	Lists each backup that was performed, including date/time and comments.			
		Limitation			
		A maximum of 30 backups files can be retained.			
I	[Add]	Adds a backup schedule.			
	(Server Edition only)				
	[Edit]	Allows you to change the selected backup schedule.			
	(Server Edition only)				
	[Delete]	Deletes the selected backup schedules.			
	(Server Edition only)				
J	Schedule list	Displays a list of registered backup schedules.			
	(Server Edition only)				
K	[Initialize System]	Restores default settings.			

	ltem	Description		
		<b>☆ Important</b>		
		<ul> <li>This will delete GlobalScan NX computer/server settings, for example Jobs, Logs, etc. Note that the MFP's internal GlobalScan NX settings are not cleared.</li> </ul>		
		<ul> <li>You must reboot the GlobalScan NX computer/server after initialization.</li> </ul>		
		■ Reference		
		See page 415 "Initializing the System".		
L	[Recover]	Performs a recovery.		
		<ul> <li>You must reboot the GlobalScan NX computer/server after initialization.</li> </ul>		
		<b>∃</b> Reference		
		See page 413 "Performing a Recovery (Server Edition Only)".		
М	[Batch Download Logs]	Collects logs from the GlobalScan NX computer application and the selected device(s).  Note		
		<ul> <li>It is intended to collect all GlobalScan NX -related logs in a single operation. Since it is for log files, a backup file is not included and must be gathered separately.</li> </ul>		

# Performing a Manual Backup

It is recommended that the Administrator backup GlobalScan NX data on a daily basis. Note that there are 30 available lines, enabling backup of data daily, for up to one month.

Fig.: Maintenance Settings

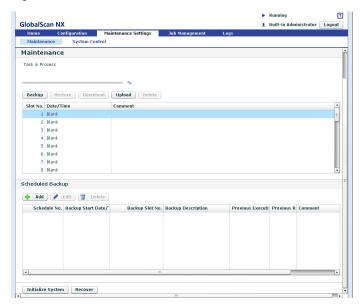


2. Select (highlight) a blank line.

Once you have reached 30 backup files, you can select which backup data to overwrite.

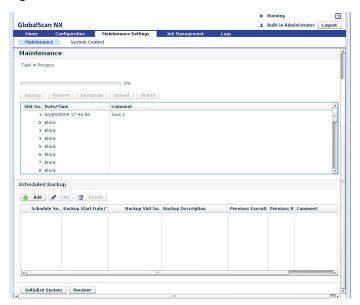
3. Click [Backup].

Fig.: Maintenance Mode



- 4. A message displays confirming the backup, and providing a [Comment] field. Enter a comment (up to 50 characters), and then click [OK]. A message displays indicating that the Backup operation was successful.
- 5. Click [OK]. The newly-created backup file is added to the list.

Fig.: Maintenance Mode



All of the configuration data of the target MFP, excluding the jobs, Job Logs, and System Logs, are backed up. Note that the data is identified by the date/time of backup, and any comment that may have been entered.



- Backups are retained in a specific folder on either the GlobalScan NX server running the
  application and AdminTool (Server Edition) or the computer running the AdminTool (Serverless
  Edition); the folder is fixed and thus not changeable.
- Interruption is not supported, i.e., once a backup has been executed, the task cannot be stopped.
- It is possible to restore a backup onto another MFP. Depending on the capabilities of the MFP, some settings may or may not be supported, for example color scan settings, resolution, etc.

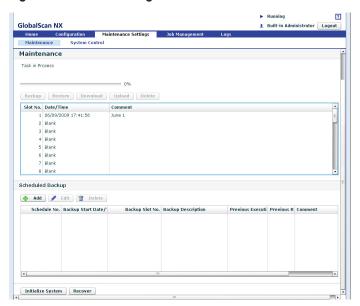
# Configuring Automatic Backups (Server Edition Only)

If you configure a backup schedule, backups will be automatically made on the specified date at the specified time.



• You can register up to 10 backup schedules.

Fig.: Maintenance Settings



2. Click [Add] under Scheduled Backup.

The Register Scheduled Backup screen appears.

Fig.: Register Scheduled Backup screen

		Register Scheduled Backup			
Α	+	Execution date	● Specify date/time   ■  Specify day of the week   Mon	iun.	
B C D E		Time (24-hour format)  Backup Slot No.  Backup description  Comment  OK Cancel	0 Min. (0 - 59) 1 (1 - 30)		
				BWX002	

3. Specify the settings, as outlined in the table below.

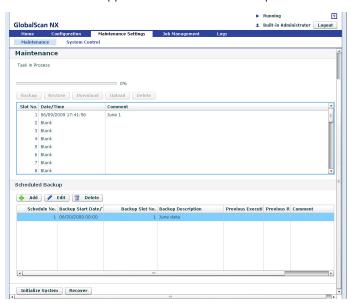
Table: Register Scheduled Backup screen

		ltem	Description
A	[Execution date]		Specify the day(s) on which the backup is to be performed.
			[Specify date/time]: select the date using the calendar.

	ltem	Description	
		[Specify day of the week]: select the check boxes of the days on which you want the backup to be performed.	
В	[Time (24-hour format)]	Specify the time the backup is to be performed.	
С	[Backup Slot No.]	Specify a number for the backup slot. The number you specify will appear as the [Slot No.] on the backup list. The number you specify determines the "slot" that backup data is written to.	
		For example, if you specify 3 for a backup in the backup list, that backup data will overwrite the data in the third slot when the backup is performed.	
		You can specify up to 30 slots by entering a number from 1 to 30.	
D	[Backup description]	Enter an explanation of the scheduled backup. You can enter up to 128 characters.	
Е	[Comment]	Enter the information that will appear in [Comment] on the backup data list.	
		You can enter up to 50 characters.	

# 4. Click [OK].

The new schedule appears in the scheduled backup list.



- If GlobalScan NX Server is not running at the specified backup time, the backup will be not performed.
- Backups are not performed under the following conditions:
  - If you are logged in to AdminTool as an Administrator. (Backups are still performed if a general user is logged in.)
  - If any of the following maintenance processes is running: backup, restore, download, upload, initialize, or recovery.
- If a scheduled backup is not performed, a failure is recorded in the system and error logs, and the Administrator will receive an error notification email. However, error notification emails are not sent during the initialization or recovery processes.



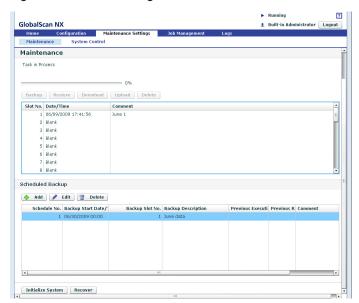
• If multiple backups are scheduled to be performed at the same time, the backup that is higher on the list receives priority.

# Changing the Settings of a Scheduled Backup

Use the following procedure to change the settings of a scheduled backup.

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

#### Fig.: Maintenance Settings



2. On the scheduled backup list, select the backup whose settings you want to change, and then click [Edit].

Fig.: Register Scheduled Backup screen



- 3. Change the settings as necessary.
- 4. Click [OK].

The modified scheduled backup will appear in the scheduled backup list.



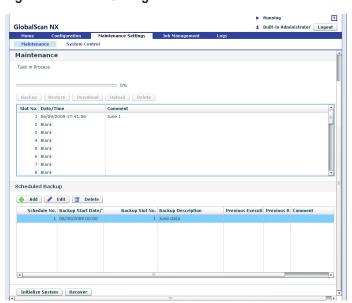
To return to the Maintenance screen without saving the changes, click [Cancel].

# Deleting a Scheduled Backup

Use the following procedure to delete a scheduled backup.

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

Fig.: Maintenance Settings



On the scheduled backup list, select the backup you want to delete, and then click [Delete].

A confirmation message will appear.

3. To delete the scheduled backup, click [OK].



• To return to the Maintenance screen without deleting the scheduled backup, click [Cancel].

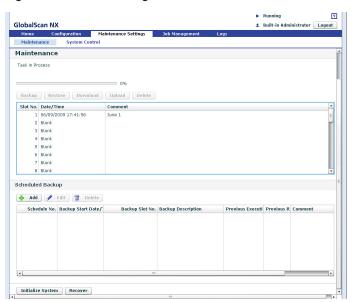
# Downloading a Backup File

You can download a backup file, for example, when copying the backup data to another computer, proceed as follows:



- Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.
- 1. Click [Maintenance Settings], and then [Maintenance], if necessary.

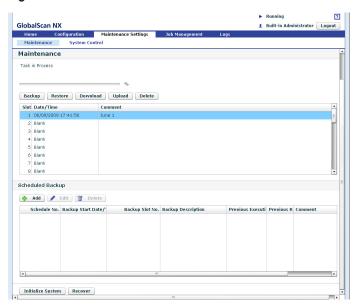
#### Fig.: Maintenance Settings



/

# 2. Select the line of backup data you want to download.

#### Fig. Maintenance Mode



# 3. Click [Download].

You can set a password for the backup file. If entered, this password will be required when the backup file is uploaded.

### 4. Enter the password.

# **○** Limitation

- The maximum length is 128 characters.
- Enter only alphanumeric characters for the download password.

Re-enter the password to confirm.

### Fig.: Maintenance Mode

Download	
Confirm	
Do you want to do	wnload?
Password	I
Confirm Password	
OK Cancel	

- 5. Click [OK] to save the password.
- 6. Save the backup file to the desired location.

A message displays indicating that the download operation was successful.

### 7. Click [OK].

# **Uploading a Backup File**

It is possible to upload a backup file to restore GlobalScan NX settings.

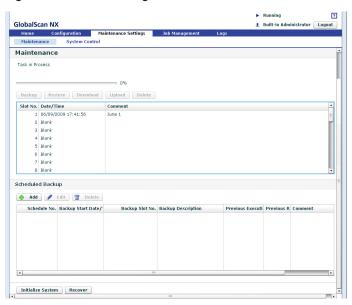


- Backup files created with Serverless Edition can be uploaded to Server Edition.
- You can import backup files created by a GlobalScan NX system that has different options installed on it.

# Reference

- See page 401 "Performing a Manual Backup".
- 1. Click [Maintenance Settings], and then [Maintenance], if necessary.

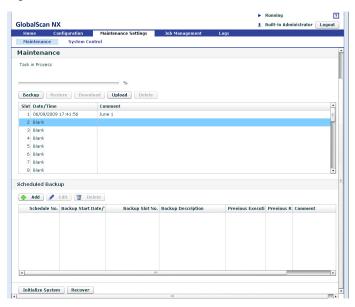
## Fig.: Maintenance Settings



2. Select a blank line on the list.

# 3. Click [Upload].

## Fig.: Maintenance Mode



- 1. Browse to the backup (.bk) file.
- 2. Click [Open].
- If the backup file was password-protected, enter the password used to download the file, and then [OK]. A message displays indicating that the upload operation was successful.
- Reference
  - See page 408 "Downloading a Backup File".
- 4. Click [OK].

# Restoring a Backup

You can restore the settings of the target MFP(s), by using a restored a backup file. To do so, proceed as follows:

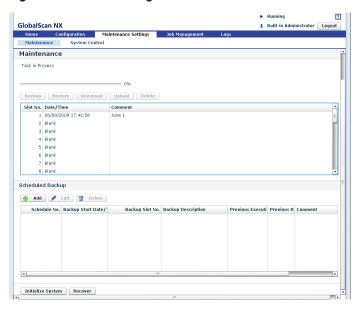


- If you want to restore the data including an NT authentication profile, be sure to delete the NT authentication profile of the data beforehand. The NT authentication profile cannot be restored.
- You cannot restore data which does not have a screen size item to a machine with a 4.3 inch screen.

# Limitation

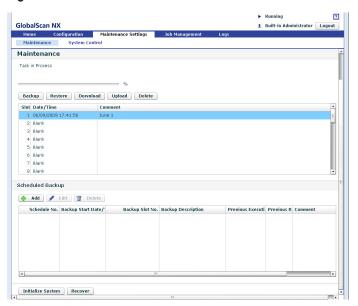
- If you are uploading a backup file that was created using a different version or edition of GlobalScan NX, the available space on the server's hard disk must be at least 12 times larger than the size of the backup file. This is because the backup file must be decompressed in order to convert it to the current version or edition.
- 1. Click [Maintenance Settings], and then [Maintenance], if necessary.

### Fig.: Maintenance Settings



# 2. Select the line of backup data to restore.

#### Fig. Maintenance Mode



- 3. Click [Restore]. A confirmation message displays.
- Click [OK] to confirm. A message displays indicating that the Restore operation was successful.
- 5. Click [OK]. A message displays indicating that the system must be rebooted.
- 6. Click [OK]. You are automatically logged out of the AdminTool.
- 7. Reboot the GlobalScan NX Server.

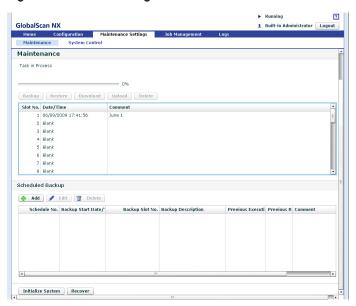


- Interruption is not supported, i.e., once a Restore operation has been executed, the task cannot be stopped.
- It is possible to upload a backup that is available outside the MFP to restore the settings.
- It is possible to Restore a Backup onto another MFP. Depending on the capabilities of the MFP, some settings may or may not be supported, for example color scan settings, resolution, etc.

# Performing a Recovery (Server Edition Only)

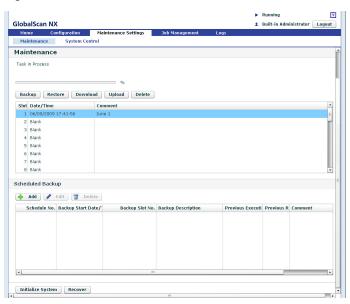
The target data will be recovered, if possible, when a problem has occurred on the System. The target data here includes the content of the Job Queue and the distribution settings of the Profiles, Projects, etc. Interruption is not supported.

#### Fig.: Maintenance Settings



- 2. Select (highlight) the backup file that you want to recover.
- 3. Click [Recover].

Fig.: Maintenance Mode



4. A confirmation message displays.

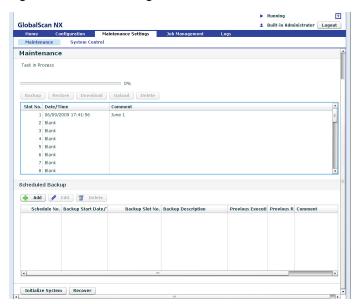
- Click [OK] to confirm. A message displays indicating that the Recovery operation was successful.
- 6. Click [OK]. A message displays indicating that the system must be rebooted.
- 7. Click [OK]. You are automatically logged out of the AdminTool.
- 8. Reboot the GlobalScan NX Server.

# Deleting a Backup File

Backup files can be deleted. To do so, proceed as follows:

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

Fig.: Maintenance Settings



- 2. Select (highlight) the backup file you want to delete.
- 3. Click [Delete].
- 4. Click [OK] to confirm deletion.



Click [Cancel] to exit, without deleting the backup file.

# Initializing the System

Initializing the system will delete all GlobalScan NX settings of the target MFP, for example jobs, logs, etc., and restore some default settings. The following settings, however, are retained:

- Backups held by the system
- System Logs
- Built-in Password for the current Administrator

• Activation settings (license-related settings)



• Once initialization has been executed, the task cannot be interrupted.

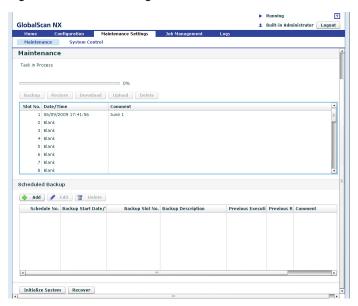


• You must reboot the system after an initialization.

To initialize the system, proceed as follows:

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

## Fig.: Maintenance Settings



2. Click [Initialize System].

The warning message displays.

- 3. Click [OK] to begin initializing system.
- 4. Reboot the GlobalScan NX server.



• Click [Cancel] to exit, without initializing system.

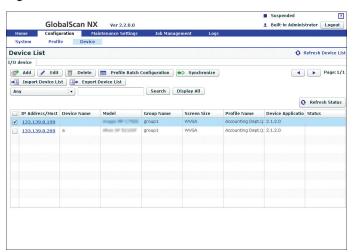
5. On the [Home] page, click the [Device] shortcut.

Fig.: AdminTool Home Page



The Device List displays.

## Fig.: AdminTool Device List



- 6. On the first row/column, click the check box, to select all MFPs in the list.
- 7. Click [Synchronize].



- Synchronization occurs in sequentially, device by device, thus if an error should occur attempting to synchronize a particular machine, an error screen will display. To continue synchronization on the next device, click [OK] or [Cancel] to exit.
- To determine the status of synchronization, check the System Log.

• See GlobalScan NX Administrator's Guide, "MANAGING LOGS".

# **Batch Execution of Maintenance (Server Edition only)**

GlobalScan NX provides a mechanism for performing maintenance from an MS-DOS command prompt. This mechanism is provided so that GlobalScan NX can cooperate with external backup tools.

There are many backup tools offered by third-party vendors. Such backup tools usually offer the scheduled backup feature that performs a system backup at the specified interval, with the specified preprocessing and post-processing.

In pre-processing, the relevant distribution service and Web server should be stopped because entry of new jobs, or setting changes, should not happen to the target system while performing a system backup. In post-processing, the stopped distribution service and Web server should be restarted.

The stop commands, service\_stop and server\_stop, will stop the relevant distribution service and Web server, respectively, after the job has been completed, if the target system is currently processing a job.

# Supported Commands

The following commands (functions) are intended to be used in the pre-processing and post-processing settings for system backup.

service start

Starts GlobalScan NX's distribution service ([Suspended] to [Running]). Even if this command is executed when GlobalScan NX's distribution service is already running, GlobalScan NX's distribution service will not change, and no error message will display.

service\_stop

Stops GlobalScan NX's distribution service ([Running] to [Suspended]). Even if this command is executed when GlobalScan NX's distribution service is already stopped, the status of the GlobalScan NX's distribution service will not change, and no error message will display.

service\_resume

Resumes GlobalScan NX's distribution service. Unlike the start command (service\_start), this command restarts GlobalScan NX's distribution service, with the status GlobalScan NX's distribution service was in before the maintenance. See tables "Order of command calls: service\_stop to service\_resume" below.

### Table: Order of Command Calls: service\_stop to service\_start

Before Maintenance	First Command	Second Command	After Maintenance
Suspended	Stop	Start	Running

Before Maintenance	First Command	Second Command	After Maintenance
Running	Stop	Start	Running

### Table: Order of Command Calls: service\_stop to service\_resume

Before Maintenance	First Command	Second Command	After Maintenance
Suspended	Stop	Resume	Suspended
Running	Stop	Resume	Running

This command can be used to prevent the status of GlobalScan NX's distribution process from being changed after the maintenance. When no other command was executed before this command, the status of the GlobalScan NX's distribution service remains the same.

server\_start

Starts the Web server that GlobalScan NX uses. Even if this command is executed when the relevant Web server is already running, the status of the relevant Web server will not change, and no error message will display.

• server\_stop

Stops the Web server GlobalScan NX uses. Even if this command is executed when the relevant Web server is already stopped, status of the relevant Web server will not change, and no error message will display.

### **Recommended Order of Command Calls**

The recommended order of command calls are listed in the table below.

### Table: Recommended Order of Command Calls

Before Performing a Backup	After Performing a Backup
service_stop	server_start
server_stop	service_resume

These commands are processed sequentially. Therefore, if another command is executed on another command prompt, while a command is processed, they will be processed one-by-one, in the order of execution.

#### How to Execute the Command Calls

The command calls can be executed from the command line or a batch file.

# **Executing Commands from the Command Line**

Manually type the command name to the command line, as follows:

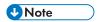
java -jar batch-execution.jar -cmd [-out\_result]



• The command line "cmd" values are listed in the table below.

#### Table: Command Line "cmd" Values

"cmd" Value	Description
service_start	Starts GlobalScan NX's distribution service.
service_stop	Stops GlobalScan NX's distribution service.
service_resume	Resumes GlobalScan NX's distribution service.
server_start	Starts the Web server the GlobalScan NX uses.
server_stop	Stops the Web server GlobalScan NX uses.



• Use out\_result to output the result of the command execution. When this is omitted, the result will not be output.

### Executing the Commands from a Batch File

The batch files for the command calls are listed in the table below.

#### **Table: Command Call Batch Files**

Batch File	Description
service_start.bat	Starts GlobalScan NX's distribution service.
service_stop.bat	Stops GlobalScan NX's distribution service
service_resume.bat	Resumes GlobalScan NX's distribution service.
server_start.bat	Starts the Web server GlobalScan NX uses.
server_stop.bat	Stops the Web server GlobalScan NX uses.

/

# 8. SYSTEM CONFIGURATION

# **General Settings**

General Settings allow you to specify the default language of the MFP display panel. The supported languages are English, German, French, Italian, Spanish, and Dutch. You are also able to set a date format to apply to System Logs, Job Logs, etc.

- 1. Click [Home], and then the [System] shortcut.
- 2. Click [General Settings].

Fig.: System Settings Screen



The General Settings screen displays.

Fig.: General Settings Screen



If you select [Allow scan operation from Metadata screen], scanning can be started while the Metadata screen is displayed.

- This setting is enabled after synchronizing with the MFP.
- To start scanning on the Metadata screen, distribution settings and scan settings must be
  preset. No scanning will start until the default destination address and other necessary settings
  are configured.
- 3. Specify the default language of the MFP display panel. The supported languages are English, German, French, Italian, Spanish, and Dutch.



- The default language of the AdminTool is determined in accordance with the language of the operating system in use.
- 4. Specify one of the following date formats for the display:
  - MM/DD/YYYY
  - DD/MM/YYYY
  - YYYY/MM/DD



- The specified date format will be applied to all dates (except for those added to Document Names). For example, the date for the following items is displayed in the specified format:
  - Job Logs
  - System Logs
  - · Backup Data Files
  - Metadata
- The specified date format setting is not affected by the language setting of the AdminTool.
- 5. When the Standard Operation Panel is used, specify whether to allow starting scan operation from the Metadata screen in [Allow scan operation from Metadata screen].



- [Allow scan operation from Metadata screen] is always enabled when the Smart Operation Panel is used.
- This setting takes effect after synchronizing the Profile with the connected MFPs.
- To start scanning from the Metadata screen, specify scan and distribution parameters properly. If any of the required settings are not specified, you cannot start scanning.
- 6. Click [Apply] to save the settings.



• Click [Back] to exit, without saving the settings.

# Service Settings (Output Service/Filter Service)

It is suggested you first configure settings on the System level. At the System Level, the Profile settings are copied. At the Profile Level, the Project settings are copied. In short, you have the flexibility to set all parameters at once on the System Level or drill down to the Profile or Project Level to further modify settings. All GlobalScan NX Services/Filters can be configured on the System, Profile or Project Level.

# **Authentication Profile Settings**

GlobalScan NX supports Active Directory and LDAP(S) authentication methods. The authentication Profiles screen is used to configure the settings for the authentication servers. You can add, edit, and delete the Authentication Profiles, and specify the system default Authentication Profile. The Authentication Profile that has been specified as the default is displayed when you log in to the AdminTool.

In addition to the Active Directory and LDAP authentication methods, GlobalScan NX supports two types of Passwordless authentication methods: Passwordless Authentication (Active Directory) and Passwordless Authentication (LDAP).

Passwordless authentication methods use a proxy account to connect to the authentication server and then search for a login user. Authentication succeeds if a single login user is found.

With passwordless authentication methods, the Send to Me and Send to Home Folder features can be used without entering a password.



- Up to 50 Authentication Profiles can be registered with the system.
- The user who is registered with all the Authentication Profiles can log in to the AdminTool via the
  User mode. However, the user can only check his/her Job Logs. Other capabilities of the
  AdminTool will not be available to the user.

# Limitation

- Once an Authentication Profile is created, the authentication type cannot be changed later on.
- Special characters, such as accented characters, are not allowed in user names and passwords. If
  these characters are used in users' login names and passwords, those users will not be able to log
  in to GlobalScan NX.
- Authentication Profiles that use a passwordless authentication method do not appear in the [Authentication Profile] list on the AdminTool Login Page.

# Reference

- See page 443 "Administrator Settings".
- See page 451 "About User Mode".

# **Adding Authentication Profile Settings**

# 

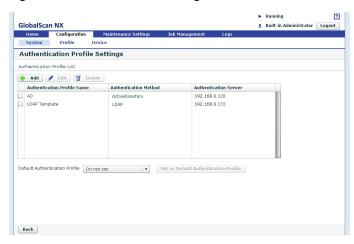
If you select [LDAP Authentication] as the authentication type in a network environment that uses
Active Directory, GlobalScan NX might not be able to acquire the Active Directory domain name
correctly. If this is the case, we recommend changing the authentication type to [Active Directory],

or else delivery methods that use the login user's account information (such as Send to Home Folder) will fail.

To add an Authentication Profile, proceed as follows:

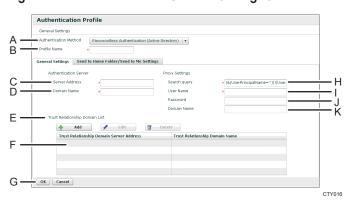
- 1. Click [Home], and then the [System] shortcut.
- 2. Click [Authentication Profiles]. The Authentication Profile Settings screen displays.

Fig.: Authentication Profile Settings Screen



3. Click [Add]. The Authentication Profile screen displays.

Fig.: Authentication Profile - General Settings Screen



4. For Active Directory, add the settings except for proxy settings, as outlined in the table below.

A Passwordless Authentication (Active Directory) Profile can be added using the same procedure here. For this type of profile, add the settings including proxy settings.

Active	Directory/Password	ess Authentication (Active Directory) Profile Settings
	ltem	Description
Α	[Authentication Method]	Select Active Directory or Passwordless Authentication (Active Directory). If selecting LDAP, go to item 6.
В	[Profile Name]	Specify the Authentication Profile Name.  Limitation  The maximum length of the Authentication Profile Name is 128 characters.  Note  The name must be unique. You cannot use "None" for the name of an Authentication Profile.
С	[Server Address]	Specify the IP address or host name of the authentication server.  You can specify up to three authentication servers. During authentication, if GlobalScan NX cannot connect to the first server and a second server has been specified, GlobalScan NX will try to connect to the second server. If the connection to the second server fails and a third server is specified, the third server is tried.  Be sure to separate multiple IP addresses or host names with a comma.  Note  If you have specified multiple authentication servers, the leftmost server has highest priority.  When multiple authentication servers are specified, connection will be terminated if server access is not established within 30 seconds.
D	[Domain Name]	Specify the Domain Name.
E	[Trust Relationship Domain List]	<ul> <li>Add, edit or delete trusted domains, using the associated buttons.</li> <li>Note</li> <li>The user can log in to the Project, etc. by using a user/group account that is registered with a trusted domain, a domain the specified authentication server trusts to authenticate the user. The trusted domains will be shown in a drop-down list on the Project (MFP) and Administrator login screen.</li> <li>Trusted domains must be specified manually via the AdminTool. Otherwise, they will not be displayed in the</li> </ul>

ರ

	ltem	Description
		drop-down list. (A maximum of 10 trusted domains can be specified in each Authentication Profile.)
		<ul> <li>You cannot delete a Trust Relationship Domain by which the Administrator has been specified.</li> </ul>
		What is an Authentication Server?
		An authentication server lets you specify other "trusted domains" (authentication server). When two domains are set as trusted domains, if a user/group simply logs into the domain successfully, the user/group can automatically access the other domain's resources. Fundamentally, by just specifying the server address, trusted domains registered on the authentication server should be automatically acquired and displayed in the drop-down list when logging in; in Windows there is no drop-down list, but the functions are still implemented, but due to a restrictions in GSNX, this can't be done. Therefore along with setting the main authentication server, the administrator also manually specifies the trusted domains set on the authentication server.
F	Trusted Domain	Domains added to the Trusted Relationship Domain List appear here.
G	[OK]	Saves settings.
	[Cancel]	Exits, without saving settings.
Н	[Search query]	Specify the query to use to search the directory for the user to authenticate.
		To prevent login via an invalid user account, the following default value has been set:
		(&(UserPrincipalName=^)
		(!(UserAccountControl:1.2.840.113556.1.4.803:=2))
		(!(lockoutTime>=1)))
		<b>♣</b> Note
		<ul> <li>"^" in the query will be replaced by the user name entered in the login screen, followed by "@", and then followed by the value specified in [Domain Name].</li> </ul>
		<ul> <li>If the search returns more than one match, an error will occur.</li> <li>Enter a more specific query, and then try again. Example</li> </ul>

	ltem	Description
		queries that search only for accounts that are active are given below:
		Search query customization example 1
		The query in this example allows a user to log in if a user account simply exists with the specified user name.
		UserPrincipalName=^
		Search query customization example 2
		The query in this example allows a user to log in if a user account with the user name exists and the account is active.
		• (&(UserPrincipalName=^)(!(UserAccountControl: 1.2.840.113556.1.4.803:=2)))
		() Limitation
		The maximum length is 128 characters.
I	[User Name]	Enter the user name for the proxy user.
		This user name is used for connection to the directory.
		Limitation
		The maximum length is 128 characters.
J	[Password]	Enter the password for the user name entered in [User Name].
		! Limitation
		The maximum length is 128 characters.
K	[Domain Name]	Enter the domain name of the Active Directory that manages the proxy account.
		If this field is left blank, the value specified in the separate [Domain Name] box will be used.
		() Limitation
		The maximum length is 128 characters.

- The selected authentication method or Active Directory, is used for authenticating the specified trusted domain(s). Thus, for example, if the selected authentication method is Active Directory and the specified trusted domain is an NT domain, the authentication will fail.
- 5. When finished, click [OK] to save the settings.

#### 0

# 6. Select LDAP Authentication from the Authentication Method drop-down list.

Fig.: Authentication Profile - General Settings Screen

	Authentication Pr	rofile	
	General Settings		
A	Authentication Method	LDAP Authentication	
В—	Profile Name	*	
	General Settings Send	to Home Folder/Send to Me Settings	
c—	LDAP Server Address	s *	
D-	Security	None   ▼	
E-	Port No.(1 - 65535)	389	
F—	Base DN	*	
G—	Search Scope	Subtree   v	
н—	User DN	LDAP search ▼	
1-	Search query	*	
J —	Proxy user name		
K—	Proxy user password	d	
L	Server Type	Active Directory 🔻	
М	OK Cancel		
			CTY019

7. Specify the LDAP settings, as outlined in the table below.

A Passwordless Authentication (LDAP) Profile can be added using the same procedure here.

**Table: LDAP Authentication Profile Settings** 

	ltem	Description
А	[Authentication Method]	Select LDAP from the drop-down list. If selecting Active Directory, go back to 5.
В	[Profile Name]	Specify Profile Name.
С	[LDAP Server Address]	Specify the IP address or host name of the authentication server.  You can specify up to three authentication servers. During authentication, if GlobalScan NX cannot connect to the first server and a second server has been specified, GlobalScan NX will try to connect to the second server. If the connection to the second server fails and a third server is specified, the third server is tried.  Be sure to separate multiple IP addresses or host names with a comma.  Note  If you have specified multiple authentication servers, the leftmost server has highest priority.

D		When multiple authentication servers are specified, connection will be terminated if server access is not established within 30 seconds.  Select one of the following security settings:  [None]
D		• [None]
D		• [LDAPS (LDAP over SSL)] • [LDAPS (StartTLS)]  • Note
	[Security]	<ul> <li>When selecting [LDAPS (LDAP over SSL)] or [LDAPS (StartTLS)], it is necessary to import the Site Certificate, in order to connect to the specified LDAP Server.</li> </ul>
		When you use Active Directory Authentication, it is necessary to import a Domain Controller-template certificate.    Reference
		See page 464 "Managing the Site Certificate".
Е	[Port No.]	Specify the port number of the authentication server. (1 - 65535). (Default: 389) (SSL Default: 636)
F	[Base DN]	Specify the Base DN, the search start position.  The entries under the specified Base DN will be the search targets.
G	[Search Scope]	Select the search scope from:  • [Subtree]  The specified Base DN, and all sub-trees of all levels under the specified Base DN will be searched.  • [Single Level]  The specified Base DN, and sub-trees of one level down will be searched.  • [Specified Object Only]  Only the specified Base DN will be searched.
Н	[User DN]	When adding LDAP Authentication Profile, you can specify how to specify user's DN.  In addition to the conventional method, user name entered in the login screen can be used to determine the user's DN.  • [LDAP search]

	ltem	Description
		Conventional method. User DN can be obtained via LDAP search using proxy user. [Search query], [Proxy user name], and [Proxy user password] must be specified.
		• [Affixation]
		New method. Creates User DN by adding prefix / suffix to the user name entered in the login screen.
		• [Prefix]
		Specify the prefix of the user search conditions.
		• [Suffix]
		Specify the suffix of the user search conditions.
		The specified prefix and suffix are used in order to uniquely identify the user when performing a user search. They are used in combination with the user name. For example, if the prefix, suffix, and user name are as follows:
		Prefix: "cn="
		Suffix: ",o=ABCCorp,c=US"
		<ul> <li>User name: "Smith" (This is entered by the user, when logging in to the Project (via MFP) or AdminTool.</li> </ul>
		The resulting search condition will be as follows:
		<ul> <li>cn=Smith,o=ABCCorp,c=US</li> </ul>
		The user search will be performed based on this condition; the user entry that matches this condition is searched for within the LDAP server.
		<b>↓</b> Note
		<ul> <li>When logging in to the Project (via MFP) or AdminTool, it is necessary to input the User Name with the suffix and prefix included. Otherwise, login will fail.</li> </ul>
		Specify the conditions for searching the LDAP address list for the user.
	[Search query]	To prevent login via an invalid user account, a default value is supplied according to the selected server type:
I		• [Active Directory]: (&(cn=^)(!(UserAccountControl: 1.2.840.113556.1.4.803:=2))(!(lockoutTime>=1)))
		• [Novell eDirectory]: (&(cn=^)(!(loginDisabled=true)))
		• [Domino Directory]: (&(cn=^)(!(CheckPassword=2)))

	ltem	Description	
• On the login so replaced by th • Passwordless A [User DN] setti		<ul> <li>[Custom]: No default</li> <li>Note</li> <li>On the login screen, the characters of the user name will be replaced by the "^" character.</li> <li>Passwordless Authentication (LDAP) Profiles do not have the [User DN] setting.</li> <li>If the search returns more than one match, an error will occur. Enter a more specific query, and then try again.</li> </ul>	
		Example queries that search only for active accounts are given below this table.  Limitation  The maximum length is 128 characters.	
J	[Proxy user name]	Enter the user name for the proxy user.  This user name is used to search the LDAP directory.  If this field is left blank, "Anonymous" is used as the proxy user.  Entry Example: cn=users, dc=ricoh, dc=co, dc=jp	
К	[Proxy user password]	Enter the password for the user name entered in [Proxy user name].  If [Proxy user name] is blank, this field is ignored.	
L	[Server Type]	Specify the LDAP server type from one of the following:  • [Active Directory]  • [Domino Directory]  • [Novell eDirectory]  • [Custom]  If selecting [Custom], specify the following items display in an expanded window:  • [Display Name Attributes]  • [User Object Class Name]  • [User Name Attributes]  • [Associate Group Attributes]  • [Group Object Class Name]  • [Group Name Attributes]	

	Item	Description	
		[Member Attributes]	
М	[OK]	Saves settings.	
	[Cancel]	Exits, without saving settings.	

## Search query customization example 1

The query in this example allows a user to log in if a user account simply exists with the specified user name.

Server Type	Search Query
Active Directory	
Novell eDirectory	cn=^
Domino Directory	
Custom	Depends on the authentication environment.

# Search query customization example 2

The query in this example allows a user to log in if a user account with the user name exists and the account is active.

Server Type	Search Query
Active Directory	(&(cn=^)(!(UserAccountControl:1.2.840.113556.1.4.803:=2)))
Novell eDirectory	(&(cn=^)(!(loginDisabled=true))) Same as the default value.
Domino Directory	(&(cn=^)(!(CheckPassword=2))) Same as the default value.
Custom	Depends on the authentication environment.

## 8. When finished, click [OK] to save the settings.



- Click [Cancel] to exit, without saving the settings.
- If you did not enter the required settings, the associated fields will appear in red highlight. Enter the necessary information, and then click [OK].

# Setting Send to Home Folder/Send to Me Settings

Authentication Profile settings include the [Send to Home Folder/Send to Me Settings] tab.

You can configure the items on this tab to specify an alternate LDAP server, from which to retrieve an MFP user's email address and home folder.

To set Send to Home Folder/Send to Me settings, proceed as follows:

- 1. Click [Home], and then the [System] shortcut.
- 2. Click [Authentication Profiles]. The Authentication Profile Settings screen displays.
- Click [Add], and then click the [Send to Home Folder/Send to Me Settings] tab. The Send to Home Folder/Send to Me Settings screen displays.

Fig.: Authentication Profile – Send to Home Folder/Send to Me Settings (for Active Directory)

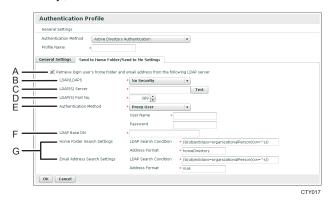
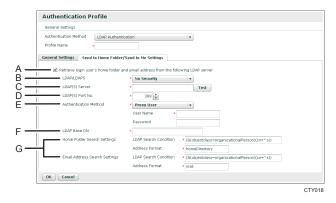


Fig.: Authentication Profile – Send to Home Folder/Send to Me Settings (for LDAP authentication)



# 4. Add the settings as outlined in the table below.

Table: Alternate LDAP Server Settings

	ltem	Description
A	[Retrieve login user's home folder and email address from the following LDAP server]	Select this option to retrieve a user's home folder and e-mail address from an LDAP server other than the server used for authentication.
В	[LDAP/LDAPS]	Select the security method to use when connecting to the LDAP server.  • [No Security]  Uses a standard LDAP connection (no encryption).  • [LDAPS (LDAP over SSL)]  Uses secure LDAP over an SSL connection.  • [LDAPS (StartTLS)]  Uses secure LDAP using TLS.  * Important  • For [LDAPS (LDAP over SSL)], the Certificate you are using must be registered with the system beforehand. (See page 464 "Managing the Site Certificate".) If it is not, an error will occur when trying to obtain the address book.  • For [LDAPS (StartTLS)], the LDAP server you are using must support StartTLS. If it does not, an error will occur when trying to obtain the address book.
С	[LDAP(S) Server]	Enter the IP address or host name of the LDAP server.  Click [Test] to test the connection to the LDAP server you have specified.
D	[LDAP(S) Port No.]	Enter the port number to for connection to the LDAP server.  • Note  • The default port number for LDAP is 389. The default port number for LDAPS (LDAP over SSL) is 636.
Е	[Authentication Method]	Select the type of account used to log in to the LDAP server:  • [Proxy User]

	ltem	Description
		Uses the login information entered in [User Name] and [Password] for authentication.
		• [Login User]
		Uses the login information the MFP user entered to authenticate with the Project.
		[No Authentication]
		Authentication is not used.
F	[LDAP Base DN]	Enter the Base DN.
G	[Home Folder Search Settings]	Specify the criteria used to search for the MFP user's home folder and email address.
	[Email Address Search Settings]	[LDAP Search Condition]
		Specify the LDAP search syntax. The default value is: (&(objectclass=organizationalPerson)(cn=^s)).
		"^s" is replaced with the specified keyword.
		For examples of how to specify search conditions, see "LDAP Search Condition Examples" under page 148 "Send to Email Service".
		• [Address Format]
		Specify the LDAP attribute that contains the home folder or email address for an entry in the address list.
		The default values are as follows:
		[Home Folder Search Settings]: homeDirectory
		• [E-mail Address Search Settings]: mail

5. When finished, click [OK] to save the settings.



- Click [Cancel] to exit, without saving the settings.
- If you did not enter the required settings, the associated fields will appear in red highlight. Enter the necessary information, and then click [OK].

# **Editing Authentication Profile Settings**

To edit an Authentication Profile, proceed as follows:

1. Click [Home], and then the [System] shortcut.

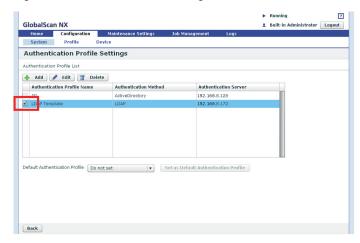
### 2. Click [Authentication Profiles].

Fig.: System Settings Screen

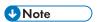


3. Select the check box of the Authentication Profile you wish to edit.

Fig.: Authentication Profile Settings Screen



- 4. Click [Edit].
- 5. Edit the settings according to the selected Authentication Method. For an explanation of Active Directory Authentication Profile settings, see the previous section, "Add Authentication Profile", item 4. For LDAP Authentication Profile settings, see the same section, item 6.
- 6. When finished, click [OK] to save the settings.



• Click [Cancel] to exit, without saving the settings.

# **Deleting an Authentication Profile**

To delete an Authentication Profile, proceed as follows:

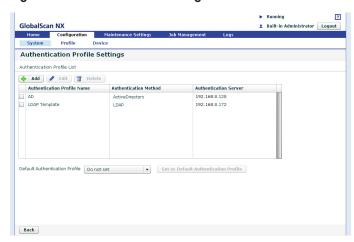


- You cannot delete an Authentication Profile that is currently used for the "System's Default",
   "Administrator Settings", "Profile's Default Settings", or "Project's Authentication Settings".
- 1. Click [Home], and then the [System] shortcut.
- 2. Click [Authentication Profiles].

### Fig.: AdminTool Home Page



Fig.: Authentication Profile Settings Screen



- 3. Select the check box of the Authentication Profile you wish to delete.
- 4. Click [Delete]. The display reads, "Are you sure you want to delete this authentication profile?"

ಶ

5. To confirm deletion, click [OK].

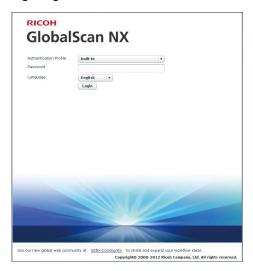


• Click [Cancel] to exit, without deleting the Authentication Profile.

# **Setting a Default Authentication Profile**

The Authentication Profile set here is used as the default value in the Default Authentication Profile drop-down list when creating a new Profile.

Fig.: Login Screen

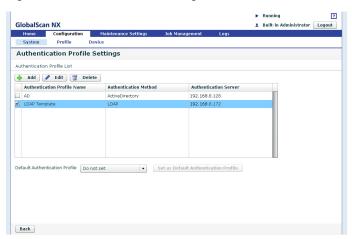


To set the default Authentication Profile, proceed as follows:

1. Click [Home], and then [System] shortcut.

# 2. Click [Authentication Profiles].

### Fig.: Authentication Profile Settings Screen



- 3. Click [Default Authentication Profile] drop-down.
- 4. Select the desired Authentication Profile.



- You can select one of the Authentication Profiles displayed in the Authentication Profile list or [Do not set].
- Click [Set as Default Authentication Profile].



Click [Back] to exit, without saving the setting.

# Using an MFP's User Authentication Function

This section explains the necessary settings for using the user authentication function on MFPs.

Using an MFP's user authentication function enables you to take advantage of the following functionality:

- Using an MFP's authentication, you can enable single sign-on to Projects that use an Authentication Profile. See "Single Sign-on Function Support" below.
- Even if a Project does not use an Authentication Profile, user information can still be output in the Job Log. A user's name can also be used in Metadata.

# Required Settings for GlobalScan NX

To enable single sign-on to a Project, you must first set an Authentication Profile to the Project.

## Required Settings for MFPs

The following settings are required on an MFP.



 The names of keys, buttons, etc., may vary depending on the MFP type. For details about operating a particular MFP, see that device's documentation.

#### **Authentication Settings**

Set one of the following four types of user authentication methods for the MFP.

For details about setting an authentication method, see the MFP's documentation.

- Basic Authentication
- IDAP Authentication
- User Code Authentication
- Windows Authentication

#### **Confirming User Privileges**

Use the following procedure to confirm the access privileges for the users who will use user authentication.

You must confirm the privileges for each user who will use GlobalScan NX.

- 1. Log in to the MFP as an administrator.
- 2. Display the initial settings screen.
  - When using the Standard Operation Panel Press the [User Tools/Counter] key.
  - When using the Smart Operation Panel
     Press [Home], [User Tools], and [Machine Features] in this order.
- 3. Press [System Settings].
- 4. Press [Administrator Tools].
- 5. Press [Address Book Management], and then select a user.
- 6. Press [Auth. Info].
- 7. Under [Select Available Functions], make sure [JavaTM Platform], [Facsimile], and [Scanner] are selected.

### **Setting Access Privileges**

Use the following procedure to configure the settings that are necessary to let users operate the scan function.

- 1. Log in to the MFP as the administrator.
- 2. Display the initial settings screen.
  - When using the Standard Operation Panel

Press the [User Tools/Counter] key.

- When using the Smart Operation Panel
   Press [Home], [User Tools], and [Machine Features] in this order.
- 3. Press [System Settings].
- 4. Press [Administrator Tools].
- 5. Press [Address Book Management], and then select a user.
- 6. Press [Protection].
- In [Protect File(s)] > [Permissions for Users/Groups], press [Program/Change/ Delete], and then select [Full Control].

# Single Sign-on Function Support

With the Basic Authentication and LDAP MFP user authentication methods, if the user name and password used to access the MFP are the same as those needed to log in to a Project, users can log in to the Project without re-entering their user name and password.



This function does not work if User Code Authentication is set as the MFP's authentication method.

### **Card Authentication**

If you want to use card authentication for authentication in GlobalScan NX, you must have one of the following products:

- Card Authentication Package (Embedded Type)
- Card Authentication Package Enterprise Server (Server Type)

# Reference

• For details, see the documentation for the products above.

### 8

# **Administrator Settings**

# Set the Administrator using Authentication Profiles

Authentication Profiles are intended for managing the authentication settings, not user accounts. Thus if there is more than one Authentication Profile that shares the same authentication settings, a user who has been assigned to the administrator by an Authentication Profile can log in to the Administrator Tool by another Authentication Profile that shares the authentication settings with the Authentication Profile that has assigned the user.

For instance, in the following example, AuthProf\_A and AuthProf\_B share the same authentication settings.

- 1. Register User\_C with the system as the administrator by using AuthProf\_A.
- 2. User\_C tries to log in to the Administrator Tool by using AuthProf\_B.

User\_C will be authenticated and can log in to the Administrator Tool as the administrator.



- The Administrator currently logged in, and displayed within the Administrator List, cannot be removed, i.e., you cannot remove yourself from the Administrator List as long as you are logged in as an Administrator.
- The Group which is registered as an Administrator and whose member(s) are currently logged in cannot be removed.

To choose the Administrator(s) from the Users/Groups registered with the Authentication Profiles, proceed as follows:

1. Click [Home], and then [System] shortcut.

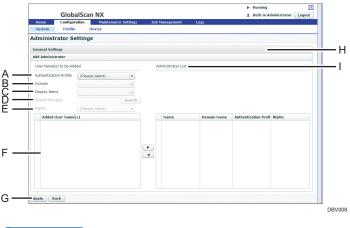
## 2. Click [Administrator].

Fig.: Administrator Settings Screen



Click [Add Administrator]. Scroll down, if necessary. The Administrator Settings screen displays.

Fig.: Add Administrator Screen



**U** Note

You may be asked to log in to the directory server for obtaining the users/groups list from the
directory server. In that case, log in to the directory server with an appropriate user account.

# 4. Specify the Administrator settings, as outlined in the table below.

**Table: Add Administrator Screen** 

	ltem	Description
А	[Authentication Profile]	Select Authentication Profile to use.
В	[Domain]	Select the domain or trusted domain, if applicable.
С	[Display Items]	Select the display item, either User or Group.
D	[Search String(s)]	Enter the string to search for Users/Groups.  Any Users/Groups that match the specified search string can be searched.  Example  A search for "les" matches:  • lester frank  • Lester, lorraine  If you enter a space or nothing, all Users/Groups will be searched for.
E	[Rights]	The following administrator authentication can be selected for administrators to be registered:  • [System Administrator]  • [Device Administrator]
F	[Added User Name(s)]	Displays the search results, up to 100 Users/Groups.  To add the User/Group as an Administrator, select the check box, and then click [*].
G	[Apply]	Saves settings
	[Back]	Exits, without saving settings.
Н	General Settings	Returns to General Settings screen.
I	Administrator List	The list of currently registered Administrators.

# 5. Click [OK] to save the settings.



• Click [Back] to exit, without saving the settings.

## **Error Notification Email Address**

In order for GlobalScan NX to notify Administrators and users of a job processing error, you must set the Administrator's email address. You need to set the Administrator's email address even if you are sending notification email to only the user.

Error notification email will be sent in the following cases:

#### To administrators

- When a job could not be processed.
- When available disk space has dropped to the specified alert size.

#### To user

- When a job could not be processed (one notification email per failed job).
- 1. Click [Home], and then [System] shortcut.

### Fig.: AdminTool Home Page



# 8

### 2. Click [Administrator].

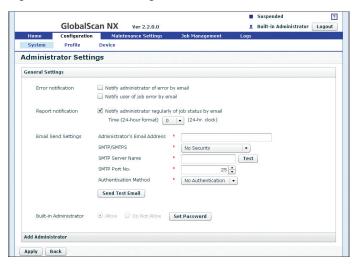
### Fig.: System Settings Screen





 You can also click [Built-in Administrator], in the upper right corner of the display, to enter the screen directly.

#### Fig.: Administrator Settings Screen



- 3. Select who you want to send the error notification email to:
  - [Notify administrator of error by email]: Send error notifications to administrators.
  - [Notify user of job error by email]: Send error notifications to the user.



• Users' email addresses are obtained from the authentication server.

- User's email addresses can only be obtained if Active Directory or LDAP is operating as the
  Project authentication method. If a different authentication method is in operation, even if you
  select this option, the users' email addresses will not be obtained.
- 4. Select [Notify administrator regularly of job status by email], as necessary.

This report informs the administrator about the current system status, number of jobs in the queue and error job queue. A report notification email is sent once a day.

- Report emails are only sent at the specified time, once a day. The time the email is sent can be specified by the hour.
- The report email is not sent if the GSNX service is stopped.
- If load balancing or failover servers are used, a notification report is sent by every server.

#### **Email contents**

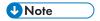
#### Subject

• The subject includes the server's IP address and current job queue status.

#### Body

- GSNX version
- Data/Time the report was generated
- IP address of the GSNX server
- Delivery service status
- Number of jobs in the job queue
- Number of jobs in the error job queue
- Display name
- Error messages
- Specific service
- 5. In [Administrator's Email Address], enter the Administrator's email address.

The address you enter will also be used as the sender in notification email.



- If you want to send notification to multiple Administrators, enter their email addresses separated by commas.
- If you selected either of the check boxes, you must configure the SMTP server settings. If you do not configure these settings, notification email cannot be sent.



 In order to send notification using SMTP-AUTH or POP before SMTP, be sure to enter the authentication account under proxy user information input column. Otherwise, no notification

can be sent to the Administrator, even if the Login user account is specified as the login account.

• Click [Test] to test the connection to the SMTP server you have specified.

# Reference

- See page 148 "Send to Email Service".
- To set the Built-in Administrator's Password, follow step 3 of the next procedure.Otherwise, click [Apply] to save the settings.



- Click [Send Test Email] to send a confirmation email to the address you have specified. If the
  confirmation email arrives, the server settings are correct.
- Click [Back] to exit, without saving the settings.

### Set Built-in Administrator's Password

The Built-in Administrator's Password is used by the Administrator when there is no Authentication Profile available. For example, this will be used right after the installation of the GlobalScan NX software.

1. Click [Home], and then the [System] shortcut.

Fig.: AdminTool Home Page



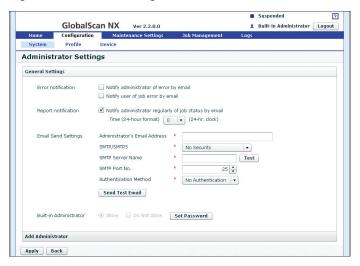
Ω

## 2. Click [Administrator].

Fig.: System Settings Screen



Fig.: Administrator Settings Screen



3. Click [Set Password].

Fig.: Set Built-in Administrator Password Screen

Set Built-in Administrator Password			
Password Confirm Password			
OK Cancel			

4. Enter the Password in the adjacent field.



- The maximum length is 128 characters.
- Enter only alphanumeric characters for the Built-in Password.
- 5. Re-enter the Password to confirm.
- 6. Click [OK] to save the settings.



- · Click [Cancel] to exit, without saving the settings.
- 7. [Allow] and [Do Not Allow] are not yet available when the Built-in Administrator's Password has been changed. To enable the buttons, add an Administrator other than the Built-in Administrator and then log in by using that Administrator's account.



- It is not possible to select [Do Not Allow] when there is no other Administrator other than the Built-in Administrator.
- You cannot select [Do Not Allow] while the Built-in Administrator is logged in.
- When you restore (enable again) the Built-In Administrator's password, the last-used password will be used.
- In case you forget the Built-In Password, you can disable the current Built-In Password in the following manner:
  - If an Administrator other than the Built-in Administrator exists, log in to the AdminTool by
    using that Administrator's account and password and change the Built-In Password.
  - If no other administrator, other than the Built-in Administrator exists, perform a modifyinstallation in which you can set a new Built-in Password.
- 8. To set the Administrator using Authentication Profiles, continue with the next section, item 3. Otherwise, click [Apply] to save the settings.



• Click [Cancel] to exit, without saving the settings.

#### **About User Mode**

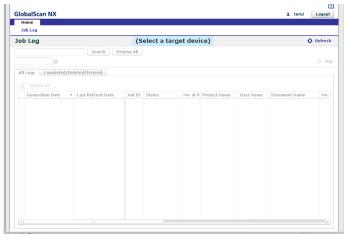
General users, those without administrative privileges, can log in to the AdminTool in User mode. However, users can only access/move between his/her own logs. Other capabilities of the AdminTool are not available.

Fig. "Serverless Edition User mode" is an example of what the user can see when logging in to GlobalScan NX's Serverless Edition AdminTool.

If you have logged in to the Administrator Tool in the User mode, job logs will be displayed as follows:

	Document name	User name	
Job logs of a Project with authentication	You can check your own job logs only. Other job logs are masked with asterisks.	You can check your own job logs only. Other job logs are masked with asterisks.	
Job logs of a Project without authentication	You can check all job logs.	You can check your own job logs only. Other job logs are masked with asterisks. (In this case, the user name is actually blank, as the Project does not require authentication.)	

Fig.: Serverless Edition User Mode



UNote

 In Serverless Edition, the user will have to first select the target device in order to view the Job Log, as this log is stored on the MFP itself. However, in the Server Edition, the user does not have to select a target device, as all log-related data is stored on the Server.

# Reference

- See page 44 "Step 1: AdminTool Login".
- See page 424 "Authentication Profile Settings".
- See page 372 "Job Log".

# Managing the Server Certificate

In order to use HTTPS to secure communication between the computer/server, with the GlobalScan NX AdminTool, and a connected MFP, it is necessary to install a server certificate. HTTPS is a communication protocol that includes SSL (Secure Sockets Layer) data encryption. When a Web browser communicates with the computer/server installed with the AdminTool, a secure handshake authenticates the session using a public and private key, provided by the certificate. The public key is used to encrypt information and the private key is used to decipher it.

By obtaining and installing a certificate, from a trusted Certificate Authority (CA), it is possible to protect GlobalScan NX data.



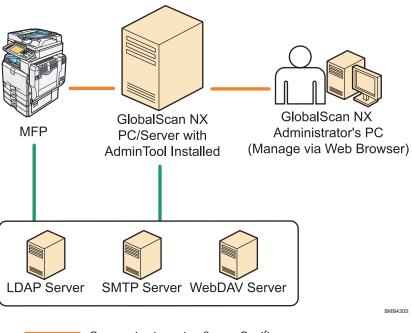
- When using SSL, it is not necessary to install certificates on registered MFPs, as the VM card contains a self-certified web server.
- A maximum of two server certificates can be managed per computer.
- If IIS is specified as the Web server for GSNX, only the On/Off feature is provided. See page 461 "IIS - SSL On/Off".
- If you will be using the failover or load balancing functions and want to protect the data, you must install server certificates on the servers you will use for these functions.

# 

 When SSL is used, the URL of the AdminTool must be specified as follows: https://IPAddress:PortNo/DirectoryName/
 The URL can vary according to the settings selected during software installation.

Q

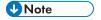
Fig.: Server Certificate



- Communication using Server Certificate
- Communication using Site Certificate

# Obtaining and Installing a Server Certificate

If the Built-in Web Server (Default) is selected during GlobalScan NX software installation, the Web Server is automatically installed on the computer, along with a shortcut to the Server Certificate Setting Tool. Use this tool to obtain and install a server certificate.

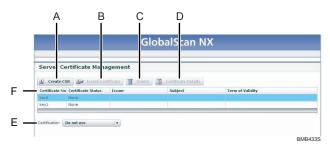


- The Server Certificate Setting Tool is not available to remote computers, i.e., it can only start from the Web browser on the computer running GlobalScan NX software.
- Click [Start] > [All Programs] > [GlobalScan NX] > [GlobalScan NX SSL Setting Tool].
   You can also double click the [GlobalScan NX SSL Setting Tool] shortcut icon on the desktop.
   The Server Certificate Management screen displays.



• Unlike the AdminTool, the Server Certification Setting Tool does not require login. Therefore, the Server Certificate Management screen displays immediately after start up.

 The display language you chose during GlobalScan NX software installation is applied to the Server Certification Setting Tool. Unlike the AdminTool, you cannot change the Tool's display language.



2. Review the table, and then continue with step 3. Please do not execute any functions until step 3.

Table: Server Certificate Management Screen

	ltem	Description	
A	[Create CSR]	Creates the CSR.  When you click this button, the Create CSR screen shown below displays; provide the necessary information.	
В	[Install Certificate]	Installs the server certificate.	
С	[Delete]	Deletes (uninstall) the server certificate.  Choose the certificate (line) you wish to delete, click this button, and the certificate and the private key are deleted. Note that the certificate that is currently in use cannot be deleted. See [Certification], below.	
D	[Certificate Details]	Displays the details of the certificate.  Choose the target certificate, and then click this button. A screen that shows certificate details displays.	
E	[Certification] Drop-down List	Select the certificate to use from the available certificates listed in the drop-down.  Choose [Do not use] if a certificate is not used.	
F	Column Headings	<ul> <li>Certificate No.</li> <li>Certificate number, for example, key0, key1.</li> <li>Certificate Status</li> <li>Certificate Status, for example, None, Requesting or Installed.</li> </ul>	

- 3. Create a CSR (Certificate Signing Request):
- 4. Select a line in which you wish to create/register a Certificate.



When you are carrying out this operation on a line whose "Certificate Status" is not "None",
you create a CSR using the existing private key. For example, in a situation where you want to
extend the use of a certificate that has expired, select the appropriate line and follow this
procedure to create a CSR again.

### 5. Click [Create CSR].

The Create CSR screen displays.

Fig.: Create CSR Screen





- Required fields are indicated by an asterisk (\*).
- 6. Specify the information outlined in the table.

**Table: CSR Input Form** 

ltem	Description	Supported Characters *1	No. of Characte rs
Common Name [CN]	The URL using FQDN.	Alphanumeric characters and the following characters:  Space []	1 - 64

ltem	Description	Supported Characters *1	No. of Characte
	It looks like "www.gsnxcorp.com" or " gsnxcorp.com".  Note  You must use the FQDN (Fully- qualified Domain Name).	Hyphen [-] Dot [.] Underscore [_]	
Organization Unit [OU]	The name of the department or organization unit making the request.	Alphanumeric characters and the following characters:  Space []  Hyphen [-]  Dot [.]  Underscore [_]  Comma [,]  Plus [+]  Slash [/]  Parenthesis [ ( ], [ ) ]	1 - 64
Organization [O]	The legal name of the organization under which your organization is registered  • Do not abbreviate.	Same as Department Name	1 - 64
City/Locality [L]	The name of city in which the organization is located  Note  Do not abbreviate.	Same as Department Name	1 - 128

ltem	Description	Supported Characters *1	No. of Characte rs
State/Province [ST]	The state or province name spelled out completely  Note  Do not abbreviate.	Alphanumeric characters and the following characters:  Space []  Hyphen [-]  Dot [.]  Comma [,]  Plus [+]  Slash [/]  Parenthesis [ ( ], [ ) ]	1 - 128
Country Code [C]	The 2-character ISO format country code	Alphabets, for example,  • United States of America: us  • Germany: de  • United Kingdom: uk  Regarding other countries, please search for the word "ccTLD" through the Internet search engine.	2
Key Length	1024 or 2048 can be specified as the key length. The key encryption method for 1024 and 2048 is RSA.		

<sup>\* 1</sup> Supported Characters lists the characters that are generally supported. However, as the supported characters can vary between Certificate Authorities, you might want to check them beforehand.

# 7. Click [OK].

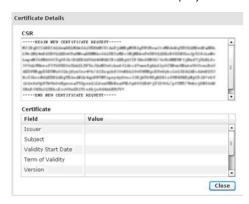
The Create CSR screen closes.

The "Certificate Status" changes to "Requesting".

Certificate No	Certificate Status	Issuer	Subject
key0	Requesting		
key1	None		

- 8. Submit the newly-created CSR to a Certificate Authority to obtain a certificate.
  - 1. Select the line where you created the CSR.
  - 2. Click [Certificate Details].

The Certificate Details screen displays.



3. Copy and paste the CSR content from the Certificate Details screen and submit it to a Certificate Authority.



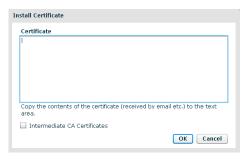
- The text from "-----BEGIN NEW CERTIFICATE REQUEST-----" to "-----END NEW CERTIFICATE REQUEST-----" is the CSR content (information) the Certificate Authority needs to create a certificate.
- Some Certificate Authorities require the CSR content via email, others require it via a Web site. For details, see the instructions provided by the CA.
- The Certificate Authority may charge a fee to issue a certificate.
- 9. If you obtain a certificate from a Certificate Authority, install the certificate as follows:
  - 1. Select the line where you wish to install the certificate.

If you wish to import intermediate CA certificates, proceed to Step 2. If not, go to Step 6.



- Be sure to choose the line where you created the CSR content. If you choose the other
  one, operation will not be guaranteed, even if the installation is successful.
- 2. Click [Install Certificate].

The Install Certificate screen displays.



- 3. Select the [Intermediate CA Certificates] check box.
- 4. Copy the content of the intermediate CA certificate to import, and paste it to the text area in the screen.



- Some Certificate Authorities send the certificate via email, others display the certificate in the Web browser. For details, see the instructions provided by the CA.
- See the sample certificate obtained from a Certificate Authority by email. The text from"-----BEGIN CERTIFICATE-----" to"-----END CERTIFICATE -----" is the certificate content (information) you must copy and paste to the text area.

```
Dear World GSNX Corp. Custoner,

Thank you for ordering World GSNX Corp. Digital ID.
Your Server ID (Certificate) has been issued and is attached at
the end of this message.
Please refer to the following URL to install your Digital ID on
your server and to see the details of World GSNX Secured Seal.

Please visit:
http://www.worldssnx.com/server/help/g id.html
Common Mame: #WW.WORLDGSNX.com
-----BEGIN CERTIFICATE-----
```

#### 5. Click [OK].

The Create CSR screen closes. The "Certificate Status" changes to "Installed".

If you want to install multiple intermediate CA certificates, repeat Steps 2 through 5 for each certificate.

If you want to delete intermediate CA certificates, select the intermediate CA certificate and click [Delete] on the Certificate Details screen.

6. Click [Install Certificate].

The Install Certificate screen displays.

7. Confirm that the [Intermediate CA Certificates] check box is not selected.

8. Copy the content of the certificate issued using the CSR, and paste it to the text area in the screen.



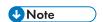
- Some Certificate Authorities send the certificate via email, others display the certificate in the Web browser. For details, see the instructions provided by the CA.
- See the sample certificate obtained from a Certificate Authority by email. The text from"-----BEGIN CERTIFICATE-----" to"-----END CERTIFICATE -----" is the certificate content (information) you must copy and paste to the text area.



9. Click [OK].

The Create CSR screen closes. The "Certificate Status" changes to "Installed".

10. Select the certificate you wish to use from the Certification drop-down list.



- You can select not to use a certificate. In that case, choose [Do not use].
- 11. When finished, close the Web browser.



When you have changed the certificate, you are prompted to restart the computer/server.
 Please do so.

# IIS - SSL On/Off

If the IIS Web Server was specified during GlobalScan NX software installation, the screen below displays when launching the Server Certificate Setting Tool. On this screen, SSL On/Off control is supported.

In order to enable SSL communication, it is necessary to configure IIS as well as GlobalScan NX. The configuration can be done through the IIS Management Tool (Internet Services Manager).

The following procedure gives a simple explanation of how to enable SSL using IIS.

- 1. Double-click the [GlobalScan NX SSL Setting Tool] shortcut on the desktop.
- 2. Select the [Use SSL] check box.

Fig.: GlobalScan NX SSL Setting Tool for IIS



- 3. Restart the GlobalScan NX service.
- 4. In the IIS management tool, open the GlobalScan NX properties, select the Directory Security tab, and then request a certificate.

Contact a certificate authority (CA) to have a certificate issued.

- 5. After you have obtained a certificate, register it in IIS.
- 6. Enter the port number to use for SSL connections (the default is 8443).
- Download the intermediate CA certificates and import them into GlobalScan NX via the Site Certificate settings in AdminTool.

On the Device List screen in AdminTool, select all MFPs, and then click [Synchronize] to update their SSL settings.

# 

- The SSL setting in GlobalScan NX must first be configured before configuring the SSL setting in IIS.
- In case you first configured the SSL setting in IIS, access the following URL to set the SSL setting in GlobalScan NX to On.

https://127.0.0.1:8443/gsnx/ssl\_xx.html

https://localhosts:8443/gsnx/ssl\_xx.html

Replace "xx" with your desired language code as specified below:

- English: en
- French: fr
- German: de
- Italian: it
- Dutch: nl
- Spanish: es
- After configuring the SSL setting in GlobalScan NX, you must reboot the computer to enable the new setting.



• For instructions on IIS-related procedures, refer to the IIS manuals.

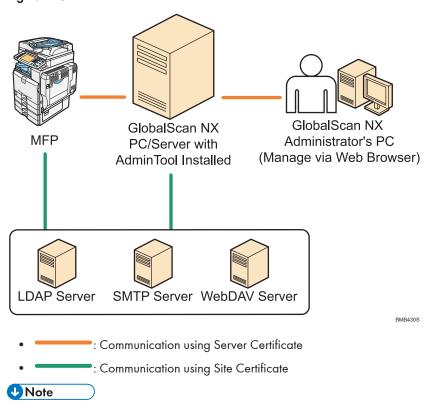
Ω

# Managing the Site Certificate

For Server and Serverless Editions, a Site Certificate is required in order to utilize SSL/TLS to encrypt data communication, thus secure the path between the GlobalScan NX computer/server and destination servers, for example, SMTP, LDAP or WebDAV servers.

For the LDAP server, the Site Certificate enables you to secure User Authentication and Address Book search operations. Furthermore, when running the Serverless Edition, the Site Certificate secures the connection between the MFP and the target destination, thus document data is protected from possible interception.

Fig.: Site Certificate



- If you will be using the failover or load balancing functions, you must also import a Site Certificate for the servers you will use for these functions. Import the certificate before registering the servers.
- If you would like to use Private Keys for secure Send to FTP Service, see page 466 "Managing the Private Keys".
- Not an external server certificate but both root CA certificate and intermediate CA certificate are imported on GSNX.

Supported Certificate file formats include the following:

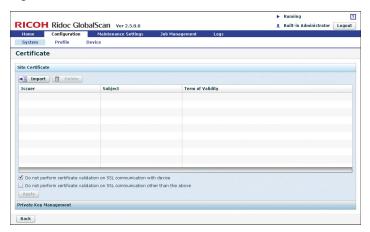
• DER encoded binary X.509

- Base 64 encoded X.509
- Cryptographic Message Syntax Standard PKCS #7

To import a site certificate, proceed as follows:

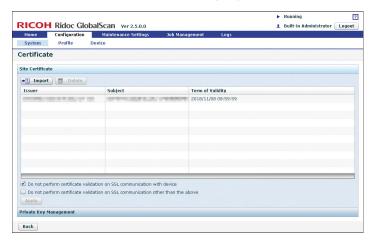
- 1. Log in to the GlobalScan NX AdminTool.
- 2. From the Home Page, select the [System] shortcut.
- 3. Click [Certificate].
- Click the [Site Certificate] accordion button to open the Site Certificate screen, if necessary.
- 5. Click [Import].

Fig.: Site Certificate Screen



6. Specify the path to the file, i.e., browse and select, for example "sample.cer".

The Site Certificate has been successfully imported.



- Private Keys other than RSA and DSA keys generated with the OpenSSL tool are not supported.
- To delete a Site Certificate select (highlight) the Certificate, and then click [Delete]. Click [OK] to confirm deletion.
- Selection of multiple Certificates is supported as follows:
   click multiple items while pressing the SHIFT key or CTRL key.



- Deletion of a Certificate is performed regardless of whether the Certificate is currently used or not.
- 7. To change the setting for certificate validation, select the check box and click [Apply].
  - If you do not want to perform certificate validation when communicating with the MFP, select the [Do not perform certificate validation on SSL communication with device] check box.
  - If you do not want to perform certificate validation when communicating with a destination server, select the [Do not perform certificate validation on SSL communication other than the above] check box.

# Managing the Private Keys

When using SFTP, or Secure FTP (SSH Protocol), in the Send to FTP Service, it is necessary to import a Private Key.



- See page 140 "About Services".
- See page 205 "About Filters".

To import a Private Key, proceed as follows:

- 1. Log in to the GlobalScan NX AdminTool.
- 2. From the Home page, select the [System] shortcut.
- 3. Click [Certificate].
- 4. Click [Private Key Management] accordion button on the bottom of screen to open the Private Key Management screen.
- 5. Click [Import].
- 6. Specify the path to the file and open.

The Private Key has been successfully imported.



- To delete a Private Key, select (highlight) the Key, and then click [Delete]. Click [OK] to confirm deletion.
- Selection of multiple Keys is supported as follows: click multiple items while pressing the SHIFT key or CTRL key.

## 

• Deletion of a Key is performed regardless of whether the Key is currently used or not.

# Replacement Table Settings

This section explains what Replacement Tables are and what they are used for, and describes how to create, edit, export/import, and delete Replacement Tables.

A Replacement Table is a table consisting of entries made up of comparison strings and output data. Input data is compared with the comparison strings, and if the input matches the comparison string, the output data is output. The comparison string can be a literal string, such as "Johnson" or "555-5432", or it can be a regular expression for more powerful matching. Input is usually from Metadata.

## Reference

- See page 509 "About Regular Expressions".
- See page 334 "About Metadata".

Replacement Tables are used in the Flow Redirect and Metadata Converter Filters.

#### Use in the Flow Redirect Filter

A Replacement Table is used to specify the target Project for Flow Redirection. The output data is the Project to redirect a Flow to when the input matches a comparison string.

For example, if the input data is the "User Name" Metadata item, the Replacement Table might look like the following:

## Table: Flow Redirect Replacement Table

Comparison String	Output (Target Project)
Johnson	Johnson Project
Mendoza	Save to Marketing Server
Tanaka	To PDF and Email

When a user with the user name "Mendoza" scans a document, the Flow will be redirected to the "Save to Marketing Server" Project, as specified in the table.

## **■** Reference

- See page 257 "Flow Redirect Filter" for details on the Flow Redirect Filter.
- See page 517 "Redirecting a Flow" for an example using the Flow Redirect Filter.

#### Use in the Metadata Converter Filter

A Replacement Table is used with the Metadata Converter Filter to replace the values of Metadata items. If the input Metadata item's value matches an entry in the table, the Metadata item's value is replaced with the output value.

For example, to replace a department code with the department's name, the Replacement Table might look like the following:

Table: Metadata Converter Replacement Table

Comparison String	Output
435	Legal Department
535	Engineering Department
635	Marketing Department

When the Department Code "435" is given as input to the table, "Legal Department" is output from the table.



• See page 260 "Metadata Converter Filter" for details on the Metadata Converter Filter.

## Adding a Replacement Table

To create a new Replacement Table, proceed as follows:

- 1. Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration] tab.
- 2. Click [Replacement Table].

Fig.: System Settings Screen



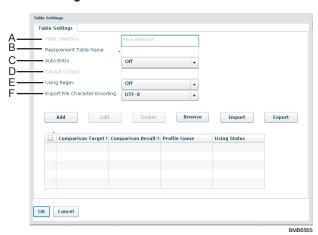
The Replacement Table Settings screen displays.



- 3. Select the type of Filter this table will be used with from the [Filter Selection] drop-down list.
  - [Flow Redirect]
     Select this option to use the table with the Flow Redirect Filter.
  - [Metadata Converter]
     Select this option to use the table with the Metadata Converter Filter.
- 4. Click [Add Entry].

The Table Settings screen displays.

#### **Table Settings Screen**



5. Set values for [Replacement Table Name], [Auto Entry], [Default Output], and [Using Regex]. The table below describes the settings.

Table: Table Settings Screen

	lable Seffings Screen	Description
		·
A	[Filter Selection] (reference only)	Displays the type of Replacement Table selected for this table.
В	[Replacement Table Name]	Enter the display name for the Replacement Table.  Limitation
		The maximum length is 128 characters.
С	[Auto Entry]	Select whether or not to add a new entry to the Replacement Table if the input value does not match an entry.  • [On]  If there is no match in the Replacement Table, a new entry for the input value is added to the table. The new entry uses the input value for the comparison string and a blank string for the output.  • [Off]  No new entry is added if there is no match in the Replacement Table.
D	[Default Output]	Enter the default output value. This value is used when the input does not match an entry in the table.  Limitation  This setting is only available when [Metadata Converter] is selected as the table type.
Е	[Using Regex]	Select whether to use regular expressions in the comparison strings.  • [On]  Use regular expressions in the comparison strings.  • [Off]  Do not use regular expressions in the comparison strings.  • Reference  • See page 509 "About Regular Expressions"

6. Add, edit and or delete table entries as desired



- See page 473 "Managing Replacement Table Entries"
- 7. Click [OK].

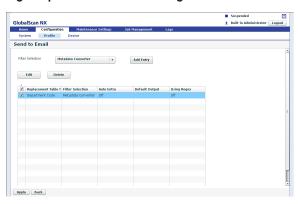
The Replacement Table Settings screen displays the new table.

## **Editing a Replacement Table**

To edit a Replacement Table, proceed as follows:

- 1. Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration]
- 2. Click [Replacement Table].
- 3. Select the check box of the Replacement Table you want to edit.

#### Fig.: Replacement Table Settings Screen



- Note
  - You can only select one table for editing. If you select two or more, [Edit] will be grayed out.
- 4. Click [Edit]

8

- Change the values for the table settings as desired. See table "Table Settings Screen" for details on the settings.
- 6. Add, edit and or delete table entries as desired.



- See page 473 "Managing Replacement Table Entries"
- 7. Click [OK].

The Replacement Table Settings screen displays table with the updated settings.

## **Managing Replacement Table Entries**

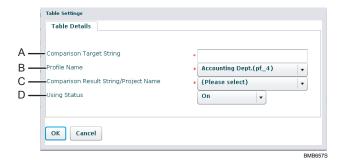
This section describes how to add, edit, and delete Replacement Table entries.

#### To add a Replacement Table entry, proceed as follows:

1. From the Table Settings screen, click [Add].

The Table Details screen appears.

#### Fig.: Table Details Screen



2. Fill in the fields for the table entry.

The table below describes the table entry fields.

Table: Table Details Screen

Tuble.	Tuble Delulis Screen	
	ltem	Description
A	[Comparison Target String]	Enter the string to compare with input.  Limitation
		Two entries cannot have the same comparison string.

	ltem	Description
В	[Profile Name] (Flow Redirect only)	Select the Profile that contains the Project to redirect a Flow when the input value matches the value in [Comparison Target String].
С	[Comparison Result String/Project Name]	For Flow Redirect tables  Select the Project to redirect a Flow to when the input value matches the value in [Comparison Target String].  For Metadata Converter tables
		Enter the string to output when the input value matches the value in [Comparison Target String].
D	[Using Status]	Select whether or not to use this entry.  In [On] Use this entry when matching input.  In [Off]  Do not use this entry when matching input. If this option is selected, even if an input string matches the comparison string, no value is output.

3. Click [OK] to save the entry and return to the Table Settings screen.

#### To edit a Replacement Table entry, proceed as follows:

1. From the Table Settings screen, select the check box of the entry you want to edit.



- You can only select one entry at a time for editing. If you select two or more, [Edit] will be grayed out.
- 2. Click [Edit].
- 3. Change the settings for the entry as desired.

See table "Table Details Screen" above for details on the settings.

4. Click [OK] to save the entry and return to the Table Settings screen.

#### To delete a Replacement Table entry, proceed as follows:

1. From the Table Settings screen, select the check boxes of the entries you want to delete.



• Select the check box in the column headings to select all entries.

#### 8

#### 2. Click [Delete].

A deletion confirmation displays. Click [OK] to confirm the deletion, or click [Cancel] to cancel the deletion.

### **Deleting a Replacement Table**

To delete a Replacement Table, proceed as follows:

- 1. Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration] tab.
- 2. Click [Replacement Table].
- 3. Select the check boxes of the Replacement Tables you want to delete.



- Select the check box in the column headings to select all Replacement Tables.
- 4. Click [Delete].

A deletion confirmation displays. Click [OK] to confirm the deletion, or click [Cancel] to cancel the deletion.

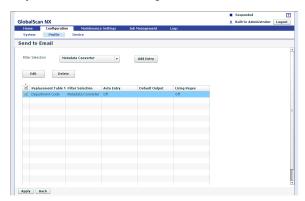
## Exporting/Importing a Replacement Table

The table entries in a Replacement Table can be exported and imported in CSV (comma separated value) format. The data can then be opened and edited in a text editor supporting either UTF-8 or Latin-1, or in a spreadsheet application such as Microsoft Excel. This enables you to maintain a record of all Replacement Tables.

#### To export a Replacement Table, proceed as follows:

- Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration] tab.
- 2. Click [Replacement Table].

#### Replacement Table Settings Screen

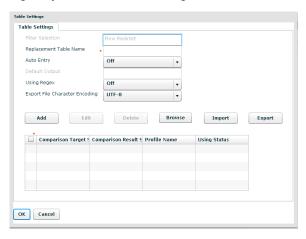


4. Click [Edit].



 You can only select one table for exporting. If you select two or more, [Edit] will be grayed out.

#### Fig.: Replacement Table Settings Screen



- 5. Select the character encoding methods for exporting from the drop-down list.
- 6. Click [Export].

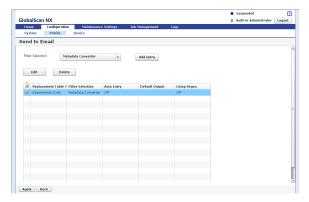
Select a folder to save the file, enter a file name for the exported data, and click [Save]. The Replacement Table will be exported and saved under the file name you specified in 5.

#### To import Replacement Table entries, proceed as follows:

 Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration] tab.

- 2. Click [Replacement Table].
- 3. Select the check box of the Replacement Table you want to import entries into.

#### Replacement Table Settings Screen

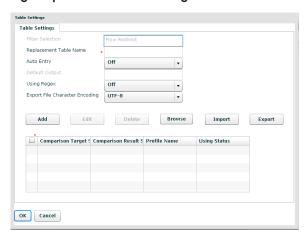


4. Click [Edit].



 You can only select one table for importing. If you select two or more, [Edit] will be grayed out.

Fig.: Replacement Table Settings Screen



5. Click [Browse].

The [Open File] window displays. Select the CSV file you want to import, and click [Open].

6. Click [Import].

The file selected in 5 is imported, and the data are added to the Replacement Table.



• The amount of data that can be imported to a replacement table is limited as follows:

- One replacement table can have a maximum of 700 entries.
- The total number of entries for all replacement tables must not exceed 5000.

## Reference

 See page 478 "Replacement Table CSV Specifications" for details about the format for Replacement Table CSV files.

## **Replacement Table CSV Specifications**

This section describes the format for CSV files for Replacement Tables.

The CSV file for a Replacement Table is a text file where each line is one table entry, and the values for the entry are separated by commas. The figures below show an example row for a Flow Redirect table and a Metadata Converter table.

#### Fig.: Entry for Flow Redirect Table in CSV File

BMB294S

#### Fig. Entry for Metadata Converter Table in CSV File

BMB2958

The table below describes the fields in the CSV file.



CSV files exported from GlobalScan NX contain several lines of headers above the entries.
 Header rows begin with the character "#". Do not change these lines.

#### Table: Replacement Table CSV File Fields

Field	Data	Corresponding Table Detail Field
1	The comparison string. This can be any user-defined value.	[Comparison Target String]
2	The comparison result (output).  For Flow Redirect Tables:	[Comparison Result String]

Field	Data	Corresponding Table Detail Field
	This value is the Control ID of the target Project. The Control ID is used internally in GlobalScan NX to identify a Project. It can be obtained by viewing the Project properties under [Control ID].	
	For Metadata Converter Tables:  The output string. This can be any user-defined value.	
3	O or 1. A zero (O) indicates that the entry will not be used for comparisons. A one (1) indicates that the entry will be used for comparisons.	[Use]
4	The Control ID of the Profile that contains the target Project.  This entry is used only for Flow Redirect Tables. The Control ID is used internally in GlobalScan NX to identify a Profile. It can be obtained by viewing the Profile properties under [Control ID].  For Metadata Converter Tables, this column will be blank.	[Profile Name]

#### Import Conditions for a Replacement Table CSV File

- If the comparison string (column 1) for an entry is blank, the entry will not be used for comparisons. ([Use] will be set to "0" in the Replacement Table).
- If the [Use] column (column 3) for an entry is a value other than 0 or 1, that entry will not be imported.
- If the comparison string (column 1) for an entry already exists in the table, that entry's information in the table will be updated with the data in the CSV file.
- If the comparison string (column 1) for an entry does not exist in the table, a new entry is added to the table with the data in the CSV file.

- If you are editing a CSV file that was exported by GlobalScan NX, do not change the header lines.
   Header lines begin with the character "#".
- If you edit the CSV file with a spreadsheet program, make sure to save it in CSV format; proprietary formats, such as the Excel format, cannot be read by GlobalScan NX.

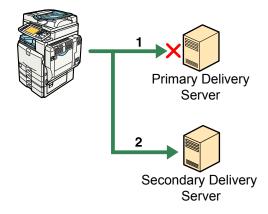
# Failover - Secondary Delivery Server (Server Edition Only)

The failover feature provides processing redundancy when you register a Secondary Delivery Server to the Primary Delivery Server (the main processing server). If the Primary Delivery Server experiences connectivity or other communication problems, the Secondary Delivery Server will automatically assume the Primary Delivery Server's document jobs.

This feature is useful in large organizations where there are heavy workloads. In such environments, server down time can result in expensive delays.

The following figure illustrates the role of the Secondary Delivery Server.

Fig.: Secondary Delivery Server Overview



BMB950S

- 1. The MFP attempts to send a job to the Primary Delivery Server, but fails due to a network error.
- 2. The MFP automatically reroutes the job to the Secondary Delivery Server.



- The jobs that remain on the Primary Delivery Server will not be processed until the Primary Delivery Server is restored. Make sure to restore the Primary Delivery Server as soon as possible.
- The message "The secondary server is being used because connecting to the primary server failed.
   Check the status of the primary server." will be sent to the e-mail address specified in the error notification settings on the Administrator Settings Screen.

## **Secondary Delivery Server Settings**

This section explains the settings that are available on the Secondary Delivery Server Settings screen.



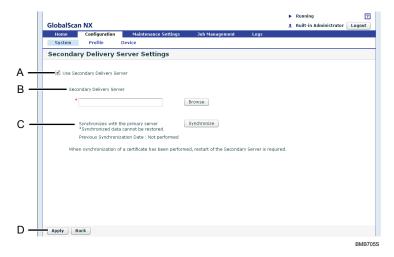
• To use the failover function in the Business Server Edition, you must purchase a license code and activate the feature separately.



• For details about activating software, see GlobalScan NX Installation Guide.

The following figure shows the Secondary Delivery Server Settings screen.

Fig.: Secondary Delivery Server Settings Screen



**Table: Secondary Delivery Server Settings** 

	ltem	Description
А	[Use Secondary Delivery Server]	Select this option to enable the failover function.
В	[Secondary Delivery Server]	Click [Browse] to select the Secondary Delivery Server from a list, or enter the Secondary Delivery Server's URL in the text box.
С	[Synchronize]	Synchronizes all the settings on the Primary Delivery Server with the Secondary Delivery Server.
D	[Apply]	Saves the current settings and returns you to the System menu.
	[Back]	Returns you to the System menu without saving the settings.

### Registering a Secondary Delivery Server

To register a Secondary Delivery Server, proceed as follows.

## Preparation

- Install and activate the GlobalScan NX software on the computer that you want to use as the Secondary Delivery Server.
- If you are using SSL, import Server Certificates and Site Certificates into the Secondary Delivery Server.
- Only one Secondary Delivery Server can be registered to the Primary Delivery Server at a time.
- 1. If necessary, click [Home] and then the [System] shortcut.
- 2. Click [Secondary Delivery Server Settings].

The Secondary Delivery Server Settings screen displays. See Fig. "Secondary Delivery Settings Screen" above.

- 3. Select the [Use Secondary Delivery Server] check box.
- 4. Click [Browse] to select the server that you want to use as the Secondary Delivery Server from a list of connected servers, or enter the server's URL in [Secondary Delivery Server].

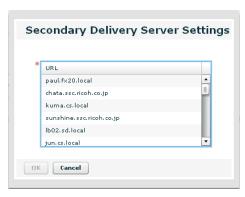
If you click [Browse], a window containing a list of server names displays. Select a server, and then click [OK]. The URL of the server displays in text box.

If you enter the URL of the server, the format must be as follows:

http(s)://IP Address:Port No/Virtual Directory Name/

Default: http(s)://IP Address:8080(8443)/gsnx/

Fig.: Select Server Window



5. Click [Synchronize] to copy all of the Profiles, system settings, etc., from the Primary Delivery Server to the Secondary Delivery Server.

AdminTool will check the specified server to make sure it can be registered as a Secondary Delivery Server. See "Secondary Delivery Server Conditions" below for the list of conditions.

If the specified server can be registered, a confirmation message displays.

8

6. Click [Yes] to synchronize the servers. Or, click [No] to cancel the operation.



• You can click [Apply] to save the settings without synchronizing the servers.

#### **Secondary Delivery Server Conditions**

- If the server you are registering as the Secondary Delivery Server meets any of the conditions listed below, an error message will display when you click [Synchronize].
  - The server is not a GlobalScan NX server.
  - The server is not running the same server edition of GlobalScan NX (Business or Enterprise) as the Primary Delivery Server.
  - The version of the software that is installed on the server is different from the version that is installed on the Primary Delivery Server.
  - The server is the Primary Delivery Server (i.e. you are trying to register the Primary Delivery Server as its own Secondary Delivery Server).
  - The server is already registered as the Secondary Delivery Server to another Primary Delivery Server.
  - The server is already registered as the Primary Delivery Server with another GlobalScan NX system.
- If one or more MFPs are registered to the specified Secondary Delivery Server, an error message will display.

Remove all registered MFPs from the specified server, and then click [Synchronize] again.



• For details on removing MFPs, see page 345 "About Device Properties".

#### When Using Secondary Delivery Server

Make sure to keep the following in mind:



- If you change any settings on the Primary Delivery Server, you must synchronize the Secondary Deliver Server again.
- If you do not synchronize the servers, the Secondary Delivery Server will not operate correctly.
- After you register a Secondary Delivery Server, you can use AdminTool on the Secondary Delivery
  Server to perform the same operations that are available on the Primary Delivery Server, such as
  adding Profiles and changing system settings. However, changing system settings through the
  Secondary Delivery Server can result in malfunctions. For this reason, do not use AdminTool on the
  Secondary Delivery Server to change system settings.

- After you register a Secondary Delivery Server, you must synchronize the Primary Delivery Server with all connected MFPs so that the MFPs can recognize the Secondary Delivery Server. See page 349 "Synchronizing the Device".
- For synchronization to succeed, the two following settings must be the same on the Primary Delivery Server and the Secondary Delivery Server. (For details about configuring these settings, see GlobalScan NX Installation Guide):
  - DNS Server IP address
  - Date/time setting
- If you are using Replacement Tables in your delivery flows, keep the following in mind:
  - Before enabling the failover function, you must configure the Replacement Tables and then synchronize both the Primary and Secondary Delivery Server.
  - After you have enabled failover, you must not use the auto-entry function for the Replacement Tables.



- Job information and log details are not synchronized between delivery servers. This means that job
  information and log details are stored only on the server that processed the job. Therefore, if you
  want to view the status and error information of a job that was processed by the Secondary
  Delivery Server, you must access the Secondary Delivery Server to do so.
- To change the Secondary Delivery Server, you must first remove the currently registered server. See page 484 "Removing a Secondary Delivery Server".

## Removing a Secondary Delivery Server

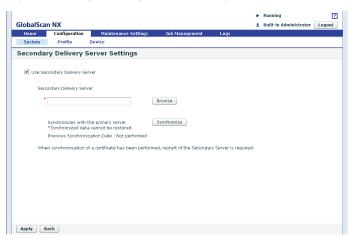
To remove the Secondary Delivery Server setting from the Primary Delivery Server, proceed as follows:

- 1. If necessary, click [Home], and then click the [System] shortcut.
- 2. Click [Secondary Delivery Server Settings].

The Secondary Delivery Server Settings screen displays.

8

Fig.: Secondary Delivery Server Settings Screen



- 3. Clear the [Use Secondary Delivery Server] check box.
- 4. Click [Apply].

A confirmation message displays.

5. Click [OK] to confirm the settings.

## Making a Secondary Delivery the Primary Delivery Server

If the Primary Delivery Server becomes unusable, or if you no longer want to use it as the Primary Delivery Server, you can easily change the registered Secondary Delivery Server to be the Primary Delivery Server.



- Make sure that you synchronize the Primary and Secondary Delivery Servers whenever you
  change settings such as Profiles on the Primary Delivery Server. If you do not, the Secondary
  Delivery Server will not have the most recent settings, and this might complicate the transition to
  Primary Delivery Server.
- 1. Log in to the AdminTool on the Secondary Delivery Server.

Fig.: System Settings Menu



A confirmation screen displays.

- 3. Click [Yes] to confirm removal of the Secondary Delivery Server setting and change the server status to Primary Delivery Server. Or, Click [No] to cancel the operation.
- 4. If necessary, make any other settings to configure the server for use as the Primary Delivery Server (synchronizing Profiles with MFPs, for example).



• For details on synchronizing the server with MFPs, see page 349 "Synchronizing the Device".



 If you want to restore the original Primary Delivery Server, you must re-register the Secondary Delivery Server. See page 482 "Registering a Secondary Delivery Server".

#### O

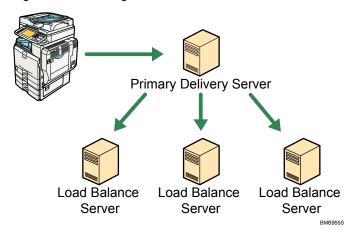
# Load Balancing (Enterprise Server Edition Only)

The load balancing function enables the Primary Delivery Server (main processing server) to delegate jobs to one or more registered Load Balance Servers in order to increase processing efficiency. Multiple jobs are processed at the same time, resulting in faster throughput.

This feature is useful in large organizations where several hundred jobs might be processed simultaneously.

The following figure illustrates how load balancing works.

Fig.: Load Balancing Overview



#### **Load Balancing Conditions**

- The Job Log and Job Queue are stored only on the Primary Delivery Server; the Load Balance Servers send the job information to the Primary Delivery Server. You can view the status of all jobs on the Primary Delivery Server.
- If you apply the [Top Priority] setting to a job in the Job Queue, that job is moved to the front of the queue on the server that is processing it.
- Error jobs are controlled from the Primary Delivery Server, even if the job has been delegated
  to a Load Balance Server. However, the job data itself is stored on the Load Balance Server. If
  the Load Balance Server storing the job goes offline, error job handling will be abandoned.
- The Primary Delivery Server delegates jobs between the Load Balance Servers and itself.
- Jobs are delegated primary to the Load Balance Servers in order to reduce the load on the Primary Delivery Server.

## Reference

- See page 372 "Job Log".
- See page 379 "Job Queue".

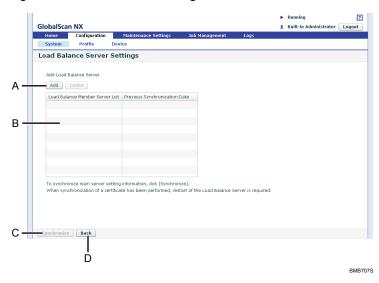
- See page 383 "Error Queue".
- See page 388 "Job Settings".

## **Load Balance Server Settings**

This section explains the settings that are available on the Load Balance Server Settings screen.

The following figure shows the Load Balance Server Settings screen.

Fig.: Load Balance Server Settings Screen



**Table: Load Balance Server Settings** 

	ltem	Description
A	[Add]	Displays the Add Load Balance Server screen, where you can add a new Load Balance Server.
	[Delete]	Removes the selected Load Balance Server from the list.
В	[Load Balance Member Server List]	Displays a list of all currently registered Load Balance Servers.
С	[Synchronize]	Synchronizes all the settings on the Primary Delivery Server with the Load Balance Servers.
D	[Back]	Returns you to the System settings screen without synchronizing the servers' settings.

#### 8

## **Registering Load Balance Servers**

To register Load Balance Servers, proceed as follows:



- Install and activate the GlobalScan NX software on the computers that you want to use as Load Balance Servers.
- If you are using SSL, import Server Certificates and Site Certificates into the Load Balance Servers.
- 1. If necessary, click [Home] and then the [System] shortcut.
- 2. Click [Load Balance Server Settings].

The Load Balance Settings screen displays. See Fig. "Load Balance Server Settings Screen" above.

3. Click [Add].

The Add Load Balance Server screen displays.

Fig.: Add Load Balance Server Screen

Add Load Balance Server		
URL *	Browse	
OK Cancel		

4. Click [Browse] to select the server that you want to add from a list of connected servers, or enter the server's URL in [URL].

If you click [Browse], a window containing a list of server names displays. Select a server, and then click [OK]. The URL of the server displays in text box.

If you enter the URL of the server, the format must be as follows:

http(s)://IP Address:Port No/Virtual Directory Name/

Default: http(s)://IP Address:8080(8443)/gsnx/



#### 5. Click [OK].

AdminTool will check the specified server to make sure it can be registered as a Load Balance Server. See "Load Balance Server Conditions" below for the list of conditions.

- 6. To add more Load Balance Servers, repeat steps 3 to 5 for each additional server.
- 7. Click [Synchronize] to copy all the Profiles, system settings, etc., from the Primary Delivery Server to the Load Balance Servers.

AdminTool will check the specified servers to make sure they can be registered as Load Balance Servers. See "Load Balance Server Conditions" below for the list of conditions.

If the servers you have specified can be registered, a confirmation message displays.

8. Click [Yes] to synchronize the servers. Or click [No] to cancel the operation.



- You cannot use AdminTool with a registered Load Balance Server. If you try to connect to a
  registered Load Balance Server with AdminTool, a message will be displayed telling you that you
  cannot log in.
- The delivery status (suspended/running) of the Primary Delivery Server is automatically synchronized with the Load Balance Servers when the status of the Primary Delivery Server is changed.

#### **Load Balance Server Conditions**

- If a server you are registering as a Load Balance Server meets any of the conditions listed below, an error message will display when you click [Synchronize].
  - The server is not a GlobalScan NX server.
  - The server is not running the Enterprise Server Edition of GlobalScan NX.
  - The version of the software that is installed on the server is different from the version that is installed on the Primary Delivery Server.
  - The server is the Primary Delivery Server (i.e., you are trying to register the Primary Delivery Server as its own Load Balance Server).

8

- The server is already registered as a Load Balance Server.
- The server is registered as the Primary or Secondary Delivery Server with another GlobalScan NX system.
- The server has jobs in its Job Queue. (This condition is not checked during synchronization.)

## Reference

- See page 480 "Failover Secondary Delivery Server (Server Edition Only)".
- If one or more MFPs are registered to any of the specified Load Balance Servers, an error message will display.

Remove all registered devices from the server, and then click [Synchronize] again.

#### When Using Load Balance Servers

Make sure to keep the following in mind:



- Before you change any settings (including the start/stop service setting), make sure that all the Load Balance Servers are running.
- If you change any settings on the Primary Delivery Server, you must synchronize the Load Balance Servers again. If you do not synchronize the servers, the Load Balance Servers will not operate correctly.
- For synchronization to succeed, the two following settings must be the same on the Primary Delivery Server and all Load Balance Servers. (For details on configuring these settings, see GlobalScan NX Installation Guide.)
  - DNS Server IP address
  - Date/time setting
- If you are using Replacement Tables in your delivery flows, keep the following in mind:
  - Before enabling the load balance function, you must configure the Replacement Tables and then synchronize the Load Balance Servers.
  - After you have enabled failover, you must not use the auto-entry function for the Replacement Tables.

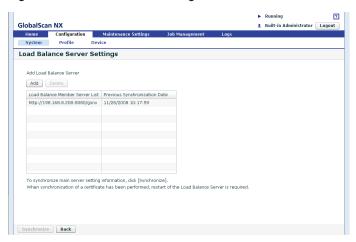
## **Removing Load Balance Servers**

To remove Load Balance Servers, proceed as follows:

1. If necessary, click [Home] and then the [System] shortcut.

The Load Balance Settings screen displays.

Fig.: Load Balance Server Settings Screen



In [Load Balance Member Server List], select the Load Balance Servers that you want to remove.



- You can select multiple servers by holding down SHIFT or CTRL while selecting them.
- 4. Click [Delete].

A confirmation message displays.

5. Click [Yes] to confirm the removal. Or, click [No] to cancel the operation.

The selected Load Balance Servers are removed from the list.



- When you remove a Load Balance Server, it is only removed from the list; the server's settings are not deleted. After the Load Balance Server is removed, you can access AdminTool on it as you would on a current server.
- When you remove a Load Balance Server, any jobs in the Job Queue of that server will still be
  processed. However, the log information is stored only on the server that processed the job and is
  not forwarded to the Primary Delivery Server.

Q

#### O

# **Kerberos Option**

If you are using the Kerberos ticket for authentication with Send to Folder and Send to WebDAV Services, you can select whether to use only the Kerberos ticket for authentication, or to use other authentication credentials in the event that authentication with the Kerberos ticket fails. This function is available only when the Project uses Active Directory Authentication.

- When you use the Kerberos ticket as the preferred authentication credential:
   GlobalScan NX first tries to authenticate with the destination server (for example a WebDAV server) using the Kerberos ticket. If authentication fails, GlobalScan NX then attempts to authenticate using different authentication credentials, such as the user's user name and password.
- When you use only the Kerberos ticket:
   GlobalScan NX tries to authenticate with the destination server using the Kerberos ticket. If authentication fails, user access is not granted.
- If it fails to resolve the host name in the destination path via DNS or the Hosts file, Kerberos authentication will fail.
- To use the Send to Folder Service after enabling the enhanced SMB protocol, authenticate the ticket received on Kerberos authentication as the priority, regardless of the Kerberos Option settings.

To select the Kerberos Option, proceed as follows:

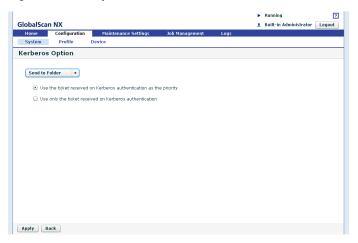
1. If necessary, click [Home], and then click the [System] shortcut.

#### System Settings Menu



#### 2. Click [Kerberos Option].

#### Fig.: Kerberos Option



- 3. Select the Service you want to configure from the drop-down list.
- 4. Select the method for authentication using the Kerberos ticket for each Service.
  - [Use the ticket received on Kerberos authentication as the priority]
     GlobalScan NX will first attempt to authenticate with the destination server using the Kerberos ticket. If authentication fails, GlobalScan NX attempts authentication using different authentication credentials.
  - [Use only the ticket received on Kerberos authentication]
     GlobalScan NX will attempt to authenticate with the destination server using the Kerberos ticket only. If authentication fails, user access is not granted.
- 5. Click [Apply] to save the settings. Or, click [Back] to return to the System Settings screen.



 To use Kerberos Option in Serverless Edition, you must purchase a license code and activate the feature separately, as with Server Edition. For details on activating software, see GlobalScan NX Installation Guide.

## Reference

• See GlobalScan NX Installation Guide.

# Plug-in Information Menu

On the Plug-in Information screen, you can view the name, version, and details of each plug-in that is installed.

Use the following procedure to view the plug-in information.

- 1. If necessary, click [Home], and then click the [System] shortcut.
- 2. Click [Plug-in Information].

Fig.: System Settings Screen



The names and versions of the installed plug-ins appear. Plug-ins are grouped into tabs by categories.

Fig.: Plug-in Information Screen



3. Click a plug-in name to open its properties screen.

The properties screen contains a description and other details of the plug-in.

4. Click [OK] to close the properties screen.

## 9. APPENDIX

This section provides additional resources to supplement the guide, including details on File Formats, Metadata Specifications, AdminTool Localization, Glossary of Terms, and more.

# **Active Directory Authentication**

Active Directory Authentication is supported, with the following conditions:

- Time/Date Setting
  - The date/time setting of all the systems, i.e., the Active Directory server, GlobalScan NX server and target MFP(s), must be the same. If not, Authentication will fail.
- Lockout
  - Care must be taken for the lockout policy of the relevant Key Distribution Center (KDC), in order to prevent an account from being locked out.

If the user (including the administrator) enters the password incorrectly for a number of times (the possible number of attempts is specified by the lockout policy), the user will be locked out. The lockout policy can vary between Key Distribution Centers.

## **File Formats**

GlobalScan NX supports a wide variety of file formats. Those that display on the MFP display panel is controlled by settings selected via the AdminTool, so users at the MFP display panel may see all or limited choices on the Scan Settings screen.

## Reference

• See page 307 "About Scan Settings".

#### Serverless Edition

#### Table x: Black & White File Formats

Visible (by Default)	Invisible (by Default)
TIFF (MMR, multi-page)	TIFF (MMR, single-page)
PDF (searchable, multi-page)	PDF (single-page)

#### Table x: Grayscale/Color File Formats

Visible (by Default)	Invisible (by Default)
JPEG	PDF (single-page)
PDF/A (searchable, multi-page)	
High Compression PDF (searchable, multi-page)	

#### **Server Edition**

#### Table x: Black & White File Formats

Visible (by Default)	Invisible (by Default)
TIFF (MMR, multi-page)	TIFF (MR, multi-page)
BMP (Uncompressed)	TIFF (MH, multi-page)
PNG	TIFF (Uncompressed, multi-page)
GIF	TIFF (MMR, single-page)
PDF (multi-page)	TIFF (MR, single-page)
High Compression PDF (multi-page)	TIFF (MH, single-page)
	TIFF (Uncompressed, single-page)
	TIFF-F (MMR, multi-page)

Visible (by Default)	Invisible (by Default)
	TIFF-F (MR, multi-page)
	TIFF-F (MH, multi-page)
	TIFF-F (MMR, single-page)
	TIFF-F (MR, single-page)
	TIFF-F (MH, single-page)
	DCX (multi-page)
	DCX (single-page)
	PDF (single-page)
	High Compression PDF (single-page)

## Table x: Grayscale/Color File Formats

Visible (by Default)	Invisible (by Default)
JPEG	TIFF (Uncompressed, multi-page)
BMP (Uncompressed)	TIFF (Uncompressed, single-page)
PNG	PDF (single-page)
GIF	High Compression PDF (single-page)
PDF (multi-page)	
High Compression PDF (multi-page)	

# Input/Output Formats for the Image Converter Filter (Server Edition)

By using the Image Converter Filter, you can convert input data into another format with the same color depth. The tables below show the supported input formats and convertible output formats for the Server Edition.

## Limitation

- If JPEG format is selected as the output data, the data is output in 24-bit color, regardless of the input color depth.
- Input with a color depth of 24 bits in grayscale or full color is converted to 8-bit color when converted to the GIF format for the Server Edition.

## Reference

• For the Image Converter Filter settings, see page 230 "Image Converter Filter".

#### Black & White (1bit)

You can convert each supported format into any one of the convertible formats.

Supported Formats (Input data)	Convertible Formats (Output data)
TIFF (MH, single-page)	TIFF (MH, single-page)
TIFF (MR, single-page)	TIFF (MR, single-page)
TIFF (MMR, single-page)	TIFF (MMR, single-page)
TIFF (Uncompressed, single-page)	TIFF (Uncompressed, single-page)
TIFF (MH, multi-page)	TIFF (MH, multi-page)
TIFF (MR, multi-page)	TIFF (MR, multi-page)
TIFF (MMR, multi-page)	TIFF (MMR, multi-page)
TIFF (Uncompressed, multi-page)	TIFF (Uncompressed, multi-page)
TIFF-F (MH, single-page)	TIFF-F (MH, single-page)
TIFF-F (MR, single-page)	TIFF-F (MR, single-page)
TIFF-F (MMR, single-page)	TIFF-F (MMR, single-page)
TIFF-F (MH, multi-page)	TIFF-F (MH, multi-page)
TIFF-F (MR, multi-page)	TIFF-F (MR, multi-page)
TIFF-F (MMR, multi-page)	TIFF-F (MMR, multi-page)
DCX (single-page)	DCX (single-page)
DCX (multi-page)	DCX (multi-page)
BMP (Uncompressed)	BMP (Uncompressed)

Supported Formats (Input data)	Convertible Formats (Output data)
PNG GIF	JPEG
	PNG
	GIF

## Gray Scale/Full Color (4bit, 8bit, 24bit)

You can convert each supported format into any one of the convertible formats.

Supported Formats (Input)	Convertible Formats (Output)
TIFF (Uncompressed, single-page)	TIFF (Uncompressed, single-page)
TIFF (Uncompressed, multi-page)	TIFF (Uncompressed, multi-page)
BMP (Uncompressed)	BMP (Uncompressed)
JPEG	JPEG
PNG	PNG
GIF	GIF

# **Metadata Specifications**

Document Metadata contains various document properties, such as the document name, the user who created the document, and the date the file was created. Metadata is stored in XML format, and consists of 2 kinds of items: basic Metadata items and custom Metadata items.

Basic Metadata items are defined by the system and are automatically added to a document. Custom Metadata items are added by the Administrator, and the Administrator defines the items' names (IDs). The item names are used to specify Metadata items when configuring Filters and other features that use Metadata.

For Filters and other features where you can use Metadata, some basic Metadata items will be displayed in a drop-down list, which you can select and use directly. To use items that are not displayed and custom Metadata items, you can enter the tag name directly into the list box according to the rules.



 To output the Metadata in its native XML format, use the XML Transformer Filter without specifying an XSL file.

#### Reference

- See page 334 "About Metadata".
- See page 254 "XML Transformer Filter".

### Fig.: Metadata XML

```
<?xml version="1.0" encoding="UTF-8" ?>
<document>
 cproperties>
   <basic>
    - cproperty id="hostName">
       <value> 192.168.1.1 </value>
     </property>
     cproperty id="generationDate">
       <value>20070928T060811Z
     </property>
     cproperty id="name">
       <value>20070928150811
     </property>
     cproperty id="width">
       <value>1176</value>
          arue >6bf13dde-6066-45
      </property>
    </basic>
   <resultURL>
    - cproperty id="ScanToFolder">
       <value>http://123/20071206220708.tif</value>
      </property>
      property id="ScanToWebDAV">
                                  com/projectA/</value>
           nue>https://disk.comp.
                                          مراح المانية ا
      </property>
     cproperty id="ScanToFolder">
       <value>\\LANMachine\common\scanner\fullDoc.pdf</value>
      </property>
    </resultURL>
  </properties>
</document>
```

#### 1. The "document" Element

The document element is the root element of the Metadata.

#### 2. The "properties" Element

The properties element contains all of the property elements and the resultURL element.

#### 3. The "basic" Element

Basic Metadata items and custom Metadata items are listed between the <br/> <br/>basic> and </br>

#### 4. The "resultURL" Element

Document URLs are listed between the  $\$ resultURL> and  $\$ /resultURL> tags.

#### 5. Metadata Property

The "id" attribute of the contains tag contains the name of the Metadata item for both basic and custom Metadata.

#### 6. Metadata Item Value

The text between the <value> and </value> tags is the value associated with the enclosing Metadata item.



- The "resultURL" element is included in the XML when the following Services precede the XML Transformer Filter in a Flow:
  - When [Create URL Using Base URL] is specified in the Send to Folder Service.
  - When the Send to FTP or Send to WebDAV Service is used.

# Reference

Item Name (ID)

- See page 163 "Send to Folder Service".
- See page 178 "Send to FTP Service".
- See page 189 "Send to WebDAV Service".
- The order of Metadata displayed in XML and the actual order displayed above may differ.

Description

The basic Metadata items and their corresponding tag names are displayed in the table below.

Table: Metadata Items (displayed in drop-down lists)

Display Name

Item Name (IU)	Display Name	Description
name	Document Name	The name of the scanned document.
userName	User Name	The user name used to log in to the Project and send the document. If the Project did not require authentication, this contains the user name used to log in to the MFP. In the following cases, the value will be empty:  • Neither the Project nor MFP requires authentication.  • The document was received via the fax function.
pageCount	Document Page(s)	The number of originals. A two-sided original is counted as 2 originals.
generationDate	Document Creation Date (UTC)	The time of acceptance of the Scan/FAX document.  • UTC (Coordinated Universal Time) is used.  • The format is "yyyymmddThhmmssTZD".  (TZD is the time zone and "Z" indicates "UTC".) For example, if the document was accepted on July 13, 2007 at 03:00:00 PM (Eastern Standard Time -5 UTC), the value will be as follows:  "20070713T200000Z".
contentSize	Document Size	The total data size (Bytes).

Item Name (ID)	Display Name	Description	
pageSize	First Page Size	The size of the first page. For this, Page Size values are used. See the "Page Size Values" tables below.  [] Limitation	
		Any Page Size values not on the lists are indicated as "Unknown".	
outMode	2-Sided/1-Sided	duplex/single	
port	Port No.	The FAX reception port:  • G3-1  • G3-2  • G3-3  • InternetFAX  • IPFax	
tsi	TSI	TSI (RTI/CSI)	
application	Application	The type of application that supplied the input data:  scan fax	
hostAddress	Host Address	The IP address of the device.	
hostName	Host Name	The host name of the device.	
dayOfWeek	Day of the Week	The day of week on which the job was created.	
generationDateLocal	Document Creation Date (Local Time)	The time the Scan/FAX document was accepted.  • Local time is used.  • The format is "yyyymmddThhmmss".  This value is generated using generationEpoch and sourceTimeZone.	

# Table: Metadata Items (not displayed in drop-down lists)

Item Name (ID)	Description
jobld	The job ID. This ID is unique across the system.
registrationDate	The date and time the job was created.
	UTC (Coordinated Universal Time) is used.

Item Name (ID)

Description

(TZD is the time zone and "Z" indicates "UTC".) For example, if the job was created on July 13, 2007 at 03:00:00 PM (Eastern Standard Time -5 UTC),

• The format is "yyyymmddThhmmssTZD".

the value will be as follows: "20070713T200000Z".

Item Name (ID)	Description	
scanMethod	The method used for scanning.	
	• ADF	
	• PLATEN	
	• MIX	
groupld	The ID of the Group.	
generationEpoch	The date and time that the file was created, expressed as the number of milliseconds that have elapsed since January 1, 1970, 0:00.	
	<b>◆</b> Note	
	This value is calculated based on Universal Coordinated Time (UTC).	
registrationEpoch	The date and time that the file was registered, expressed as the number of milliseconds that have elapsed since January 1, 1970, 0:00.	
	<b>U</b> Note	
	This value is calculated based on Universal Coordinated Time (UTC).	
contentType	The MIME type of the first page. This value conforms to RFC standards.	
sourceTimeZone	The local time zone that was used as the basis for the values of generationEpoch and registrationEpoch.	
hostDomain	The domain to which the device belongs. If the domain name cannot be determined, this item is blank.	
registrationDateLocal	The date and time the job was created.	
	Local time is used.	
	The format is "yyyymmddThhmmss".	
	This value is calculated based on generationEpoch and sourceTimeZone.	

# ■ Reference

- For details about formatting numeric Metadata items for output in file/folder names, see page 200 "Specifying Folder and File Names Using Metadata".
- For details about formatting Metadata items that represent dates for output in file/folder names, see page 202 "Formatting dates in Metadata".

Page Size value	Inches × Inches	mm × mm
AO	33.1 × 46.8	841 × 1189
A1	23.4 × 33.1	594 × 841
A2	16.5 × 23.4	420 × 594
A3	11.7 × 16.5	297 × 420
A4	8.3 × 11.7	210 × 297
A5	5.8 × 8.3	148 × 210
A6	4.1 × 5.8	105 × 148

Table: B-series Page Size Values

Page Size value	Inches × Inches	mm × mm
ВО	39.4 × 55.7	1000 × 1414
B1	27.8 × 39.4	707 × 1000
B2	19.7 × 27.8	500 × 707
В3	13.9 × 19.7	353 × 500
B4	9.8 × 13.9	250 × 353
B5	6.9 × 9.8	176 × 250
В6	4.9 × 6.9	125 × 176

**Table: Inch Size Values** 

Page Size value	Inches × Inches	mm × mm
5 1/2 × 8 1/2	5 1/2 × 8 1/2	140 × 216
8 1/2 × 11	8 1/2 × 11	216 × 279
81/2×13	8 1/2 × 13	216 × 330
8 1/2 × 13 2/5 Landscape	8 1/2 × 13 2/5	216 × 340
8 1/2 × 14	8 1/2 × 14	216 × 356

Page Size value	Inches × Inches	mm × mm
11×14	11 × 14	279 × 356
11 × 17	11 × 17	279 × 432

# **About Regular Expressions**

### **Meta Characters**

The following characters are called "meta characters" and have a special meaning:

Other characters are called "normal characters" and have no special meaning.

To use a meta character as a normal character, put " $\$ " in front of the meta character.

Character	Meaning	
. (period)	Match any character (except Newline).	
[]	Match any single character within the brackets.	
[^]	Match any single character not within the brackets.	
^	Match the beginning of the line.	
\$	Match the end of the line (or before Newline at the end).	
\A	Match only at beginning of string.	
\Z	Match only at end of string (or before Newline at the end).	
\G	Match only at position () (for example at the end-of-match position of prior m//g).	
\b	Match a word boundary.	
\B	Match a non-word boundary.	
\w	Match any "word" character (alphanumeric plus "_").	
\W	Match any non-"word" character.	
\s	Match any whitespace character.	
\\$	Match any non-whitespace character.	
\d	Match any digit character (0-9).	

Character	Meaning	
\D	Match any non-digit character.	
\1, \2,	Used to refer to previous group.	
\x	Escape sequence.  Match extended Unicode "combining character sequence".  Equivalent to (?:\PM\pM*).	
*	Match 0 or more times.	
* \$	Match 0 or more times (shortest match).	
+	Match 1 or more times.	
+ś	Match 1 or more times (shortest match).	
ś	Match 1 or 0 times.	
ŝŝ	Match 0 or 1 time.	
{n,m}	Match at least n but not more than m times.	
{n,m}?	Match at least n but not more than m times (shortest match).	
()	Grouping.	
I	Alternation.	
(?:regexp)	A group that cannot be referred to by \1, \2,	
(?=regexp)	Match following expression to "regexp".	
(?!=regexp)	Match following expression to anything but "regexp".	

# **Escape Sequences**

The following escape sequences can be used.

Character	Meaning
\0	Null character.
\xhh	Hex character.
\n	Newline.
\t	Tab.

7	_	
ч		

Character	Meaning	
\b	Match a word boundary.	
\000	Octal character.	
\cC	Control character.	
\r	Return.	
∖f	Form feed.	
\a	Alarm (bell).	

The following escape sequences can also be used in replacement strings:

Character	Meaning	
\u	Make the next character uppercase.	
\I	Make the next character lowercase.	
\U	Make all following characters uppercase until the next \E.	
\L	Make all following characters lowercase until the next \E.	
∖E	End case modification, i.e., \U and \L.	

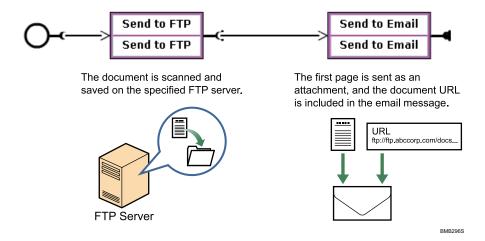
# Flow Examples

This section gives several examples of Flows. These examples highlight useful features for various Services and Filters that can help you create efficient Flows.

### Include Document URLs in an Email

This example uses the Send to Email Service with the Send to FTP Service to include the URL(s) of a scanned document in an email message. In addition, the Flow will be configured to attach only the first page of the scanned document.

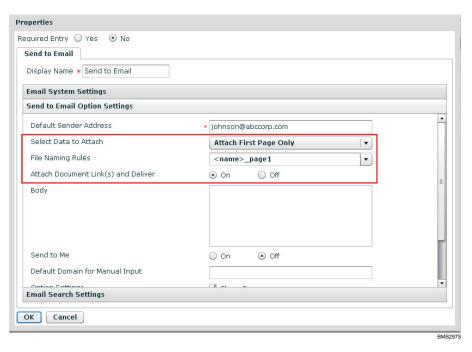
### **Example Flow**



9

### **Key Settings**

Send to Email Service



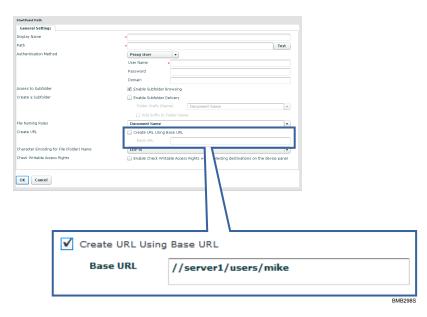
Setting	Value
[Select Data to Attach]	[Attach First Page Only]
[File Naming Rules]	<any value=""></any>
[Attach Document Link(s) and Deliver]	[On]

#### **Results**

When the email is sent, the URL of the document on the FTP server is included in the body of the message, and the first page of the document is sent as an attachment to the email.



 When using the Send to Folder Service, you must select the [Create URL Using Base URL] check box in Add StartPoint Path settings. Enter a base URL in [Base URL] if necessary.



# Reference

- See page 148 "Send to Email Service".
- See page 163 "Send to Folder Service".
- See page 178 "Send to FTP Service".
- See page 189 "Send to WebDAV Service".

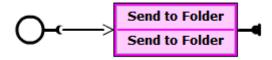
# Creating Subfolders when Saving Scanned Files

This example uses the subfolder creation feature in the Send to Folder Service to save scanned documents in subfolders with the users' names.



• This example uses to the Send to Folder Service, but the same results can be achieved by using the Send to FTP and Send to WebDAV Services as well.

### **Example Flow**



### **Key Settings**

Send to Folder Service

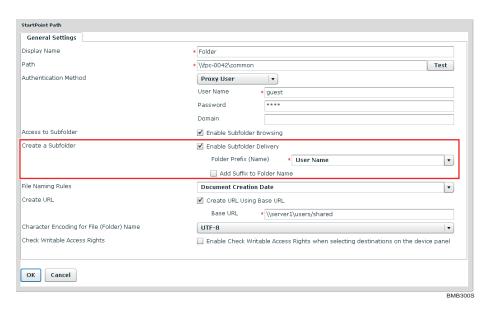


Table: Send to Folder settings for creating subfolders

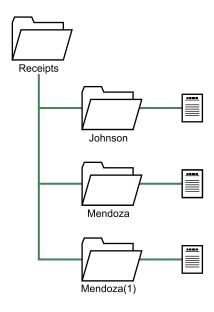
Setting	Value
[Enable Subfolder Delivery]	Selected
[Folder Prefix (Name)]	User Name
[Add Suffix to Folder Name]	Selected/Not Selected

#### **Results**

# When [Add Suffix to Folder Name] is selected

If a user with the user name "Johnson" scans a document, and another user with the user name "Mendoza" scans 2 documents, the resulting folder hierarchy will look like the figure below.

Fig.: Folder hierarchy when [Add Suffix to Folder Name] is selected



BMB301S

Every time "Mendoza" scans a document, a new subfolder is created and a suffix "(1), (2)" is appended to the subfolder's name.

### When [Add Suffix to Folder Name] is not selected

If a user with the user name "Johnson" scans a document, and a user with the user name "Mendoza" scans 2 documents, the resulting folder hierarchy will look like the figure below.

Fig.: Folder hierarchy when [Add Suffix to Folder Name] is not selected

Receipts

Johnson

BMB302S

Every time "Mendoza" scans a document, the files are saved in the existing subfolder.

Mendoza

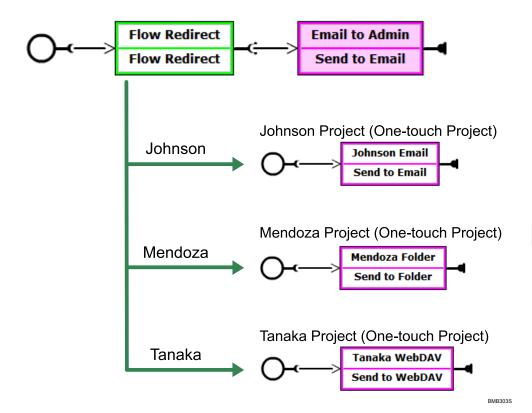
### ■ Reference

- See page 163 "Send to Folder Service".
- See page 178 "Send to FTP Service".
- See page 189 "Send to WebDAV Service".

# Redirecting a Flow

This example uses the Flow Redirect Filter to redirect the Flow based on the user's name. After creating One-touch Projects for individual users and configuring a Replacement Table that maps user names to their Projects, scanned documents are distributed to the user by his or her preferred method.

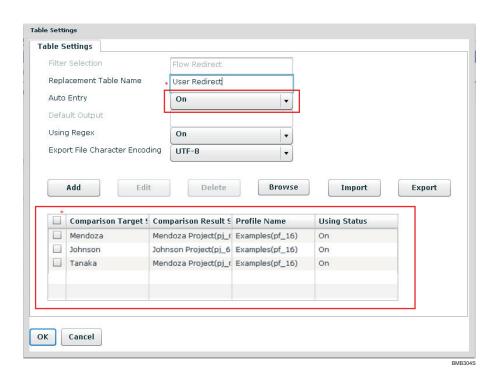
#### **Example Flow**



When a user who is not registered in the Replacement Table scans a document, the data is processed with the "Email to Admin" Send to Email Service.

### **Key Settings**

Replacement Table



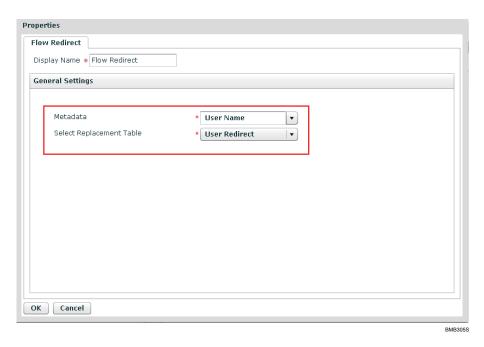
Setting Value

[Auto Entry] [On]

Replacement Entries Users' names and the Project names to redirect to.

Flow Redirect

a



Setting	Value
[Metadata]	User Name
[Select Replacement Table]	<a replacement="" table=""></a>

### Send to Email Settings

On the "Send to Email" tab in [Service], the Administrator's email address is added to the recipient list.

If the Project is using Active Directory or LDAP authentication, you can enable the Send to Me function to send an email to the user, notifying him/her that the scanned document was not saved.

#### Results

If "Johnson", "Mendoza" or "Tanaka" scans a document, the scanned document will be redirected to the specified Project and processed accordingly. If the user is not registered in the Replacement Table, an email is sent to the administrator, who can update the Replacement Table as necessary.

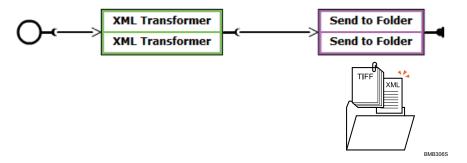
# Reference

- See page 257 "Flow Redirect Filter".
- See page 468 "Replacement Table Settings".
- See page 148 "Send to Email Service".

# Extracting and Saving Metadata as XML

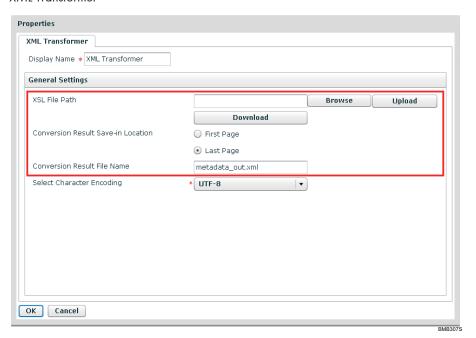
This example uses the XML Transformer Filter to extract the Metadata from a scanned document as an XML file, and then stores the document and the XML file in a shared folder.

### **Example Flow**



## **Key Settings**

### XML Transformer



Setting	Value
[XSL File Path]	<blank></blank>
[Conversion Result Save-in Location]	[Last Page]

Setting	Value
[Conversion Result File Name]	<any value=""></any>

#### **Results**

Because no XSL file has been uploaded, the Metadata will be extracted in its native XML format. [Last Page] is selected in [Conversion Result Save-in Location], so the extracted XML file will be added to the end of the scanned data. The XML file's name will be whatever is entered in [Conversion Result File Name] ("metadata\_out.xml" in this instance).



• If the folder in which you are storing the data is monitored by an external document management system (DMS) server, make sure to select [Last Page] in [Conversion Result Save-in Location], as in this example.

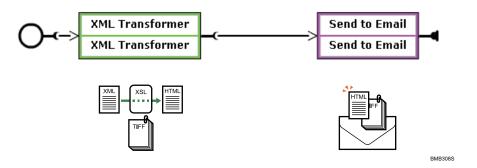
# ■ Reference

- See page 254 "XML Transformer Filter".
- See page 502 "Metadata Specifications".

# Sending Metadata in an Email as HTML

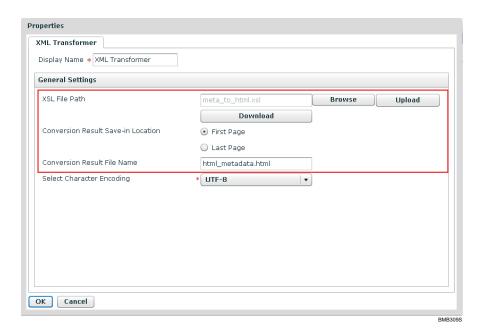
This example uses the XML Transformer Filter to convert the document Metadata from XML to HTML, and then sends it as an email. The SMTP server can then send the email in HTML format, with the Metadata as the body text.

#### Flow



#### **Key Settings**

XML Transformer



Setting	Value
[XSL File Path]	XSL file for converting the Metadata to HTML
[Conversion Result Save-in Location]	[First Page]
[Conversion Result File Name]	<any value=""></any>

9 Results

The XSL Transformer Filter uses the XSL file to convert the Metadata XML into HTML. The resulting HTML file is added to the front of the scanned data and sent as the email body text.

# ■ Reference

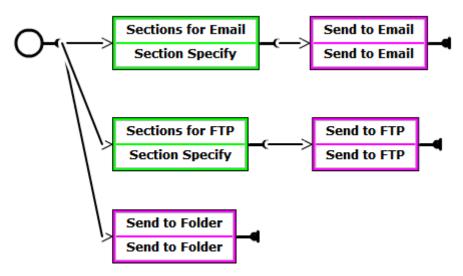
- See page 254 "XML Transformer Filter".
- See page 502 "Metadata Specifications".

# **Extracting Document Sections**

This example uses the Section Specify Filter to extract Sections of a scanned document. The example Flow contains 2 instances of the Section Specify Filter, and each instance extracts different Sections and processes them separately.

#### 9

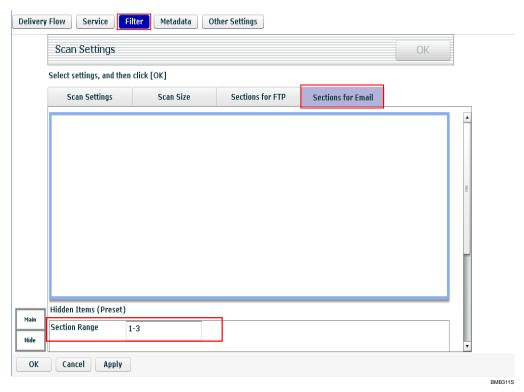
## **Example Flow**



## **Key Settings**

Documents with many Sections might be too large to send by email, so you can predefine Sections beforehand. In the "Sections for Email" tab in the [Filter] screen, enter the Sections to extract, then move the component to the [Hidden Items (Preset)] screen so the user cannot modify it on the MFP display panel.

Fig.: Section Specify Settings

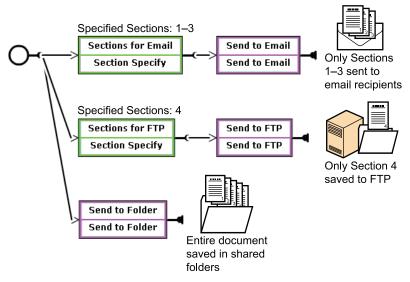


### Results

If you did not preset the Sections, the MFP user can specify the Sections to extract for each instance of the Section Specify Filter. If the user specifies Sections 1 to 3 for "Sections for Email", and Section 4 for "Sections for FTP", then the documents will be processed as in the figure below.

9

Fig.: Section Specify Filter Example



BMB312S

# Reference

- See page 248 "Section Specify Filter (Server Edition Only)".
- See page 279 "About Distribution Parameters".

# Using the Image Converter Filter

This example explains how the Image Converter Filter works. When the user specifies a file format on the MFP display panel, the output might be in a format different from the one selected on the display panel, depending on whether or not the Image Converter Filter is in the Flow.

### Case 1: Let the MFP user specify the output format

To allow the MFP user to select the output format, select [File Format Selected on [Scan Settings] Tab] in [Image Converter List] on the Image Converter Filter's Properties screen, as shown in the figure below. For this flow, if the user selects DCX as the format, the scanned data will be in DCX format.

Image Converter
Image Converter

Send to Email
Send to Email

Fig.: Letting the user select the output format



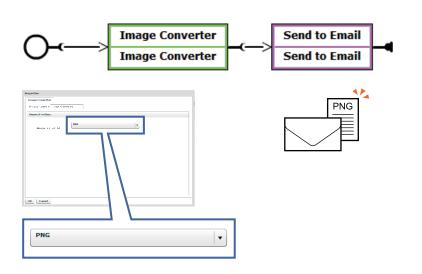
BMB313S

### Case 2: Preset the output format

To set the output format, select a format from [Image Converter List] on the Image Converter Filter's Properties screen. When you have selected a format, the output from the Image Converter Filter will always be in the selected format, regardless of what the user selects on the MFP display panel. The figure below shows an example where "PNG" is selected as the output format.

Fig.: Presetting the output format

9



BMB314S



When you preset the output format, the format selection that the MFP user makes on the MFP
display panel is ignored. Therefore, it is recommended to hide the [File Format] component on
the [Scan Settings] tab by moving it to the [Hidden Items (Preset)] screen to not confuse the
user.

# Reference

- See page 230.
- See page 279 "About Distribution Parameters".

# List of TCP/UDP Ports

GlobalScan NX uses the TCP/UDP ports listed in the following tables. Refer to these tables when configuring GlobalScan NX.

# Mportant ...

- Configure the ports so that they do not conflict with other connections and services running on the computer.
- Configure the necessary ports as exception ports on the firewall.

# When Not Using SSL

### Ports Necessary for AdminTool

Function	Port Number	Protocol	
Using the AdminTool Log/job operations	The port number specified when installing GlobalScan NX * 1	НТТР	
Transferring logs Registering MFPs	8080 (MFP)	НТТР	

<sup>\*1</sup> The default value is 8080.

### Ports Necessary for Authentication

Authentication Method	Function	Port Number	Protocol
Active Directory Authentication	Executing authentication	88	KRB5
		389	LDAP
	Creating an authentication profile	137	NBNS
		389	LDAP
		445	SMB
	Obtaining the user list on the Administrator settings screen	88	KRB5
		389	LDAP
LDAP Authentication	Executing authentication	The port number specified when setting	LDAP

Authentication Method	Function	Port Number	Protocol
		the authentication profile * 1	
	Creating an authentication profile	The port number specified when setting the authentication profile * 1	LDAP
	Obtaining the user list on Administrator settings screen	The port number specified when setting the authentication profile * 1	LDAP

<sup>\* 1</sup> The default value is 389.

### Ports Necessary for Delivery

Delivery Method	Port Number	Protocol
	25 *1	SMTP
Send to Email	389 *2	LDAP
Send to Folder	445	SMB
Send to FTP	21 *3	FTP
	20 *4	FTP
Send to WebDAV	80 *5	НТТР

- \*1 Set the port number to the same one used by the SMTP server. If a port is not specified, the default port number 25 is used.
- \*2 Set the port number to the same one used by the LDAP server. If a port is not specified, the default port number 389 is used.
- \*3 Set the port number to the same one used by the FTP server. If a port is not specified, the default port number 21 is used.
- \*4 This port number cannot be changed because it is automatically set to one less than the port number above.
- \*5 Set the port number to the same one used by the WebDAV server. If a port is not specified, the default port number 80 is used.

# When Using SSL

# Ports Necessary for AdminTool

Function	Port Number	Protocol
Using AdminTool Log/job operations	The port number specified when installing GlobalScan NX * 1	HTTPS
Transferring logs Registering MFPs	51443 (MFP)	HTTPS

<sup>\*1</sup> The default value is 8443.

# Ports Necessary for Authentication

Authentication Method	Function	Port Number	Protocol
	Executing authentication	88	KRB5
		636	LDAPS
	Confirming the presence of a sever	389	LDAP
Active Directory		137	NBNS
Active Directory Authentication	Creating an	389	LDAP
	authentication profile	445	SMB
		636	LDAPS
	Obtaining the user list	88	KRB5
	on the Administrator settings screen	636	LDAPS
Executing authentication  LDAP Authentication  Creating an authentication profi		The port number specified when setting the authentication profile * 1	LDAPS
	Creating an authentication profile	The port number specified when setting the authentication profile * 1	LDAPS

a

Authentication Method	Function	Port Number	Protocol
	Obtaining the user list on the Administrator settings screen	The port number specified when setting the authentication profile * 1	LDAPS

<sup>\*1</sup> The default value is 636.

### Ports Necessary for Delivery

Delivery Method	Port Number	Protocol
Send to Email	465 *1	SMTPS
Send to Email	636 *2	LDAPS
Send to Folder	445	SMB
Send to FTP	22 *3	SFTP
Send to WebDAV	443 *4	HTTPS

- \*1 Set the port number to the same one used by the SMTP server. If a port is not specified, the default port number 25 is used.
- \*2 Set the port number to the same one used by the LDAP server. If a port is not specified, the default port number 389 is used.
- \*3 Set the port number to the same one used by the FTP server. If a port is not specified, the default port number 22 is used.
- \*4 Set the port number to the same one used by the WebDAV server. If a port is not specified, the default port number 443 is used.

# Ports for RMI

### Ports for RMI

Function	Port Number	Protocol
D. I. C.	41108	RMI
Batch execution	41109	RMI

# Ports for SNMP

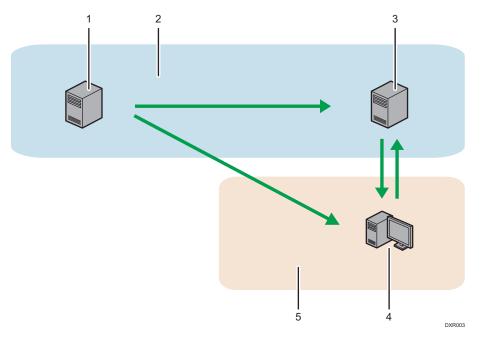
## Ports for SNMP

Function	Port Number	Protocol
Searching MFPs	161	SNMP

# Using Kerberos Authentication in a Multiple-Domain Environment

To use Kerberos authentication to distribute a folder when communicating between domains, domains other than the domain of the computer on which GlobalScan NX is installed also need to be configured to perform Kerberos authentication. You can use the configuration tool provided with GlobalScan NX to map each host name belonging to the domain to a corresponding Kerberos realm.

Fig.: System configuration in a multiple-domain environment



- 1. Computer/server with management tool installed
- 2. Domain name: taro.local
- 3. Active Directory of the domain to which the user belongs
- 4. Active Directory of the destination domain
- 5. Domain name: jiro.local

# **Obtaining the Configuration Tool**

- 1. Use the following path to obtain "Multi-DomainKerberosAuthentication":
  - Path name: <GlobalScan NX installation folder>\tools\UserTool
  - File name: Multi-DomainKerberosAuthentication.zip

g

## 2. Extract the zip file to your preferred location.

The following files are generated:

addHostToRealmMap.bat

This executable file allows you to add mappings between each host name belonging to the specified domain and its corresponding Kerberos realm.

delHostToRealmMap.bat

This executable file allows you to delete all mappings between the host names belonging to the specified domain and their corresponding Kerberos realms.

· domain.inf

This is a configuration file for addHostToRealmMap.bat and delHostToRealmMap.bat.

checkCurrentRealm.bat

This executable file allows you to view information registered for a Kerberos realm.

· logs folder

Log files are created when addHostToRealmMap.bat or delHostToRealmMap.bat is executed.

readme.txt

This file provides detailed information about each of the files generated when Multi-DomainKerberosAuthentication.zip is extracted.

# Adding Mappings for a Multiple Domain Environment

1. Specify the available domain names in domain.inf.

Example: The following example assumes the multiple-domain environment shown in the figure at the top of this section.

```
# Write the domain in following format
#
# # ex
taro.local
jiro.local
```

- Each line can contain only one domain name.
- · Specify all of the following domains:
  - 1. Authentication domains used for folder distribution
  - 2. Destination domains specified for folder distribution
  - 3. Domain to which the computer on which GlobalScan NX is installed belongs
- The specified domains must be trusted by each other.

### 9

#### 2. Execute addHostToRealmMap.bat.

The mappings between all the host names belonging to the specified domain and their corresponding Kerberos realms are added.

```
Add Hosts to Kerberos Realm

This tool allows you to map a host or multiple hosts that are sharing the same D
NS suffix to the realm for Kerberos authentication.
The mapping is recorded in the registry in THKEY_LOCAL_MACHINEYSYSTEMYCurrentCortrolSetYControlYLsaYKerberosYHostToRealm"

[Add following host(s)]
taro.local

Would you like to continue? (y/n) [n]: y

[Setting Result]

2017/09/04-11:01:43.48

Add .faro.local JRO.LOCAL

Add .jiro.local JRO.LOCAL
```

- The mapping information is stored in the registry of the computer on which the configuration tool was executed.
- 3. Open the log file generated in the logs folder to check the execution result.
- 4. Execute checkCurrentRealm.bat.

The registered mapping information is displayed in the DOS prompt screen.

```
Check the current resistry "HKEY_LOCAL_MACHINEYSYSTEMYCurrentControlSet¥Control¥
Lsa¥Kerberos¥HostToRealm" settins

HKEY_LOCAL_MACHINEYSYSTEM¥CurrentControlSet¥Control¥Lsa¥Kerberos¥HostToRealm¥JIR
0.LOCAL

HKEY_LOCAL_MACHINEYSYSTEM¥CurrentControlSet¥Control¥Lsa¥Kerberos¥HostToRealm¥TAF
0.LOCAL
```

Check that all of the mapping information specified in domain.inf is registered.

# Deleting Mappings for a Multiple Domain Environment

 In domain.inf, specify the name of the domain for which you want to delete the Kerberos realm mapping information.

Each line can only contain one domain name.

2. Execute delHostToRealmMap.bat.

The mappings between the host names belonging to the specified domain and their corresponding Kerberos realms are deleted.

- 3. Open the log file generated in the logs folder to check the execution result.
- 4. Execute checkCurrentRealm.bat.

The registered mapping information is displayed in the DOS prompt screen.

Check that all of the mapping information for the domain specified in domain.inf has been deleted.

# **Troubleshooting**

This section describes the procedures for resolving issues that may arise during operation of GlobalScan NX software. Perform the suggested solution in order to address the issue. If you are unable to resolve the problem, contact your sales or service representative.

Issue	Cause/Solution
The MFP screen displays a message indicating that Profile configuration information cannot be found.	No Profile has been delivered to the MFP via the Device settings, or no Group has been created for the selected Profile.
No Group or Project is displayed on the MFP screen.	All Groups for the Profile are set to hidden.
Cannot perform Inbound FAX Transfer.	Make sure that the MFP's Reception Settings function for facsimile is set to "Store". For details, refer to the MFP model's Operating Instructions.
Cannot use GSNX from MFPs using Basic Authentication.	Make sure that the users are given Full Control privileges. GSNX is not available to MFPs using Basic Authentication, unless users are given Full Control privileges.
	• For details about MFP authentication methods, see page 440 " Using an MFP's User Authentication Function".
Authentication fails.	Make sure that the date/time settings of DNS matches those of the MFPs and the computer installed with the GSNX application and AdminTool.
The location of scanned documents is sent as a folder path, even though I specified that locations be sent as URLs.	If documents are stored and managed by ScanRouter DocumentServer, then it might not be possible to reference documents by URL under the current settings in ScanRouter DocumentServer. If this is the case, then locations to documents are instead specified as folder paths. To enable documents to be referenced by URL,
	you must change the Web settings. For details

Issue	Cause/Solution
	about these settings, refer to the ScanRouter
	DocumentServer documentation.

## **Glossary of Terms**

#### AdminTool

The AdminTool is a software utility that enables the GlobalScan NX Administrator to establish all network and MFP configuration and management settings. An easy to navigate, Web-based application, the AdminTool enables creation of Profiles, Groups/Projects, and Flows, as well as the selection of Services/Filters. Once configured, GlobalScan NX-enabled MFPs can join in network-scanning operations.

#### **Distribution Parameter**

A parameter that is set to a Service/Filter and is used for document distribution. Distribution Parameters can be set by means of the AdminTool and/or the MFP display panel. For example, it is possible to pre-set only the "To" address(es) and the file format by using the AdminTool and leave the "Cc" address(es) and the Subject unset so that users can specify them from the display panel when they scan a document.

#### **Failover**

Failover is a function where job processing switches from the Primary Delivery Server (the main processing server) to a Secondary Delivery Server if the Primary Delivery Server fails due to a connection error or other cause.

### **Filter**

A Filter represents a set of criteria that defines input/output, controlling how the document is processed. Filters are added to Projects according to application needs and may require that additional settings be configured via the AdminTool and/or the MFP display panel.

#### Flow

A Flow (or Workflow) represents a document distribution process for a Project. Each Project has a Flow that holds the details of the Services/Filters used in the Project. The Flow for each Project is configured by the Administrator via the AdminTool.

#### GlobalScan NX Server Edition

The Server Edition of GlobalScan NX supports the configuration and management of up to 750 (for the Enterprise Server Edition) or 32 (for the Business Server Edition) connected devices. The Server Edition requires that the GlobalScan NX application and AdminTool software be installed on a computer. The Server Edition offers the most advanced feature-set for document capture and distribution, including image enhancements and plug-ins. The Server Edition requires a dedicated Server PC to maintain all the system settings and data necessary for distribution. All Services and related processes necessary for document distribution are performed by the Server PC.

#### GlobalScan NX Serverless Edition

GlobalScan NX Serverless Edition enables control of connected MFPs without the need for a dedicated Server PC, thus there is no overhead associated with network server integration. All Services and related processes necessary for document distribution are performed within the MFP(s).

#### Group

A Group allows the Administrator to group Projects registered with a Profile. Groups are added to a Profile by creating a new Group or editing an existing Group, as needed. For example, Projects of a Profile can be grouped based on their job type, names, etc. Groups are useful when a Profile has multiple registered Projects. Groups are displayed as tabs on the MFP display panel when the Standard Operation panel is used, and in a list when the Smart Operation Panel is used.

### Load Balancing

Load balancing is a method to increase job processing efficiency by distributing jobs to several servers. Several jobs can then be processed simultaneously, increasing the rate at which jobs are completed.

#### Metadata

Metadata can be added to each scanned document. The Administrator can design Metadata for a Project by combining available input components, such as a text box and a drop-down list. Like Distribution Parameters, the value of each input component can be set via the AdminTool and/or MFP display panel. The values given through the Metadata are added as document information to the scanned document. These values can be utilized as Distribution Parameters in Services/Filters.

#### **Profile**

A Profile is a set of parameters that is applied to the MFP. These parameters are configured by the Administrator in order to control MFP operation.

#### **Project**

A Project refers to a document distribution task, or collection of Services that are available to users, and is configured by the Administrator to address application needs of a specific user group.

## **Secondary Delivery Server**

When you enable the failover function, the Secondary Delivery Server processes jobs in the event that the main server is down. If the main server fails, for example it loses its network connection, processing is automatically switched to the Secondary Delivery Server.

## Send to Email

Sends scanned images as an email message from the MFP to one or more addresses.

#### Send to Folder

Sends scanned images from the MFP to the specified folder(s) on a network directory.

#### Send to FTP

Sends scanned images from the MFP to the specified folder(s) on an FTP server.

#### **Send to Printer**

Sends scanned images from the MFP to the printer installed on the server and print them.

## Send to WebDAV

Sends scanned images from the MFP to the specified folder(s) on a WebDAV (Web-based Distributed Authoring and Versioning) server.

9

## Services

A Service represents a distribution method used during document processing. For example, the Send to Email Service.

## GlobalScan NX Feature Comparison

The tables below compares major features of the Serverless Edition and Server Edition.

For details about each feature, see the linked pages.

• Security

Feature	Serverless Edition	Server Edition
Secure Login/Communication	Supported	Supported
Authentication: Active Directory, LDAP	Supported	Supported
SSL Encryption: LDAPS and LDAP with StartTLS	Supported	Supported

• Document Distribution Services/Filters

Feature	Serverless	Server
regiore	Edition	Edition
1. Services		
Send to Email/Send to Me	Supported	Supported
Send to Folder (SMB)/Send to Home Directory	Supported	Supported
Send to FTP	Supported	Supported
Send to Printer		Supported
Send to WebDAV	Supported	Supported
One-touch Scan	Supported	Supported
2. Filters		
Archiver		Supported
Flow Redirect	Supported	Supported
Image Converter	Supported	Supported
Image Correction		Supported
OCR		Supported

C

Feature	Serverless Edition	Server Edition
PDF Converter	Supported	Supported
Metadata Replacement	Supported	Supported
Metadata Converter	Supported	Supported
Section Specify		Supported
XML Transformer	Supported	Supported

## • AdminTool Features

Feature	Serverless Edition	Server Edition
1. Configure General System Settings	Supported	Supported
2. Create/Edit/Delete Profiles	Supported	Supported
3. Create/Edit/Delete Groups	Supported	Supported
4. Create/Edit/Copy/Delete Projects	Supported	Supported
5. Devices		
Add/Delete MFP(s)	Supported	Supported
Assign Profile to MFP	Supported	Supported
Confirm MFP Status	Supported	Supported
6. Maintenance		
Initialize System	Supported	Supported
Backup and Restore Data	Supported	Supported
Integration with Third-party Maintenance Software		Supported
7. Job Management		
Queue (View Waiting/Processing and Error Jobs)	Supported	Supported
Search/Delete/Interrupt/Confirm Job Status	Supported	Supported
8. Logs		

## • Other Standard Features

Feature	Serverless Edition	Server Edition
Touch Panel Screen Customization	Supported	Supported
Email Notification	Supported	Supported
Fax Routing (Inbound)	Supported	Supported
File Format Conversion	Supported	Supported
Manual [?] Button	Supported	Supported
Metadata Input	Supported	Supported
User Mode Login	Supported	Supported
Start/Stop Service		Supported
Feature extensibility via the SDK (for example DMS integration)	Supported	Supported
Failover *1		Supported
Document delivery using Kerberos security *1		Supported
Load Balancing *2		Supported

<sup>\* 1</sup> This feature requires activation for the Business Server Edition.

9

<sup>\*2</sup> This feature is available only on the Enterprise Server Edition.

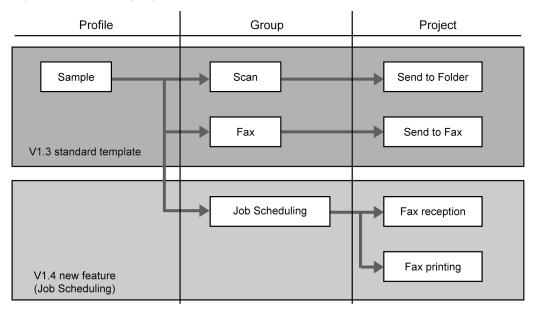
## **Template**

A sample profile can be imported during installation.

Edit the sample profile before using it.

However, the sample profile can only be imported the first time the software is installed.

Fig.: Structure of sample profile



This figure shows the structure for the Server Edition. In the Serverless Edition, Send to Folder is used instead of Send to Printer.

Table: Job Scheduling

Condition	Server Edition	Serverless Edition
09:00:00 - 16:59:59	Send to Printer	Send to Folder
17:00:00 - 08:59:59	Send to Folder (outside office hours)	Send to Folder (outside office hours)
Saturday	Send to Folder (outside office hours)	Send to Folder (outside office hours)
Sunday	Send to Folder (outside office hours)	Send to Folder (outside office hours)

#### How to set conditions

• To set Monday to be outside office hours

- 2. Click [Replacement Table].
- 3. Select Job Scheduling, and then click [Edit].
- 4. Select the row whose corresponding value is [monday], and then click [Edit].
- 5. Change the usage status to [On], and then click [OK].
- 6. Click [OK] to return to the Replacement Table list.
- 7. Click [Apply] to save the settings.
- To set Saturday to be office hours
  - 1. Click [Home], and then click the [System] shortcut.
  - 2. Click [Replacement Table].
  - 3. Select Job Scheduling, and then click [Edit].
  - 4. Select the row whose corresponding value is [saturday], and then click [Edit].
  - 5. Change the usage status to [Off], and then click [OK].
  - 6. Click [OK] to return to the Replacement Table list.
  - 7. Click [Apply] to save the settings.
- To set 17:00 17:59 to be office hours
  - 1. Click [Home], and then click the [System] shortcut.
  - 2. Click [Replacement Table].
  - 3. Select Job Scheduling, and then click [Edit].
  - 4. Select the row whose corresponding value is [.\*T17.\*], and then click [Edit].
  - 5. Change the usage status to [On], and then click [OK].
  - 6. Click [OK] to return to the Replacement Table list.
  - 7. Click [Apply] to save the settings.
- To set 17:00 17:30 to be office hours
  - 1. Click [Home], and then click the [System] shortcut.
  - 2. Click [Replacement Table].
  - 3. Select Job Scheduling, and then click [Edit].
  - 4. Select [Add].
  - 5. In [Comparison Target String], enter [(.\*T17[0-2].\*)|(.\*T1730.\*)].
  - Select [Sample] in [Profile Name] and [Outside Office Hours] in [Comparison Result String/Project Name], and then click [OK]
  - Click [OK] to return to the Replacement Table list.
  - 8. Click [Apply] to save the settings.

# **INDEX**

	Deleting an Authentication Profile
	Editing Authentication Profile Settings
4-Line LCD Display Panel MFPs365	Setting a Default Authentication Profile439
A	Authentication Server66, 151, 171, 424
	Domain Name
Access to Subfolder	Server Address
Send to Folder	Auto-adjust image orientation246
Send to FTP	В
Active Directory Active Directory/Passwordless Authentication (Active Directory) Profile Settings	Back Button23, 35, 96, 98
426	Background Color
Active Directory Authentication 13, 21, 33, 66,	PDF Stamper Filter (Font Tab for Bates Stamp)274
151, 424, 497	Backup
Add a Service/Create a Flow, Quick Start 61	Changing the Settings of a Scheduled Backup406
Add Device Screen75	Configuring Automatic Backups403
Add Scanned Time to Document Name83	Deleting a Backup File415
Address Search Settings156	Deleting a Scheduled Backup
Administrator Settings	Downloading a Backup File
Error Notification Email Address	Performing a Manual Backup401
Set Built-in Administrator's Password449	Performing a Recovery
Set the Administrator using Authentication Profiles 443	Restoring a Backup411 Uploading a Backup File410
AdminTool13, 21, 33	
Home Page48, 69	Basic Metadata30, 41
Homepage46	Batch Execution of Maintenance
Localizing363	Recommended Order of Command Calls419
Login	Supported Commands417
URL44, 453	Blank Page Sensitivity
Alignment Button63	,
Allow User Modification	Body Text152
PDF Stamper Filter (Position Tab)275	Border Color
Alternate LDAP Server Settings	PDF Stamper Filter (Font Tab for Bates Stamp)274
Always Use Default Sender Address151	Border Width
Application Bar84, 94, 98, 124	PDF Stamper Filter (Font Tab for Bates Stamp)274
Archiver Filter	Built-in Administrator44, 47, 449
Convertible Formats (Output Data)242	C
Supported Formats (Input Data)242	Cc/Bcc/ReplyTo Addresses66, 68, 154
Archiver Filter Properties242	Certificate Authority (CA)13, 453
Attach Document Link(s) and Deliver152	•
Authentication Methods 13, 21, 33, 149, 424	Compression
Active Directory Authentication13, 21, 33, 66, 151,	Compression Ratio
424	Configure the MFPs, Quick Start69
and Flow Redirect259	Control ID82, 111
LDAP Authentication	Copy Project Button97, 99
Authentication Profile45, 112, 424	Counter End
Adding Authentication Profile Settings424	PDF Stamper Filter (Stamp Tab for Bates Stamp)271
and Flow Redirect259	Counter Start

Create a Subfolder	Panel83
Example	242
Send to Folder	242
Archiver Filler	
Send to WebDAV192 Flow Redirect Filter	
Create URL	
CSV File, Replacement Tables	
Current Counter Metadata	
PDF Stamper Filter (Stamp Tab for Bates Stamp)271 Metadata: Validate/Replace (Specifier	
Custom Metadata	260
OCR Filter	245
PDF Converter Filter (Server Edition)	217, 223
Date Format	
Section Specify Filter	
Section Splitter Filter	
Seria to Littati	
Default Document Name329 Send to Folder	
Default Domain for Manual Input153 Send to FTP	
Default Filter Service Settings	
Default Output Service Settings85 XML Transformer Filter85	255
Default Sender Address	28, 29, 38, 39 40, 279, 304
Delete Screen Page Button	
Delivery Flow	
Density	v279
Deskew225 Hiding a Distribution Parameter	291
Details Opening/Navigating Distribution Para	
PDF Stamper Filter (General Tab)270 Setting Email Distribution Parameters	292
Stamper Settings Properties	300
Details Button	
Device List	290
Device Name	160, 286
Do Not Divide	,
Device Properties	
Changing MFP's Profile and/or Project	161, 286
Document Name	
Device Name	24, 35
Editing Device Properties	245
Group Name	
Profile Name	
Synchronizing the Device	97, 99
Use Fax	lyTo 68, 158
Use Scanner	285
Device Properties Screen	287
Device Shortcut	161, 287
Email Login Information	
Device Status	150

Proxy User	150	Image Correction Filter	23
Email System Settings Screen	148	Metadata Converter Filter	260
Email/Folder Search		Metadata Replacement Filter	263
Enable Address Search15		OCR Filter	
Enable Editing		PDF Converter Filter	
Enable Manual Address Entry		PDF Stamper Filter	
Enhanced PDF Converter Filter	07, 134	Section Specify Filter	
Supported Formats (Input Data)	222	Section Splitter Filter	
Enhanced SMB Protocol		XML Transformer Filter	254
		Filter Summary	
Error Notification		Archiver Filter	
Error Queue		Flow Redirect Filter	
Date Selection		Image Converter Filter	
Delete		Image Correction Filter	
Display All		Metadata: Validate/Replace (Specified) Filter	
Error Image		Metadata: Validate/Replace Filter	
Job Count		OCR Filter	
Log Data		PDF Converter Filter	
Refresh		PDF Stamper	
Search/Narrow Search		Section Specify Filter	
Error Queue Screen		Section Splitter Filter	
Error Queue Shortcut	383	XML Transformer Filter	
F		Filters	
		Accessing Property Settings Screens	
Failover	15, 480	Filter Summary	
FAX		Flow Editor Screen	
Inbound FAX Transfer	356	Start Position	
File Format	310	Flow Redirect Filter	
File Formats15, 27, 3	38, 307, 498	Example	
Archiver Filter	242	Replacement Table Setting Example	
Enhanced PDF Converter Filter		Flow Redirect Filter Properties	257
Image Converter	230	Flow Settings	
Image Converter Filter231, 49	95, 500, 545	Adding a Service/Filter to the Flow	
Image Correction		Alignment Button	
Image Correction Filter		Changing a Service/Filter's Display Name	
OCR Filter		Changing Display Position of a Service/Filter	
PDF Converter Filter		New Filter Services	
PDF Stamper Filter		New Output Services	
Server Edition - Black & White		Removing a Service/Filter	
Server Edition - Grayscale/Color		Waste Basket Button	
Serverless Edition - Black & White		Working with Services/Filters in the Flow	
Serverless Edition - Grayscale/Color		Flows29, 4	
File Naming Rules 152, 169, 17	73, 182, 193	Examples	
Filter Properties	213, 244	Redirecting Example	517
Archiver Filter		Font Color	
Enhanced PDF Converter Filter		PDF Stamper Filter (Font Tab for Bates Stamp	
Flow Redirect Filter		Watermark)	2/4
Image Converter Filter	230	Font Family	

PDF Stamper Filter (Font Tab for Bates Stamp and Text Watermark)273	<u>I</u>
Font Size	lcon
PDF Stamper Filter (Font Tab for Bates Stamp and Text	Profile
Watermark)274	Project111
Font Style	IIS - SSL On/Off
PDF Stamper Filter (Font Tab for Bates Stamp and Text	IIS Web Server453
Watermark)274	Image Converter Filter
Format Conversion245	Convertible Formats (Output Data)231
FTP Login Information	Example
Anonymous181	Input/Output Formats495, 500, 545
Login User	Supported Formats (Input Data)230
Proxy User	Image Converter Properties
Use Certificate	Image Correction Filter
G	Auto Orientation
	Change Resolution240
General Settings, System421	Convertible Formats (Output Data)237
GlobalScan NX Editions19	Deskew240
Server Edition20	Noise Reduction (Black & White image only)239
Serverless Edition	Remove Blank Pages239
GlobalScan NX Feature Comparison542	Remove Punch Holes (Black & White image only) 239
GlobalScan NX Feature Highlights13	Supported Formats (Input Data)236
GlobalScan NX Workflow18	Image Correction Properties238, 239
Group 26, 37	Image Scale Percentage
Group List - MFP Display Panel92	PDF Stamper Filter (Stamp Tab for Image Stamp) 272
Group Settings	PDF Stamper Filter (Stamp Tab for Image Watermark)
Add a Group	273
Adding a New Screen Page101	Inbound FAX Transfer103, 356
Changing a Group Name99	Reception Settings Function362
Changing Group Display Order	Use Fax361
Deleting a Group104	IP Address/Host Name44
Deleting a Screen Page102	Serverless Edition
Hiding a Group103	Issue alert at396
Group Tab - MFP Display Panel92	Item Settings List331
Group/Project Screen282, 283	
Group/Project Screen Overview	J
Guides for This Solution	Job Log44, 370, 372
Olides for This Solution	Completed/Deleted/Error374
Н	Date Selection374
Hidden Items (Preset)340	Delete All
	Details
Hidden Items (Preset) Screen281	Display All
Horizontal	Log Data
PDF Stamper Filter (Position Tab)275	Refresh
How to Read This Guide11	Search/Narrow Search372
HTTP/HTTPS44, 189, 453	Status Icons
	with Load Balance Servers
	272

Job Log Button	95	Security	430
Job Log Screen	372	LDAP Server Type	
Job Log Security Mode	83	Active Directory	432
Job Queue		Domino Directory	432
Date Selection	382	Novell eDirectory	432
Display All	380	LDAP(S) Port No	156
Job Count		LDAP(S) Server	155
Log Data	381	LDAPS (LDAP over SSL)	
Refresh	380	LDAPS (StartTLS)	
Search/Narrow Search	380	Left/Right Margin	133, 430
Top Priority	381	PDF Stamper Filter (Position Tab)	27/
Job Queue (Scan and Fax)	379	•	
Job Queue Screen		Letter Keys on the Display Panel	
Job Queue Shortcut		Load Balance	
		Conditions	
Job Settings  Auto Delete Stored Log(s)		Load Balance Servers	
Deliver During Specified Time Range		Conditions	
Deliver Fax job(s) on specified day		Registering	
Log Storage Settings		Removing	
Number of processing threads		Settings	
Number of Retries		Synchronizing	
OCR Mode		Load Balancing	
Retry Interval		Localizing the AdminTool	363
Save Fax job(s)		Login Button	21, 33
Scheduled Delivery		AdminTool	46
Job Settings Screen		Login Failed	46
		Login Status	46
K		M	
Kerberos Option	493		
L		Maintenance	
	4.5	Maintenance Mode Automatic Backups	
Language		Backup	
OCR Filter		Batch Execution of Maintenance	
Language Button		Deleting a Backup File	
LDAP Authentication 13, 21, 33, 66,		Download	
LDAP Authentication Profile Settings	429	Downloading a Backup File	
LDAP Base DN	156	Initializing the System	
LDAP Login Information		Performing a Manual Backup	
Proxy User	156	Performing a Recovery	
LDAP Server 14, 68, 148,	154, 464	Recover	
Base DN		Restore	399
LDAP Server Address	429	Restoring a Backup	411
Port No	430	System Initialization	
Proxy user name	432	Upload	
Proxy user password	432	Uploading a Backup File	410
Search query	431	Manual Entry	68, 159, 285
Search Scope	430	,	. ,

Max. No. of Groups84	PDF Stamper Filter (Stamp Tab for Bates Stamp)271
Metadata14, 30, 40, 334	Page Numbers
Adding Metadata Input Components to a Project 334	PDF Stamper Filter (Position Tab)275
Basic Metadata30, 41, 334	Page Orientation
Changing Input Component Display Order342	PDF Stamper Filter (Preview Tab)
Converting to HTML Example521	Page Range
Custom Metadata	PDF Stamper Filter (Position Tab)275
Deleting an Input Component344	Page Size
Extracting	PDF Stamper Filter (Preview Tab)
Hiding an Input Component	PDF Conversion Mode
Metadata Input Component Screen	PDF Converter Filter
Metadata Input Components - MFP Display Panel (Smart	Convertible Formats (Output Data) 215, 222, 268
Operation Panel)	Supported Formats (Input Data)215
Metadata Input Components - MFP Display Panel	PDF Converter Properties (Server Edition) 217, 223
(Standard Operation Panel)341	PDF Converter Properties (Serverless Edition) 216
Specifications502	PDF Format218, 224
Tag Name on Metadata XML337, 338, 339	PDF Stamper Filter
Metadata Button	Supported Formats (Input Data)268, 269
Metadata Validate/Replace (Specified) Filter	PDF Stamper Filter Properties277
Properties	PDF Stamper Settings (Font Tab for Bates Stamp and Text Watermark)273
Multiple-Domain Environment533	
	PDF Stamper Settings (General Tab)269
N	PDF Stamper Settings (Position Tab)274
New Group Button	PDF Stamper Settings (Preview Tab)276
New Project Button96, 99	PDF Stamper Settings (Stamp Tab for Bates Stamp)270
New Screen Page Button95	• •
New Text Button96, 99	PDF Stamper Settings (Stamp Tab for Image Stamp)272
Notification	PDF Stamper Settings (Stamp Tab for Image
0	Watermark)
OCD File	PDF Stamper Settings (Stamp Tab for Text Watermark)272
OCR Filter	
Convertible Formats (Output Data)	POP before SMTP150
	Prefix
OCR Language	PDF Stamper Filter (Stamp Tab for Bates Stamp) 270
OCR Scanned PDF325	Preset Document Name
OCR Scanned PDF Screen325	Email Destinations
One-touch Scan 14, 28, 39, 113, 131, 304	Folder Destinations
Options Button	Subject Text
Options Screen280	Preview
Original Orientation311	Priority Level
Original Setting312	,
Other Settings327	Priority Levels
P	Private Keys
	Import
Pad Zero	port400

Product names	3	Comparison Result String/Project Name	474
Profile	25, 36	Comparison Target String	473
Profile > Project > Service Workflow	26, 37	Deleting	474
Profile Icons		Editing	
Profile List		Use	
Profile Name		Replacement Tables	
Profile Properties Button		Adding a Replacement Table	
·		Auto Entry	
Profile Properties Screen		CSV File Specifications	
Profile Settings Add a Profile		Default Output	
		Deleting a Replacement Table	
Deleting a Profile		Editing a Replacement Table	
Editing Profile Properties		Entries	
Exporting a Profile		Exporting	
Importing a Profile		Import Conditions	
Importing/Exporting Profiles		Importing	
Profile Shortcut		Using Regex	
Project	27, 38	with Flow Redirect Filter	
Project Button	23	with Metadata: Validate/Replace Filter	
AdminTool	47	Resolution	
Project Configuration Screen13	31, 283, 305	Root Button	177, 184, 199
Project Icons	124	Rotation(Degree)	
Project Menu - MFP Display Panel	28. 39	PDF Stamper Filter (Position Tab)	275
Project Name		S	
Project Properties		<u> </u>	
Editing Project Properties	108	Saved Job	384
		Delete Saved Jobs	385
Project Settings		Download Saved Jobs	385
Adding Toyt to a Crown Serson		Scan Method	312, 313
Adding Text to a Group Screen Changing Project Button Display Order		ADF/Exposure Glass	312, 313
		Batch Scan	313, 314
Deleting a Project		Mixec Batch Scan	313
Importing Profile/Project Icons		SADF	313, 314
Moving a Project Button  Moving a Project to Another Group		Scan Preview	331
Moving a Project to Another Screen Page		Scan Settings	
		Changing a Scan Setting's Display Posit	
Resizing a Project Button		Hiding a Scan Setting	
Project/Group Screen	27, 38	Making a Scan Setting Uneditable	
R		Scan Settings Button	
Pofrack Dutton	72.05	Scan Settings Screen	
Refresh Button		Scan Size	
Regular Expression Usage Examples		Auto Detect	
Regular Expressions		Mixed Sizes	
Escape Sequences			
Meta Characters		Scan Size Settings	202
Remove Blank Pages		Hiding All Scan Size Settings	
Replacement Table Entries		Selecting Individual Scan Size Settings	
A 1.1:	472	Scan Type	309

Scanned Time Information	Send to Email Options Screen - A Panel (Smart Operation Panel)	ΛFP Display
Scheduled backup	Send to Email Options Screen - A	
Edit	Panel (Standard Operation Panel)	
Screen Component Transfer Zone 285, 314, 340	Send to Email Properties Screen	65
Screen Title23, 50, 84, 94, 98, 124	Send to Email Service Settings	
Search	Email Search Settings	
Email Destinations	Email System Settings	
Error Queue384	Send to Email Option Settings	
Folder Destinations176	Send to Folder	14
FTP Destinations184	Send to Folder Service Settings	163
Job Log372	Send to Home Folder Settings	170
Job Queue	StartPoint Path Settings	165
System Log368	Send to FTP	14
WebDAV Destinations	Send to FTP Service Settings	178
Secondary Delivery Server	StartPoint Path Settings	179
Changing from Secondary to Primary485	Send to Home Folder	14, 170, 17
Conditions	Send to Me	
Registration482	Send to Printer	
Removing	Send to Printer Service Settings	
Settings480	Send to WebDAV	
Synchronizing481		
Section	Send to WebDAV Service Settings	
Section Range	HTTP Proxy Server	
Examples	Metadata Elements StartPoint Path Settings	
Section Specify Filter		
Example522	Server Certificate	,
Section Specify Filter Properties249	Certificate AuthorityCreate CSR (Certificate Signing Request)	
Section Splitter Filter Properties252	Obtaining and Installing a Server Certificat	
Select Data to Attach	Server Management	
Selected Destinations	Server Status	
Send to Email Destinations	Running	
Send to Folder Selected Destinations	Suspended	
Send to FTP Selected Destinations	•	
Send to WebDAV Selected Destinations	Service Buttons	
Selected Destinations Button	Service Menu	
Selected Item(s) List	Layout Overview	
Send to Email		
Send to Email Destination Selection Screen - MFP	Service Menu - MFP Display Panel	
Display Panel (Smart Operation Panel) 280	Service Menu - MFP Display Pane Operation Panel)	28
Send to Email Destination Selection Screen - MFP Display Panel (Standard Operation Panel) 280	Service Menu for One-touch Scan - I	
Send to Email General Screen - AdminTool280	Service Properties	147
Send to Email Hidden Items (Preset) Screen282	Accessing Property Settings Screens	
Send to Email Option Settings Screen151	Send to Email Service	148
Send to Email Options Screen - AdminTool281	Service Settings	64

Service Summary141	Refresh	394
Send to Email Service141	Select Delivery Service Startup Status	394
Send to Folder Service141	Server Disk Space	393
Send to FTP Service141	Server Status	39
Send to Printer Service141	Setting Server Disk Space	393
Send to WebDAV141	Stop/Start Service	393
Services17, 22, 34, 140, 147, 200	Switch Delivery Service Status	394
Setting Send to Home Folder/Send to Me	System Log	
Settings434	Date Selection	
Shared Network Folder Login Information	Delete	
Login User167	Display All	
Proxy User	Export	
Shared Network Folders141, 163	Lines	
Allowable Types163	Log Data	
Show Preview	Refresh	
PDF Stamper Filter (Preview Tab)276	Search/Narrow Search	
Single-page Settings	System Log Screen	
PDF Stamper Filter (Position Tab)275	System Log Settings	
Site Certificate13, 464	Log Storage Setting	
Certificate File Formats	System Shortcut	370
Delete466	T	
Import465	T	0.1.0
Managing Private Keys466	Terms	•
Validation	MFP Configuration Terms	
SMTP over SSL	System Setting Terms	
SMTP Port No	Timeout Settings	
SMTP Server Name	Tooltips	94, 97
SMTP-AUTH	Top/Bottom Margin	
SMTP/SMTPS Settings65, 149	PDF Stamper Filter (Position Tab)	
SMTPS (SMTP over SSL)	Trademarks	
SMTPS (StartTLS)149	Troubleshooting	537
SSL Encryption	Trusted Domain Relationship List	420
Stamp Image	U	
PDF Stamper Filter (Stamp Tab for Image Stamp) 272		
PDF Stamper Filter (Stamp Tab for Image Watermark)	URL	
273	AdminTool	
Stamp Name	Document URLs	
Stamper Settings Properties277	Send to WebDAV	
StartPoint Paths163, 178, 189	with Send to Email	
Subject Text160, 284	User Authentication	
Supported Languages	User DN	
Suspend at	User Mode	44, 45
•	V	
Synchronize Button		
System Control Screen396	Vertical	
System Control Settings	PDF Stamper Filter (Position Tab)	
Delivery Service Status	View Folder(s) Button 17	'A 184 199

#### W

Waiting Queue46, 37	75, 393, 394
Waste Basket	339
Waste Basket Button	97, 99
Watermark Text	
PDF Stamper Filter (Stamp Tab for Waterm	ark Text)272
WebDAV Login Information	
Anonymous	192
Login User	192
Proxy User	191
X	
XML Transformer Filter	
Convertible Formats (Output Data)	254
Example	520, 52
XSL File	254
XML Transformer Filter Properties	255
XSL File	522
YSI File Path	254