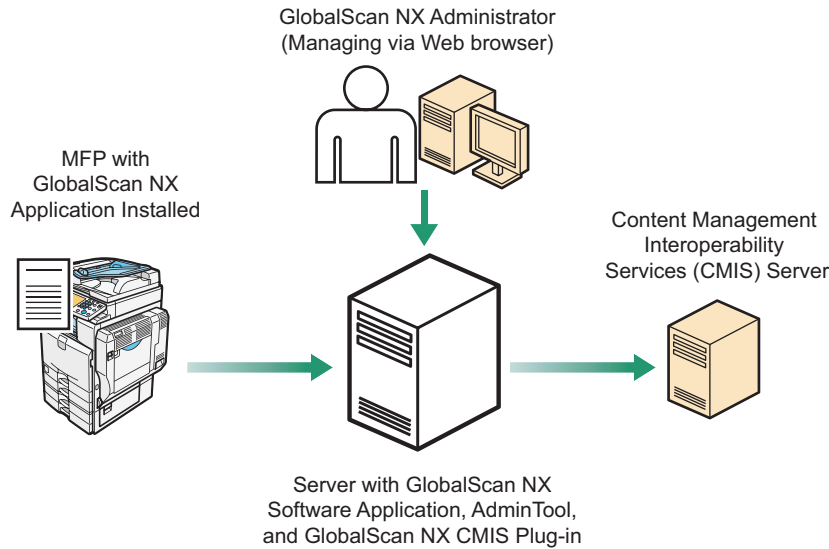


GlobalScan NX CMIS Plug-in

User's Guide

The GlobalScan NX CMIS Plug-in is a GlobalScan NX (GSNX) plug-in service that distributes documents scanned using a multi-functional device (MFP) to IBM File Content Manager P8.



DBV023

Fig. 1: GlobalScan NX CMIS Plug-in Workflow

Note

- This product is displayed as "Send to CMIS" on the MFP control panel.
- This manual explains the operation procedures for the CMIS Plug-in. For details about the operation procedures for other Services/ Filters, see *GSNX User's Guide*.

Introduction

This manual contains detailed instructions and notes on the operation and use of this product. For your safety and benefit, read this manual carefully before using the product. Keep this manual in a handy place for quick reference.

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Before You Begin

Abbreviations

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

Product / Name	Abbreviation
GlobalScan NX	GSNX
Multifunctional Device	MFP, Device
GlobalScan NX CMIS Plug-in	CMIS Plug-in
Content Management Interoperability Services	CMIS
Enterprise Content Management	ECM

CMIS Plug-in

<When using the Standard Operation Panel> Step 1: Placing the Original

Place the original face up on the Automatic Document Feeder (ADF) or face down on the exposure glass.

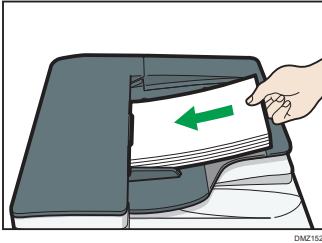


Fig. 2: ADF

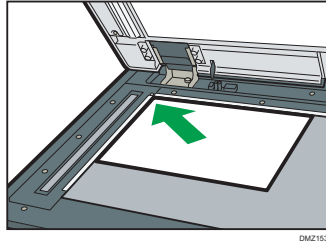


Fig. 3: Exposure Glass

Step 2: Opening the Group/Project Screen

1. Press [**Scanner**] on the MFP control panel (once or twice).

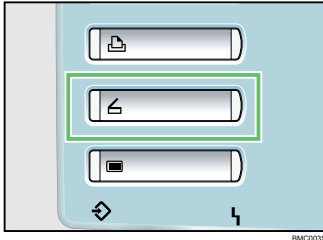


Fig. 4: Control Panel

Note

- Any key other than the [**Scanner**] key can be programmed to access GSNX. Check with your Administrator.
- The appearance of the GSNX user interface varies depending on the MFP model and the administrator settings.

2. Select the group tab you require.
3. Select the project button you require.

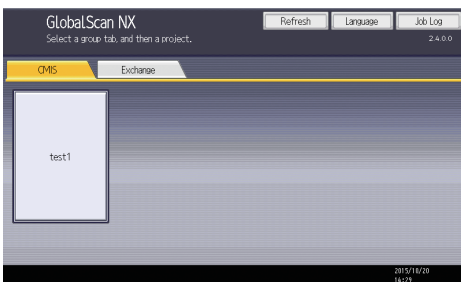


Fig. 5: Group/Project Screen

Step 3: Logging In

If you are required to log in, the screen shown in Fig. 6 or Fig. 7 (below) will appear. If login is not required, proceed to P.3 "Step 4: Selecting/Entering Metadata".

With an Authentication

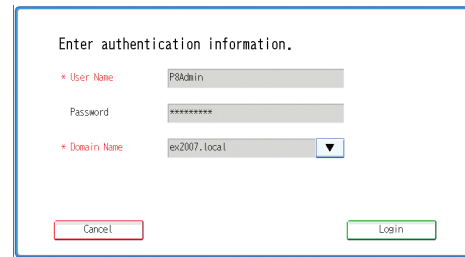


Fig. 6: Login Screen

1. Press [**User Name**] and enter your user name.
2. Press [**OK**].
3. Press [**Password**] and enter your password, if necessary.
4. Press [**OK**].
5. Select/enter Domain Name, if necessary.
6. Press [**Login**].

Without an Authentication

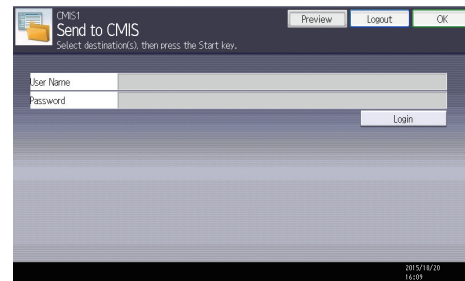


Fig. 7: Login Screen

1. Press [**User Name**] and enter your name.
2. Press [**Password**] and enter your password.
3. Press [**Login**].

Note

- If login fails, press [**OK**] and repeat the above procedure using valid account information.

Step 4: Selecting/Entering Metadata

If metadata is required, the metadata screen will appear. If metadata is not required, proceed to P.4 "Step 5: Selecting a Service".

1. Select the relevant fields, drop-down menus, or buttons.
2. Enter the document information.
3. Repeat steps 1 - 2 as necessary.
4. When finished, press [**OK**].

Step 5: Selecting a Service

The Service Menu for the project selected in P.3 "Step 2: Opening the Group/Project Screen" appears.

1. Press [Send to CMIS].

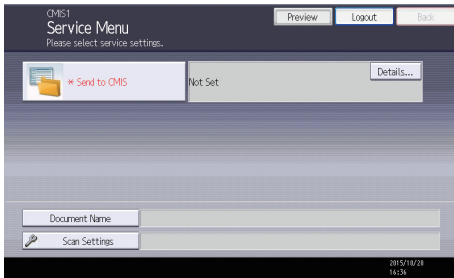


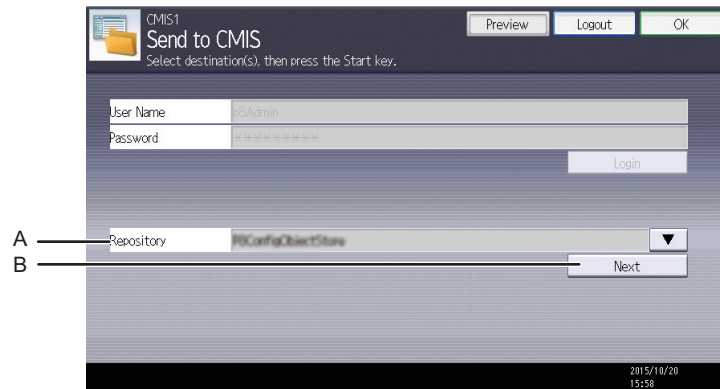
Fig. 8: Service Menu

↓ Note

- If only one service exists, the Repository Selection screen will appear.

Step 6: Specifying a Destination (Repository Selection Screen)

Send to CMIS Screen Overview



DMZ303

Fig. 9: Send to CMIS Screen

This screen does not appear depending on the settings specified by the administrator.

"User Name", "Password", and "Login" do not appear when the authentication profile has been set to the project.

A. Repository

Specify the repository to connect. The repository list is listed in alphabetical order.

This input is not visible until the user performs a successful login.

B. Next

Load "Destination Folder Selection Screen".

This input is not visible until the user performs a successful login.

Procedure

From Send to CMIS screen (Fig. 9), proceed as follows:

1. Specify a repository.
2. Press [**Next**].
The Destination Folder Selection screen is displayed.

Step 7: Specifying a Destination (Destination Folder Selection Screen)

Send to CMIS Screen Overview

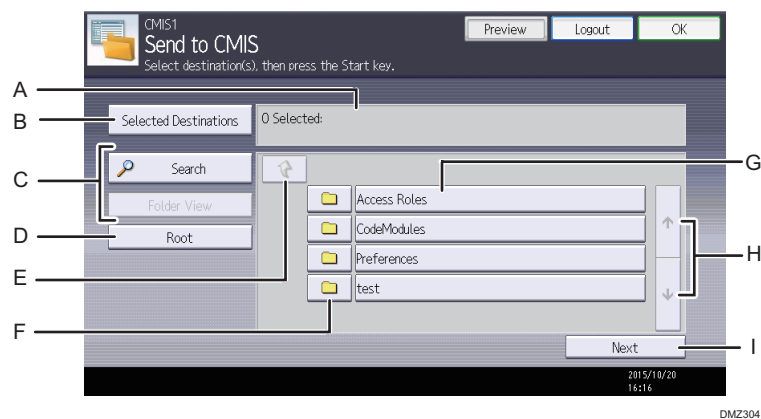


Fig. 10: Send to CMIS Screen

A. Selected Folder

The number of selected destinations and the selected folder name are displayed in the following format:

[Display Name] folder

B. Selected Destinations

Display a list of the destination folders currently selected. You can press folders in this list to remove them.

C. Search, Folder View

Perform the keyword search in the current folder and its sub-tree folder(s).

D. Root

Return to the screen displaying the root folders.

E.

Display the folders on the upper level folders. This button is disabled in root folder view.

F.

The list of accessible sites, libraries, and/or folders is displayed.

G. Folder Name

Select a folder name to add that folder to **[Selected Destinations]**.

H. Scroll key

Use the up and down keys to scroll through the Folder Name list when all of the folders will not fit on one screen.

I. Next

If one or more destination folder(s) is specified, move to the Document Information Input screen.

If not, an error dialog will appear.

Procedure

From Send to CMIS screen (Fig. 10), proceed as follows:

1. Select a destination folder.
2. Press **[Next]**.
The Document Information Input screen is displayed.

Step 8: Specifying a Destination (Document Information Input Screen)

Send to CMIS Screen Overview

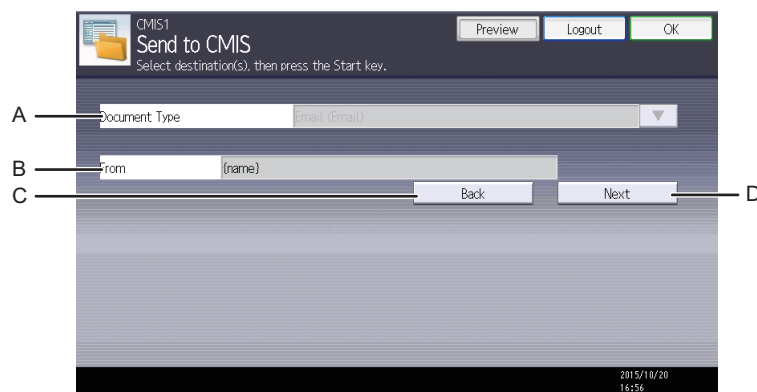


Fig. 11: Send to CMIS Screen

A. Document Type

Specify the document type. The Document type list is sorted in alphabetical order using its display name attribute.

B. Document Properties

Specify document properties. The Document properties list is sorted in alphabetical order using its display name attribute.

The UI control type varies depending on the document property type. (String / Integer / Date-time). Parameter settings on the screen that are marked with an asterisk (*) must be specified.

Up to 14 properties can be set.

C. Back

Move to the Destination Folder Selection screen.

D. Next

Move to the Scanning screen.

Procedure

From Send to CMIS screen (Fig. 11), proceed as follows:

1. Select a document type from the drop-down list.
2. Specify document properties.
3. Press [**Next**].
The Scanning screen is displayed, and then Press [**OK**].

Note

- All required fields must be set before scanning.
If there are some empty required fields, you cannot start the scan.

Step 9: Setting the Scan Parameters

Note

- Depending on the administrator settings, other scan parameters might or might not be required.
- The Scan Settings and Scan Size screens can be customized by the administrator, thus the settings that are available might vary.

Document Name

This name identifies the e-mail attachment or file.
From the Service Menu (Fig. 8), proceed as follows:

1. Press [**Document Name**].
2. Enter a name, and then press [**OK**]. The "Document Name" field is automatically populated.

Note

- The administrator can preset the names. Editing is possible, unless the document is set to read-only.

Scan Settings/Scan Size

From the Service Menu (Fig. 8), proceed as follows:

1. Press [**Scan Settings**].
2. Press [**Scan Settings**] or [**Scan Size**].
3. Configure the settings as necessary, and then press [**OK**].

Note

- For details about Scan Settings and Scan Size, see *GSNX User's Guide*.

Filters

For details about how to specify other filters, see *GSNX User's Guide*.

Step 10: Start the Scan

1. Confirm that the destinations are correct. If necessary, open the Service Menu screen, and then press [**Details**]. To close the [**Details**] screen, press [**Summary**].
2. Confirm that the control panel [**Start**] key is lit green. If it is not, check that all the necessary settings and values have been selected or entered, and that an original is placed in the ADF or on the exposure glass.
3. Press [**Start**].
The original is scanned and the resulting scan file is distributed.

Step 11: Exit the Project

When scanning finishes, press the [**Logout**] button (see Fig. 12). The Group/Project screen (Fig. 5) will appear.

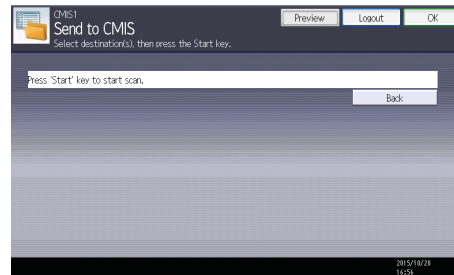


Fig. 12: Scanning Screen

Step 12: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.

The content of the Job Log is determined by the administrator. Depending on the administrator's settings, you will be able to view the job log of every project or a specific project only.

To view the Job Log, proceed as follows:

1. Press [**Job Log**].
2. Check the job log.
3. When finished, press [**OK**].

<When using the Smart Operation Panel>

Step 1: Placing the Original

Place the original face up on the Automatic Document Feeder (ADF) or face down on the exposure glass.

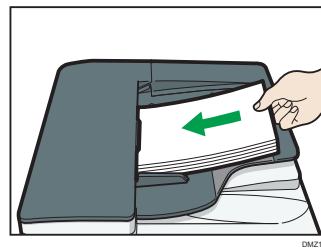


Fig. 13: ADF

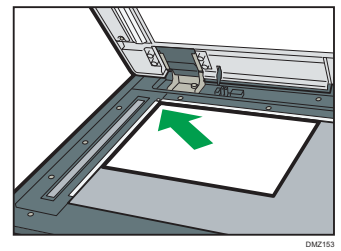


Fig. 14: Exposure Glass

Step 2: Opening the Group/Project Screen

1. Press [**Home**], and then press [**GlobalScan**].

Note

- The appearance of the GSNX user interface varies depending on the MFP model and the administrator settings.
2. Press the Group Selection button and select a Group.

3. Select the project button you require.

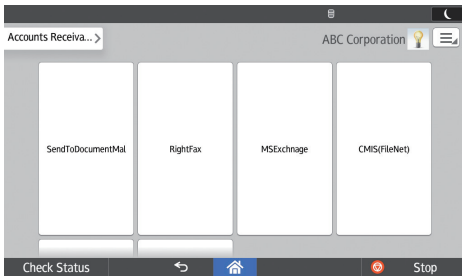


Fig. 15: Group/Project Screen

Step 3: Logging In

If you are required to log in, the screen shown in Fig.16 will appear. If login is not required, proceed to P.9 “Step 4: Selecting/Entering Metadata”.

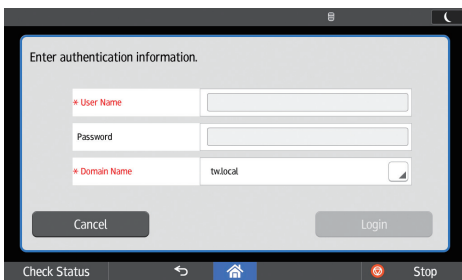


Fig. 16: Login Screen

1. Press [User Name] and enter your user name.
2. Press [OK].
3. Enter your password, if necessary.
4. Press [OK].
5. Select/enter Domain Name, if necessary.
6. Press [Login].

Step 4: Selecting/Entering Metadata

If metadata is required, the metadata screen will appear. If metadata is not required, proceed to P.9 “Step 5: Selecting a Service”.

1. Select the relevant fields, drop-down menus, or buttons.
2. Enter the document information.
3. Repeat steps 1 - 2 as necessary.
4. When finished, press [Destination].

Step 5: Selecting a Service

The Service Menu for the project selected in P.8 “Step 2: Opening the Group/Project Screen” appears.

1. Press [Send to CMIS].

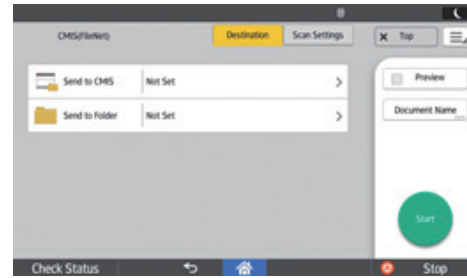


Fig. 17: Service Menu



Fig. 18: Login Screen

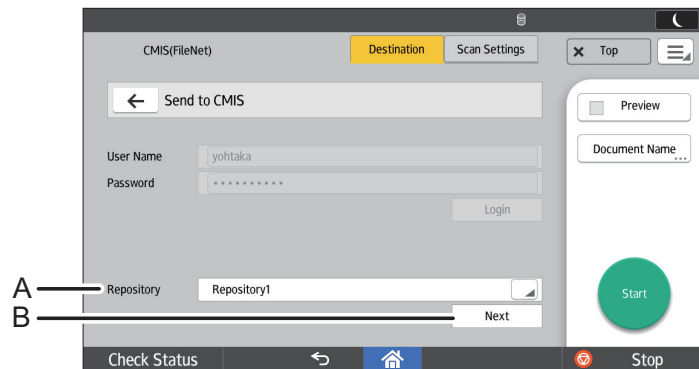
2. Press [User Name] and enter your name.
3. Press [OK].
4. Enter your password.
5. 4. Press [OK].
6. Press [Login].

Note

- If login fails, press [OK] and repeat the above procedure using valid account information.

Step 6: Specifying a Destination (Repository Selection Screen)

Send to CMIS Screen Overview



DMZ079

Fig. 19: Send to CMIS Screen

This screen does not appear depending on the settings specified by the administrator.

“User Name”, “Password”, and “Login” do not appear when the authentication profile has been set to the project.

A. Repository

Specify the repository to connect. The repository list is listed in alphabetical order.

This input is not visible until the user performs a successful login.

B. Next

Load “Destination Folder Selection Screen”.

This input is not visible until the user performs a successful login.

Procedure

From Send to CMIS screen (Fig. 19), proceed as follows:

1. Specify a repository.
2. Press [**Next**].
The Destination Folder Selection screen is displayed.

Step 7: Specifying a Destination (Destination Folder Selection Screen)

Send to CMIS Screen Overview

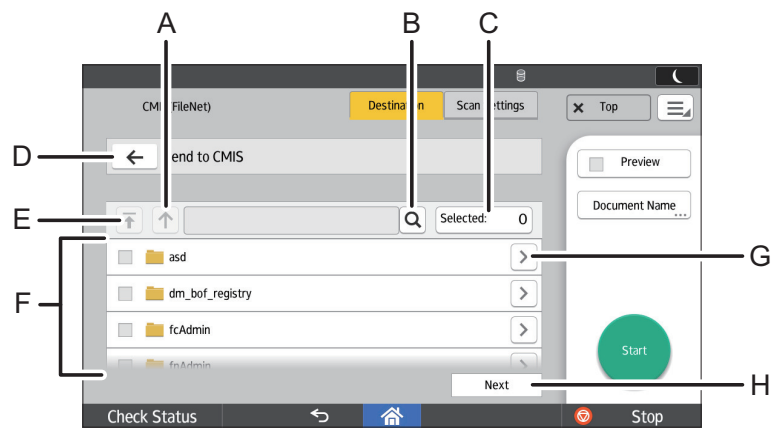


Fig. 20: Send to CMIS Screen

- A. Display the folders on the upper level folders. This button is disabled in root folder view.
- B. Perform the keyword search in the current folder and its sub-tree folder(s).
- C. **Selected Folder**
The number of selected folders is displayed. Pressing this button displays a list of selected folders.
- D. Returns to the Service Menu screen.
- E. Return to the screen displaying the root folders.
- F. **Folder List**
A list of the folders that can be specified as a destination displays here. Only one destination can be selected.
- G. The list of accessible sites, libraries, and/or folders is displayed.
- H. **Next**
If one or more destination folder(s) is specified, move to the Document Information Input screen.
If not, an error dialog will appear.

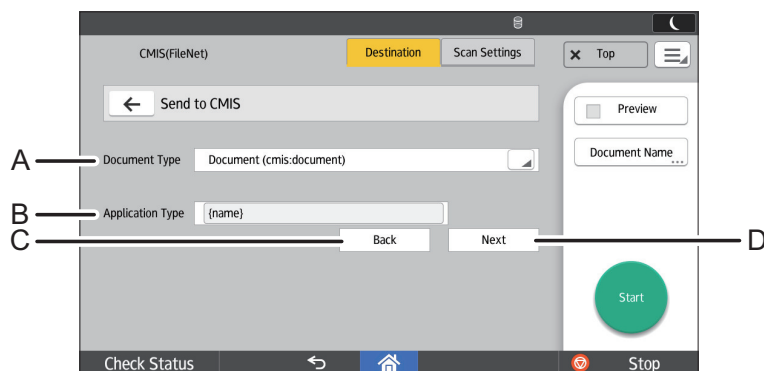
Procedure

From Send to CMIS screen (Fig. 20), proceed as follows:

1. Select the check box of a folder to be added.
To cancel selection, clear the check box.
 Note
If necessary, press [>] to display subfolders.
2. Press [Next].
The Document Information Input screen is displayed.

Step 8: Specifying a Destination (Document Information Input Screen)

Send to CMIS Screen Overview



DMZ077

Fig. 21: Send to CMIS Screen

A. Document Type

Specify the document type. The Document type list is sorted in alphabetical order using its display name attribute.

B. Document Properties

Specify document properties. The Document properties list is sorted in alphabetical order using its display name attribute.

The UI control type varies depending on the document property type. (String / Integer / Date-time). Parameter settings on the screen that are marked with an asterisk (*) must be specified.

Up to 14 properties can be set.

C. Back

Move to the Destination Folder Selection screen.

D. Next

Move to the Scanning screen.

Procedure

From Send to CMIS screen (Fig.21), proceed as follows:

1. Select a document type.
2. Specify document properties.
3. Press [**Next**].

Note

- All required fields must be set before scanning.
If there are some empty required fields, you cannot start the scan.

Step 9: Setting the Scan Parameters

Note

- Depending on the administrator settings, other scan parameters might or might not be required.
- The Scan Settings screen can be customized by the administrator, thus the settings that are available might vary.

Document Name

This name identifies the e-mail attachment or file.
Proceed as follows:

1. Press [**Document Name**].
2. Enter a name, and then press [**OK**].

Note

- The administrator can preset the names. Editing is possible, unless the document is set to read-only.

Scan Settings

Proceed as follows:

1. Press [**Scan Settings**].
2. To change the setting, press it, change the parameters, and then press [**OK**].

Note

- For details about Scan Settings, see *GSNX User's Guide*.

Filters

For details about how to specify other filters, see *GSNX User's Guide*.

Step 10: Start the Scan

1. Confirm that the destinations are correct. If necessary, press [**Destination**] to open the Service Menu screen, and then press [>].

Note

- To see more details, press the Number of selected folders button.

2. Press [**Start**].

Note

- If an error message is displayed after you press [Start], check that the document is placed on the ADF or exposure glass and any required Distribution Parameters are selected and/or entered. An asterisk (*) indicates that the setting is required.

3. Press [**OK**] to close the confirmation message.

Step 11: Exit the Project

When scanning finishes, press [**Top**] (see Fig. 22). The Group/Project screen will appear.

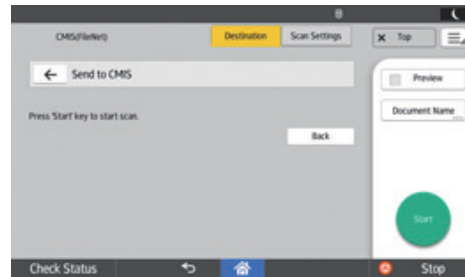


Fig. 22: Scanning Screen

Step 12: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.

The content of the Job Log is determined by the administrator.
To view the Job Log, proceed as follows:

1. Press [≡] at the top right of the screen, and then select [**Job Log**].
2. Check the job log.
3. When finished, press [**Exit**].