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GlobalScan NX DocumentMall Plug-in
Administrator's Guide

The GlobalScan NX DocumentMall Plug-in is a GlobalScan NX (GSNX) plug-in that distributes documents scanned using a multifunctional device (MFP) to DocumentMall.

This plug-in enables distribution of documents to DocumentMall, automatic generation of a distribution folder, and association of document information with DocumentMall.
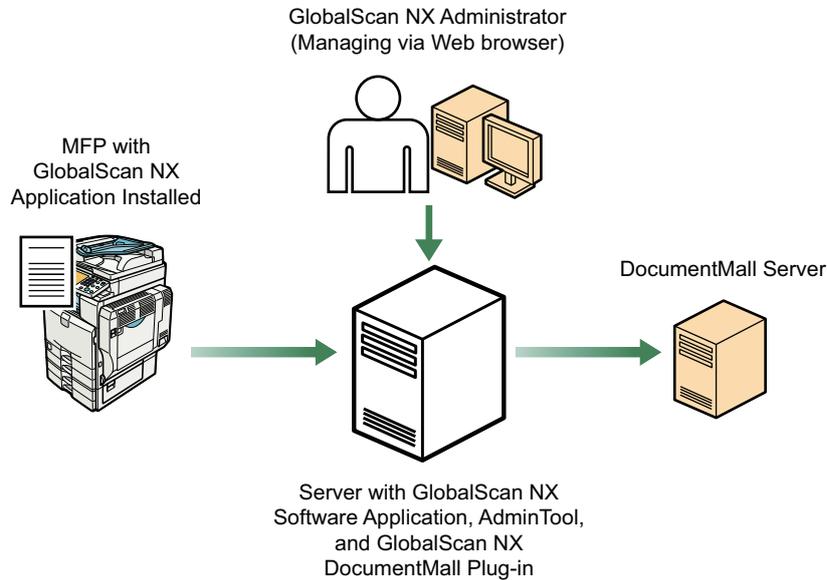
Fig. 1: GlobalScan NX DocumentMall Plug-in workflow

⬇ Note

- This plug-in is displayed as "Send to DocumentMall" on the GSNX server, in AdminTool, and on the MFP control panel.
- This manual explains the configuration procedures for the DocumentMall Plug-in. For details about administrator settings and service/filter settings, see *GSNX Administrator's Guide*.
- For details about DocumentMall settings and operations, see the DocumentMall operating instructions.

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.

Product / Name	Abbreviation
GlobalScan NX	GSNX
Multifunctional Device	MFP, device
GlobalScan NX DocumentMall Plug-in	DocumentMall Plug-in

System Requirements

DocumentMall Ver.9.2 or later must be installed on the DocumentMall server.

Installing the DocumentMall Plug-in

Step 1: Pre-Installation Procedure

To log in to GSNX AdminTool, you must use either a Built-in Administrator account (specified during the installation of AdminTool) or an Administrator account (specified beforehand using AdminTool).

1. Open your Web browser.

2. Enter the GSNX AdminTool URL.

   http://IP address of the server where GSNX is installed:port number/the virtual directory name

   (Default setting: http://*IP address*:8080/gsnx/)

   ⬇ Note

   • The IP address, port number, and the virtual directory name vary with the GSNX settings.

3. Press [**ENTER**] or click [**Go**].

   The AdminTool login page appears.

   Fig. 2: AdminTool login page

4. Select an authentication profile and enter the corresponding password.

5. Select a language from the drop-down list.

6. Click [**Login**].

   The AdminTool home page appears.
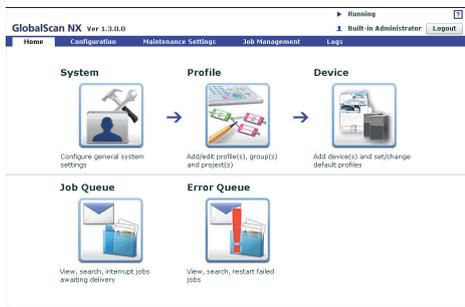
7. Click [**Maintenance Settings**].

   Fig. 3: AdminTool home page

8. Click [**System Control**].

9. Click [**Switch Delivery Service Status**] to switch the GSNX server status from [**Running**] to [**Suspended**].

   ⬇ Note

   • To update the "Delivery Service Status", click [**Refresh**], which is next to "Delivery Service Status".

10. Click [**Yes**].

11. Click [**Logout**] to log out of AdminTool.

Step 2: Installation

1. Close all applications currently running on the GSNX server.

2. Double-click **GSLaunch.exe**.

   The "GlobalScan NX DocumentMall Plug-in Setup" screen appears.

3. Click [**DocumentMall Plug-in**].

   The "Welcome" window appears.

4. Click [**Next**].

5. Read the licensing agreement, and then select "I accept…".

6. Click [**Next**].

   ⬇ Note

   • The folder where GSNX is installed is automatically selected as the location for the plug-in's installation files.

7. Click [**Next**].

   Installation starts.

8. Click [**Finish**].

   If a message prompting you to restart the computer appears, click [**OK**]. This will complete the installation.

9. Activate the DocumentMall Plug-in.

   ⬇ Note

   • To activate the plug-in, select its name under [License Name] in the GlobalScan NX Activation Tool. For details about how to activate the DocumentMall Plug-in, see *GSNX Installation Guide*.

Uninstalling the DocumentMall Plug-in

To uninstall the plug-in, in Windows [Control Panel], click [Uninstall a Program] or [Programs and Features].

⭐ Important

• Before uninstalling the plug-in, be sure to deactivate it. Note that deactivating the plug-in will also deactivate the licenses of GlobalScan NX, its optional software, and other plug-ins. For details about uninstalling and deactivation, see GSNX Installation Guide.

Step 3: Start the Service

1. Login to GSNX AdminTool.

   E Reference
   - For details about how to log in to AdminTool, see P.3 "Step 1: Pre-Installation Procedure".

2. Click [**Maintenance Settings**].

3. Click [**System Control**].

4. Click [**Switch Delivery Service Status**] to switch the GSNX server status from [**Suspended**] to [**Running**].

   ⬇ Note
   - To update the "Delivery Service Status", click [**Refresh**], which is next to "Delivery Service Status".

5. Click [**Logout**] to log out of AdminTool. To continue setting up DocumentMall Plug-in without logging out of AdminTool, click [**Home**] and proceed to P.4 "Step 2: Add a Profile".

Adding the DocumentMall Plug-in

Step 1: Login to AdminTool

To log in to AdminTool, you must use either a Built-in Administrator account (specified during the installation of AdminTool) or an Administrator account (specified beforehand using AdminTool).

1. Open your Web browser.

2. Enter the GSNX AdminTool URL.

   http://IP address of the server where GSXN is installed:port number/the virtual directory name

   (Default setting: http://*IP address*:8080/gsnx/)

   ⬇ Note
   - The IP address, port number, and the virtual directory name vary with the GSNX settings.

3. Press [**ENTER**] or click [**Go**].

   The AdminTool login page appears.

Fig. 4: AdminTool login page

4. Select an authentication profile and enter the corresponding password.

5. Select a language from the drop-down list.

6. Click [**Login**].

   The AdminTool home page appears.

Step 2: Add a Profile

1. Click [**Profile**].

Fig. 5: AdminTool home page

2. Click [**Create**].

   The Profile Properties screen appears.

   If you are adding the DocumentMall Plug-in to an existing profile, proceed to P.4 "Step 3: Add a Group".

3. Enter the profile name and screen name.

   ⬇ Note
   - The profile name can contain up to 128 characters.
   - The screen name can contain up to 50 characters.
   - For details about profile settings, see *GSNX Administrator's Guide*.

4. Click [**OK**].

Step 3: Add a Group

1. In the Profile List, double-click the profile name you want to add the DocumentMall Plug-in to.

   The Group/Project screen appears.

Fig. 6: Group/Project screen

   ⬇ Note
   - If you are adding the DocumentMall Plug-in to an existing group, click the group you require, and then proceed to P.5 "Step 4: Add a Project".

2. Click [🔲] (top left).

   The Group Properties screen appears.

3. Enter the group name.

   ⬇ Note
   - The group name can contain up to 128 characters.

4. Make sure the status of "Display" is [**On**].

5. Click [**OK**] to save the settings.

    The group appears as a tab on the Group/Project screen when the Standard Operation Pane is used, and in a list when the Smart Operation Panel is used.

    ⬇ **Note**

    *   For details about group settings, see *GSNX Administrator's Guide*.

Step 4: Add a Project

1. Drag the [▦] button (below the [▤] button) to the Group/Project screen.

    The Project Properties screen appears.

    ⬇ **Note**

    *   If you are adding the DocumentMall Plug-in to an existing project, click the desired project, and then proceed to P.5 "Step 5: Add a Service and Filter/Create a Delivery Flow".

2. Enter the project name.

    ⬇ **Note**

    *   For details about project settings, see *GSNX Administrator's Guide*.

3. Click [**OK**].

    A new project button appears.

Step 5: Add a Service and Filter/Create a Delivery Flow

1. Double-click the project button.

    The Project Configuration screen appears.

2. Under "New Service(s)", drag "Send to DocumentMall" to the Delivery Flow Editor screen.
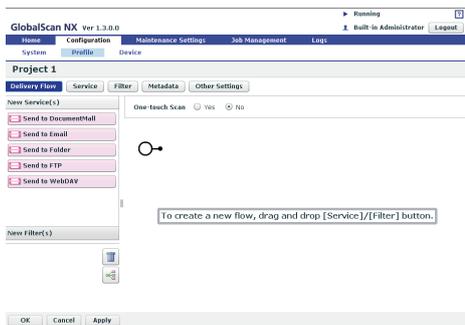

Fig. 7: Delivery Flow Editor screen

⬇ **Note**

*   To automatically align Service(s) and Filter(s), click the [🔗] button (below the [🗑] button).

*   For details about creating a delivery flow, see *GSNX Administrator's Guide*.

3. Under "New Filter(s)", drag the service you require to the Delivery Flow Editor screen.

4. Double-click the lower half of the Service/Filter icon added to the Delivery Flow.

    The Properties screen appears.

    ⬇ **Note**

    *   There are three levels at which you can configure the properties for services: the System Level, Profile Level, and Project Level. This example procedure explains how to configure the properties at the Project Level. For details about how to specify the properties at other levels, see *GSNX Administrator's Guide*.

    *   The contents of each setting vary depending on the Service/Filters. For details, see *GSNX Administrator's Guide*. If you are using the optional Service/Filter plug-in, see the Administrator's Guide of each plug-in.

    *   For details about the properties of the DocumentMall Plug-in, see P.6 "Configuring the DocumentMall Plug-in".

5. Change the settings as necessary.

6. Click [**Apply**], and then click [**OK**] to return to the Group/Project screen.

Step 6: Configure the MFP (s)

Finally, identify the MFP(s) that you want to use with GSNX operations by adding them manually or discovering them on the network. (In the following procedure, you will also assign a profile to the device.)

1. On the home page, click the [**Device**] shortcut.
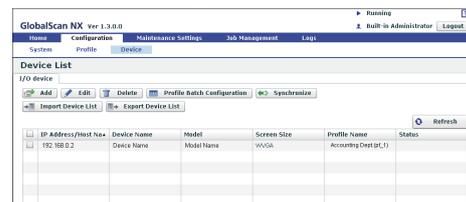
    The device list appears.

Fig. 8: Device List

2. Select one of the following methods:

    ### Manually Add MFP(s)

    a. Click [**Add**].
        The Add Device screen appears.

    b. Select [**Specify Manually**], enter the IP address or host name of the MFP that you want to add, and then click [**Next**].

    c. Proceed to step 3.

    ### Search for Connected MFPs

    a. Click [**Add**].
        The Add Device screen appears.

    b. Select [**Select from list**].

    c. Click [**Search**].
        Any GSNX-enabled MFPs that are discovered on the network will be displayed.

    d. Select the check boxes of the MFPs you want to add, and then click [**Next**].

    e. Proceed to step 3.

3. Configure the device properties: [**Device Name**], [**Profile Name**], and [**Use Scanner > Yes**]. Then click [**OK**].

Configuring the DocumentMall Plug-in

Step 1: Configuring a Proxy Server

To use a proxy server, you must configure the proxy server settings before you configure the start point path.
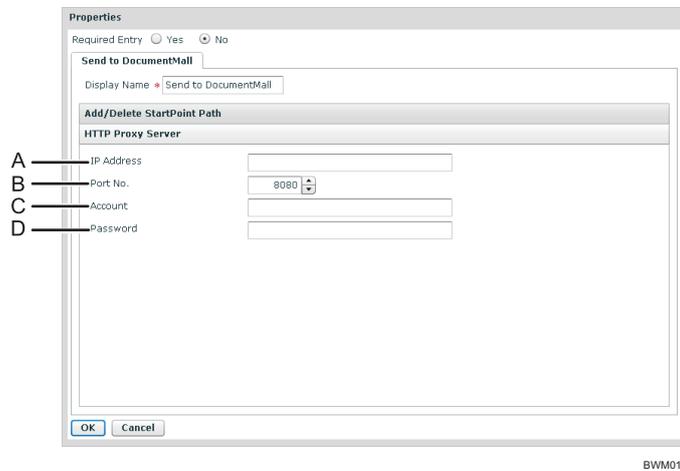
HTTP Proxy Server Screen Overview

Fig. 9: HTTP Proxy Server screen

⬇ Note

- Settings marked with an asterisk (*) must be specified.

A. IP Address
Enter the IP address or host name of the proxy server.

B. Port No.
Enter the port number for the proxy server.

C. Account
Enter the account name used for logging in to the proxy server.

D. Password
Enter the password used for logging in to the proxy server.

Procedure

1. Click [**Home**].

2. Click [**Profile**].

3. Select the profile you require.

4. Select the project you require.

5. Double-click the lower half of the DocumentMall Plug-in (Send to DocumentMall) icon in the delivery flow area. The Properties screen appears.

6. Click [**HTTP Proxy Server**].

7. Configure the proxy server settings.

8. Click [**OK**].

Step 2: Configuring the StartPoint Path

Use this procedure to configure the settings of the DocumentMall Plug-in for connection to DocumentMall.
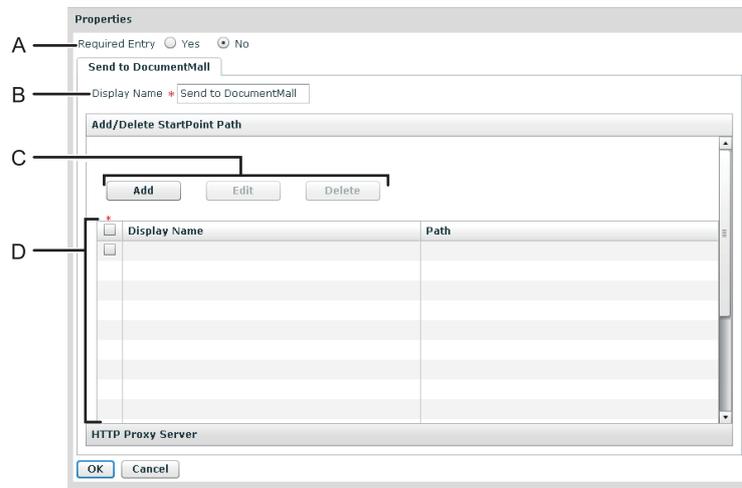
Properties Screen Overview

Fig. 10: Properties Screen

> 🔽 **Note**

- Settings on the screen that are marked with an asterisk (*) must be specified.

A. Required Entry (Project settings only)

Select whether to require that this service be used.

- **Yes**
  When scanning, at least one StartPoint path must be specified in the destinations list.
- **No**
  Allows delivery to continue even if no StartPoint path is specified in the destinations list.

B. Display Name

Enter a display name for this service.

> 🔽 **Note**

- The display name can contain up to 30 characters.

C. Add / Edit / Delete

- **Add**
  Add a new StartPoint path.
- **Edit**
  Modify the settings of the selected StartPoint path.
- **Delete**
  Delete the selected StartPoint path.

D. StartPoint Path Table

Display a list of registered StartPoint paths.

Use the check boxes to select a StartPoint path for editing or deleting root folders. Select the check box on the first row or column to select an entire StartPoint path.

Procedure

1. Click [**Home**].

2. Click [**Profile**].

3. Select the profile you require.

4. Select the project you require.

5. Double-click the lower half of the DocumentMall Plug-in (Send to DocumentMall) icon in the delivery flow area.
   The Properties screen appears.

6. In "Display Name", enter the display name that you require.

7. Click [**Add**].

8. Proceed to P.8 "Step 3:Adding a StartPoint Path".

Step 3: Adding a StartPoint Path

Use this procedure to connect to DocumentMall at the destination, specify the path to the destination cabinet, and configure the naming rules for subfolders and files.

Add StartPoint Path Screen General Settings Tab Overview

Fig. 11: General Settings tab (Add StartPoint Path screen)

⬇Note

• Settings on the screen that are marked with an asterisk (*) must be specified.

A. Display Name

Enter a display name for the StartPoint path.

⬇Note

• The display name can contain up to 128 characters.

B. Path

Enter the path to the destination cabinet in DocumentMall.
You can specify the path in one of the following two ways.
1. By specifying a folder in a cabinet:
"/Cabinet name/Folder name" or "Cabinet name/Folder name"
2. By specifying a cabinet only:
"/Cabinet name" or "Cabinet name"

C. Account

Enter the name of the account used for logging in to DocumentMall.

D. Authentication Method

Select one of the following authentication methods:

(The information you enter here will be applied when accessing the destination and when saving read documents.)

- Proxy User
  Enter the login information specified in [**User Name**] , [**Password**], and [**Account**] for authentication.
- Login User
  Enter the login information specified in [**Account**] and the project for authentication.

E. User Name

Enter the user name of the account used for logging in to DocumentMall.

F. Password

Enter the password of the account used for logging in to DocumentMall.

G. Connect (Disconnect)

Connection to DocumentMall is possible through the account name, user name, and password (entered in steps C, E, and F respectively). If a proxy server is used, the input information for the proxy server is also used.

If authentication is successful, the path name is verified. If the path name is correct, the [**Path**], [**Account**], and [**User Name**] fields are grayed out and the [**Document Type**] fields become available.

- **Disconnect**
  When connection is successfully established, the button changes from [**Connect**] to [**Disconnect**]. To re-specify the connection destination, click [**Disconnect**]. This will delete all settings for document types and columns. You can now change the [**Path**], [**Account**], and [**User Name**] if necessary.

H. Access to Subfolder

Select the [**Enable Subfolder Browsing**] check box to allow MFP users to browse subfolders and select them as destinations.
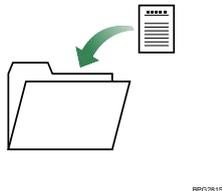
I. Create a Subfolder

Select the [**Enable Subfolder Delivery**] check box to create a subfolder within a destination folder.

- If you enable subfolder creation
  A folder is automatically created in the destination folder and scanned documents are stored there.

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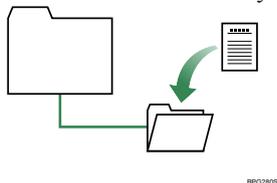
> **Note**
>
> - If a subfolder with the same name does not exist, a new subfolder will be created with the name designated in Folder Naming Rule.
> - If a subfolder with the same name already exists, no new subfolder will be created and the scanned documents will be sent to the existing folder.

- If you do not enable subfolder creation
  No subfolder is created and scanned documents are sent directly to the specified destination folder(s) and stored there.

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J. Folder Naming Rule

Select one of the following two methods of naming created subfolders.

- **Select from Existing Metadata**

  Select a metadata item from the drop-down list. The value of that metadata item will then be used as the file name. Only major metadata items can be selected from the drop-down list.

- **Manual Entry**

  Enter a name for the subfolder directly.

  You can create nested subfolders by including a path separator. For example, if you enter "abc/xyz", the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this example, scanned documents will be saved in "xyz".

  ⬇ Note

  - Folder names can contain up to 255 characters.
  - The following characters cannot be used in folder names and will be automatically replaced by underscores "_" if included:

    * : < > ? / ¥ | "

    Note however that "/" is not replaced by an underscore "_", but is recognized as a path delimiter (separator).

K. File Naming Rules

Use one of the following two methods to specify the name of files to be saved in a distribution destination folder:

- **Select from Existing Metadata**

  Select a metadata item from the drop-down list; the value of that metadata item will then be used as the file name. Only major metadata items can be selected from the drop-down list.

- **Manual Entry**

  Directly enter the file name you require.

  ⬇ Note

  - The following characters cannot be used in folder names and will be automatically replaced by underscores "_" if included:

    * : < > ? / ¥ | "

  - If the first or last character of a file name is a single full point (period "."), that character will be automatically replaced by an underscore "_".
  - If a file with the same name already exists, a suffix will be added to the file name.

L. Document Type

To specify a specific document type to be delivered to DocumentMall, select the [**Specify document type on delivery**] check box. If this check box is selected, all the available DocumentMall document types will appear in a drop-down list. Select the document type you require from the list.

Procedure

1. Specify [**Display Name**], [**Path**], [**Account**], [**Authentication Method**], [**User Name**], and [**Password**].

2. Click [**Connect**].

3. Select [**Access to Subfolder**] or [**Create a Subfolder**] as necessary.

4. If you selected the [**Create a Subfolder**] check box in step 3, specify a folder naming rule.

5. Specify a file naming rule and document type as necessary.

6. Proceed to P.11 "Step 4: Specifying Metadata Association".

Step 4: Specifying Metadata Association

You can specify the same document property column settings as the document type property specified for the destination.

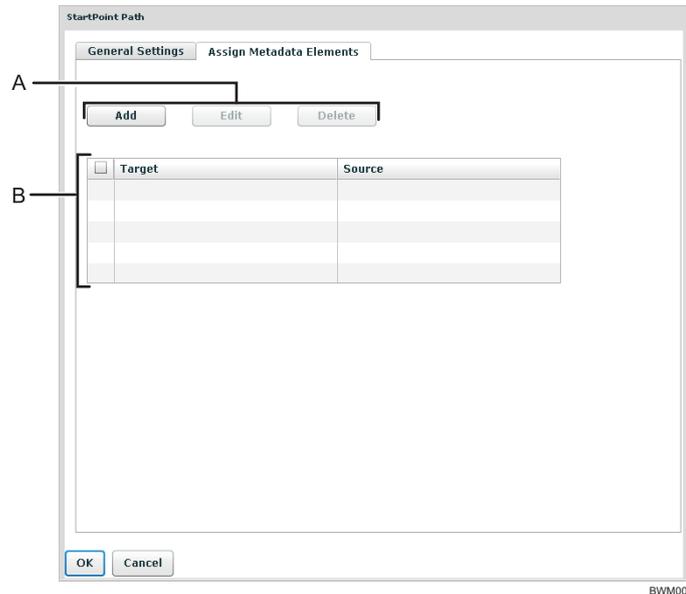## StartPoint Path - Assign Metadata Elements Tab Overview

Fig. 12: Add Elements tab (StartPoint Path screen)

A. Add / Edit / Delete

- **Add**
  Add a newly assigned metadata element.
- **Edit**
  Modify the settings of a selected metadata element.
- **Delete**
  Delete all selected metadata elements.

B. Metadata association table

The metadata association table lists the registered document information associations.

To edit or remove a document information association, select the association from the list and click [**Edit**] or [**Delete**].

The list contains a [**Target**] column (for DocumentMall property names) and a [**Source**] column (for GlobalScan NX's metadata information or user-specified settings).

Add Assigned Metadata Elements – General Settings Tab Overview

Fig. 13: Add Assign Metadata Elements screen

⬇Note

• Settings marked with an asterisk (*) must be specified.

A. Target

The Target field lists the available properties for the document type selected on the General Settings screen as well as the following common DocumentMall attributes:

• authors

• title

• keywords

• subject

In this example, the list shows the Date type in the property column's "Field name (Field Type)" format. Other properties are displayed in the property column's "Field name" format.

⬇Note

• If the [**Specify document type on delivery**] check box is not selected on the StartPoint Path - General Settings tab, only DocumentMall's common attribute columns are displayed.

B. Source

Select the items of GSNX metadata that you want to add to.
To select an item of GSNX metadata, specify the item in "Select from Existing Metadata".
If you want to specify an item of GSNX metadata using "Manual Entry", specify the tag defined for the item or enter the item directly as a character string.

Multiple items of metadata can be combined or an arbitrary character string can be entered.

Procedure

1. Click the [**Assign Metadata Elements**] tab.

2. Click [**Add**].

3. From "**Target**" select a DocumentMall column to be associated.

4. From "**Source**", select existing document information to be associated or enter a character string.

5. Click [**OK**].

6. Click [**OK**].

7. Click [**OK**].

8. Proceed to P.13 "Step 5: Configuring the MFP Service Screen".

Step 5: Configuring the MFP Service Screen

Use this screen to specify preset items and specify whether an item is hidden or displayed. The preset options are displayed on the MFP's control panel. For details about which items can be preset or specified as hidden or displayed, see the explanation for each item.

◑Note

- Items other than "Selected Folders" can be specified as hidden or displayed. However, other items cannot be specified individually as hidden or displayed.
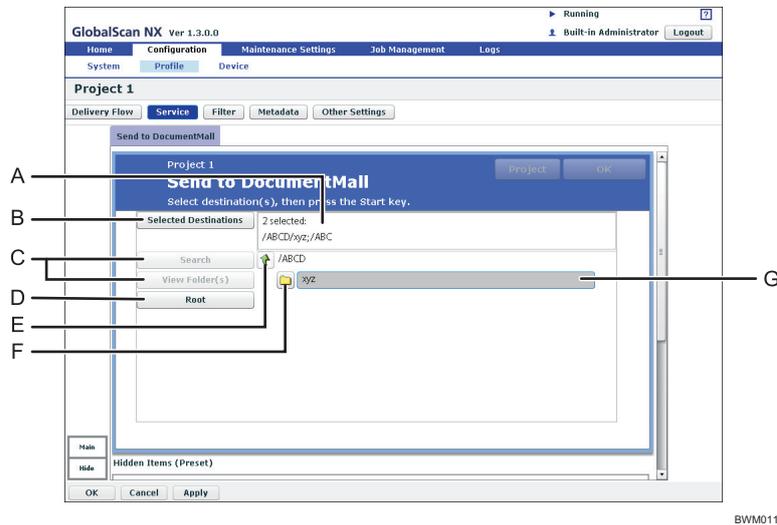
MFP Service Screen Overview

Fig. 14: MFP Service screen

A. Selected Folder(s)

The number of selected destinations and the absolute path to the selected folder are displayed.
This setting cannot be specified as hidden.

B. Selected Destinations

Display a list of the destination folders currently selected.

C. Search, View Folder(s)

Not available in the DocumentMall Plug-in.

D. Root

Return to the screen displaying the root folders.

E. 📁

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

F. 📁

A folder containing subfolders. Click this button to view the subfolders.
This item is only available if the [**Access to Subfolder**] check box on the StartPoint Path screen is selected.

G. Folder Name

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

Procedure

1. Click [**Service**].

2. Change the settings on the Service screen as necessary.

3. Click [**OK**].

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