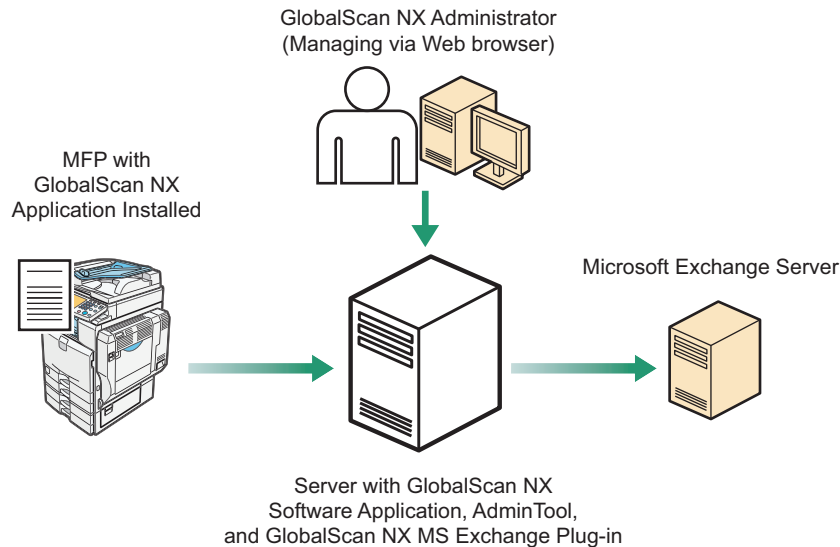


## GlobalScan NX Plug-in for Microsoft® Exchange Administrator's Guide

The GlobalScan NX Plug-in for Microsoft® Exchange (MS Exchange Plug-in) is a GlobalScan NX (GSNX) plug-in service that distributes documents scanned using a multifunctional device (MFP) to Microsoft Exchange Server.

The Send to MS Exchange Server Service settings are divided into 3 screen tabs. You can configure EWS server settings on the Email System Settings screen, configure email message settings, such as what data to attach, the message body on the Email Option Settings screen, and configure LDAP server settings to allow MFP users to use the address book on the Email Search Settings screen.



DBV032

**Fig. 1:** GlobalScan NX MS Exchange Plug-in Workflow

### Note

- This plug-in is displayed as "Send to Exchange" on the GSNX server, in AdminTool, and on the MFP control panel.
- This manual explains the configuration procedures for the MS Exchange Plug-in. For details about Administrator Settings and Service/Filter Settings, see *GSNX Administrator'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 Plug-in for Microsoft® Exchange	MS Exchange Plug-in

### System Requirements

To install the MS Exchange Plug-in, the following GlobalScan NX edition must be installed:

- GlobalScan NX Business Server Edition (Ver. 2.2.0.0 or later)
- GlobalScan NX Enterprise Server Edition (Ver. 2.2.0.0 or later)

For details about the version and edition of Microsoft Exchange Server with which the MS Exchange Plug-in is compatible, see the Readme file.

### About Authentication

NTLMv2 authentication, and Kerberos authentication can be used when accessing Microsoft Exchange Server from the MS Exchange Plug-in.

Kerberos authentication is available only when the Kerberos option is installed and set.

## Installing the MS Exchange Plug-in

### Step 1: Pre-Installation Procedure

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 AdminTool URL.  
**http://IP address:8080/gsnx/**
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].

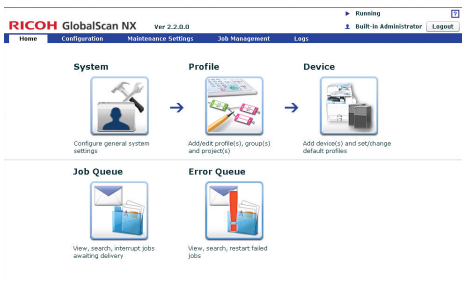


Fig. 3: AdminTool Home Page

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], 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 Exchange Plug-in Setup" screen appears.
3. Click [Exchange 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 MS Exchange 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 MS Exchange Plug-in, see *GSNX Installation Guide*.

### Uninstalling the MS Exchange 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 the AdminTool.  
**Reference**
  - For details about how to log in to the AdminTool, see P.3 "Step 1: Pre-Installation Procedure".
2. Click [Maintenance Settings].
3. Click [System Control].

4. Check GSNX server status on System Control screen. If the status is [**Suspended**], click [**Switch Delivery Service Status**] to switch the GSNX server status from [**Suspended**] to [**Running**].

**Note**

- To update the "Delivery Service Status", click [**Refresh**] next to "Delivery Service Status"

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

## Adding the MS Exchange 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 AdminTool URL.  
**http://IP address:8080/gsnx/**
3. Press [**ENTER**] or click [**Go**].  
The AdminTool Login Page appears.

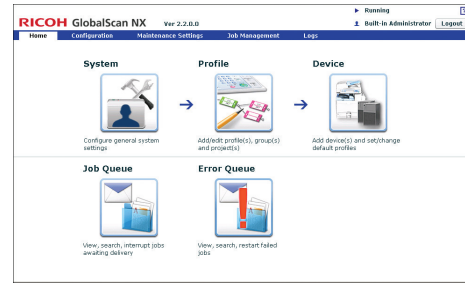


**Fig. 4:** AdminTool Login Page

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 MS Exchange Plug-in to an existing profile, proceed to P.4 "Step 3: Add a Group".
  3. Enter the profile name and screen title.
- Note**
- The profile name can contain up to 128 characters.
  - The screen title 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 MS Exchange Plug-in to.  
The Group/Project screen appears.



**Fig. 6:** Group/Project screen

- Note**
- If you are adding the MS Exchange 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**].



- 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

- Drag the  button (below the  button) to the Group/Project screen.

The Project Properties screen appears.

#### Note

- If you are adding the MS Exchange 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".

- Enter the project name.

#### Note

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

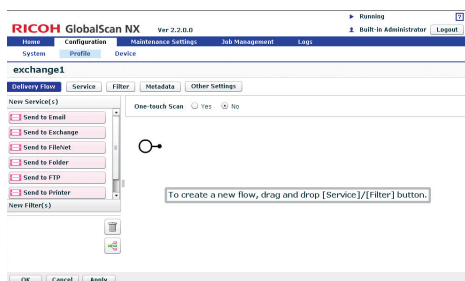
- Click **[OK]**.

A new project button appears.

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



- Double-click the project button.  
The Project Configuration screen appears.

- Under "New Service(s)", drag "Send to Exchange" 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*.

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

- 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 in 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 properties of the MS Exchange Plug-in, see P.6 "Configuring the MS Exchange Plug-in".

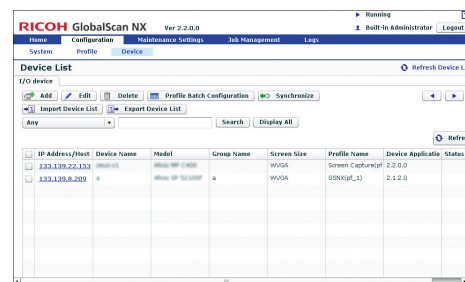
- Change the settings as necessary.

- Click **[Apply]**, and then **[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 GSX operations by adding them manually or discovering them on the network. (In the following procedure, you will also assign a profile to the device.)

- On the Home Page, click the **[Device]** shortcut.  
The Device List appears.



**Fig. 8:** Device List

- Select one of the following methods:

#### Manually Add MFP(s)

- Click **[Add]**.  
The Add Device screen appears.
- Select **[Specify Manually]**, enter the IP address or host name of the MFP that you want to add, and then click **[Next]**.
- Proceed to step 3.

#### Search for Connected MFPs

- Click **[Add]**.  
The Add Device screen appears.
- Select **[Select from list]**.
- Click **[Search]**.  
Any GSX-enabled MFPs that are discovered on the network will be displayed.
- Select the check boxes of the MFPs you want to add, and then click **[Next]**.
- Proceed to step 3.

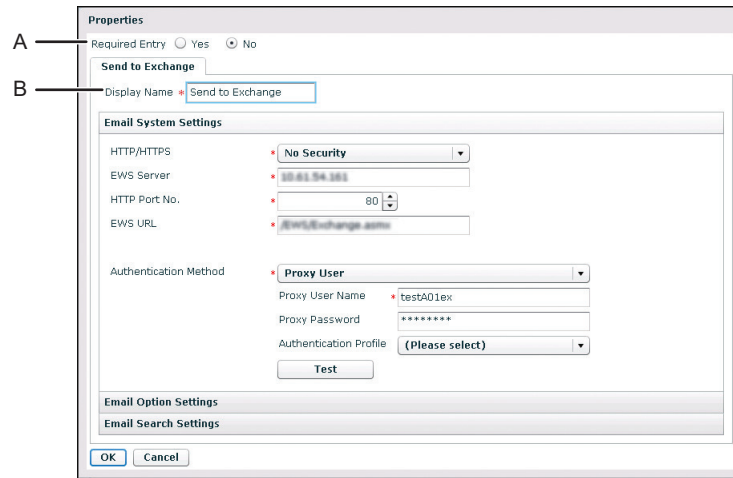
- Configure the device properties: **[Device Name]**, **[Profile Name]**, and **[Use Scanner > Yes]**. Then click **[OK]**.

# Configuring the MS Exchange Plug-in

## Step 1: Configuring the EWS Server Settings

Use this procedure to configure the settings of the MS Exchange Plug-in for connection to Microsoft Exchange Server.

### Properties Screen Overview



DBV033

**Fig. 9:** 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 EWS server must be specified in the destinations list.
- **No**  
Allows the Delivery Flow to continue even if no EWS server is specified in the destinations list.

#### B. Display Name (Project settings only)

Enter the display name for this service.

#### Note

- The display name can contain up to 30 characters.

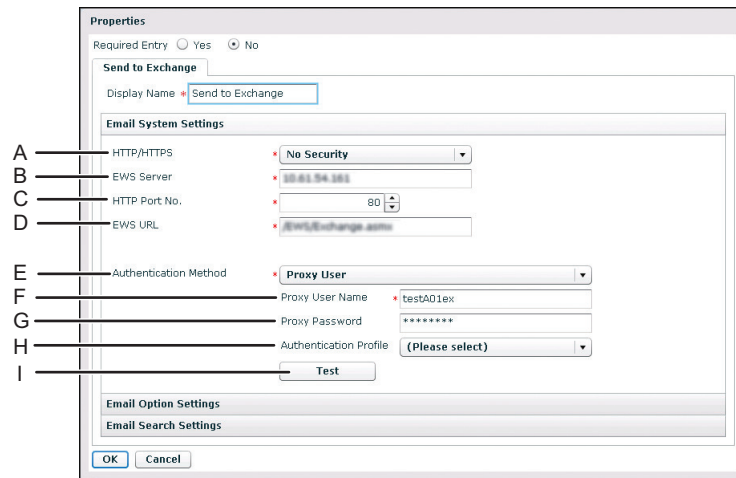
### Procedure

1. Click [**Home**].
2. Click [**Profile**].
3. Select the desired profile you require.
4. Select the desired project you require.
5. Double-click the lower half of the Send to Exchange Plug-in (Send to Exchange) icon in the Delivery Flow.  
The Properties screen appears.
6. In "Display Name", enter the display name that you require.
7. Proceed to P.7 "Step 2: Configuring the EWS Server Settings".

## Step 2: Configuring the EWS Server Settings

Use this procedure to connect to Microsoft Exchange Server at the distribution destination and configure the EWS server settings.

### Properties Screen Email System Settings Tab Overview



DBV034

Fig. 10: Properties Screen Email System Settings Tab

#### Note

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

#### A. HTTP/HTTPS

Select the security method to use when connecting to the EWS server.

- [No Security]**  
Use a standard HTTP connection (no encryption).
- [HTTPS (HTTP over SSL)]**  
Use secure HTTP over an SSL connection.

#### ★ Important

- For **[HTTPS (HTTP over SSL)]**, the certificate you are using must be registered with the system beforehand. If not, an error will occur during email transmission.

#### B. EWS Server

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

Click **[Test]** to check the connection to the HTTP server you have specified.

#### C. HTTP Port No.

Enter the port number to use.

#### Note

- The default port number for non-secure HTTP is 80.
- The default port number for HTTPS (HTTP over SSL) is 443.

#### D. EWS URL

URL to reach the Exchange Web Service. The default value is /EWS/Exchange.asmx

#### E. Authentication Method

Select the authentication method in use. The information specified here will be applied when accessing the EWS server. Sent emails will be saved in the mailbox of the user specified here.

- Proxy User**  
Apply the information specified in **[User Name]** and **[Password]** for authentication.
- Logged-in User**  
Apply the login information for the project for authentication.

#### Note

- If you are using passwordless authentication, we recommend that you not use **[Logged-in 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.

#### **F. Proxy User Name**

Enter the proxy user name of the account that is used for logging in to EWS server.

If the server requires domain information, enter the proxy user name in the format of "domain\username".

#### **G. Proxy Password**

Enter the proxy user password of the account used for logging in to EWS server.

#### **H. Authentication Profile**

Select the registered Active Directory authentication profile when using Kerberos tickets to distribute data.

To use the Kerberos option, access the [**Kerberos Option**] drop-down menu under the System Settings in GSNX and select [**Send to Exchange**], then select an authentication method that uses Kerberos tickets.

Make sure to select an Authentication Profile if [**Use only the ticket received on Kerberos authentication**] is set as the Kerberos option. For details about the Kerberos option, see *GSNX Administrator's Guide*.

#### **I. Test**

When this button is pushed, the plug-in checks whether or not the specified server exists or the specified account has Read privileges. The connection test result is displayed with the [**OK**] dialog box.

The following is the detailed sequence:

[**OK**]: The specified EWS server exists

[**NG**]: An error message is displayed.

### Procedure

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1. Specify [**HTTP/HTTPS**], [**EWS Server**], [**HTTP Port No.**], [**EWS URL**], [**Authentication Method**], [**Proxy User Name**], and [**Proxy Password**].
2. Specify [**Authentication Profile**] as necessary.
3. Click [**Test**] to check the connection and the authentication to the EWS server.
4. Proceed to P.9 "Step 3: Configuring the Email Option Settings".



### Step 3: Configuring the Email Option Settings

You can configure settings such as the content of email messages and options to permit or forbid certain operations on the MFP display panel.

#### Properties Screen Email Option Settings Tab Overview

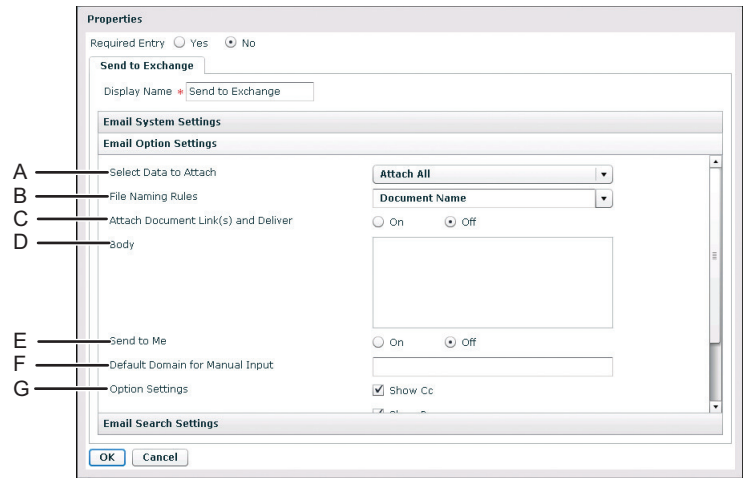


Fig. 11: Properties Screen Email Option Settings Tab

#### A. Select Data to Attach

Select the data to attach to the email message.

- [Attach All]
- [Attach First Page Only]
- [Do Not Attach]

#### B. 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.

#### C. Attach Document Link(s) and Deliver

Specify whether or not to include URLs to the locations where the document has been saved by other Services (for example, Send to FTP).

- [On]  
Add URLs to the body of the email message.
- [Off]

Do not add URLs to the email message.

#### ★ Important

- 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 Exchange Service.

#### D. Body

Enter the email body text you want to deliver with each scanned document. For example, "This email is from ABC Corporation".

#### ↓ Note

- 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 is no "resultURL" part.
- Metadata of the scanned file, except for "resultURL", can be used as the body text of email.

## E. Send to Me

Specify 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:

- The Project uses Active Directory Authentication or LDAP Authentication with [**Active Directory**] specified in the [**Server Type**] setting.
  - The email address of the user is registered with the User Profile in the Authentication Server.
- **[Off]**

The email address of the MFP user will not be added to the destination addresses.

 **Note**

- This feature can be enabled only when Active Directory or LDAP is used as the Project authentication method. If you are using a different authentication method, this feature will not be enabled.

## F. 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**

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.

## G. Option Settings

Select additional options.

- **[Show Cc]**  
Allow MFP users to enter addresses in the CC field.
- **[Show Bcc]**  
Allow MFP users to enter addresses in the BCC field.
- **[Show ReplyTo]**  
Allow MFP users to enter a Reply-to address.
- **[Enable Manual Address Entry]**  
Allow MFP users to manually enter email addresses.  
If not selected, [**Manual Entry**] on the Send to Exchange Service screen is not available.
- **[Enable Address Validation]**  
Verify whether the email address is well-formed when the address is entered by MFP users.

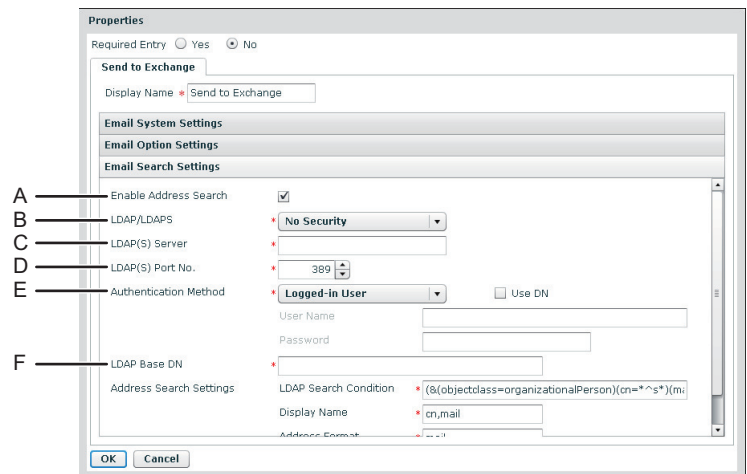
## Procedure

1. Click the [**Email Option Settings**] tab.
2. Specify the settings as necessary.
3. Proceed to P.11 "Step 4: Configuring the Email Search Settings".

## Step 4: Configuring the Email Search Settings

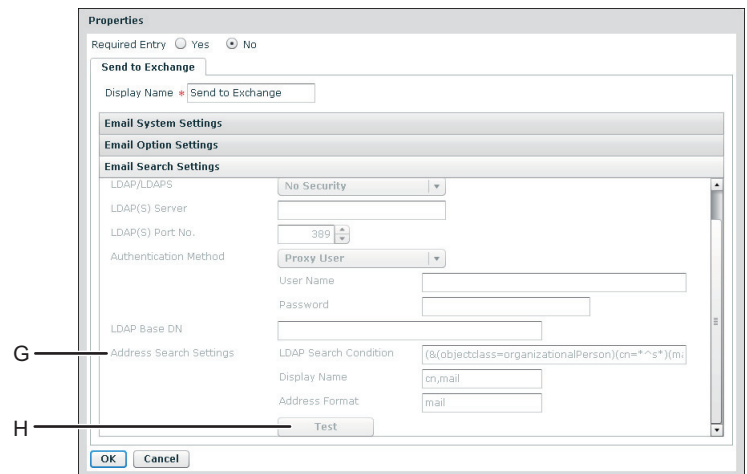
You can configure LDAP server settings to allow MFP users to search an LDAP address book.

### Properties Screen Email Search Settings Tab Overview



DGW103

Fig. 12: Properties Screen Email Search Settings Tab



DGW104

Fig. 13: Properties Screen Email Search Settings Tab

#### A. Enable Address Search

Select this option to enable MFP users to search for email addresses in the address book stored on an LDAP server.

#### B. LDAP/LDAPS

Select the security method to use when connecting to the LDAP server.

- [No Security]  
Use a standard LDAP connection (no encryption).
- [LDAPS(LDAP over SSL)]  
Use secure LDAP over an SSL connection.
- [LDAPS(StartTLS)]  
Use secure LDAP using TLS.

#### ★ Important

- For [LDAPS(LDAP over SSL)], the certificate you are using must be registered with the system beforehand. If 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 not an error will occur when trying to obtain the address book.

#### C. 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 use.

The default port number for non-secure LDAP is 389.

The default port number for LDAPS (LDAP over SSL) is 636.

#### E. Authentication Method

Select the type of account that is used to log in to the LDAP server. Select from the following:

- **[Proxy User]**

Use the proxy user's login information entered in **[User Name]** and **[Password]** for authentication.

- **[No Authentication]**

Authentication is not used.

- **[Logged-in User]**

Use DN

Specify whether or not to use the login user's Distinguished Name (DN) when the login user accesses the LDAP server.

- If this check box is selected:

For the address search via the GlobalScan NX AdminTool, the login user accesses the LDAP server using the user's login information entered in **[User Name]** and **[Password]**, in the same way as when **[Proxy User]** is selected.

For the address search via an MFP display panel, the login user accesses the LDAP server using the login user's DN obtained from the authentication result, and the password specified for a project login.

Logged-in User's DN for Each Authentication Method

Authentication Method	DN	DN Format Example
ActiveDirectory Authentication/ActiveDirectory User Verification	userPrincipalName	userid@ricoh.com
LDAP Authentication/LDAP User Verification	distinguishedName	cn=userid, cn=Users, dn=ricoh, dn=com

LDAP Server Configuration Required for LDAP Search

Authentication Method	Required Authorization
ActiveDirectory Authentication/LDAP Authentication	Permission of logged-in user access
ActiveDirectory User Verification/LDAP User Verification	Permission of an anonymous user access

- If this check box is not selected:

For the address search via the GlobalScan NX AdminTool, the login user accesses the LDAP server using the user's login information entered in **[User Name]** and **[Password]**, in the same way as when **[Proxy User]** is selected.

For the address search via an MFP display panel, the login user accesses the LDAP server using the user name and password specified for a project login.

#### F. LDAP Base DN

Enter the Base DN.

#### G. Address Search Settings

Configure searching criteria for the address book.

- **[LDAP Search Condition]**

Specify the LDAP search syntax. The default value is: (&(objectclass=organizationalPerson)(cn=^s\*)(mail=\*)).

- **[Display Name]**

Specify the LDAP attributes, separated by a "," mark, for the display name of each item in the address list.

The default attribute is "cn,mail".

The following is the example that LDAP attributes are separated by a "," mark: sn,givenName,mailaddress.

- **[Address Format]**

Specify the LDAP attribute for the email address of each item in the address list. The default value is "mail".

#### H. Test

Test the connection to the specified LDAP server.

## Procedure

1. If you enable [Enable Address Search], specify [LDAP/LDAPS], [LDAP(S) Server], [LDAP(S) Port No.], [Authentication Method], [User Name], [LDAP Base DN], [LDAP Search Condition], [Display Name], and [Address Format].
2. Specify [Password] as necessary.
3. Click [Test] to check the connection and the authentication to the LDAP server.
4. 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. They cannot however be individually set for each item.

## MFP Service Screen Overview

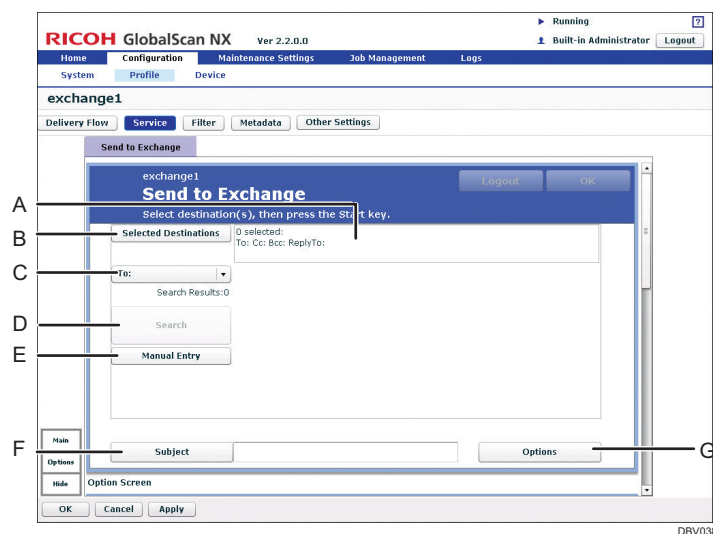


Fig. 14: MFP Service Screen

### A. Selected Folder(s)

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

[Display Name] folder

This setting cannot be specified as hidden.

### B. Selected Destinations

Displays a list of the email destinations currently selected. You can select addresses in this list to remove them. Press [Reset All] to clear all selected addresses.

### Note

- If the Send to Me feature is enabled, the email address of the logged-in user is displayed in [Selected Destinations] and the data is delivered to the logged-in user's email address.

### C. [To:]/[Cc:]/[Bcc:]/[ReplyTo:]

Select the destination type for email addresses. 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.

## D. Search

Search the Email Address List for the destination email addresses. Any names that match the specified search string can be searched.

### Examples

The followings are examples of using the wildcard character, "\*".

1. Searching for "\*les\*" matches:

- charles smith
- lester frank
- Lorraine Lester
- Steven Morales

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

2. Searching for "les\*" matches:

- lester frank
- Lester, lorraine

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

3. Searching 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.

## E. 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 Email Option Settings screen.
- If you entered a domain name in [**Default Domain for Manual Input**] in the 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).

## F. Subject

Enter the default Subject of the email. The text specified here will appear in the Subject field within the recipient's email inbox.

#### ↓ Note

- The maximum length is 128 characters.  
Metadata of the scanned file, except for "resultURL", can be used as the subject of e-mail.

## G. 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.

## MFP Service Screen (Option Screen) Overview

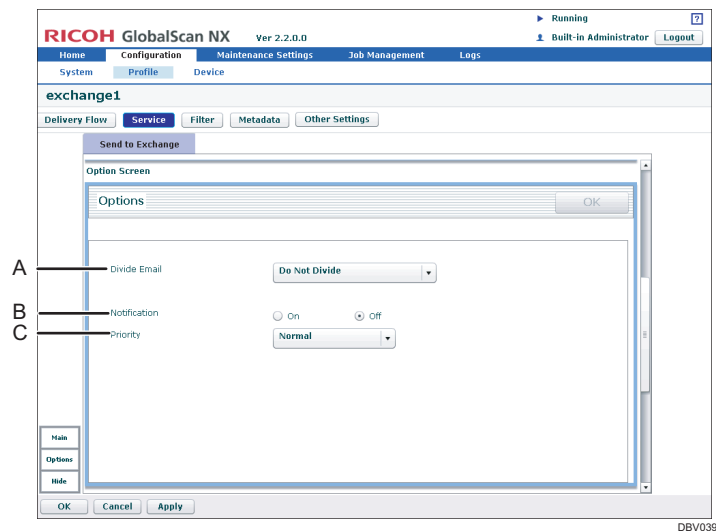


Fig. 15: MFP Service Screen (Option Screen)

### A. Divide Email

Select a method for dividing the email.

- **[Do Not Divide]**  
Send all scanned data in one email.
- **[Page Divide]**  
Send each page of the scanned data as multiple emails.

#### 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.

### B. Notification

Specify whether or not to use a delivery receipt notification that To/Cc/Bcc destinations have received the email. The notification is managed by the MS Exchange server.

- **[On]**  
A delivery receipt is sent to To/Cc/Bcc destinations when they have received the email.
- **[Off]**  
Disable receipt notification.

### C. Priority

Select the priority to assign to the email from the following:

- **[High]**
- **[Normal]**
- **[Low]**
- The default value is **[Normal]**.

## Procedure

1. Click **[Service]**.
2. Change the settings on the Service screen as necessary.
3. Click **[OK]**.