# **RICOH**



# **GlobalScan NX**

**Operating Instructions** 

User's Guide

## **Guides for This Solution**

The following guides are available for GlobalScan NX:

### GlobalScan NX User's Guide (this 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.

### 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 certificate installation procedures are also covered.

### 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 Administrator's 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.



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

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## **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.
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# 1. INTRODUCTION

Welcome to GlobalScan NX, a versatile document capture and distribution solution that turns your departmental MFP into a powerful network scanner. As a convenient electronic routing system, GlobalScan NX enables better day-to-day management of document workflow. Specifically, GlobalScan NX adds intuitive "Send-to" Services to the MFP, so that the device you are accustomed to using as a copier/printer, can also support scanning of paper documents. Using GlobalScan NX's intuitive graphical display, you can quickly and easily scan documents to valid email addresses, network shared folders, and/or FTP/WebDAV servers.

## How to Read This Guide

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

In order to familiarize yourself with the many capabilities of GlobalScan NX, we recommend that you first read this guide in its entirety. Note that some steps are divided into two sections, Overview and Instructions. We recommend that you first read an explanation of the function in the Overview section, and then continue with the Instructions section. However, if you are already familiar with GlobalScan NX's operational flow, proceed directly to the Instructions section.

### Symbols

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



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



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 displayed on the MFP display panel or keys on the MFP control panel.

k

# 2. ABOUT GLOBALSCAN NX

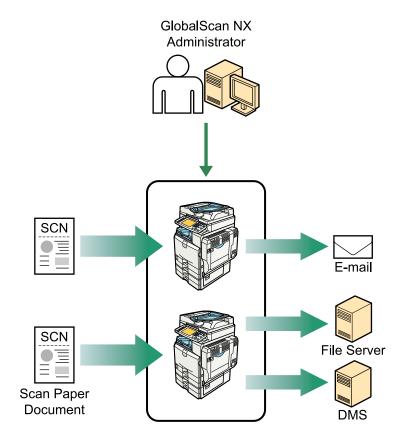
GlobalScan NX bridges the gap between hardcopy and electronic workflows by enabling a network-connected MFP to convert paper documents, such as contracts, invoices, and brochures, into easily shared digital images. Once in electronic form, the file can be delivered to customers, clients, and colleagues,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

# GlobalScan NX Feature 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.

Fig: GlobalScan NX Workflow



BLZ001S

Table: GlobalScan NX Feature Highlights

Feature	Description	
Send to Me	Automatically delivers scanned images to the login user's email address.	
Send to Home	Automatically delivers scanned images to the login user's Home folder.	
One-touch Scan	Allows you to execute a scan job at the touch of a button by predefining all required Parameters by the Administrator.	
Send-to Services	Supports Send to Email/Folder/FTP/Printer/WebDAV Services.	
Deliver to Multiple Destinations	Scans a document using one or more Services, for simultaneous delivery to the target destinations.	
Metadata	Adds document information to the scanned document.	

Feature	Description	
Filters	Supports special Filters, for example, the PDF Filter enables you to create a searchable, password-protected PDF file.	
Document Name	Identifies the job by name, i.e., an attachment filename.	
Secure Login	Supports Authentication, enabling only authorized users to access GlobalScan NX functions.	
Batch Scan	Scans a large document in batches, and send as one job.	
Scalable Solution	<ul> <li>Two scanning applications to choose from:</li> <li>Serverless Edition is designed for small- to large-size companies. The Administrator controls connected MFPs without the need for a dedicated server PC.</li> <li>Server Edition is designed for enterprise environments. The Administrator controls up to 750 MFPs (for the Enterprise Server</li> </ul>	
	Edition) or 32 MFPs (for the Business Server Edition) via a server PC.	
Scan Settings	Allows you to set Resolution, File Format, Density, and more.	
Job Log	Allows you to view job details for all Projects or a specific Project.	



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

# What Is 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. For example, using the Send to Email Service, the Sales Department can distribute proposals to prospective customers; using the Send to Folder Service, the Legal Department can archive briefs and depositions. Depending on the task, you press the associated Project button on the MFP display panel.

The Administrator also creates Groups, i.e., a collection of one or more Projects. For example, Projects can be grouped based on job type, department name, etc. 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. The Group names and Project button display names are determined by the Administrator, thus are fully customizable.

The Administrator can also apply an icon to the Project button, as well as the Application Bar. The Application Bar consists of the Screen Title, in this example, ABC Corporation, and user instructions directly below (Standard Operation Panel only). After you have selected a Project, the name of that Project will also appear in the Application Bar.

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

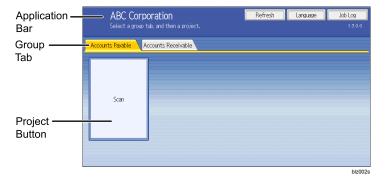
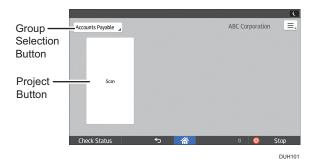


Fig.: Group/Project Screen (Smart Operation Panel)



2

## What Is a Service?

A Service refers to the "Send to" distribution method used during job processing. For example, if you wish to send scanned documents to one or more email addresses, simply select the Project button containing the [Send to Email] Service.

When you open the GlobalScan NX application at the MFP control panel, you have access to one or more of the Services, listed in the table.

Fig.: Service Menu (Standard Operation Panel)

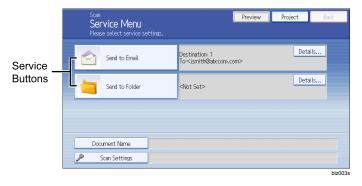


Fig.: Service menu (Smart Operation Panel)



• Services are customized by the Administrator, consequently some features may be preset (not visible on the display panel), while others may be restricted (not available).

### **Table: GlobalScan NX Services**

Service	Description	
Send to Email (SMTP)	Sends scanned images to one or more email addresses. The document is converted to the selected file format, for example, TIFF, JPEG, etc., and delivered to the selected destinations.	
	Send to Email supports the following features:	
	Search and select email addresses by accessing the company e- mail address book via LDAP (Lightweight Directory Access Protocol), eliminating the need to manually enter the addresses.	
	Search for recipient addresses by keyword.	
	Support manual entry of email addresses.	
	<ul> <li>Deliver scanned images automatically to the login user's email address using the Send to Me feature.</li> </ul>	
	Set the Document Name of the attachment file.	
	Enter To, Cc, Bcc, ReplyTo addresses.	
	Set the email Priority Level.	
	Specify whether or not to enable Error Notification.	
	Specify whether or not to enable divided transmission.	
Send to Folder	Sends scanned images directly to a network folder/subfolder.	
	Send to Folder supports the following features:	
	Perform a folder search based on a search string.	
	Set the Document Name of the file.	
	Deliver scanned images automatically to the login user's Home directory.	
	View and select folders/subfolders.	
	Easily navigate through folder hierarchy.	
Send to FTP	Sends scanned images to the specified folders on an FTP server.	
	Send to FTP supports the following features:	
	Perform a folder search based on a search string.	
	Set the Document Name of the file.	
	SSL (Secure Sockets Layer) file transfer.	
	View and select folders/subfolders.	
	Easily navigate through folder hierarchy.	

Service	Description	
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.	
	() Limitation	
	A printer driver must be installed in the computer/server that the Server Edition is installed.	
Send to WebDAV	Sends scanned images to the specified folders on a WebDAV server.  Send to WebDAV supports the following features:	
	Perform a folder search based on a search string.	
	Set the Document Name of the file.	
	<ul> <li>SSL (Secure Sockets Layer) file transfer.</li> <li>View and select folders/subfolders.</li> <li>Easily navigate through folder hierarchy.</li> </ul>	
	Supports Property Binding which copies Metadata to the WebDAV Server application.	

## What Is One-touch Scan?

Optimized for ease-of-use, GlobalScan NX supports One-touch Scan, a feature that allows you to quickly scan a document, using one or more of the Services described in the previous section. The Administrator configures the Project with pre-defined Distribution Parameters, such as the destination email addresses/folders, Resolution, Document Name, File Format, etc.

Since the Distribution Parameters cannot be changed at the MFP display panel, One-touch Scan is best suited to applications that have fixed settings. For instance, if you archive invoices, medical records, or tax forms, a Project can be created to automatically deliver the electronic files to a target email address or folder.

After logging in to the Project (if required), the Service Menu/Details screen or Service Menu/Summary screen displays by default, depending on whether the Project contains one Service or multiple Services, respectively. Note that the Service button, [Document Name], and [Scan Settings] are disabled (grayed out), because the Administrator identified the Project as a One-touch Scan.



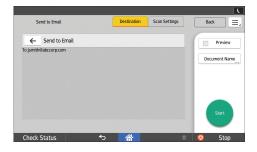
When the Smart Operation Panel is used, the Service button is not displayed, and the setting items
of [Scan Settings] are grayed out so you cannot change them.

To begin scanning, place the document on the Automatic Document Feeder (ADF) or exposure glass, and then press the [Start] key. The document is scanned and delivered to the preset destinations, for example, email addresses, folders, etc.

Fig.: Service Menu/Summary Screen for One-touch Scan (Standard Operation Panel)



Fig.: Service Menu/Summary Screen for One-touch Scan (Smart Operation Panel)





• When the Standard Operation Panel is used, the [Start] key must be green in order to scan, so be sure you have placed a document on the ADF or exposure glass. If a document is not set, the [Start] key remains red.

# 3. USING GLOBALSCAN NX (When Using the Standard Operation Panel)

The Administrator configures GlobalScan NX to address specific document processing needs. Therefore, the steps you take to complete tasks may vary. However, GlobalScan NX's intuitive user interface helps guide you through the scanning/distribution process.

# **Step-by-Step Summary**

Table "Step-by-Step Summary" provides a quick tutorial on how to perform a scan operation. Please review this summary before proceeding. Again, the exact steps taken to perform a scan operation are determined by Administrator settings.

If you are using GlobalScan NX on an MFP that has a 4-line display panel, see page 86 "Using GlobalScan NX on a 4-line Display Panel MFP".

Table: Step-by-Step Summary

Step	Action	Description
1	Place Document	Place the document on the MFP's Automatic Document Feeder (ADF) or exposure glass.
2	Open Group/Project Screen/ Select a Project	To open the Project screen, press the [Scanner] key (or other allocated key). Next, select a Project button.
3	Log In	If required, log in to the Project with your User Name, Password, etc.
4	Select/Enter Metadata	If applicable, select/enter Metadata (document information) for the scanned image.
5	Select Service and Set Distribution Parameters	Select the Service, for example, Send to Email, and then set the necessary Distribution Parameters, i.e., enter the email addresses and/or select the folder destinations.
6	Set Other Scan Parameters	If necessary, perform one or more of the following procedures:  • Enter a Document Name to use as the filename.
		Specify Scan Settings, such as Resolution, File Format, Density, and Scan Size. Also, if applicable, set the parameters of the Filters. For example, create a searchable, password-protect PDF file using the PDF Filter.

Step	Action	Description
7	Start Scan	To initiate scanning, press the [Start] key on the MFP control panel.
8	Exit Project	When scanning is complete, press [Project] to exit the Project.
9	Review Job Log	Press [Job Log] to view details regarding scan jobs.

### How to Use the Letter Keys on the Display Panel

When specifying a User Name, Password, Document Name, Subject, etc., you enter the information with the letter keys on the display panel. Navigate this screen as follows:

Fig.: Letter Keys on the Display Panel

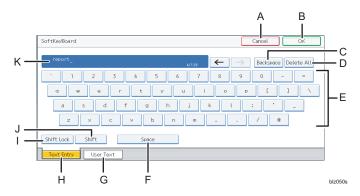


Table: Letter Keys on the Display Panel

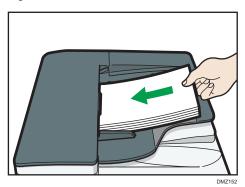
	ltem	Description
А	[Cancel]	Exits the Letter Keys Screen, without applying entered text.
В	[OK]	Applies displayed text to selected Service, e.g., a subject line to email.
С	[Backspace]	Deletes the character that is directly in front of the cursor.
D	[Delete All]	Deletes all entered character.
Е	Keyboard	Enables entry of alphanumeric characters and special symbols.
F	[Space]	Inserts a blank space.

	ltem	Description
G	[User Text]	Enables selection of pre-defined text, e.g., [Urgent], [High], etc., to apply to an email subject or document name. For details, refer to your MFP's Operating Instructions.
Н	[Text Entry]	The default method of text entry.
I	[Shift Lock]	Enables selection of multiple upper-case characters.
J	[Shift]	Enables selection of a single upper-case character.
K	Text Field	Displays entered text, along with character counter. The maximum length of text fields - User Name, Password, Subject, Document Name, Search string, etc is 128 characters, represented by a 0/128 gauge that tracks remaining space as text is entered.

# **Step 1 : Place Document**

1. Place the document on the Automatic Document Feeder (ADF) or exposure glass.

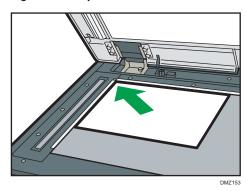
Fig.: MFP - Automatic Document Feeder





 When using the ADF, the original orientation should match the illustration displayed on the MFP's ADF.

Fig.: MFP - Exposure Glass



3

# Step 2 : Open Group/Project Screen/Select a Project

### Overview

A Group refers to a collection of one or more Projects. The Administrator designs Groups and Projects based on application needs. In the figure "Group/Project Screen", there are two Groups, one called Accounts Payable, containing the Send to Email Service, and a second Group called Accounts Receivable, containing the Send to Folder Service. As such, the Group/Project screen becomes an efficient way to create an intuitive workflow.

Fig.: Group/Project Screen





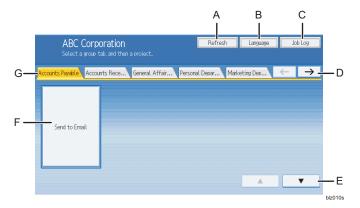
- The Group tab and Project button display names are customized by the Administrator, thus the Group/Project screen appearance varies.
- The Administrator may have incorporated an icon, which displays on the Project button itself, and/or to the left of the Screen Title.

Fig.: Group/Project Screen with Icons



Please take a moment to review the sample Group/Project screen and associated features listed in the table.

Fig.: Group/Project Screen



### Table: Group/Project Screen

	ltem	Description
Α	[Refresh]* 1	Updates the Project list, i.e., display the currently available Projects.
В	[Switch Language]	Displays a screen with available language selections (English, French, Dutch, German, Spanish, and Italian).
С	[Job Log]	Displays details regarding scan jobs, for all Projects or select Projects.
D	[←][→]	Press to scroll right/left through additional Group tabs, if available.
Е	[▲] [▼]	Press to view the next/previous page of Group, with associated Projects.
F	Project button	Press to select the document distribution task, i.e., Services.
G	Group tab	Displays the Projects in the Group.

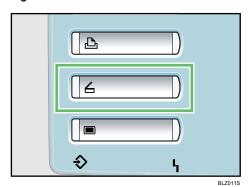
<sup>\*1</sup> Server Edition only.

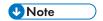
### Instructions

To open the Group/Project screen, and then select a Project, proceed as follows:

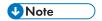
1. Press the [Scanner] key on the MFP control panel.

Fig.: MFP - Control Panel





- Depending on the MFP model, you may need to press the [Scanner] key twice.
- A key other than the [Scanner] key may have been assigned to GlobalScan NX operation. If necessary, check with the Administrator.
- 2. If necessary, press the Group tab to display the Projects registered with the Group.
- 3. Select the desired Project button.



- If the Project you have selected is currently unavailable, for example, the Administrator has not finished configuring the settings, an error message displays on the MFP display panel.
- 4. If login (Authentication) is required, proceed to page 28 "Step 3: Log in". If login is not required, go to page 31 "Step 4: Select/Enter Metadata" or page 33 "Step 5: Select Service and Set Distribution Parameters".

Step 3 : Log in

### Overview

If the Project you selected in the previous step requires Authentication, the Login screen appears. If not, go to page 31 "Step 4: Select/Enter Metadata" or page 33 "Step 5: Select Service and Set Distribution Parameters".

The procedure for logging in to a Project differs depending on the settings made by the administrator and whether authentication is required to operate the MFP. The following procedure explains the login process when authentication is required.

1. On the MFP, a message appears, prompting you to log in:



Enter your authentication credentials (user name and password). If card authentication is enforced, log in using a card.

 When you access a GlobalScan NX Project and a separate password is required to log in to the Project, the GlobalScan NX authentication screen appears. The user name you used to log in to the MFP is already entered as the user name.



- 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.
  - You are not registered as a shared user on both the GlobalScan NX and Card Authentication Package authentication servers.

If authentication is not required for the MFP, but it is required for the Project, the GlobalScan NX authentication screen appears when you access the Project. Depending on the authentication method set by the administrator, the login screen varies, as shown in the following screen shots.

3

**U** Note

• If necessary, press [♠] and [♥] (right side of the Login screen) to view additional login fields.

### Reference

• For details about the device settings, see the documentation for the device.

Fig.: Active Directory Authentication Login Screen

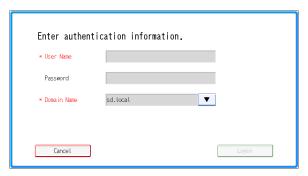
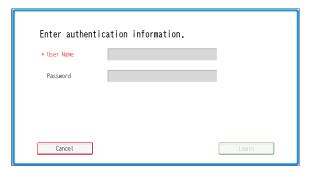


Fig.: LDAP Authentication Login Screen



If multiple authentication methods are assigned to a Project, the necessary fields for each method will appear. Items marked with an asterisk (\*) and displayed in red are required to log in.

### Instructions

To log in to a Project, proceed as follows:

- 1. Press the Project button.
- 2. Press the [User Name] box.

The letter keys screen appears.



- See page 22 "How to Use the Letter Keys on the Display Panel".
- 3. Enter your User Name.

- 4. Press [OK].
- 5. If necessary, press the [Password] box.

The letter keys screen appears.

- 6. Enter your Password.
- 7. Press [OK].
- 8. If additional login information is required, such as a domain name, press [▼] next to each domain name, and then select a domain name.
- 9. Press [Login].



- If login is successful, the Project becomes available. If login is unsuccessful, a message displays. Press [OK] and re-enter a valid User Name and Password. If necessary, check with the Administrator.
- If a certain time period has elapsed without any operation after login, you are automatically logged out of the Project. This time period, which is preset by your Administrator, is within the range of 60 to 600 seconds. The default setting is 60 seconds.
- Depending on Administrator settings, the Authentication information (User Name, Password, etc.) you enter may also be used when performing a scan operation. For example, when using the Send to Folder Service, your entered credentials enable access to the destination folders. Likewise, when using the Send to Email Service, your same credentials enable connection to the mail server.
- If One-touch Scan is enabled, the Distribution Parameters are pre-defined, thus the settings on the Service Menu are disabled (grayed out). To initiate the scan, place the document on the ADF or exposure glass, and then press the [Start] key.

### Reference

• See page 18 "What Is One-touch Scan?".

Proceed to page 31 "Step 4: Select/Enter Metadata".

# Step 4: Select/Enter Metadata

### Overview

If Metadata, also called document information, is requested or required for a Project, the Metadata screen displays. Metadata is designed by the Administrator to capture properties that relate to the scanned document, perhaps a company name, department number, billing code, etc. If the Project does not require document information, the Metadata screen does not display. In that case, proceed to page 33 "Step 5: Select Service and Set Distribution Parameters".

The Administrator combines input components, for example, text boxes, drop-down lists, etc., that allow you to easily enter/select the information from the MFP display panel. Since the Metadata screen is customized by the Administrator, fields and setting selections can differ from those shown. Also note that the settings can be enabled or disabled (grayed out) by the Administrator. If disabled, the settings cannot be accessed/modified.

Please take a moment to review the sample Metadata screen and associated features listed in the table.

Fig.: Metadata Screen

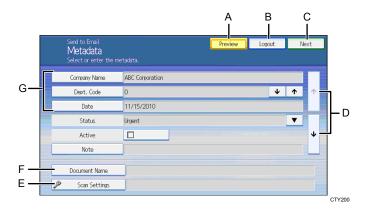


Table: Metadata Screen

	ltem	Description
Α	[Preview]	If the Administrator has enabled [Allow scan operation from Metadata screen] this function, you can start a scanning by pressing the [Start] key while the Metadata screen is displayed. If you press the [Preview] button before scanning, a preview of the scanned image appears.
		<ul> <li>• The [Preview] button may not be usable with certain MFPs.</li> </ul>

	ltem	Description
В	[Logout]	Returns to the Group/Project Screen.
С	[Next]	[Next] is enabled after all required Metadata fields are complete.  After pressing [Next], the Service Menu screen displays.
D	[↑] [↓]	If Metadata fields exceed screen capacity, use these buttons to scroll up and down.
Е	[Scan Settings]	See page 52 "Step 6 : Set Other Scan Parameters".
F	[Document Name]	See page 52 "Step 6 : Set Other Scan Parameters".
G	Input Fields	Specify the necessary information for each displayed input field.  In the figure "Metadata Screen", pressing [Company Name] opens the letter keys screen, allowing you to enter/edit the field. Any field indicated by an asterisk (*) is required, thus must be entered.  • Note  • The Administrator can set default values, which you can view, edit, or delete prior to scanning.  • Input fields can be read-only, which means they cannot be edited.
		The Administrator can restrict the format, and require numeric values and dates within a specified range. Therefore, if you enter information in an invalid format, an error displays, allowing you to edit the field.

### Instructions

To select/enter Metadata, proceed as follows:

- 1. Select/enter the Metadata to be added to the scanned document.
- 2. When finished, press [Next].

Proceed to page 33 "Step 5: Select Service and Set Distribution Parameters".

# Step 5 : Select Service and Set Distribution Parameters

This section explains how to select Send to Email and Send to Folder/FTP/WebDAV Services, as well as how to establish the Distribution Parameters required for job processing. Before proceeding, please review the Service Menu Layout.

### Service Menu Layout

When multiple Services exist within a Project, a Service Menu displays, allowing you to choose a "Send-to" Service. The available Services, display sequence of Services, and button labels are configured by the Administrator.

Please take a moment to review the Service Menu Screen and associated features listed in the table.

Fig.: Service Menu/Summary Screen



Table: Service Menu/Summary Screen

	ltem	Description
A	Service buttons	Opens the associated Services Destination Selection screen, enabling you to enter/select target destinations.
		You can easily access each filter's setting screen from the Service Menu screen.
		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.
		<b>↓</b> Note
		<ul> <li>Each filter's properties screen can be accessed via either this way or the conventional way depending on the settings specified by the Administrator.</li> </ul>
		<ul> <li>When a filter's properties screen opens in this way, then the conventional way is not available.</li> </ul>
		<ul> <li>For PDF Converter filter, the current settings are displayed in the field right next to the button. For other filters, the current settings will not be displayed.</li> </ul>
В	[Document Name]*1	Opens the letter keys screen for file name entry. If sending an email, for example, the attachment can be identified by the entered name.  Reference
		See page 52 "Step 6 : Set Other Scan Parameters".
С	[Scan Settings]*1	Provides access to Scan Settings, Scan Size and, if applicable, Filter settings. The adjacent field displays current Scan Settings as space allows.
		■ Reference
		See page 52 "Step 6 : Set Other Scan Parameters".
D	[Preview]	Displays the scanned image so that you can verify its content before you send it.
		! Limitation
		If this function is not available, [Preview] will not be displayed on the MFP display panel.
		<b>☐</b> Reference
		See page 80 "Preview".

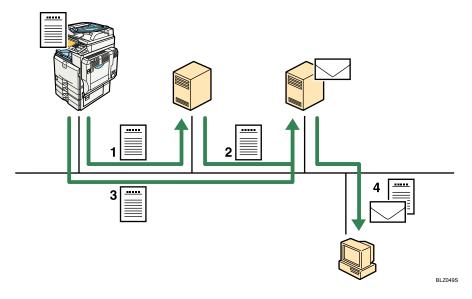
	ltem	Description
Е	[Back]	This button is only enabled if Metadata exists. In that case, press this button to open the Metadata screen. If this button is grayed out, there is no Metadata screen, thus cannot be selected.  Reference
		See page 31 "Step 4 : Select/Enter Metadata".
F	[Details]	Displays the list of currently selected addresses. Press [Summary] to return to the Service Menu/Summary screen.
G	[↑] [↓]	Allows you to scroll through available Services.

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

# Send to Email (SMTP) Overview

The Send to Email function allows you to scan documents to one or more email addresses, as an attachment. For example, if the Human Resources Department plans to distribute a memo to all employees regarding a new vacation policy, the most timely and cost-effective way to handle the task is through Send to Email. Each recipient receives the memo in their email inbox, thus can view, print, forward, and/or archive the message.

Fig.: Send to Email Workflow



1. With GlobalScan NX Server Edition, documents are sent from the MFP to GlobalScan NX Server.

- With GlobalScan NX Server Edition, documents are sent from GlobalScan NX Server to the mail server.
- 3. With GlobalScan NX Serverless Edition, documents are sent from the MFP to the mail server.
- 4. The mail server distributes the received documents to the specified email addresses.



- The Send to Email screen appearance depends on Project settings, which are configured by the Administrator.
- The actual appearance of [Send to Email] may be different than your display, i.e., the
  Administrator has the ability to change the displayed name, as well as the order in which the
  buttons appear.
- If the Send to Email Service has default destination addresses that display in the To, Cc, Bcc, ReplyTo fields, they have been preset by the Administrator and, if not set to read-only, can be modified or removed.
- Depending on settings made by the Administrator, a URL (link) to the location where the document is saved may appear in the body of the received email message.
- The Administrator may also create default body text that appears in the received email message.
- When Send to Me is enabled, if your email address can be obtained from your login information
  for the Project, that address displays in the [From] field within the received email message header.
  Otherwise, the default email address that has been set by the Administrator displays in the [From]
  field.
- When Error Notification is enabled, if an error occurs, for example, an invalid address is entered, an email indicating the error is sent to the login user or the address set by the Administrator, whichever is available.

Please take a moment to review the Send to Email - Main screen and associated features listed in the table.

Fig.: Send to Email Main Screen

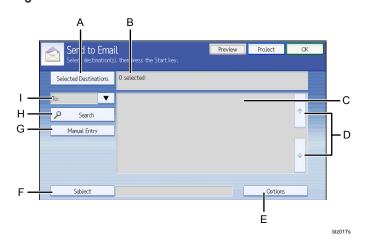


Table: Send to Email - Main Screen

	ltem	Description
А	[Selected Destinations]	Displays a list of the email destinations currently selected. You can press destinations in this list to remove them. Press [Reset All] to clear all selected addresses.  •• Note
		<ul> <li>If the Send to Me feature is enabled by the Administrator, the [Selected Destinations] list will display "Send to Me". This means that the scanned document will be delivered to your email address, as well as any other selected destinations.</li> </ul>
В	Number of Selected Addresses/Email List	Displays the number of selected addresses, along with addresses that have been entered/selected.
С	Email Address List	Displays search results.  Press [Search] to search for email addresses.  • Note  • If [Search] is grayed out, the Administrator has disabled the Search function.
D	[↑] [↓]	Displays additional email addresses in the Email Address List.
Е	[Options]	Displays the Options screen for the Service. Depending on settings made by the Administrator, this button may not be displayed.    Reference
		See Table "Send to Email - Options Screen".
F	[Subject]	Opens the letter keys screen for entry of an email subject text. The text displays in the recipient's email subject field. This field may contain pre-defined text.
		Depending on settings made by the Administrator, this field may not be displayed.

	ltem	Description
G	[Manual Entry]	Press this button to manually enter an email address with the letter keys on the display panel.  • Note
		<ul> <li>If the Administrator has created a default domain, you only need to enter the recipient's name, for example, jsmith. The domain, for example, globalscannx.com, is automatically appended to form jsmith@globalscannx.com. For details, check with the Administrator.</li> <li>If [Manual Entry] is grayed out, the Administrator has disabled</li> </ul>
		the function.
Н	[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, "*".
		1. A search for "*les*" matches:
		• char <b>les</b> smith
		• lester frank
		• Lorraine <b>Les</b> ter
		Steven Morales
		The search string ("les") can appear anywhere in the name.
		2. A search for "les*" matches:
		• lester frank
		• Lester, lorraine
		The search string ("les") may only appear at the beginning of the name.
		3. A search for "*les" matches:
		• Smith, char <b>les</b>
		• steven mora <b>les</b>
		The search string ("les") may only appear at the end of the name.
		Note
		If [Search] is grayed out, the Administrator has disabled the function.

	ltem	Description
I	[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].
		<ul> <li>Note</li> <li>Depending on settings made by the Administrator, some or all of these options may not be displayed.</li> </ul>

Fig.: Send to Email - Options Screen

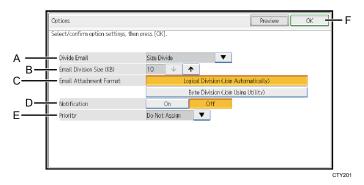


Table: Send to Email - Option Screen

	ltem	Description
А	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.
		Specify whether to divide the scanned data into complete files or into multiple incomplete parts that must be restored by the recipient's email application in order to be opened.
		<b>◆</b> Note
		<ul> <li>If a function is grayed out, the Administrator has disabled the feature.</li> </ul>

	ltem	Description
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	Email Attachment Format	<ul> <li>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 GlobalScan NX can acquire your email address, a failure notification will be sent to you. In that case, we recommend that you scan the data again with, for example, a lower resolution setting.</li> <li>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 email attachments.</li> <li>Limitation</li> </ul>
		The High Compression PDF and Searchable PDF functions are not available with Send to Email on the Serverless Edition.
D	Notification	Select whether or not to send an error notification email when a transmission error occurs. This is useful for important emails that require error tracking.  • [On]  Send an error notification email when a transmission error occurs.  • [Off]  Do not send an error notification email when a transmission error occurs.  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 obtained, GlobalScan NX sends the notification to the address specified by the administrator.

	ltem	Description
Е	Priority	Select the priority to assign to the email from the following:  • Do Not Assign  • 1 (High)  • 2  • 3 (Standard)  • 4  • 5 (Low)
F	[OK]	Returns to the Select Distribution Parameters screen.

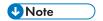
# Send to Email (SMTP) Instructions

To use the Send to Email function, proceed as follows:

### Selecting Destination Email Addresses



- If one or more destinations are preset by the Administrator, you do not need to specify the addresses. The addresses automatically display in the [Selected Destinations] field, along with the total number selected.
- 1. If necessary, press [Send to Email] on the Service Menu screen.



- If the Project contains only the Send to Email Service, the Send to Email screen automatically displays, thus you do not need to select the Service.
- Select the destination email addresses by either searching for destination email addresses or manually entering destination email addresses.

### Searching for Destination Email Addresses

1. Press [Search].

The letter keys screen displays.



• If [Search] is grayed out, the Administrator has disabled the function. In that case, manually enter the destination email address, as outlined below.



- See page 22 "How to Use the Letter Keys on the Display Panel".
- 2. Specify the search conditions.

Enter a character of the recipient's email address, for example, "s" for "Smith".



 The details of the search process can vary depending on Administrator settings. If necessary, check with the Administrator for any special search requirements.



- To search for all email addresses, do not enter anything on the letter keys, simply press [OK]. This action will return all available addresses.
- 3. Press [OK].
- 4. Select [To], [Cc], [Bcc] or [ReplyTo] from the drop-down list.
- 5. Select the destination address.



- Multiple addresses can be selected at one time.
- 6. Repeat 1-5 to add additional addresses.
- 7. When finished, go to 3.

#### Manually Entering Destination Email Addresses

- 1. Select [To], [Cc], [Bcc] or [ReplyTo] from the drop-down list.
- 2. Press [Manual Entry].

The letter keys screen displays.



- If [Manual Entry] is grayed out, the Administrator has disabled the function. In that case, search the Email Address List for the destination email addresses.
- 3. Enter the email address.

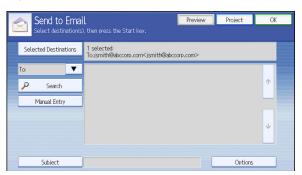


 If the Administrator has created a default domain, you only need to enter the recipient's name, for example, "jsmith". The domain, for example, "globalscannx.com", is automatically appended, forming "jsmith@globalscannx.com". For details, check with the Administrator.

### 4. Press [OK].

The letter keys screen closes and the email address you have entered displays in the Selected Destinations List.

Fig.: Email Destination Selected



- 5. Repeat 1-4 to add another address, if necessary.
- 6. When finished, go to 3.
- 3. To enter an email subject, press [Subject]. If not, go to 5.

The letter keys screen displays.



- See page 22 "How to Use the Letter Keys on the Display Panel".
- 4. Enter the subject text for the email and press [OK].

The text displays in the recipient's email Subject field, along with the attached file. Note that this field may contain pre-defined text.

Depending on settings made by the Administrator, this field may not be displayed.



- The maximum subject length is 128 characters.
- 5. For additional email settings, press [Options]. If not, go to 7.

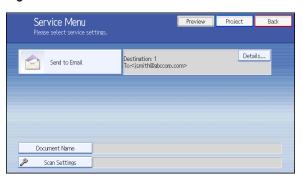
You can configure additional settings through the Options screen, for example, Error Notification, Priority Level, etc., provided that the Administrator has enabled the functions.



- See Table "Send to Email Main Screen".
- See Table "Send to Email Options Screen".
- 6. Press [OK] to close the Options screen.

### 7. Press [OK] to open the Service Menu screen.

Fig.: Service Menu Screen



If you wish to also scan the document to a target folder, for example, a Windows shared folder, FTP server, or WebDAV server, proceed to page 153 "About Send to Folder/FTP/WebDAV". If not, go to page 52 "Step 6: Set Other Scan Parameters".

### **Deleting Selected Email Addresses**

There are two ways to delete the selected email addresses from the Email Address List and/or the Selected Destinations List.

### **Email Address List**

Press the target address button in the Email Address List.
 Highlight disappears, canceling the selection.

### **Selected Destination List**

- 1. Press [Selected Destinations].
  - The selected addresses are displayed.
- 2. Press the target address on the display panel.

Highlight disappears, canceling the selection.



• To cancel all selected addresses, press [Reset All].

# Send to Folder/FTP/WebDAV Overview

GlobalScan NX supports three ways to send scanned documents to a folder:

· Send to Folder

The Send to Folder Service allows you to scan documents to one or more network shared folders. Send to Folder improves recordkeeping processes by enabling users to quickly capture and store invoices, medical records, order forms, etc. This feature also supports Send to Home, whereby the scanned document is automatically sent to the login user's Home directory.

This feature is also useful for sharing large files, for example, manuscripts, photographs, PowerPoint presentations, etc., that may not be suitable for email. Any network user with access rights can open the files contained within the folders.

#### Send to FTP

The Send to FTP (File Transport Protocol) Service allows you to scan documents to a specified FTP site. This is helpful to users who wish to share access to files, for example, documents that require on-demand, remote access, such as brochures, presentations, manuals, etc.

This feature is also useful for file sharing in mixed operating system environments, that is, when documents originate on, for example, Windows, UNIX, and Linux, etc. computers.

#### Send to WebDAV

The Send to WebDAV Service allows you to collaboratively edit and manage files on remote servers, when used in combination with a third-party DMS (Document Management System) that supports WebDAV (Web-based Distributed Authoring and Versioning).

Once stored on the file server, authorized users can collaborate on, for example, proposals, research reports, product designs, etc., by checking documents in/out, incorporating changes, and then sharing the versioned files with clients, colleagues, and others.

## Reference

For further details, see page 153 "About Send to Folder/FTP/WebDAV".

# 

As a user, the transport method, i.e., Folder (network shared), FTP, or WebDAV, may not be
apparent, unless the Administrator has used a display name that identified the Service, like "Send
to Folder", "Send to FTP", or "Send to WebDAV". Instead, the Service may be simply labeled
"Shared Folder". What's important to remember, is that the steps you take to scan the document are
virtually identical, regardless of the target destination or transport method.

Please take a moment to review the sample Send to Folder main screen and associated settings listed in the table.

Fig.: Send to Folder - Main Screen

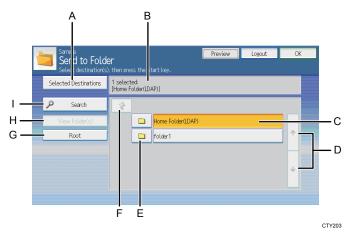


Table: Send to Folder - Main Screen

	ltem	Description
A	[Selected Destinations]	Displays a list of the destination folders currently selected. You can press folders in this list to remove them. Press [Reset All] to clear all selected destinations.
		When the Send to Home Folder feature is enabled by the Administrator, Folder List will display the [Home Folder] button. By selecting [Home Folder] as a destination, the scanned document will be delivered to your Home folder, as well as any other selected destinations. As with other folders, you can move to a subfolder or deselect Home Folder from MFP. Note that this is supported by the Send to Folder (network shared folder) Service only.
		If Home Folder cannot be obtained, documents cannot be delivered to Home Folder even if Send to Home Folder is selected. In this case, the delivery process (job) is successful but it is recorded in the system log as a failure. Please contact your administrator if documents are not delivered to your Home Folder.
В	Number of Selected Folders	Displays the number of selected folders.
С	Folder List	A list of the folders that can be specified as a destination displays here. The initial content of the list is preset by the Administrator.

	ltem	Description
D	[↑] [↓]	Press to view additional folders in the Folder List.
Е		Press to view subfolders of the selected folder. For root folders for which display of the subfolders is not allowed, this button is grayed out and cannot be pressed. Whether the folder is allowed to display the subfolders is specified by the Administrator.
F	*	Press to display the folders on upper location. This button is available when subfolders are displayed.
G	[Root]	Returns to the screen displaying the root folders. This button is available when subfolders are displayed.
Н	[View Folder(s)]	Returns to folder view after performing a search.
I	[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.

# Send to Folder/FTP/WebDAV Instructions

To use the Send to Folder/FTP/WebDAV Services, proceed as follows:

## **Selecting Destination Folders**



- If the destination folder is preset, you do not have to specify the folder.
- 1. If necessary, press [Send to Folder] on the Service Menu screen.



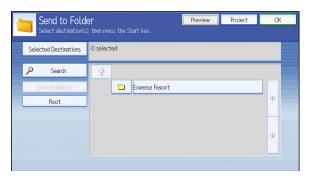
• The Service display name, for example, [Send to Folder], is set by the Administrator, thus can vary.

Fig.: Service Menu Screen



The Destination Selection screen, with Folder List displays.

Fig.: Folder List



2. Select the destination folders by either Selecting Destination Folders from List or Searching For Destination Folders.

## **Selecting Destination Folders from List**

1. Press the destination folder.

Multiple folders can be selected at one time. The selected folders are highlighted.

Fig.: Folder List





• The is used to move down one level. The is used to move up one level. To quickly return to the root folder, press [Root].

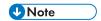
### 2. Press [OK].

The Service Menu screen opens. Proceed to page 52 "Step 6: Set Other Scan Parameters".

### **Searching for Destination Folders**

1. Press [Search].

The letter keys screen displays.



- A search is performed on all folders currently displayed on the display panel.
- If [Search] is grayed out, the Administrator has disabled the function.

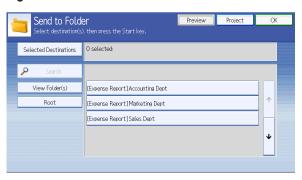
# ■ Reference

• See page 22 "How to Use the Letter Keys on the Display Panel".

### 2. Enter the folder name, and then press [OK].

The search is performed within the current folder; the targets are its subfolders. The folders that match the given search condition are displayed in the list.

#### Fig.: Folder Searched List

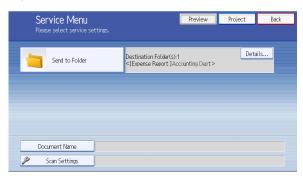


# 

- To search for all folders/subfolders, do not enter anything with the letter keys, simply
  press [OK]. This action will return all available destinations.
- 3. Select the destination folders from the list.
- 4. Repeat 1-3 to select additional destinations.
- 5. Press [OK].

The Service Menu screen opens.

Fig.: Service Menu Screen



Proceed to page 52 "Step 6: Set Other Scan Parameters".

### **Deleting Selected Folder Destinations**

There are two ways to delete the selected folder destinations, from the Folder List and/or the Selected Destinations List.

#### **Folder List**

Press the target folder button in the Folder List.
 Highlight disappears, canceling the selection.

### **Selected Destination List**

- Press [Selected Destinations].
  - The selected folders are displayed.
- Press the target folder on the screen.Highlight disappears, canceling the selection.



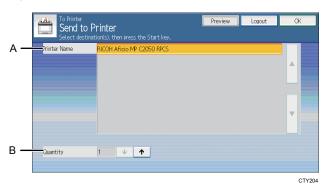
• To cancel all selected folders, press [Reset All] (on this screen).

# Send to Printer (Server Edition Only) Overview

The Send to Printer Service enables you to print data using the printers installed on the server.

JPEG (file extension ipeg, ipg, or ipe) and TIFF (file extension tif or tiff) files can be printed. Files are printed according to the default driver settings of each selected printer.

Fig.: Send to Printer Screen



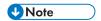
**Table: Send to Printer Screen** 

	ltem	Description
Α	[Printer Name]	Displays the names of the printers installed on the server.
В	[Quantity]	Specify the number of copies to print.

# Send to Printer (Server Edition Only) Instructions

Use the following procedure to use the Send to Printer Service:

1. Press [Send to Printer] on the Service Menu screen.



- The Service display name, for example [Send to Printer], is set by the Administrator and might be different on your MFP.
- 2. In the [Printer Name] list, select the names of the printers to use for printing.

You can select up to 30 printers at one time. The printers you select will appear highlighted.

3. Specify the number of copies to print.

You can print up to 999 copies at one time.

4. Press [OK].

The Service Menu screen opens.

# **Step 6: Set Other Scan Parameters**

This section explains how to set the following parameters:

- Document Name
- Scan Settings
- Scan Size
- Filters



Depending on Administrator settings, these parameters may or may not be required.

#### **Document Name Overview**

[Document Name] allows you to specify a file name for the scanned image, enabling the recipient to determine the content of the email attachment, or retrieve a file from a shared folder. The Job Log also displays the Document Name, enabling you to determine the job status.

The Administrator can pre-define the Document Name which can be edited, unless the Administrator has set the property as read-only, in which case the field is grayed out.



- Depending on the parameters applied by the Administrator, scan date information is added after Document Name. The format is as follows: DocumentName\_yyyymmddhhmmss.
- If a Document Name is not specified, regardless of the Administrator's settings, the scan date is
  applied as the name. The format is as follows: yyyymmddhhmmss.
- Depending on the Administrator's settings, the entered Document Name may be ignored because
  the default Document Name that Administrator predefined overrides one entered at the MFP
  display panel.

### **Document Name Instructions**

To add/edit a Document Name, proceed as follows:

1. Press [Document Name].

The letter keys screen displays.



• [Document Name] is accessed from the Metadata or Service Menu screen.

# Reference

• See page 22 "How to Use the Letter Keys on the Display Panel".

2. Enter the name, for example, "meeting".

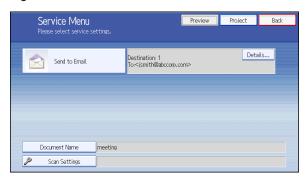


• The maximum Document Name length is 128 characters.

### 3. Press [OK].

The letter keys screen closes. The entry appears in the Document Name field.

Fig.: Service Menu Screen



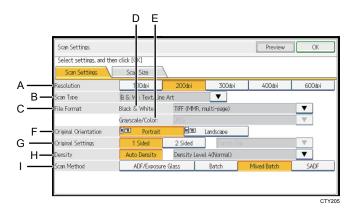
# Scan Settings Overview

The Scan Settings screen enables you to select settings that determine the way GlobalScan NX processes the scanned document, such as Resolution, File Format, Density, etc.

For example, you may be scanning a detailed color drawing, so select [400 dpi] Resolution and [Full Color: Text / Photo] Scan Type. Likewise, you may want to save time scanning a duplex report (via the ADF) by selecting [2 Sided] mode as [Original Settings].

Please take a moment to review the sample Scan Settings screen and associated features listed in the table.

Fig.: Scan Settings Screen



- The Scan Settings screen can be customized by the Administrator, thus some selections may not be displayed, i.e., are preset, while others may be limited. For example, the Resolution settings may be limited to 200 dpi and 400 dpi.
- Only supported values are available. Values that are not supported by the MFP are grayed out. If all of a setting's values are grayed out, the default value for that setting is applied.

**Table: Scan Settings Screen** 

	ltem	Description
A	Resolution	Select [100 dpi], [200 dpi], [300 dpi], [400 dpi], or [600 dpi].
		Specify [200 dpi] 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	Select the scan type. Only one mode (Black & White, Gray Scale, or Full Color) can be applied to each document.
		Black & White: Text
		B & W : Text/Line Art
		Black & White: Text/Photo
		Black & White: Photo
		Gray Scale
		Full Color: Text/Photo
		Full Color: Glossy Photo
		Auto Color Select
		<b>♦</b> Note
		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.

	ltem	Description
С	File Format	Select the format that you want to send the files in.  If you want to combine multiple scanned documents into a single file, you must select a multi-page under [File Format].  •• Note
		<ul> <li>Note that the Administrator sets the File Format selections, thus the display panel may show all or limited settings.</li> <li>Reference</li> <li>See Appendix page 158 "File Formats".</li> </ul>
D	Black & White:	Select the File Format for Black & White. This setting is disabled (grayed out) if a Grayscale or Color setting has been specified as the Scan Type.
E	Grayscale/Color:	Select the File Format for Grayscale/Color. This setting is disabled (grayed out) if a Black & White setting has been specified as the Scan Type.
F	Original Orientation	When using the ADF, select the document orientation.  • [Portrait]  • [Landscape]
G	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.  • Note  • 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.  • 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].

	ltem	Description
Н	Density	Selecting [Auto Density] corrects scanning density to improve resolution of paper types such as non-white paper like newspaper or transparent originals.
		To adjust image density, select a density level from the drop-down list next to [Auto Density].
		<b>U</b> Note
		<ul> <li>When [Auto Density] is enabled, images within 10 mm from the edges of the original may appear faded.</li> </ul>

	Item	Description
ı	Scan Method	Select the scan method.
		• [ADF/Exposure Glass]
		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 originals 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 waits until additional originals are placed.
		[SADF] (Semi-automatic Document Feeder)
		Scans multiple page originals as a single job 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.
		<b>U</b> Note
		If the maximum document volume exceeds the MFP's internal memory capacity, the documents are not sent.

# Scan Settings Instructions

To specify Scan Settings, proceed as follows:

- 1. Press [Scan Settings].
- 2. Press the [Scan Settings] tab.
- 3. Select the desired settings.
  - Reference
    - See table "Scan Settings Screen" in "Scan Settings Overview".
- 4. Confirm that the settings are correct.
- 5. Press [OK].

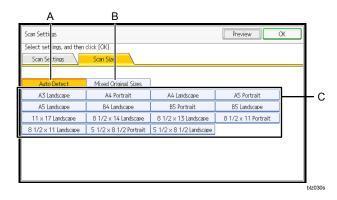
To set a Scan Size or Filter, continue. If not, go to page 75 "Step 7: Start Scan".

### Scan Size Overview

The Scan Size screen enables you to adjust scanning to match the size of your original; [Auto Detect] meets most application needs. Note that the default setting is selected by the Administrator, as are the available selections, so your Scan Size screen may appear different than that shown in the figure "Scan Size Screen".

Please take a moment to review the sample Scan Size screen and associated features listed in the table.

Fig.: Scan Size Screen



#### Table: Scan Size Screen

	ltem	Description
A	[Auto Detect]	Scans original sizes using the automatic size detect function.  Automatic size detection is performed for the first scan only, and the detected size is used for all of originals to follow.
В	[Mixed Original Sizes]*1	Scans a batch of originals with different length by detecting the length of each.

	ltem	Description
С	Paper Sizes	Lists all paper size selections. For instance, if you are scanning a legal-size document, select [8 1/2 × 14 Landscape].

<sup>\* 1</sup> This button might be grayed out depending on the MFP model you use. For details, refer to the Readme file.

### **Scan Size Instructions**

To specify a scan size, proceed as follows:

- 1. Press [Scan Settings].
- 2. Press the [Scan Size] tab.
- 3. To change the default scan size, press the desired button.



- See Table "Scan Size Screen".
- 4. Press [OK].

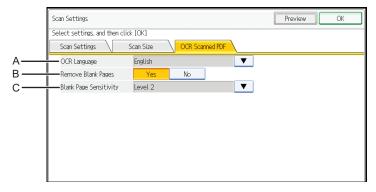
To set Filters, continue. If not, go to page 75 "Step 7: Start Scan".

# OCR Scanned PDF Overview (Serverless Edition Only)

The OCR Scanned PDF screen enables you to create the OCR scanned PDF.

This function is available with MFP which supports the OCR function.

Fig.: OCR Scanned PDF Screen



DBV044

#### Table: OCR Scanned PDF Screen

	ltem	Description
Α	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

### **Filters Overview**

This section explains how to use the following Filters:

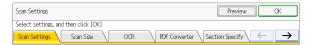
- OCR Filter
- PDF Converter Filter
- Enhanced PDF Converter Filter
- · Section Specify Filter
- Section Splitter Filter
- Image Correction Filter
- PDF Stamper Filter

The Filter tabs may not be displayed depending on the settings for the Project. In that case, proceed to page 75 "Step 7: Start Scan".



- To access Filters tabs, press [Scan Settings] on the Metadata screen or Service Menu screen.
- The Filter tab display names, for example, "PDF Converter", are set by the Administrator, thus the name may vary.
- If the setting you require is not visible, press the right or left arrow button.

### Fig.: Filter Tabs



### OCR Filter (Server Edition Only) Overview

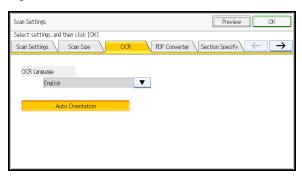
The Optical Character Recognition (OCR) Filter converts scanned data into text data using OCR software. This function also supports auto orientation. When the Administrator has enabled this setting, additional processing is done to correctly orient the document. For example, even if the original pages are mixed - right side up/down - the scanned images face in the correct direction when the recipient views the file.

### OCR Filter (Server Edition Only) Instructions

To process the scanned document using the OCR Filter, proceed as follows:

- 1. Press [Scan Settings].
- 2. Press the [OCR] tab.
- 3. Specify the settings.

Fig.: OCR Filter Screen



4. If necessary, select the OCR language.

For example, if document text is in Spanish, select Spanish from the list.



- If you select an incorrect language, for example, the language selection is Spanish and the scanned document is English, the OCR result will be incorrect.
- 5. Press [Auto Orientation] to orient all pages in the same direction.
- 6. Press [OK].

Proceed to page 75 "Step 7: Start Scan".



• Depending on the Administrator's settings, the document that is output from the OCR filter may be in Excel format (\*.XLS) or Rich Text format (\*.RTF).

### **PDF Converter Filter Overview**

With the PDF Converter Filter, you can create a searchable, password-protected PDF, as well as restrict others from printing, modifying, or copying text and graphics from the PDF file.

Please take a moment to review the PDF Converter Filter screen and associated features listed in the table.

### Fig.: PDF Converter Filter Screen

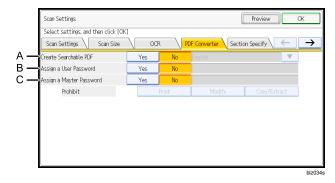


Table: PDF Converter Filter Screen

	ltem	Description
А	Create Searchable PDF	Allows you 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], [Japanese], [Traditional Chinese], [Korean (Hangul)]
		The language selection list might vary depending on the settings specified by the administrator.
		If [No] is selected, the scanned document will be converted to an Image PDF file (with not text data).
		<b>◆</b> Note
		This option is not available for Serverless Edition.
В	Assign a User Password* 1	Allows you to create a PDF that requires a password to open.
		If you select [Yes], you must enter a password in the adjacent field.
С	Assign a Master Password* 1	Allows you to restrict others from printing, modifying, or copying text and graphics from the PDF file by assigning a password. If you select [Yes], you 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 function.
		• [Print]
		• [Modify]
		• [Copy/Extract]

 $<sup>^{*}</sup>$  1 Do not use the same string for the User Password and the Master Password.

# Password confirmation entry

You will need to enter the password twice for [Assign a User Password] and [Assign a Master Password] to prevent incorrect input.

On the MFP display panel, follow the instructions below:

- 1. Press [Yes] for either [Assign a User Password] or [Assign a Master Password].
- 2. The letter keys screen will appear.
- 3. Enter the password and press [OK].
- 4. The letter keys screen will appear again.
- 5. Enter the same password to confirm it and press [OK].
- If a different password is entered, an error message will be displayed. Confirm the password and enter the correct password.



 These features may not be available depending on the settings specified by the Administrator.

#### **PDF Converter Filter Instructions**

To create a searchable, password-protected PDF file, proceed as follows:

- 1. Press [Scan Settings].
- 2. Press the [PDF Converter] tab.
- 3. Specify the settings.
  - Reference
    - See Table "PDF Converter Filter Screen".
- 4. Press [OK].

Proceed to the next Filter in this section, or go to page 75 "Step 7: Start Scan".

### Enhanced PDF Converter Filter Overview (Server Edition Only)

With the Enhanced PDF Converter Filter, you can create a searchable, password-protected PDF, as well as restrict others from printing, modifying, or copying text and graphics from the PDF file.

Please take a moment to review the Enhanced PDF Converter Filter screen and associated features listed in the table.

3

Fig.: Enhanced PDF Converter Filter Screen

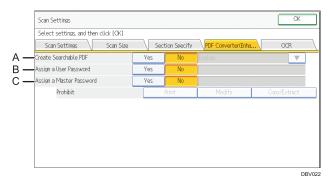


Table: Enhanced PDF Converter Filter Screen

	ltem	Description
Α	Create Searchable PDF	Allows you 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], [Japanese], [Swedish], [Polish], [Hungarian], [Czech], [Finnish], [Traditional Chinese], [Thai], [Greek], [Korean(Hangul)], [Catalan], [Turkish], [Arabic], [Hebrew], [Vietnamese]
		The language selection list might vary depending on the settings specified by the administrator.
		If [No] is selected, the scanned document will be converted to an Image PDF file (with not text data).
В	Assign a User Password* 1	Allows you to create a PDF that requires a password to open.
		If you select [Yes], you must enter a password in the adjacent field.

	ltem	Description
С	Assign a Master Password* 1	Allows you to restrict others from printing, modifying, or copying text and graphics from the PDF file by assigning a password. If you select [Yes], you 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 function.
		• [Print] • [Modify]
		• [Copy/Extract]

<sup>\*1</sup> Do not use the same string for the User Password and the Master Password.

### Password confirmation entry

You will need to enter the password twice for [Assign a User Password] and [Assign a Master Password] to prevent incorrect input.

On the MFP display panel, follow the instructions below:

- 1. Press [Yes] for either [Assign a User Password] or [Assign a Master Password].
- 2. The letter keys screen will appear.
- 3. Enter the password and press [OK].
- 4. The letter keys screen will appear again.
- 5. Enter the same password to confirm it and press [OK].
- 6. If a different password is entered, an error message will be displayed. Confirm the password and enter the correct password.



 These features may not be available depending on the settings specified by the Administrator.

#### **Enhanced PDF Converter Filter Instructions**

To create a searchable, password-protected PDF file, proceed as follows:

- 1. Press [Scan Settings].
- 2. Press the [PDF Converter(Enhanced)] tab.
- 3. Specify the settings.



• See Table "Enhanced PDF Converter Filter Screen".

### 4. Press [OK].

Proceed to the next Filter in this section, or go to page 75 "Step 7: Start Scan".

### Section Specify Filter (Server Edition Only) Overview

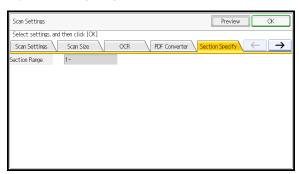
The Section Specify Filter is useful when, for example, you would like to send a document that excludes the cover sheet, say a fax cover page. Another example is if you scan brochures and would like to send just the body pages, excluding the cover. In short, this Filter enables you to specify just the sections that you want to send. For example for a document consisting of 6 sections, the Section Range, "1-2, 5-6", will remove section 3-4 from the scanned data.

### Section Specify Filter (Server Edition Only) Instructions

To specify the target sections for extraction, proceed as follows:

1. Press the [Section Specify] tab.

Fig.: Section Specify Filter Screen



2. Enter the setting.



• For valid range entries, see the table below.

### 3. Press [OK].

Proceed to page 75 "Step 7: Start Scan".

Please take a moment to review the sample Section Specify Filter settings listed in the table. The examples are for a Document consisting of 5 Sections.

Table: Section Specify Filter - Valid Range Entries

Entry Example	Result
No Entry	All Sections are extracted.
The third Section is extracted.	

Entry Example	Result	
-3	The first through third Sections are extracted.	
3-	The third through 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).	
(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. "6-8" is 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).	

# Section Splitter Filter (Server Edition Only) Overview

Split a job consisting of multiple sections into a specified number of sections. Specify the number of sections that the job is split into using the MFP's control panel.

Fig.: Section Splitter Filter Screen



**Table: Section Splitter Filter Screen** 

	ltem	Description
Α	Number of Sections	Specify the number of sections for split between 1 and 500.

### Section Splitter Filter (Server Edition Only) Instructions

- 1. Press [Scan Settings].
- 2. Press [SectionSplitter] tab.
- 3. Specify the split number for [Number of Sections] between 1 and 500.
- 4. Press [OK].

### Image Correction Filter (Server Edition Only) Overview

The Image Correction Filter allows you to improve scanned images. Using this Filter, you can automate image correction of scanned documents and perform efficient digitization and distribution of high-quality documents.

The following table explains the settings and functions that are available on the Image Correction screen.



**Table: Image Correction Filter Screen** 

	ltem	Description
A	Noise Reduction (Black & White image only)	This function removes speckles and blemishes (noise) on the original document from the scanned image.
		• If the file format in "Scan Settings" is a grayscale or color format, this function will not be applied, even if it is set to [Yes].

	ltem	Description	
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.  Provided  If the file format 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 cannot prevent shadow from contoured or partial punch holes appearing on the scanned image.  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.  Provide  This function is available even if the original contains pages that are of various solid colors.	

	ltem	Description
D	Deskew	This function straightens skewed images on originals, producing scanned images that are better aligned.  R  Note  White margins can appear around the scanned image if the degree of correction is extreme.  The range of skew that can be corrected is -7 to +7 degrees.
E	Auto Orientation	This function detects the correct orientation of an image, and then rotates the image appropriately.  R  Note  This function can correct images that are rotated by 90°, 180°, or 270°.
F	Change Resolution	Change the resolution of the scanned documents to a specified value.  • Note  • The values you can specify are: 100 dpi, 200 dpi, 300 dpi, 400 dpi, and 600 dpi.  • The resolution will not be changed if the resolution of the scanned document is less than the specified value.

# Image Correction Filter (Server Edition Only) Instructions

Use the following procedure to configure the Image Correction Filter.

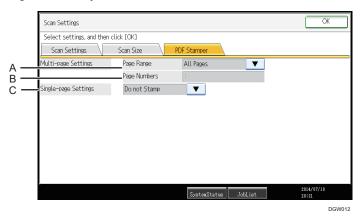
- 1. Press [Scan Settings].
- 2. Press the [Image Correction] tab.
- 3. Select [Yes] for the functions you want to apply.
- 4. Press [OK].

#### PDF Stamper Filter (Server Edition Only) Overview

The PDF Stamper Filter converts scanned data into a PDF file with the specified text or image embedded. You can specify the target pages to be stamped.

Depending on the setting configured by the administrator, the content may not be shown on the PDF Stamper tab screen.

Fig.: PDF Stamper Filter Screen



**Table: PDF Stamper Filter Screen** 

I GDIC: I DI	oramper rimer sereem	
A	Page Range (Multipage Settings)	Specify the target pages to be stamped for the document.  • [All Pages]
		[Specified Pages]     Enter a value in "Page Numbers".
		[First Page]     [Last Page]
		<ul><li> [Even Pages]</li><li> [Odd Pages]</li></ul>

В	Page Numbers (Multipage 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 is 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-	
С	Single-page Settings	Specify whether or not to embed a stamp into single page documents.	
		• [Do not Stamp]	
		• [Stamp All]	

## PDF Stamper Filter (Server Edition Only) Instructions

To process the scanned document using the PDF Stamp Filter, proceed as follows:

- 1. Press [Scan Settings].
- 2. Press the [PDF Stamper] tab.
- 3. Specify the settings.
- 4. Press [OK].

# Step 7: Start Scan

Be sure a document is placed on the MFP's Automatic Document Feeder (ADF) or exposure glass.



• See page 24 "Step 1 : Place Document"

## **Starting Job Distribution**

 Confirm that the correct destinations have been selected. Open the Service Menu screen, and then press [Details...].

Fig.: Service Menu/Summary Screen



The Service Menu/Details screen displays.

Fig.: Service Menu/Details Screen



2. If necessary, change the destinations, Document Name, or Scan Settings.



- A resolution of 200 dpi or more is recommended.
- A pixel between  $200 \times 350$  and  $7016 \times 9921$  is only supported for an image data to scan.
- The following is an example of combination of resolutions and paper sizes.

	Resolution				
Paper Size	100dpi	200dpi	300dpi	400dpi	600dpi
BO JIS	А	NA	NA	NA	NA
A0	А	А	NA	NA	NA
B1 JIS	А	А	NA	NA	NA
A1	А	А	А	NA	NA
B2 JIS	А	А	А	NA	NA
A2	А	А	А	А	NA
B3 JIS	А	А	А	А	NA
А3	А	А	А	А	А

<sup>&</sup>quot;A" represents "Available", and "NA" represents "Not Available".

If a paper, whose paper size and resolution is described as "NA", is used, an error will occur.

## ■ Reference

- See page 33 "Step 5: Select Service and Set Distribution Parameters"
- See page 52 "Step 6: Set Other Scan Parameters"
- 3. Press [Summary] to return to the previous screen.
- 4. If necessary, before you press the [Start] key, press [Preview] to view the scanned image.

The Preview screen will appear after you press the [Start] key.

# Limitation

If this function is not available, [Preview] will not be displayed on the MFP display panel.

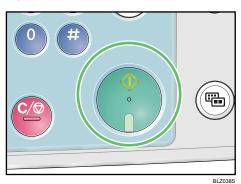
# Reference

- See page 80 "Preview".
- 5. Confirm that the [Start] key on the MFP control panel is green.



If the [Start] key is red, check that the document is placed on the ADF or exposure glass, and
that any required Distribution Parameters are selected and/or entered. An asterisk (\*)
indicates a required setting.

Fig.: MFP - Control Panel



- 6. Perform the scan using one of the methods listed below.
  - Performing Scan Using ADF (Automatic Document Feeder)
  - Performing Scan Using ADF (Batch Scan)
  - Performing Scan Using ADF or Exposure Glass (Mixed Batch scan)
  - Performing Scan Using ADF / SADF (Semi-Automatic Document Feeder)
  - Performing Scan Using Exposure Glass



• The method you choose here must match that which was selected in the Scan Settings screen, specifically, the [Scan Method] value.

# ■ Reference

• See table "Scan Settings Screen" in "Scan Settings Overview".

# Limitation

You cannot change the scan method for GlobalScan NX during the scan from the ADF to the
exposure glass, or vice versa. If the scanning process has been initiated from the exposure
glass, subsequent scans must also take place from the exposure glass. This also applies if
scanning has been initiated from the ADF.

When scanning has finished, a confirmation message will appear on the MFP display panel. Press [OK] to close the confirmation message.

#### Fig.: MFP display panel



#### **Canceling Job Distribution**

It is possible to cancel scan distribution by pressing the [Clear/Stop] key. The document cannot be recovered, so take care when pressing [Clear/Stop] key. Also note that once the scan data has been submitted to GlobalScan NX, i.e., scanning is complete, distribution cannot be canceled, except by the Administrator.

## Performing Scan Using ADF (Automatic Document Feeder)

1. Press the [Start] key.

The document is scanned and distributed.

# Performing Scan Using ADF (Batch Scan)

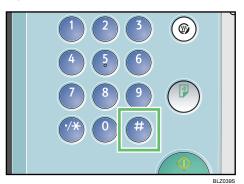
1. Press the [Start] key.

The scanned data is stored in the MFP temporarily. When scanning is complete, the device waits for the next document to scan.

- 2. Place the next set of documents on the ADF.
- 3. Press the [Start] key.
- 4. Repeat 2 and 3 until all pages are scanned.
- 5. When finished, press the [#] key.

The scanned documents from the multiple scans are sent as one job.

Fig.: MFP Control Panel



**☆ Important** 

After all document scanning is complete, please be sure to press the [#] key. Unless you
press the [#] key, the scanned data remains in the MFP and job processing does not start. In
this case, the Auto Logout feature is temporarily disabled.

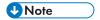
#### Performing Scan Using ADF or Exposure Glass (Mixed Batch scan)

1. Press the [Start] Key.

The scanned data is stored in the MFP temporarily. When scanning is complete, the device waits for the next document to scan.

- 2. Place the next document to scan.
- 3. Press the [Start] key.
- 4. Repeat steps 2 and 3 until you complete the scan.
- 5. Press the [#] key to finish the scan.

The scanned documents from the multiple scans are sent as one job.



 If you do not set the documents to scan continuously within 60 seconds, the documents scanned up to now are distributed automatically. In that case, step 5 is not necessary.

# Performing Scan Using ADF / SADF (Semi-Automatic Document Feeder)

1. Press the [Start] Key.

The scanned data is stored in the MFP temporarily. When scanning is complete, the device waits for the next document to scan.

2. Place the next set of documents on the ADF to scan continuously, within 60 seconds.

The scan starts automatically. Repeat this step until you complete the scan.

3. Press the [#] key to finish the scan.

The scanned documents from the multiple scans are sent in as one job.



• If you do not set the documents to scan continuously within 60 seconds, the documents scanned up to now are distributed automatically. In that case, "3" is not necessary.

## **Performing Scan Using Exposure Glass**

1. Press the [Start] Key.

The scanned data is stored in the MFP temporarily. When scanning is complete, the device waits for the next document to scan.

- 2. Set the next document to scan.
- 3. Press the [Start] key.
- 4. Repeat 2-3 until you complete the scan.
- 5. Press the [#] key to finish the scan.

The scanned documents from the multiple scans are sent as one job.



• If you do not set the documents to scan continuously within 60 seconds, the documents scanned up to now are distributed automatically. In that case, "5" is not necessary.

#### **Preview**

This section explains how to display and use the Preview screen.

You can use the Preview screen to check whether originals have been scanned correctly.

To display the Preview screen, press [Preview], and then press the [Start] key to scan the documents. When scanning is complete, the Preview screen appears automatically so you can view the scanned images before you send them.



• If this function is not available, [Preview] will not be displayed on the MFP display panel.

Fig. Preview

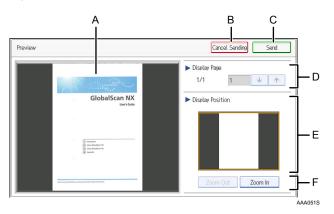


Table: Preview

	ltem	Description	
A	Displayed image	Displays the scanned image on the screen. When you zoom in on the preview, and part of the image is displayed off screen, you can scroll the image by touching the desired portion of the screen and display the hidden area.	
В	[Cancel Sending]	Press to close the Preview screen without sending the files.  • If [Mixed Batch] is selected for [Scan Method] on the Scan Settings screen, [Cancel] is displayed. Pressing [Cancel], the document displayed on the preview display will not send. Pressing [Cancel] makes it possible to continue and scan more documents.	
С	[Send]	Press to close the Preview screen and send the files.  Note  If [Mixed Batch] is selected for [Scan Method] on the Scan Settings screen, [OK] is displayed. Pressing [OK] makes it possible to continue and scan more documents.	
D	[Display Page]	Displays the number of the currently displayed page and the total number of pages. You can view the next and previous pages by pressing [↑] and [↓].  You can also specify a page number by pressing the text box, and then, on the Switch Display Page screen, entering a page number.	

	ltem	Description
Е	[Display Position]	Displays the position of the image that is currently displayed in the preview area.
F	[Zoom Out] and [Zoom In]	Press these to reduce or enlarge the displayed preview.

# Step 8 : Exit Project

It is possible to continuously scan documents without exiting the Project. When scanning is complete - there are no more documents to process - press [Project].

Fig.: Service Menu Screen





If a certain time period has elapsed without any operation after login, you are automatically exit of
the Project. This time period, which is preset by your Administrator, is within the range of 60 to 600
seconds. The default setting is 60 seconds.

# Step 9: Review Job Log

The Job Log provides details about the scanned document, such as Date / Time, Project Name, Document Name, Job Status, etc. The content of the Job Log is determined by Administrator settings. You can obtain job logs of all Projects or a specific Project depending on the Administrator's settings.

To view the Job Log, proceed as follows:

- 1. If necessary, press [Project] to exit the Project.
- 2. Press [Job Log].
- 3. If applicable, select the specific Project.



• If the Project requires Authentication, you are prompted for entry of your User Name, Password,

#### Fig.: Job Log Screen

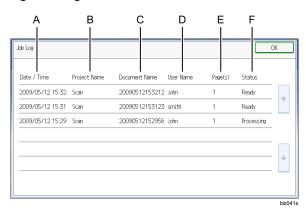


Table: Job Log Screen

	Label	Description
Α	Date / Time	Indicates the date and time that scanning took place.
В	Project Name	Indicates the name of the selected Project.
С	Document Name	Indicates the specified Document Name (for example, email attachment file name and/or the name of the file delivered to the folder).
		<b>■</b> Reference
		See page 52 "Document Name Overview".
		See page 52 "Document Name Instructions".

	Label	Description
D	User Name	Indicates the user name used to log in to the Project or MFP.  If no authentication was required, this item is blank.
Е	Page(s)	Indicates the number of pages scanned.
F	Status	Indicates the scan results, for example, complete, error, etc.

# **U** Note

- Depending on Administrator settings, the "Document Name" and "User Name" of scans performed by other users may display as asterisks (\*\*\*\*) to mask the information.
- The [Document Name] and [Page(s)] are not displayed for machines with a 4.3 inch screen.

You can use GlobalScan NX on MFPs that have a 4-line display panel. Because screen space is limited, some functions that are available on MFPs with a full-color display panel are not available on MFPs with a 4-line display panel.

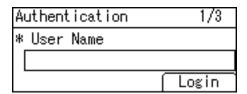
The following table provides a step-by-step overview of how to use GlobalScan NX on an MFP that has a 4-line display panel.

#### Table: Step-by-Step Summary

Step	Action	Description
1	Place Document	Place the document on the MFP's Automatic Document Feeder (ADF) or exposure glass. For details, see page 24 "Step 1 : Place Document".
2	Select a Group and Project	To select a Project, press the key that has been assigned for starting GlobalScan NX. Next, select the Group and Project you require.
3	Enter Metadata	If necessary, enter the Metadata (document information) for the scanned image.
4	Start Scan	To begin scanning, press the [Start] key on the MFP control panel.



- The following functions are not available on MFPs that have a 4-line display panel:
  - Authentication (login)
  - Selection of a delivery service, such as Send to Email
  - · Configuration of scan parameters, such as resolution and filter settings
  - Preview
  - Displaying the Job Log
- MFPs that have 4-line display panel support Projects with Authentication Profile. When such a
  Project is selected, the following login dialog will appear between Step 2 and Step 3 of the Stepby-Step Summary. Enter the necessary information such as user name and password and press the
  OK button.



#### Select a Group and Project

You can select the Group and Project you want to use for scanning and sending a document. You need to select a Group only if there is more than one.

 On the MFP control panel, press the key that has been assigned for starting GlobalScan NX.

If you are unsure which key has been assigned for starting GlobalScan NX, ask your Administrator.

2. If necessary, press the [▲] or [▼] key to select a Group, and then press the [OK] key.

Fig.: Group Selection Screen

ABC Compa	1/1	
Accounts Payable Accounts Receivable		
	Ref resh	Language

If there is only one Group, this screen will not appear.

3. Press the [▲] or [▼] key to select a Project, and then press the [OK] key.

Fig.: Project Selection Screen



# Reference

- For details about Groups and Projects, see page 14 "What Is a Project?"
- For details about using the MFP control panel, see the documentation for the MFP.

#### Search for a Project

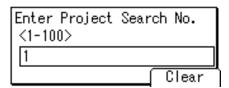
You can search for a Project that has a certain number in its name by entering the number using the number keys. Only Projects within the selected Group will be searched.

To do this, instead of selecting a Project using the [s] or [t] key in Step 3, proceed as follows:

1. Press a number key (1 to 9).

A screen for entering a number appears with the number you just pressed already in the text box.

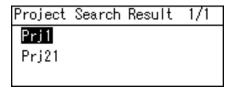
#### Fig.: Project Search Screen



2. Enter a number (1 to 100), and then press the [OK] key.

Projects whose names contain the entered number appear.

Fig.: Project Selection Screen



An error message will appear if no matches are found.

3. Press the [s] or [t] key to select a Project.



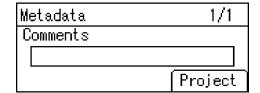
- For details about Groups and Projects, see page 14 "What Is a Project?".
- For details about using the MFP control panel, see the documentation for the MFP.

#### **Enter Metadata**

If necessary, you can enter Metadata for the document. The Metadata input screen appears after you have selected a Project.

Press the [▲] or [▼] key to display the item of Metadata you want to enter, and then press
the [OK] key.

Fig.: Metadata Input Screen



2. On the input screen, enter the necessary text, and then press the [OK] key.

#### Fig.: Metadata Input Screen

Comments		<u>OK</u>
abc	_	

#### ♠ Limitation

 Items of Metadata can be entered only through text boxes. Lists and other controls are not available for entry of Metadata.



- Asterisks (\*) identify required items of Metadata.
- The Metadata input screen will not appear if there are no Metadata items for you to enter.
- Press [Project] or the [Escape] key to cancel the operation and close the Project.

# ■ Reference

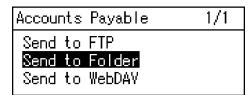
- For details about Metadata, see page 31 "Step 4: Select/Enter Metadata".
- For details about entering text and using the MFP control panel, see the documentation for the MFP.

#### Start Scan

After you have selected a Project and entered the necessary items of Metadata, you can begin scanning. Since you can neither configure scan parameters nor specify destinations on an MFP that has a 4-line display panel, the settings configured by the Administrator are applied instead.

1. On the Metadata screen (or the Project screen when there is no Metadata to enter), press the [Start] key.

Fig.: Project Screen



2. If necessary, after you have scanned all documents, press the [#] key.

For details about scanning multiple documents in one session, see page 75 "Step 7: Start Scan".

## Limitation

 When scanning single-sided originals, you can scan up to 100 sheets. When scanning double-sided originals, you can scan up to 50 sheets.

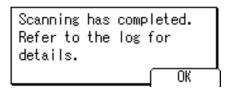


- Press the [Escape] key or [Project] (if it is displayed) to cancel the operation and close the Project.
- After scanning starts, more operations might be available. Follow the instructions on the display panel.

# Reference

- For details about using the MFP control panel, see the documentation for the MFP.
- When scanning has finished, a confirmation message will appear on the MFP display panel. Press [OK] to close the confirmation message.

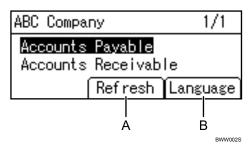
Fig.: MFP display panel



## **Other Operations**

You can use the Group selection screen (or Project selection screen when there is only one Group) to refresh the Group and Project lists<sup>\* 1</sup> and change the display language.

Fig.: Group Selection Screen



	ltem	Description
A	[Refresh]* 1	Obtain the most recent Group and Project information from the GlobalScan NX server.

	ltem	Description
В	[Language]	Select the language used for the interface:  • [English]  • [Deutsch]  • [Français]  • [Italiano]  • [Español]  • [Nederlands]

\*1 Server Edition only.



• For details about using the MFP control panel, see the documentation for the MFP.

# 4. USING GLOBALSCAN NX (When Using the Smart Operation Panel)

The Administrator configures GlobalScan NX to address specific document processing needs. Therefore, the steps you take to complete tasks may vary. However, GlobalScan NX's intuitive user interface helps guide you through the scanning/distribution process.

# **Step-by-Step Summary**

Table "Step-by-Step Summary" provides a quick tutorial on how to perform a scan operation. Please review this summary before proceeding. Again, the exact steps taken to perform a scan operation are determined by Administrator settings.

Table: Step-by-Step Summary

Step	Action	Description
1	Place Document	Place the document on the MFP's Automatic Document Feeder (ADF) or exposure glass.
2	Open Group/Project Screen/ Select a Project	Press [Home], and then press [GlobalScan]. Press the Group Selection button at the top left of the screen, select a Group, and then press the Project button.
3	Log In	If required, log in to the Project with your User Name, Password, etc.
4	Select/Enter Metadata	If applicable, select/enter Metadata (document information) for the scanned image.
5	Select Service and Set Distribution Parameters	Select the Service, for example, Send to Email, and then set the necessary Distribution Parameters, i.e., enter the email addresses and/or select the folder destinations.
6	Set Other Scan Parameters	If necessary, perform one or more of the following procedures:  • Enter a Document Name to use as the filename.  • Specify Scan Settings, such as Resolution, File Format, Density, and Scan Size. Also, if applicable, set the parameters of the Filters. For example, create a searchable, password-protect PDF file using the PDF Filter.
7	Start Scan	To initiate scanning, press [Start].



- You can change the display language of GlobalScan NX by switching the display language of the MFP. For details, see the operation manual provided with the MFP.
- You can also connect a numeric keypad to Smart Operation Panel via USB and use it to enter characters.

### How to Use the Letter Keys on the Display Panel

When specifying a User Name, Password, Document Name, Subject, etc., you enter the information with the letter keys on the display panel. Navigate this screen as follows:

Fig.: Letter Keys on the Display Panel

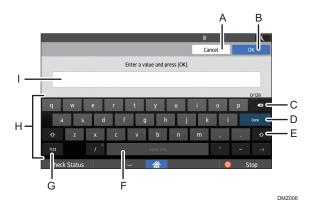


Table: Letter Keys on the Display Panel

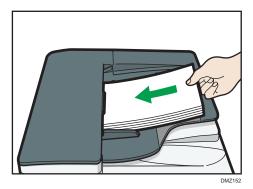
	ltem	Description
Α	[Cancel]	Exits the Letter Keys Screen, without applying entered text.
В	[OK]	Applies displayed text to selected Service, e.g., a subject line to email.
С	(X)	Deletes the character that is directly in front of the cursor.
D	[Done]	Confirms text, and closes the letter keys screen.

	ltem	Description
Е	Shift	Enables selection of a single upper-case character. Pressing it twice sets caps lock.
F	Space	Inserts a blank space.
G	[\$123]	Press to enter numerical values or symbols.
Н	Keyboard	Enables entry of alphanumeric characters and special symbols.
I	Text Field	Displays entered text, along with character counter. The maximum length of text fields - User Name, Password, Subject, Document Name, Search string, etc is 128 characters, represented by a 0/128 gauge that tracks remaining space as text is entered.

# **Step 1 : Place Document**

1. Place the document on the Automatic Document Feeder (ADF) or exposure glass.

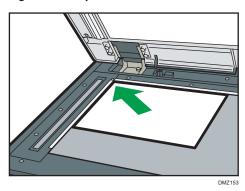
Fig.: MFP - Automatic Document Feeder





 When using the ADF, the original orientation should match the illustration displayed on the MFP's ADF.

Fig.: MFP - Exposure Glass



# Step 2: Open Group/Project Screen/Select a

#### Overview

**Project** 

A Group refers to a collection of one or more Projects. The Administrator designs Groups and Projects based on application needs. When you press the Group Selection button at the top left of the Group/ Project screen and select a Group, the Projects contained in the selected Group are displayed on the screen as shown in the figure "Group/Project Screen".

Fig.: Group/Project Screen





- The Group names and Project button display names are customized by the Administrator, thus the Group/Project screen appearance varies.
- Use the language selection widget on the [Home] screen to change the display language.
- · You may need to scroll the screen to select the desired project depending on the arrangement of projects.
- The Administrator may have incorporated an icon, which displays on the Project button itself, and/or to the left of the Screen Title.

Fig.: Group/Project Screen with Icons



Please take a moment to review the sample Group/Project screen and associated features listed in the table.

#### Fig.: Group/Project Screen

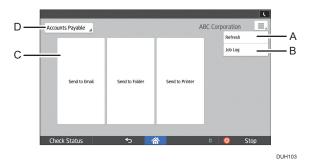


Fig.: Group/Project Screen - Group Selection Screen



Table: Group/Project Screen

	Item	Description
A	[Refresh] * 1	This item is displayed when you press [=].  Updates the Project list, i.e., display the currently available Projects.
В	[Job Log]	This item is displayed when you press [=].  Displays details regarding scan jobs for all Projects.
С	Project button	Press to select the document distribution task, i.e., Services. Swipe the screen vertically to view the next/previous page of a Group with associated Projects.
D	Group Selection button	Displays the list of registered Groups.
Е	Group List	Swipe the screen vertically to display additional Groups, if available.

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

#### Instructions

To open the Group/Project screen, and then select a Project, proceed as follows:

- 1. Press [Home], and then press [GlobalScan].
- 2. Press the Group Selection button and select a Group to display the Projects registered with it.
- 3. Select the desired Project button.



- If the Project you have selected is currently unavailable, for example, the Administrator has not finished configuring the settings, an error message displays on the MFP display panel.
- 4. If login (Authentication) is required, proceed to page 100 "Step 3: Log in". If login is not required, go to page 103 "Step 4: Select/Enter Metadata" or page 105 "Step 5: Select Service and Set Distribution Parameters".

#### Overview

If the Project you selected in the previous step requires Authentication, the Login screen appears. If not, go to page 103 "Step 4: Select/Enter Metadata" or page 105 "Step 5: Select Service and Set Distribution Parameters".

The procedure for logging in to a Project differs depending on the settings made by the administrator and whether authentication is required to operate the MFP. The following procedure explains the login process when authentication is required.

1. On the MFP, a message appears, prompting you to log in:



Enter your authentication credentials (user name and password). If card authentication is enforced, log in using a card.

 When you access a GlobalScan NX Project and a separate password is required to log in to the Project, the GlobalScan NX authentication screen appears. The user name you used to log in to the MFP is already entered as the user name.



- 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.
  - You are not registered as a shared user on both the GlobalScan NX and Card Authentication Package authentication servers.

If authentication is not required for the MFP, but it is required for the Project, the GlobalScan NX authentication screen appears when you access the Project. Depending on the authentication method set by the administrator, the login screen varies, as shown in the following screen shots.

# Reference

• For details about the device settings, see the documentation for the device.

Fig.: Active Directory Authentication Login Screen



Fig.: LDAP Authentication Login Screen



If multiple authentication methods are assigned to a Project, the necessary fields for each method will appear. Items marked with an asterisk (\*) and displayed in red are required to log in.

#### Instructions

To log in to a Project, proceed as follows:

- 1. Press the Project button.
- 2. Press the [User Name] box.

The letter keys screen appears.



- See page 94 "How to Use the Letter Keys on the Display Panel".
- 3. Enter your User Name.
- 4. Press [OK].
- 5. Enter your Password.
- 6. Press [OK].
- 7. If additional login information is required, such as a domain name, press [4] next to each domain name, and then select a domain name.

#### 8. Press [Login].



- If login is successful, the Project becomes available. If login is unsuccessful, a message displays. Press [OK] and re-enter a valid User Name and Password. If necessary, check with the Administrator.
- If a certain time period has elapsed without any operation after login, you are automatically logged out of the Project. This time period, which is preset by your Administrator, is within the range of 60 to 600 seconds. The default setting is 60 seconds.
- Depending on Administrator settings, the Authentication information (User Name, Password, etc.) you enter may also be used when performing a scan operation. For example, when using the Send to Folder Service, your entered credentials enable access to the destination folders. Likewise, when using the Send to Email Service, your same credentials enable connection to the mail server.
- If One-touch Scan is enabled, the Distribution Parameters are pre-defined, thus the settings
  cannot be changed. To initiate the scan, place the document on the ADF or exposure glass,
  and then press [Start].



• See page 18 "What Is One-touch Scan?".

Proceed to page 103 "Step 4: Select/Enter Metadata".

# Step 4: Select/Enter Metadata

#### Overview

If Metadata, also called document information, is requested or required for a Project, the Metadata screen displays. Metadata is designed by the Administrator to capture properties that relate to the scanned document, perhaps a company name, department number, billing code, etc. If the Project does not require document information, the Metadata screen does not display. In that case, proceed to page 105 "Step 5: Select Service and Set Distribution Parameters".

The Administrator combines input components, for example, text boxes, drop-down lists, etc., that allow you to easily enter/select the information from the MFP display panel. Since the Metadata screen is customized by the Administrator, fields and setting selections can differ from those shown.

Please take a moment to review the sample Metadata screen and associated features listed in the table.

Fig.: Metadata Screen

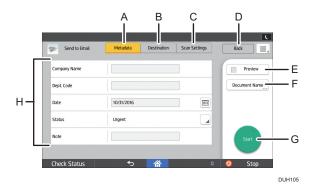


Table: Metadata Screen

	ltem	Description
А	[Metadata]	Displays the Metadata screen.
В	[Destination]	Display the Service Menu screen.
С	[Scan Settings]	Displays the Scan Settings screen. See page 122 "Step 6 : Set Other Scan Parameters".
D	[Top]	Logs out of the Project and returns to the Group/Project screen.

	ltem	Description
E	[Preview]	If you select the check box for [Preview] before scanning, a preview of the scanned image appears.  Note
		[Preview] is not available for some MFPs.
F	[Document Name]	Displays the document name entry screen. See page 122 "Step 6 : Set Other Scan Parameters".
G	[Start]	Starts scanning.
Н	Input Fields	Specify the necessary information for each displayed input field.  In the Metadata screen, pressing the text field for [Company Name] opens the letter keys screen, allowing you to enter/edit the field. Any field indicated by an asterisk (*) is required, thus must be entered.  Swipe the screen vertically to display more items.
		<ul> <li>The Administrator can set default values, which you can view, edit, or delete prior to scanning.</li> <li>Input fields can be read-only, which means they cannot be edited.</li> <li>The Administrator can restrict the format, and require numeric values and dates within a specified range. Therefore, if you enter information in an invalid format, an error displays, allowing you to edit the field.</li> </ul>

<sup>\*1</sup> Depending on settings established by the Administrator, this button is not displayed on the MFP display panel.

#### Instructions

To select/enter Metadata, proceed as follows:

- 1. Select/enter the Metadata to be added to the scanned document.
- 2. When finished, press [Destination].

Proceed to page 105 "Step 5: Select Service and Set Distribution Parameters".

# Step 5 : Select Service and Set Distribution Parameters

This section explains how to select Send to Email and Send to Folder/FTP/Printer/WebDAV Services, as well as how to establish the Distribution Parameters required for job processing. Before proceeding, please review the Service Menu Layout.

#### Service Menu Layout

When multiple Services exist within a Project, a Service Menu displays, allowing you to choose a "Send-to" Service. The available Services, display sequence of Services, and button labels are configured by the Administrator.

Please take a moment to review the Service Menu Screen and associated features listed in the table.

Fig.: Service Menu/Summary Screen

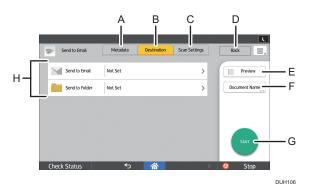


Table: Service Menu/Summary Screen

	ltem	Description
А	[Metadata] * 1	Displays the Metadata screen.
В	[Destination]	Displays the Service Menu screen.
С	[Scan Settings]	Displays the Scan Settings screen. See page 122 "Step 6 : Set Other Scan Parameters".
D	[Top]	Logs out of the Project and returns to the Group/Project screen.

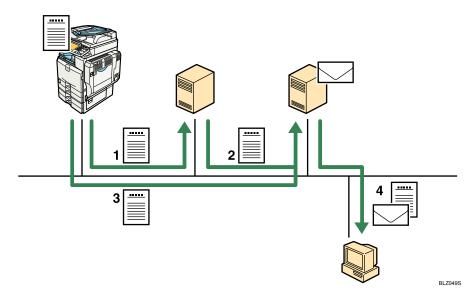
	ltem	Description
Е	[Preview]	If you select the check box for [Preview] before scanning, a preview of the scanned image appears.  • [Preview] is not available for some MFPs.
F	[Document Name]	Displays the document name entry screen. See page 122 "Step 6 : Set Other Scan Parameters".
G	[Start]	Starts scanning.
Н	Service buttons	Opens the associated Services Destination Selection screen, enabling you to enter/select target destinations.

<sup>\*1</sup> Depending on settings established by the Administrator, this button is not displayed on the MFP display panel.

## Send to Email (SMTP) Overview

The Send to Email function allows you to scan documents to one or more email addresses, as an attachment. For example, if the Human Resources Department plans to distribute a memo to all employees regarding a new vacation policy, the most timely and cost-effective way to handle the task is through Send to Email. Each recipient receives the memo in their email inbox, thus can view, print, forward, and/or archive the message.

Fig.: Send to Email Workflow



- 1. With GlobalScan NX Server Edition, documents are sent from the MFP to GlobalScan NX Server.
- With GlobalScan NX Server Edition, documents are sent from GlobalScan NX Server to the mail server.
- 3. With GlobalScan NX Serverless Edition, documents are sent from the MFP to the mail server.
- 4. The mail server distributes the received documents to the specified email addresses.



- The Send to Email screen appearance depends on Project settings, which are configured by the Administrator.
- The actual appearance of [Send to Email] may be different than your display, i.e., the
  Administrator has the ability to change the displayed name, as well as the order in which the
  buttons appear.
- If the Send to Email Service has default destination addresses that display in the To, Cc, Bcc, ReplyTo fields, they have been preset by the Administrator and, if not set to read-only, can be modified or removed.
- Depending on settings made by the Administrator, a URL (link) to the location where the document is saved may appear in the body of the received email message.
- The Administrator may also create default body text that appears in the received email message.
- When Send to Me is enabled, if your email address can be obtained from your login information
  for the Project, that address displays in the [From] field within the received email message header.
  Otherwise, the default email address that has been set by the Administrator displays in the [From]
  field.
- When Error Notification is enabled, if an error occurs, for example, an invalid address is entered, an email indicating the error is sent to the login user or the address set by the Administrator, whichever is available.

Please take a moment to review the Send to Email - Main screen and associated features listed in the table.

Fig.: Send to Email Main Screen

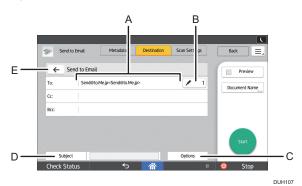
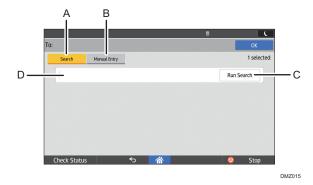


Fig.: Address Search/Manual Entry screen



# Table: Address Search/Manual Entry

	Item	Description	
A	[Search]	Displays the email search screen. Any names that match the specified search string can be searched.	
		Examples	
		The following are examples of using the wildcard character, "*".	
		1. A search for "*les*" matches:	
		• char <b>les</b> smith	
		• lester frank	
		• Lorraine <b>Les</b> ter	
		• Steven Mora <b>les</b>	
		The search string ("les") can appear anywhere in the name.	
		2. A search for " <b>les</b> *" matches:	
		• lester frank	
		• Lester, lorraine	
		The search string ("les") may only appear at the beginning of the name.	
		3. A search for "*les" matches:	
		• Smith, char <b>les</b>	
		• steven mora <b>les</b>	
		The search string ("les") may only appear at the end of the name.	
		<b>↓</b> Note	
		If [Search] is not displayed, the Administrator has disabled the function.	
В	[Manual Entry]	Press this button to manually enter an email address with the letter keys on the display panel.	
		<b> Note</b>	
		<ul> <li>If the Administrator has created a default domain, you only need to enter the recipient's name, for example, jsmith. The domain, for example, globalscannx.com, is automatically appended to form jsmith@globalscannx.com. For details, check with the Administrator.</li> <li>If [Manual Entry] is not displayed, the Administrator has disabled</li> </ul>	
		If [Manual Entry] is not displayed, the Administrator has disabled the function.	

Fig.: Send to Email - Options Screen



Table: Send to Email - Option Screen

	ltem	Description
Α	[←]	Returns to the Select Distribution Parameters screen.
В	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.  Specify whether to divide the scanned data into complete files or into multiple incomplete parts that must be restored by the recipient's email application in order to be opened.  • If a function is grayed out, the Administrator has disabled the feature.

С	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].
D	Email Attachment Format	<ul> <li>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 GlobalScan NX can acquire your email address, a failure notification will be sent to you. In that case, we recommend that you scan the data again with, for example, a lower resolution setting.</li> <li>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 email attachments.</li> <li>Limitation</li> </ul>
		<ul> <li>The High Compression PDF and Searchable PDF functions are not available with Send to Email on the Serverless Edition.</li> </ul>
E	Notification	Select whether or not to send an error notification email when a transmission error occurs. This is useful for important emails that require error tracking.  • [On]  Send an error notification email when a transmission error occurs.  • [Off]  Do not send an error notification email when a transmission error occurs.  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 obtained, GlobalScan NX sends the notification to the address specified by the

# Send to Email (SMTP) Instructions

To use the Send to Email function, proceed as follows:

### **Selecting Destination Email Addresses**



- If one or more destinations are preset by the Administrator, you do not need to specify the addresses. The addresses automatically display in the [To], [Cc], or [Bcc] field, along with the total number selected.
- 1. If necessary, press [Send to Email] on the Service Menu screen.



- If the Project contains only the Send to Email Service, the Send to Email screen automatically displays, thus you do not need to select the Service.
- The Service display name, for example, [Send to Email], is set by the Administrator, thus can vary.
- 2. Press [To], [Cc], or [Bcc].
- Select the destination email addresses by either searching for destination email addresses or manually entering destination email addresses.

#### **Searching for Destination Email Addresses**

1. Press [Search].

The letter keys screen displays.



• If [Search] is not displayed, the Administrator has disabled the function. In that case, manually enter the destination email address, as outlined below.



- See page 94 "How to Use the Letter Keys on the Display Panel".
- 2. Specify search conditions.

Enter a character of the recipient's email address, for example, "s" for "Smith".



 The details of the search process can vary depending on Administrator settings. If necessary, check with the Administrator for any special search requirements.



- To search for all email addresses, do not enter anything on the letter keys, simply press [Run Search]. This action will return all available addresses.
- 3. Press [Run Search].
- 4. Select the check box of a destination to be added.



- Multiple addresses can be selected at one time.
- 5. To perform another search, press [x], and then repeat Steps 2-4.
- 6. Press [OK].
- 7. When finished, go to 4.

#### **Entering Destination Email Addresses Manually**

1. Press [Manual Entry].

The letter keys screen displays.



- If [Manual Entry] is not displayed, the Administrator has disabled the function. In that
  case, search the Email Address List for the destination email addresses.
- 2. Enter an email address, and then press [OK] in the text input field.



- If the Administrator has created a default domain, you only need to enter the recipient's name, for example, "jsmith". The domain, for example, "globalscannx.com", is automatically appended, forming "jsmith@globalscannx.com". For details, check with the Administrator.
- To delete the entire address you have entered, press [x].
- 3. To enter other addresses, press the text input field, and then repeat Step 2.
- 4. When finished, press [OK] at the top right of the screen, and then go to 4.

4. To enter an email subject, press [Subject]. If not, go to 6.

The letter keys screen displays.



• See page 94 "How to Use the Letter Keys on the Display Panel".

#### 5. Enter the subject text for the email and press [OK].

The text displays in the recipient's email Subject field, along with the attached file. Note that this field may contain pre-defined text.

Depending on settings made by the Administrator, this field may not be displayed.



• The maximum subject length is 128 characters.

# 6. For additional email settings, press [Options]. If not, go to 8.

You can configure additional settings through the Options screen, for example, Error Notification, Priority Level, etc., provided that the Administrator has enabled the functions.



- See Table "Send to Email Main Screen".
- See Table "Send to Email Options Screen".

If you wish to also scan the document to a target folder, for example, a Windows shared folder, FTP server, or WebDAV server, press [ +] twice to display the Service Menu screen and proceed to page 153 "About Send to Folder/FTP/WebDAV". If not, go to page 122 "Step 6: Set Other Scan Parameters".

# **Deleting Selected Email Addresses**

You can delete from the Selected Destinations List the email addresses that have been selected.

1. Press [ 1].

The selected email addresses are displayed.

2. Clear the check box of the address to be deleted.



• You can edit the email addresses you have entered manually. Press [ ] of the email address you want to edit, edit the address, and then press [OK].

#### 3. Press [OK].

The selection is canceled.

# Send to Folder/FTP/WebDAV Overview

GlobalScan NX supports three ways to send scanned documents to a folder:

• Send to Folder

The Send to Folder Service allows you to scan documents to one or more network shared folders. Send to Folder improves recordkeeping processes by enabling users to quickly capture and store invoices, medical records, order forms, etc. This feature also supports Send to Home, whereby the scanned document is automatically sent to the login user's Home directory.

This feature is also useful for sharing large files, for example, manuscripts, photographs, PowerPoint presentations, etc., that may not be suitable for email. Any network user with access rights can open the files contained within the folders.

Send to FTP

The Send to FTP (File Transport Protocol) Service allows you to scan documents to a specified FTP site. This is helpful to users who wish to share access to files, for example, documents that require on-demand, remote access, such as brochures, presentations, manuals, etc.

This feature is also useful for file sharing in mixed operating system environments, that is, when documents originate on, for example, Windows, UNIX, and Linux, etc. computers.

Send to WebDAV

The Send to WebDAV Service allows you to collaboratively edit and manage files on remote servers, when used in combination with a third-party DMS (Document Management System) that supports WebDAV (Web-based Distributed Authoring and Versioning).

Once stored on the file server, authorized users can collaborate on, for example, proposals, research reports, product designs, etc., by checking documents in/out, incorporating changes, and then sharing the versioned files with clients, colleagues, and others.

# Reference

• For further details, see page 153 "About Send to Folder/FTP/WebDAV".

# 

As a user, the transport method, i.e., Folder (network shared), FTP, or WebDAV, may not be
apparent, unless the Administrator has used a display name that identified the Service, like "Send
to Folder", "Send to FTP", or "Send to WebDAV". Instead, the Service may be simply labeled
"Shared Folder". What's important to remember, is that the steps you take to scan the document are
virtually identical, regardless of the target destination or transport method.

Please take a moment to review the sample Send to Folder main screen and associated settings listed in the table.

Fig.: Send to Folder - Main Screen

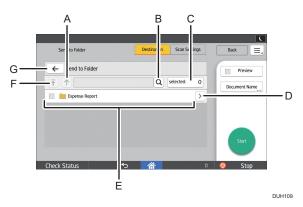


Table: Send to Folder - Main Screen

	ltem	Description
A	[1]	Press to display the folders on upper location. This button is available when subfolders are displayed.
В	[Q]	Displays the Folder search screen.
		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.
С	Number of Selected Folders	Displays the number of selected folders. Pressing this button displays a list of selected folders.
D	[>]	Press to view subfolders of the selected folder. For root folders for which display of the subfolders is not allowed, this button is not displayed. Whether the folder is allowed to display the subfolders is specified by the Administrator.

	ltem	Description
Е	Folder List	A list of the folders that can be specified as a destination displays here. The initial content of the list is preset by the Administrator.
		Swipe the screen vertically to view additional folders in the Folder List.
		<b>↓</b> Note
		When the Send to Home Folder feature is enabled by the Administrator, Folder List will display the [Home Folder] button. By selecting [Home Folder] as a destination, the scanned document will be delivered to your Home folder, as well as any other selected destinations. As with other folders, you can move to a subfolder or deselect Home Folder from MFP. Note that this is supported by the Send to Folder (network shared folder) Service only.
		If Home Folder cannot be obtained, documents cannot be delivered to Home Folder even if Send to Home Folder is selected. In this case, the delivery process (job) is successful but it is recorded in the system log as a failure. Please contact your administrator if documents are not delivered to your Home Folder.
F	[₹]	Returns to the screen displaying the root folders. This button is available when subfolders are displayed.
G	[←]	Returns to the Service Menu screen.

# Send to Folder/FTP/WebDAV Instructions

To use the Send to Folder/FTP/WebDAV Services, proceed as follows:

# **Selecting Destination Folders**

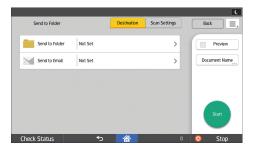


- If the destination folder is preset, you do not have to specify the folder.
- 1. If necessary, press [Send to Folder] on the Service Menu screen.



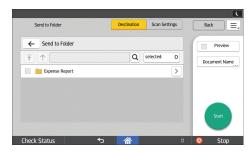
 If the Project contains only the Send to Folder Service, the Send to Folder screen automatically displays, thus you do not need to select the Service. • The Service display name, for example, [Send to Folder], is set by the Administrator, thus can vary.

Fig.: Service Menu Screen



The Destination Selection screen, with Folder List displays.

Fig.: Folder List



2. Select the destination folders by either Selecting Destination Folders from List or Searching For Destination Folders.

#### **Selecting Destination Folders from List**

Select the check box for the desired destination folder.
 Multiple folders can be selected at one time. The selected folders are highlighted.

Fig.: Folder List





• [ ▶ ] is used to move down one level. The [↑] is used to move up one level. To quickly return to the root folder, press [ ↑ ].

Proceed to page 122 "Step 6: Set Other Scan Parameters".

#### **Searching for Destination Folders**

1. Press [Q].

The letter keys screen displays.



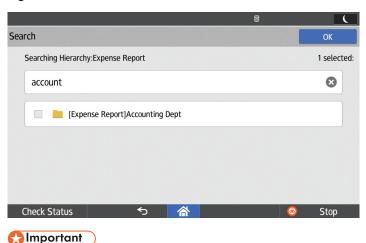
- A search is performed on all folders currently displayed on the display panel.
- If [Q] is grayed out, the Administrator has disabled the function.



- See page 94 "How to Use the Letter Keys on the Display Panel".
- 2. Enter the folder name or a part of it, and then press [Search].

The search is performed within the current folder; the targets are its subfolders. The folders that match the given search condition are displayed in the list.

Fig.: Folder Searched List



- To search for all folders/subfolders, do not enter anything with the letter keys, simply press [Search]. This action will return all available destinations.
- 3. Select the check box for the desired destination folders.
- 4. To perform another search, press [x], and then repeat 2-3.

Proceed to page 122 "Step 6: Set Other Scan Parameters".

5. Press [OK].

### **Deleting Selected Folder Destinations**

You can delete from the Folder List and/or the Selected Destinations List the folder destinations that have been selected.

 In the Folder List or Selected Destinations List, clear the check box of the folders to cancel selection.

The selection is canceled.

# Send to Printer (Server Edition Only) Overview

The Send to Printer Service enables you to print data using the printers installed on the server.

JPEG (file extension ipeg, ipg, or ipe) and TIFF (file extension tif or tiff) files can be printed. Files are printed according to the default driver settings of each selected printer.

#### Fig.: Send to Printer Screen



Table: Send to Printer Screen

	ltem	Description
Α	Printer Name	Displays the names of the printers installed on the server.
В	Quantity	Specify the number of copies to print.

# Send to Printer (Server Edition Only) Instructions

Use the following procedure to use the Send to Printer Service:

1. Press [Send to Printer] on the Service Menu screen.



 The Service display name, for example [Send to Printer], is set by the Administrator and might be different on your MFP.

2. In the [Printer Name] list, select the names of the printers to use for printing.

You can select up to 30 printers at one time. The printers you select will appear highlighted.

3. Specify the number of copies to print.

You can print up to 999 copies at one time.

# **Step 6: Set Other Scan Parameters**

This section explains how to set the following parameters:

- Document Name
- Scan Settings
- Scan Size
- Filters



Depending on Administrator settings, these parameters may or may not be required.

#### **Document Name Overview**

[Document Name] allows you to specify a file name for the scanned image, enabling the recipient to determine the content of the email attachment, or retrieve a file from a shared folder. The Job Log also displays the Document Name, enabling you to determine the job status.

The Administrator can pre-define the Document Name which can be edited, unless the Administrator has set the property as read-only, in which case the button is not displayed.



- Depending on the parameters applied by the Administrator, scan date information is added after Document Name. The format is as follows: DocumentName\_yyyymmddhhmmss.
- If a Document Name is not specified, regardless of the Administrator's settings, the scan date is
  applied as the name. The format is as follows: yyyymmddhhmmss.
- Depending on the Administrator's settings, the entered Document Name may be ignored because
  the default Document Name that Administrator predefined overrides one entered at the MFP
  display panel.

#### **Document Name Instructions**

To add/edit a Document Name, proceed as follows:

1. Press [Document Name].

The letter keys screen displays.



• See page 94 "How to Use the Letter Keys on the Display Panel".

2. Enter the name, for example, "meeting".



- The maximum Document Name length is 128 characters.
- 3. Press [OK].

### Scan Settings Overview

The Scan Settings screen enables you to select settings that determine the way GlobalScan NX processes the scanned document, such as Resolution, File Format, Density, Scan Size, Filters, etc.

For example, you may be scanning a detailed color drawing, so select the [400 dpi] Resolution and the PDF Converter[Full Color: Text / Photo] Scan Type. Likewise, you may want to save time scanning a duplex report (via the ADF) by selecting the [2 Sided (Top to Bottom)] or [2 Sided (Top to Top)] mode as [Original Settings].

Please take a moment to review the sample Scan Settings screen and associated features listed in the table.

Fig.: Scan Settings Screen



 The Scan Settings screen can be customized by the Administrator, thus some selections may not be displayed, i.e., are preset, while others may be limited. For example, the Resolution settings may be limited to 200 dpi and 400 dpi.

• Only supported values are available. Values that are not supported by the MFP are not displayed. If all of a setting's values are not displayed, the default value for that setting is applied.

# Table: Scan Settings Screen

	ltem	Description
A	[Resolution]	Displays the Resolution setting screen.  Select [100 dpi], [200 dpi], [300 dpi], [400 dpi], or [600 dpi].  Note  • Specify [200 dpi] 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]	Displays the Scan Type setting screen.
		Select the scan type. Only one mode (Black & White, Gray Scale, or Full Color) can be applied to each document.
		Auto Color Select
		Black & White: Text
		Black & White: Text/Photo
		B & W: Text/Line Art
		Black & White: Photo
		Gray Scale
		Full Color: Text/Photo
		Full Color: Glossy Photo
		<b>◆</b> Note
		<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>

	ltem	Description
С	[File Format]	Displays the File Format setting screen.
		Select the format that you want to send the files in.
		If you want to combine multiple scanned documents into a single file, you must select a multi-page under [File Format].
		<b>U</b> Note
		<ul> <li>Note that the Administrator sets the File Format selections, thus the display panel may show all or limited settings.</li> </ul>
		<b>☐</b> Reference
		See Appendix page 158 "File Formats".
D	[Original Orientation]	Displays the Original Orientation setting screen.
		Select the document orientation.
		Standard Operation Panel
		• [Portrait/Readable]
		• [Landscape/Unreadable]
		Smart Operation Panel
		• [Readable Direction]
		[Unreadable Direction (90 Degrees Counterclockwise)]
		[Unreadable Direction (180 Degrees)]
		[Unreadable Direction (90 Degrees Clockwise)]
		<b>↓</b> Note
		<ul> <li>Depending on the model, there are only two options available in the MFP display panel: [Readable Direction] and [Unreadable Direction (90 Degrees Counterclockwise)].</li> </ul>

	ltem	Description
Е	[Original Settings]	Displays the Original Settings screen.
		Select the type of original.
		• [1 Sided]
		• [2 Sided (Top to Top)]
		• [2 Sided (Top to Bottom)]
		When using the ADF, this setting ensures accurate image capture and later viewing of the scanned file.
		<b></b> Note
		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.
F	[Density]	Displays the Density setting screen.
		Selecting [Auto Density On] corrects scanning density to improve resolution of paper types such as non-white paper like newspaper or transparent originals.

	ltem	Description
G	[Scan Method]	Displays the [Scan Method] setting screen.  Select the scan method.  • [ADF/Exposure Glass]  Normal scan operation from the Automatic Document Feeder or exposure glass.  • [Batch]  Sends multiple-page originals scanned with either the ADF or exposure glass as a single job.  If [Batch] is selected, scanning starts after you place the additional originals and press [Continue]. When all the originals have been scanned, press [Finish].  Regardless of the default settings, the MFP waits until additional originals are placed.  • [SADF] (Semi-automatic Document Feeder)  Scans multiple page originals as a single job 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 [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.  • Note  • If the maximum document volume exceeds the MFP's internal memory capacity, the documents are not sent.
Н	[Scan Size]	Displays the Scan Size setting screen.    Reference
I	Filters	Displays the setting screen for each filter. Some filters may not be displayed depending on the administrator's settings.  Filters Overview".

#### Scan Size Overview

Pressing [Scan Size] displays the Scan Size screen.

The Scan Size screen enables you to adjust scanning to match the size of your original; [Auto Detect] meets most application needs. Note that the default setting is selected by the Administrator, as are the available selections, so your Scan Size screen may appear different than that shown in the figure "Scan Size Screen".

Please take a moment to review the sample Scan Size screen and associated features listed in the table.

### Fig.: Scan Size Screen



Table: Scan Size Screen

	ltem	Description
A	[Auto Detect]* 1	Scans original sizes using the automatic size detect function.  Automatic size detection is performed for the first scan only, and the detected size is used for all of originals to follow.
В	[Mixed Original Sizes]*1	Scans a batch of originals with different length by detecting the length of each.
С	[Select from Regular Size]	Displays the Regular Size paper selection screen.

<sup>\* 1</sup> These items might not be displayed depending on the MFP model you use. For details, refer to the Readme file

# OCR Scanned PDF Overview (Serverless Edition Only)

The OCR Scanned PDF screen enables you to create the OCR scanned PDF.

This function is available with MFP which supports the OCR function.

Fig.: OCR Scanned PDF Screen



Table: OCR Scanned PDF Screen

	ltem	Description
Α	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)

### **Filters Overview**

This section explains how to use the following Filters:

- OCR Filter
- PDF Converter Filter
- Enhanced PDF Converter Filter
- Section Specify Filter
- Section Splitter Filter
- Image Correction Filter
- PDF Stamper Filter

The Filters may not be displayed depending on the settings for the Project. In that case, proceed to page 143 "Step 7: Start Scan".



- The Filter display names, for example, "PDF Converter", are set by the Administrator, thus the name may vary.
- If the setting you require is not visible, swipe the screen vertically.

### OCR Filter (Server Edition Only) Overview

The Optical Character Recognition (OCR) Filter converts scanned data into text data using OCR software. This function also supports auto orientation. When the Administrator has enabled this setting, additional processing is done to correctly orient the document. For example, even if the original pages are mixed - right side up/down - the scanned images face in the correct direction when the recipient views the file.

### **OCR Filter (Server Edition Only) Instructions**

To process the scanned document using the OCR Filter, proceed as follows:

1. Press [OCR].

The OCR Filter screen is displayed.

#### Fig.: OCR Filter Screen



2. If you need to select an OCR language, press [ ] for [OCR Language], select one, and then press [OK].

For example, if document text is in Spanish, select Spanish from the list.



- If you select an incorrect language, for example, the language selection is Spanish and the scanned document is English, the OCR result will be incorrect.
- 3. Press [Auto Orientation] to orient all pages in the same direction.

Proceed to page 143 "Step 7: Start Scan".



• Depending on the Administrator's settings, the document that is output from the OCR filter may be in Excel format (\*.XLS) or Rich Text format (\*.RTF).

#### **PDF Converter Filter Overview**

With the PDF Converter Filter, you can create a searchable, password-protected PDF, as well as restrict others from printing, modifying, or copying text and graphics from the PDF file.

Please take a moment to review the PDF Converter Filter screen and associated features listed in the table.

Fig.: PDF Converter Filter Screen



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Table: PDF Converter Filter Screen

	ltem	Description
А	Create Searchable PDF	Allows you 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], [Japanese], [Traditional Chinese], [Korean(Hangul)]
		The language selection list might vary depending on the settings specified by the administrator.
		If [No] is selected, the scanned document will be converted to an Image PDF file (with not text data).
		<b>◆</b> Note
		This option is not available for Serverless Edition.
В	Assign a User Password* 1	Allows you to create a PDF that requires a password to open.
		If you select [Yes], you must enter a password in the adjacent field.
С	Assign a Master Password* 1	Allows you to restrict others from printing, modifying, or copying text and graphics from the PDF file by assigning a password. If you select [Yes], you 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 function.
		• [Print]
		• [Modify]
		• [Copy/Extract]

<sup>\* 1</sup> Do not use the same string for the User Password and the Master Password.

# Password confirmation entry

You will need to enter the password twice for [Assign a User Password] and [Assign a Master Password] to prevent incorrect input.

On the MFP display panel, follow the instructions below:

- 1. Press [Yes] for either [Assign a User Password] or [Assign a Master Password].
- 2. The letter keys screen will appear.
- 3. Enter the password and press [OK].
- 4. The letter keys screen will appear again.
- 5. Enter the same password to confirm it and press [OK].
  If a different password is entered, an error message will be displayed. Confirm the password and enter the correct password.



These features may not be available depending on the settings specified by the Administrator.

#### **PDF Converter Filter Instructions**

To create a searchable, password-protected PDF file, proceed as follows:

- 1. Press [PDF Converter].
- 2. Specify the settings.



• See Table "PDF Converter Filter Screen".

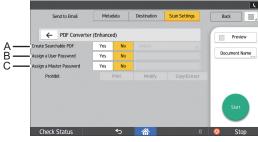
Proceed to the next Filter in this section, or go to page 143 "Step 7: Start Scan".

# Enhanced PDF Converter Filter Overview (Server Edition Only)

With the Enhanced PDF Converter Filter, you can create a searchable, password-protected PDF, as well as restrict others from printing, modifying, or copying text and graphics from the PDF file.

Please take a moment to review the Enhanced PDF Converter Filter screen and associated features listed in the table.

Fig.: Enhanced PDF Converter Filter Screen



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Table: Enhanced PDF Converter Filter Screen

	ltem	Description
А	Create Searchable PDF	Allows you 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], [Japanese], [Swedish], [Polish], [Hungarian], [Czech], [Finnish], [Traditional Chinese], [Thai], [Greek], [Korean(Hangul)], [Catalan], [Turkish], [Arabic], [Hebrew], [Vietnamese]
		The language selection list might vary depending on the settings specified by the administrator.
		If [No] is selected, the scanned document will be converted to an Image PDF file (with not text data).
В	Assign a User Password* 1	Allows you to create a PDF that requires a password to open.
		If you select [Yes], you must enter a password in the adjacent field.
С	Assign a Master Password* 1	Allows you to restrict others from printing, modifying, or copying text and graphics from the PDF file by assigning a password. If you select [Yes], you 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 function.
		• [Print]
		• [Modify]
		• [Copy/Extract]

<sup>\*1</sup> Do not use the same string for the User Password and the Master Password.

# Password confirmation entry

You will need to enter the password twice for [Assign a User Password] and [Assign a Master Password] to prevent incorrect input.

On the MFP display panel, follow the instructions below:

- 1. Press [Yes] for either [Assign a User Password] or [Assign a Master Password].
- 2. The letter keys screen will appear.
- 3. Enter the password and press [OK].
- 4. The letter keys screen will appear again.
- 5. Enter the same password to confirm it and press [OK].
- 6. If a different password is entered, an error message will be displayed. Confirm the password and enter the correct password.



These features may not be available depending on the settings specified by the Administrator.

#### **Enhanced PDF Converter Filter Instructions**

To create a searchable, password-protected PDF file, proceed as follows:

- 1. Press [PDF Converter (Enhanced)].
- 2. Specify the settings.



• See Table "Enhanced PDF Converter Filter Screen".

Proceed to the next Filter in this section, or go to page 143 "Step 7: Start Scan".

### Section Specify Filter (Server Edition Only) Overview

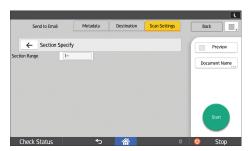
The Section Specify Filter is useful when, for example, you would like to send a document that excludes the cover sheet, say a fax cover page. Another example is if you scan brochures and would like to send just the body pages, excluding the cover. In short, this Filter enables you to specify just the sections that you want to send. For example for a document consisting of 6 sections, the Section Range, "1-2, 5-6", will remove section 3-4 from the scanned data.

### Section Specify Filter (Server Edition Only) Instructions

To specify the target sections for extraction, proceed as follows:

### 1. Press [Section Specify].

### Fig.: Section Specify Filter Screen



### 2. Enter the setting.



• For valid range entries, see the table below.

Proceed to page 143 "Step 7: Start Scan".

Please take a moment to review the sample Section Specify Filter settings listed in the table. The examples are for a Document consisting of 5 Sections.

Table: Section Specify Filter - Valid Range Entries

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 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).
(2,3)	Every third Section starting from the second Section is extracted (second and fifth Sections).

Entry Example	Result	
(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. "6-8" is 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).	

# Section Splitter Filter (Server Edition Only) Overview

Split a job consisting of multiple sections into a specified number of sections. Specify the number of sections that the job is split into.

Fig.: Section Splitter Filter Screen



**Table: Section Splitter Filter Screen** 

	ltem	Description
Α	Number of Sections	Press [♣] or [♠] to specify the number of sections for split between 1 and 500.

### Section Splitter Filter (Server Edition Only) Instructions

- 1. Press [SectionSplitter].
- 2. Specify the split number for [Number of Sections] between 1 and 500.

### Image Correction Filter (Server Edition Only) Overview

The Image Correction Filter allows you to improve scanned images. Using this Filter, you can automate image correction of scanned documents and perform efficient digitization and distribution of high-quality documents.

The following table explains the settings and functions that are available on the Image Correction screen.

#### Fig.: Image Correction Filter Screen



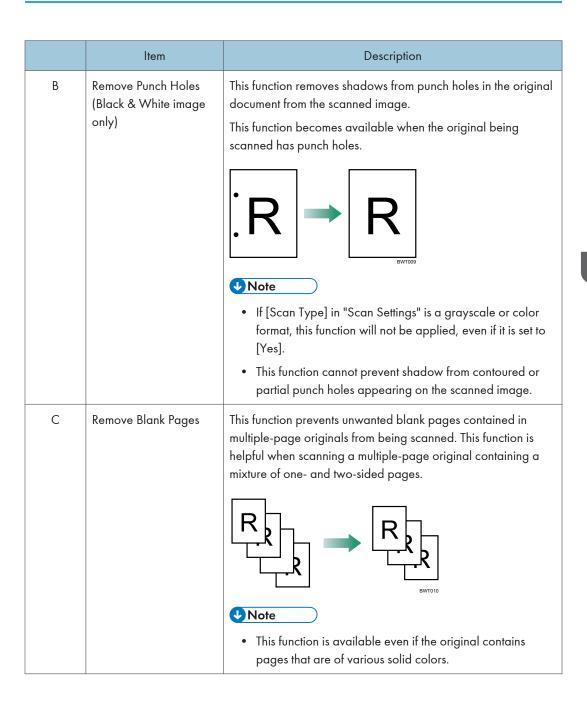
Table: Image Correction Filter Screen

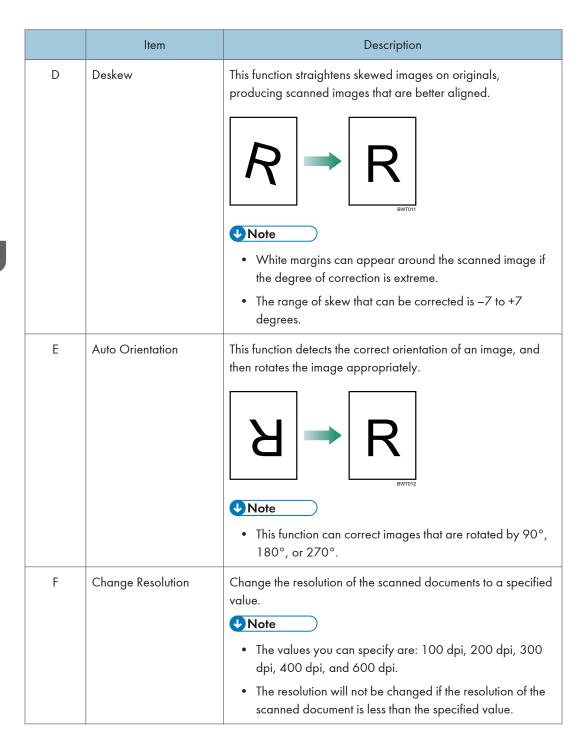
Noise Reduction (Black & White image only)

This function removes speckles and blemishes (noise) on the original document from the scanned image.

Note

If [Scan Type] in "Scan Settings" is a grayscale or color format, this function will not be applied, even if it is set to [Yes].





### Image Correction Filter (Server Edition Only) Instructions

Use the following procedure to configure the Image Correction Filter.

- 1. Press [Image Correction].
- 2. Specify the Image Correction Filter.

# Reference

• See Table "Image Correction Filter Screen".

### PDF Stamper Filter (Server Edition Only) Overview

The PDF Stamper Filter converts scanned data into a PDF file with the specified text or image embedded.

You can specify the target pages to be stamped.

Depending on the setting configured by the administrator, the content may not be shown on the PDF Stamper tab screen.

Fig.: PDF Stamper Filter Screen



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Table: Image Correction Filter Screen

	ltem	Description
A	Page Range (Multipage Settings)	Specify the target pages to be stamped for the document.  • [All Pages]  • [Specified Pages]  Enter a value in "Page Numbers".  • [First Page]  • [Last Page]  • [Even Pages]  • [Odd Pages]

	ltem	Description
В	Page Numbers	Specify the pages to be stamped for the document.
	(Multipage Settings)	This item can be configured only when [Specified Pages] is selected for "Page Range".
		The following is 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-
С	Single-page Settings	Specify whether or not to embed a stamp into single page documents.
		• [Do not Stamp]
		• [Stamp All]

# PDF Stamper Filter (Server Edition Only) Instructions

To process the scanned document using the PDF Stamp Filter, proceed as follows:

- 1. Press [PDF Stamper].
- 2. Specify the settings.

## Step 7: Start Scan

Be sure a document is placed on the MFP's Automatic Document Feeder (ADF) or exposure glass.



• See page 96 "Step 1 : Place Document"

### Starting Job Distribution

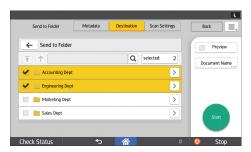
 Confirm that the correct destinations have been selected. Press [Destination] to open the Service Menu screen, and then press [>].

Fig.: Service Menu/Summary Screen



The Service Menu/Details screen displays.

Fig.: Service Menu/Details Screen



To see more details, press [ 1] or the Number of selected folders button.

2. If necessary, change the destinations, Document Name, or Scan Settings.



- A resolution of 200 dpi or more is recommended.
- A pixel between 200 × 350 and 7016 × 9921 is only supported for an image data to scan.
- The following is an example of combination of resolutions and paper sizes.

	Resolution				
Paper Size	100dpi	200dpi	300dpi	400dpi	600dpi
BO JIS	А	NA	NA	NA	NA
A0	А	А	NA	NA	NA
B1 JIS	А	А	NA	NA	NA
A1	А	А	А	NA	NA
B2 JIS	А	А	А	NA	NA
A2	А	А	А	А	NA
B3 JIS	А	А	А	А	NA
А3	А	А	А	А	А

<sup>&</sup>quot;A" represents "Available", and "NA" represents "Not Available".

If a paper, whose paper size and resolution is described as "NA", is used, an error will occur.

### Reference

- See page 105 "Step 5: Select Service and Set Distribution Parameters"
- See page 122 "Step 6: Set Other Scan Parameters"
- 3. If necessary, before you press [Start], select the check box for [Preview] to view the scanned image.

The Preview screen will appear after you press [Start].

## Limitation

• If this function is not available, [Preview] will not be displayed on the MFP display panel.

## Reference

• See page 147 "Preview".

#### 4. Perform the scan using one of the methods listed below.

- Performing Scan Using ADF (Automatic Document Feeder)
- Performing Scan Using ADF or Exposure Glass (Batch scan)
- Performing Scan Using ADF / SADF (Semi-Automatic Document Feeder)
- Performing Scan Using Exposure Glass



 The method you choose here must match that which was selected in the Scan Settings screen, specifically, the [Scan Method] value.  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.



- See table "Scan Settings Screen" in page 123 "Scan Settings Overview".
- If you have enabled the preview function in Step 3, press [Send] after confirming the scanned image.



- You cannot change the scan method for GlobalScan NX during the scan from the ADF to the
  exposure glass, or vice versa. If the scanning process has been initiated from the exposure
  glass, subsequent scans must also take place from the exposure glass. This also applies if
  scanning has been initiated from the ADF.
- 5. When scanning has finished, a confirmation message will appear on the MFP display panel. Press [OK] to close the confirmation message.

Fig.: MFP display panel



#### **Canceling Job Distribution**

It is possible to cancel scan distribution by pressing [Stop]. The document cannot be recovered, so take care when pressing [Stop]. Also note that once the scan data has been submitted to GlobalScan NX, i.e., scanning is complete, distribution cannot be canceled, except by the Administrator.

## Performing Scan Using ADF (Automatic Document Feeder)

1. Press [Start].

The document is scanned and distributed.

#### 1. Press [Start].

The scanned data is stored in the MFP temporarily. When scanning is complete, the device waits for the next document to scan.

- 2. Place the next document to scan.
- 3. Press [Continue].
- 4. Repeat steps 2 and 3 until you complete the scan.
- 5. Press [Finish] to finish the scan.
- 6. Press [OK].

The scanned documents from the multiple scans are sent as one job.



 If you do not set the next document within 60 seconds, the MFP starts sending the scanned documents automatically or cancels scanning and discards the scanned data, depending on the administrator's setting. The administrator can change the period of time the MFP waits.

### Performing Scan Using ADF / SADF (Semi-Automatic Document Feeder)

1. Press [Start].

The scanned data is stored in the MFP temporarily. When scanning is complete, the device waits for the next document to scan.

2. Place the next set of documents on the ADF to scan continuously, within 60 seconds.

The scan starts automatically. Repeat this step until you complete the scan.

- 3. Press [Finish] to finish the scan.
- 4. Press [OK] to close the confirmation message.

The scanned documents from the multiple scans are sent in as one job.



 If you do not set the next document within 60 seconds, the MFP starts sending the scanned documents automatically or cancels scanning and discards the scanned data, depending on the administrator's setting. The administrator can change the period of time the MFP waits.

### **Performing Scan Using Exposure Glass**

1. Press [Start] Key.

The scanned data is stored in the MFP temporarily. When scanning is complete, the device waits for the next document to scan.

- 2. Set the next document to scan.
- 3. Press [Continue].
- 4. Repeat 2-3 until you complete the scan.
- 5. Press [Finish] to finish the scan.
- 6. Press [OK].

The scanned documents from the multiple scans are sent as one job.



 If you do not set the next document within 60 seconds, the MFP starts sending the scanned documents automatically or cancels scanning and discards the scanned data, depending on the administrator's setting. The administrator can change the period of time the MFP waits.

#### **Preview**

This section explains how to display and use the Preview screen.

You can use the Preview screen to check whether originals have been scanned correctly.

To display the Preview screen, select the check box for [Preview], and then press [Start] to scan the documents. When scanning is complete, the Preview screen appears automatically so you can view the scanned images before you send them.

After checking previews, press [Send] to start distribution.

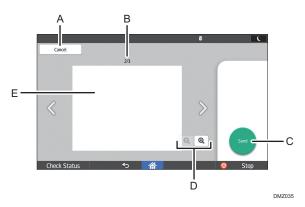


 If you do not press [Send], after waiting for the period of time specified by the administrator, the MFP starts sending the scanned documents or cancels sending.

## Limitation

• If this function is not available, [Preview] will not be displayed on the MFP display panel.

## Fig. Preview



#### **Table: Preview**

Tubic	DIE: Preview		
	ltem	Description	
Α	[Cancel]	Press to close the Preview screen without sending the files.	
В	Display Page	Displays the number of the currently displayed page and the total number of pages. You can view the next and previous pages by pressing [<] and [>].	
С	[Send]	Press to close the Preview screen and send the files.	
D	[♠] and [♠]	Press these to reduce or enlarge the displayed preview.	
E	Displayed image	Displays the scanned image on the screen.  Double-tap the image to switch the view between actual-size and full-screen.  Pinch in and out on the image to reduce or enlarge it.  Press [<] or [>] in the full-screen view to display the previous or next page.  When you zoom in on the print preview and part of the image	
		is displayed off the screen, you can swipe the image to display the hidden area.	

## Step 8: Exit Project

It is possible to continuously scan documents without exiting the Project. When scanning is complete - there are no more documents to process - press [Top].



• If a certain time period has elapsed without any operation after login, you are automatically exit of the Project. This time period, which is preset by your Administrator, is within the range of 60 to 600 seconds. The default setting is 60 seconds.

## Step 9: Review Job Log

The Job Log provides details about the scanned document, such as Date / Time, Project Name, Document Name, Job Status, etc. The content of the Job Log is determined by Administrator settings.

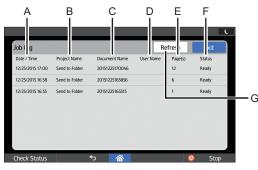
To view the Job Log, proceed as follows:

- 1. If necessary, press [Top] to exit the Project.
- 2. Press the [=4] at the top right of the screen, and then select [Job Log].
- 3. Check the logs, and then press [Exit].



• If the Project requires authentication, log in to the Project first, and then check the logs.

#### Fig.: Job Log Screen



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#### Table: Job Log Screen

	Label	Description
Α	Date / Time	Indicates the date and time that scanning took place.
В	Project Name	Indicates the name of the Project.
С	Document Name	Indicates the specified Document Name (for example, email attachment file name and/or the name of the file delivered to the folder).  • Reference
		<ul><li>See page 122 "Document Name Overview".</li><li>See page 122 "Document Name Instructions".</li></ul>
D	User Name	Indicates the user name used to log in to the Project or MFP.  If no authentication was required, this item is blank.

	Label	Description
Е	Page(s)	Indicates the number of pages scanned.
F	Status	Indicates the scan results, for example, complete, error, etc.
G	Refresh	Updates the Job Log list.



• Depending on Administrator settings, the "Document Name" and "User Name" of scans performed by other users may display as asterisks (\*\*\*\*) to mask the information.

## 5. APPENDIX

This section contains important reference material that you will find helpful in the day-to-day operation of GlobalScan NX.

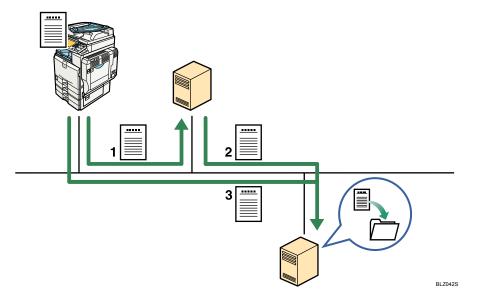
## About Send to Folder/FTP/WebDAV

This section provides further detail on GlobalScan NX's Send to Folder/FTP/WebDAV Services.

#### Send to Folder

The Send to Folder Service allows you to scan documents to one or more network shared folders. Send to Folder improves recordkeeping processes by enabling users to quickly capture and store invoices, medical records, order forms, etc. This feature also supports Send to Home, whereby the scanned document is automatically sent to the login user's Home directory.

Fig.: Send to Folder Workflow



- 1. With GlobalScan NX Server Edition, documents are sent from the MFP to GlobalScan NX Server.
- 2. With GlobalScan NX Server Edition, documents sent to GlobalScan NX Server are saved in the specified folders.
- 3. With GlobalScan NX Serverless Edition, the MFP saves documents in the specified folders.



- GlobalScan NX Server Edition supports scanning to a local and/or network folder. Sending to a local directory is supported when the directory resides on a computer with GlobalScan NX software installed.
- GlobalScan NX Serverless Edition supports scanning to a network folder only.
- The folders that can be specified as the destination are:
  - Windows shared folders
  - Local folders of the Server PC (with GlobalScan NX Server Edition only)
  - Open folders of Unix Samba Server
- The Send to Folder screen varies depending on Project settings. Project settings are configured by the Administrator.
- If the Project contains only the Send to Folder Service, the Send to Folder screen is automatically displayed, thus you do not need to select the Service.
- The appearance of [Send to Folder] may be different than your screen, as the Administrator has the
  ability to change the order in which buttons display, as well as the displayed name, i.e., button
  label.
- If the Send to Folder Service has default destination folders displayed in the Selected Destinations list, they have been preset by the Administrator and can be removed.
- Scanning a document to a folder requires that the Administrator establish access rights, or write authority. Be sure to select such a folder. Document distribution to a folder for which you do not have write authority results in an error.

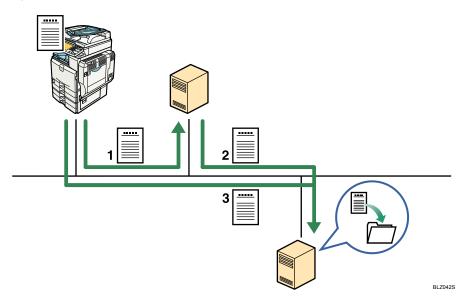
## Reference

- See page 44 "Send to Folder/FTP/WebDAV Overview" or page 115 "Send to Folder/FTP/WebDAV Overview".
- See page 47 "Send to Folder/FTP/WebDAV Instructions" or page 117 "Send to Folder/FTP/WebDAV Instructions".

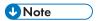
#### Send to FTP

The Send to FTP (File Transport Protocol) Service allows you to scan documents to a specified FTP site. This is helpful to users who wish to share access to files, for example, documents that require ondemand, remote access, such as brochures, presentations, manuals, etc.

Fig.: Send to FTP Workflow



- 1. With GlobalScan NX Server Edition, documents are sent from the MFP to GlobalScan NX Server.
- 2. With GlobalScan NX Server Edition, documents sent to GlobalScan NX Server are saved in the specified folders.
- 3. With GlobalScan NX Serverless Edition, the MFP saves documents in the specified folders.



- The Administrator must establish the necessary Distribution Parameters for the Send to FTP Server and set access rights on the FTP Server.
- The Send to FTP screen varies depending on Project settings. Project settings are configured by the Administrator.
- If the Project contains only the Send to FTP Service, the Send to FTP screen is automatically displayed, thus you do not need to select the Service.
- The appearance of [Send to FTP] may be different than your screen, as the Administrator has the
  ability to change the order in which buttons display, as well as the displayed name, i.e., button
  label.
- If the Send to FTP Service has default destination FTP Server sites that display in the Selected Destinations list, they have been preset by the Administrator and can be removed.
- Scanning a document to an FTP folder requires that the Administrator establish access rights, or
  write authority. Be sure to select such a folder. Document distribution to a folder for which you do
  not have write authority results in an error.

## Reference

See page 44 "Send to Folder/FTP/WebDAV Overview" or page 115 "Send to Folder/FTP/WebDAV Overview".

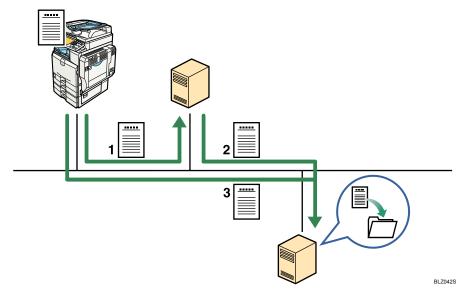
WebDAV Instructions".

### Send to WebDAV

This protocol allows you to collaboratively edit and manage files on remote servers, when used in combination with a third-party DMS (Document Management System) that supports WebDAV (Webbased Distributed Authoring and Versioning).

See page 47 "Send to Folder/FTP/WebDAV Instructions" or page 117 "Send to Folder/FTP/

Fig.: Send to WebDAV Workflow



- 1. With GlobalScan NX Server Edition, documents are sent from the MFP to GlobalScan NX Server.
- 2. With GlobalScan NX Server Edition, documents sent to GlobalScan NX Server are saved in the specified folders.
- 3. With GlobalScan NX Serverless Edition, the MFP saves documents in the specified folders.



- The Send to WebDAV screen varies depending on Project settings. Project settings are configured by the Administrator.
- If the Project contains only the Send to WebDAV Service, the Send to WebDAV screen automatically displays, thus you do not need to select the Service.
- The appearance of [Send to WebDAV] may be different than your screen, as the Administrator has
  the ability to change the order in which buttons display, as well as the displayed name, i.e., button
  label.
- If the Send to WebDAV Service has default destination WebDAV Server sites that displays in the Selected Destinations list, they have been preset by the Administrator and can be removed.

• Scanning a document to a WebDAV folder requires that the Administrator establish access rights, or write authority. Be sure to select such a folder. Document distribution to a folder for which you do not have write authority results in an error.

### **■** Reference

- See page 115 "Send to Folder/FTP/WebDAV Overview".
- See page 117 "Send to Folder/FTP/WebDAV Instructions".

## **File Formats**

GlobalScan NX supports a wide variety of file formats. Those that are displayed on the MFP display panel are controlled by the Administrator, so you may see all or limited choices on the Scan Settings screen.

## Reference

• See page 52 "Step 6 : Set Other Scan Parameters" or page 122 "Step 6 : Set Other Scan Parameters".

### Serverless Edition

#### **Black & White File Formats**

TIFF (MMR, multi-page)	TIFF (MMR, single-page)
PDF (searchable, multi-page)	PDF (single-page)

## **Grayscale/Color File Formats**

JPEG	PDF (single-page)
PDF/A (searchable, multi-page)	
High Compression PDF (searchable, multi-page)	

#### Ö

## Server Edition

### **Black & White File Formats**

TIFF (MMR, multi-page)	TIFF (Uncompressed, single-page)
BMP (Uncompressed)	TIFF-F (MMR, multi-page)
PNG	TIFF-F (MR, multi-page)
GIF	TIFF-F (MH, multi-page)
PDF (multi-page)	TIFF-F (MMR, single-page)
High Compression PDF (multi-page)	TIFF-F (MR, single-page)
TIFF (MR, multi-page)	TIFF-F (MH, single-page)
TIFF (MH, multi-page)	DCX (multi-page)
TIFF (Uncompressed, multi-page)	DCX (single-page)
TIFF (MMR, single-page)	PDF (single-page)
TIFF (MR, single-page)	High Compression PDF (single-page)
TIFF (MH, single-page)	

## **Grayscale/Color File Formats**

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)	

# **Troubleshooting**

This section describes the procedures for resolving issues that may arise during operation of the GlobalScan NX-enabled MFP. Perform the suggested solution in order to address the issue.

Issue	Cause/Solution
Cannot scan documents.	Check whether or not you set values that are not supported by the MFP.
	If the original document page volume is too large, separate the job into different batches and scan again.
The MFP screen displays a message indicating that Profile configuration information cannot be found.	Ask the administrator of the GlobalScan NX to confirm the setting.
No Group or Project is displayed on the MFP screen.	Ask the administrator of the GlobalScan NX to confirm the setting.
The scanned data cannot be sent as the file format specified on the MFP display panel.	Ask the administrator of the GlobalScan NX to confirm the setting.
Job Log indicates fatal error.	Ask the administrator of the GlobalScan NX.

b

## **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.

#### 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.

#### 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.

#### 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.

#### **Services**

A Service represents a distribution method used during document processing. For example, the Send to Email Service.

## Frequently Asked Questions

Q. What does GlobalScan NX do?

**A.** GlobalScan NX acts as a digital document routing system that accepts scanned documents (from properly equipped MFPs) and creates digital files for electronic transmission over your network to a variety of destinations, for example, email, folder, FTP/WebDAV Server, etc.

Q. Can GlobalScan NX reduce my overnight delivery costs?

**A.** Yes. GlobalScan NX can significantly reduce your overnight package delivery expenses by scanning your documents and sending them in, for example, PDF format, at a fraction of the cost. What's more, the document is delivered to its destination within seconds, not one or more days.

Q. Are the documents that I send secure?

**A.** Yes. Provided HTTPS is used. Each document scanned to the GlobalScan NX Server can be transmitted using SSL (Secure Sockets Layer) and is designed to protect passwords and content from prying eyes.

Q. Can I name the document I am scanning?

A. Yes. Each time you scan a document you have the ability to name the scanned image.

Q. Can I insert a subject into the email?

**A.** Yes. You can type "Subject" text for every email you send with the letter keys on the display panel. The Administrator can set default Subject text as well. In addition, default "Body" text, i.e., a message that will appear in the body of the email, can be set by your Administrator.

Q. Can a document be sent via email to someone who is not in the corporate Address Book?

**A.** Yes. This is also called manual email address entry, or "Manual Entry", a feature that allows you to enter any valid email address with the letter keys on the display panel. Note, however, that this feature can be disabled by your Administrator. In that case, the destination email must be selected from the list of email addresses registered on a corporate Directory Server.

Q. Can I send a document to several people on a single scan?

A. Yes. You can select/enter an unlimited number of email addresses from the MFP's display panel. The message will be distributed to all valid email addresses.

Q. How does the Batch Scan function work?

**A.** Batching allows you to scan a lengthy document in batches, and transmit the document as one job. You scan the first "batch" of pages, then you are prompted to set the next original, etc. This process is repeated until all pages have been scanned. Note that if the scanning process has been initiated from the exposure glass, subsequent scans must also take place from the exposure glass. This also applies if scanning has been initiated from the ADF.

Q. Does GlobalScan NX support color scanning?

A. Yes. Using a color MFP, documents can be scanned in JPEG, PDF, etc. file format.

Q. Can I choose the scan resolution for a document?

**A.** Yes. A default scan resolution (100dpi, 200dpi, 300dpi, 400dpi or 600dpi) is set by the Administrator, though you can reset the resolution via the MFP's display panel, unless disabled. The selected resolution is applied to all scans until you log out/exit or the MFP times out.

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