

RICOH GlobalScan NX

User's Quick Reference Guide

What is GlobalScan NX? GlobalScan NX provides efficient electronic document distribution across the enterprise via compatible network-connected MFPs. An easy-to-use solution, GlobalScan NX securely and seamlessly routes scanned documents to any valid email address, network-shared folders and printers, as well as FTP and WebDAV servers. By combining network scanning functionality within an accessible copier platform, GlobalScan NX offers cost efficiencies and greater workgroup productivity.

★ Important

- This reference is intended to serve as an overview of walk-up scan operations. Please refer to the *GlobalScan NX User's Guide* for details on a specific operation or topic.
- If you are using GlobalScan NX on an MFP that has a 4-line display panel, refer to "Using GlobalScan NX on a 4-line Display Panel MFP" in *GlobalScan NX User's Guide*.

<When using the Standard Operation Panel>

Step 1: Place Document

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

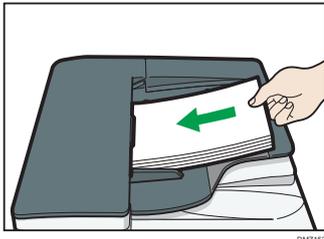


Fig. 1: ADF

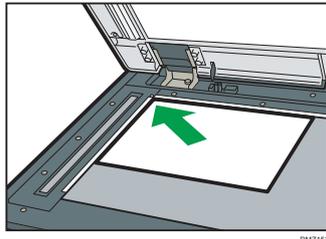


Fig. 2: Exposure Glass

Step 2: Open Group/Project Screen

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

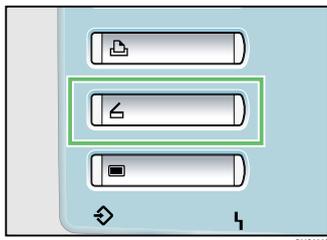


Fig. 3: Control Panel

↓ Note

- A key other than [**Scanner**] may access GlobalScan NX. Check with your Administrator.
 - The appearance of the GlobalScan NX user interface varies based on MFP model and Administrator settings.
2. Select the desired [**Group**] tab, e.g., *Accounts Payable*. See Fig. 4.
 3. Select the desired **Project** button, e.g., *Send to Email*. See Fig. 4.



Fig. 4: Group/Project Screen

Step 3: Log In

If Login is required, Fig. 5 displays. If login is not required, go to Step 4.

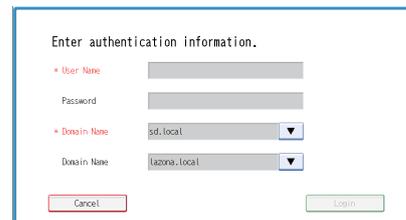


Fig. 5: Login Screen

To log in, proceed as follows:

1. Press the [**User Name**] box, and then enter your user name.
2. Press [**OK**].
3. If necessary, press the [**Password**] box, and then enter your password.
4. Press [**OK**].
5. Select/enter additional credentials, if needed.
6. Press [**Login**].

↓ Note

- If login fails, press [**OK**] and enter valid account credentials.
- Items marked with an asterisk (*) and displayed in red are required to log in. Be sure to enter these items.

Step 4: Select/Enter Metadata

If Metadata is required, **Fig. 6** displays. If Metadata is not required, go to **Step 5**.

Fig. 6: Metadata Screen

What is Metadata? The Administrator can design a Metadata screen. The values you enter/select, e.g., a billing code, are added as document information to the scanned image. Note that an asterisk (*) indicates a required setting.

To select/enter Metadata, proceed as follows:

1. Press field, drop-down or button.
2. Enter document information.
3. Repeat 1 - 2, as needed.
4. When finished, press **[Next]**.

Step 5: Select Service and Set Distribution Parameters

The Service Menu for the Project selected in **Step 2** displays.

Fig. 7: Service Menu

↓ Note

- If only one Service exists, the Destination Selection screen displays (**Fig. 8** or **Fig. 9**).

Send to Email

1. From the Service Menu, press **[Send to Email]**. **Fig. 8** displays.

Fig. 8: Email Destination Selection Screen

2. Select destination email addresses...

Search

- a. Press **[Search]**, and then enter search string, e.g., “s” for “smith”.

↓ Note

- To display all available addresses, do not enter a search string.
- b. Press **[OK]**. Search results are displayed.
 - c. To send a **[Cc]**, **[Bcc]**, or **[ReplyTo]**, press the **[To]** drop-down list and select.
 - d. Select (highlight) the addresses. To remove highlight, press address again.
 - e. If necessary, repeat a - d to search/select addresses.
 - f. Go to 3.

Manual Entry

- a. Select **[To]**, **[Cc]**, **[Bcc]**, or **[ReplyTo]** from drop-down list.
 - b. Press **[Manual Entry]**, and enter email address.
 - c. Press **[OK]**.
 - d. If necessary, repeat a - c.
 - e. Go to 3.
3. Press **[Subject]**, and enter Subject text for the email.
 4. Press **[OK]**.
 5. Press **[Options]**, and choose **[Divide Email]**, **[Notification]**, and **[Priority]** settings. For details, see *GlobalScan NX User's Guide*.
 6. Press **[OK]**, and **[OK]** again.
 7. Go to **Step 6**.

Remove Email Destination(s)

To remove a selected address from the Address List, press the address again, removing highlight. To remove a selected address from the Selected Destinations List, press **[Selected Destinations]**, and then the address, removing highlight; to cancel all selections, press **[Reset All]**. Press **[Selected Destinations]** again to return to Address List.

Send to Folder/FTP/WebDAV

The following example procedure is based on the Send to Folder Service.

1. From the Service Menu, press [**Send to Folder**]. **Fig. 9** displays.

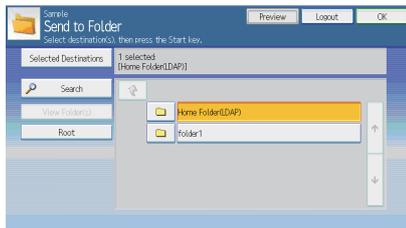


Fig. 9: Folder Destination Selection Screen

2. Select destination folders...

Select from List

- a. Press (highlight) the desired folders.
- b. Press [**OK**].
- c. Go to **Step 6**.

Search

- a. Press [**Search**], and then enter search string, e.g., “a” for “archive”.

Note

- To display all folders/subfolders, do not enter a search string.

- b. Press [**OK**].

Note

- To perform another search operation, press [**View Folder(s)**], and repeat a.

- c. Select (highlight) the folder. To remove highlight, press folder again.

Note

- A folder icon indicates subfolders are available. Press the icon to display subfolder, and select.
- To return to root folder, press [**Root**] or the green arrow.

- d. Go to **Step 6**.

Remove Folder Destination(s)

To remove a selected folder from the Folder List, press the folder again, removing highlight. To remove a selected folder from the Selected Destinations List, press [**Selected Destinations**], and then the folder, removing highlight; to cancel all selections, press [**Reset All**]. Press [**Selected Destinations**] again to return to Folder List.

Send to Printer

1. From the Service Menu, press [**Send to Printer**]. **Fig. 10** displays.

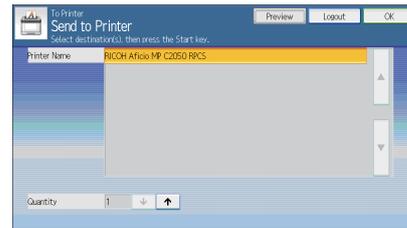


Fig. 10: Printer Selection Screen

Note

- 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

One or more of the following additional Distribution Parameters can be set:

- **Document Name** • **Scan Settings** • **Scan Size** • **Filters**

Note

- Depending on Administrator settings, other scan parameters may or may not be required.
- The Scan Settings and Scan Size screens can be customized by the Administrator, thus selections may vary.

Document Name

The specified name identifies the email attachment or file.

From the Service Menu (**Fig. 7**), proceed as follows:

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

Note

- The Administrator can preset the name. Editing is possible, unless set read-only.

Scan Settings/Scan Size

From Service Menu (**Fig. 7**), proceed as follows:

1. Press [**Scan Settings**].
2. Press [**Scan Settings**] tab or [**Scan Size**] tab.
3. Select the desired setting(s), and then press [**OK**].

Filters

For details, please refer to *GlobalScan NX User's Guide*.

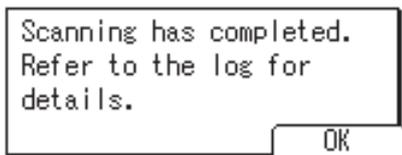
Step 7: Start Scan

1. Confirm that the destinations are correct. If necessary, open the Service Menu screen, and then press **[Details]**. Press **[Summary]** to exit the **[Details]** screen.
2. 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.
3. Confirm that the control panel **[Start]** key is green. If not, check that all required settings are selected/entered, and that a document is placed on the ADF or exposure glass.
4. Press **[Start]** key. The document is scanned and distributed. When scanning has finished, a confirmation message will appear on the MFP display panel.

MFP display panel



MFP display panel (4-line panel display)



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

Note

- If performing a Batch Scan, place the next set of documents on the ADF and press the **[Start]** key to start scan. Repeat until all pages are scanned. When finished, press **[#]**.
- If you pressed **[Preview]** in 2, check the scanned images, and then proceed as appropriate.

Step 8: Exit Project

Once the scanning process is complete, press the **[Logout]** button (see **Fig. 11**). The Group/Project screen (**Fig. 4**) displays.

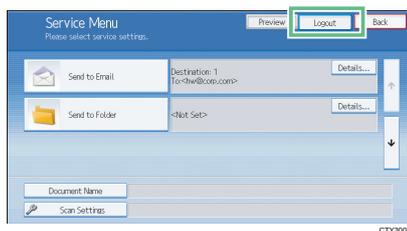


Fig. 11: Service Menu

Step 9: Review Job Log

The Job Log provides details about the scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc. See **Fig. 12**.

Date / Time	Project Name	Document Name	User Name	Page(s)	Status
2009/05/12 15:32	Scan	20090512153212	john	1	Ready
2009/05/12 15:31	Scan	20090512153123	smith	1	Ready
2009/05/12 15:29	Scan	20090512152956	john	1	Processing

Fig. 12: Job Log

Note

- The **[Document Name]** and **[Page(s)]** are not displayed for machines with a 4.3 inch screen.

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. Press **[Job Log]**.
2. If applicable, select the specific project.
3. When finished, press **[OK]** to exit.

Glossary

- **Distribution Parameter** - A parameter that is set to a Service/Filter prior to document distribution, e.g., destination email address, Document Name, resolution, etc.
- **Filter** - A Filter represents a set of criteria that defines input/output. For example, the PDF Filter creates a searchable, password-protected PDF file. Filter availability is determined by the Administrator.
- **Group** - Groups are displayed as tabs on the MFP display panel, allowing you to select specific Projects registered with the Group.
- **Project** - Projects are displayed as buttons on the MFP display panel, allowing you to select a Service.
- **Service** - A Service refers to the document distribution task, e.g., Send to Email, Send to Folder, Send to FTP, etc.

<When using the Smart Operation Panel>

Step 1: Place Document

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

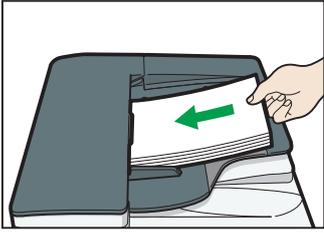


Fig. 13: ADF

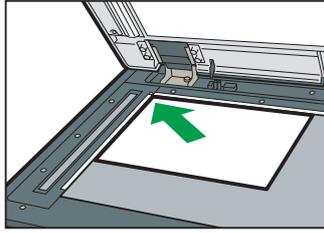


Fig. 14: Exposure Glass

Step 2: Open Group/Project Screen

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

Note

- The appearance of the GlobalScan NX user interface varies based on MFP model and Administrator settings.
2. Press the Group Selection button and select a Group. See Fig. 15.
 3. Select the desired Project button, e.g., *Send to Email*. See Fig. 15.

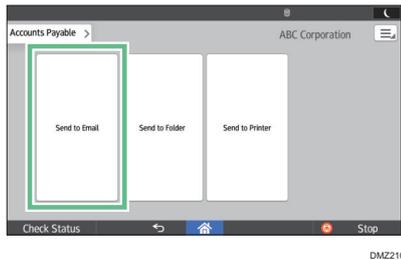


Fig. 15: Group/Project Screen

Step 3: Log In

If Login is required, Fig. 16 displays. If login is not required, go to Step 4.

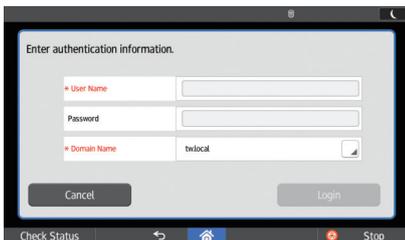


Fig. 16: Login Screen

To log in, proceed as follows:

1. Press the [User Name] box, and then enter your user name.
2. Press [OK].
3. If necessary, enter your password.
4. Press [OK].
5. Select/enter additional credentials, if needed.
6. Press [Login].

Note

- If login fails, press [OK] and enter valid account credentials.
- Items marked with an asterisk (*) and displayed in red are required to log in. Be sure to enter these items.

Step 4: Select/Enter Metadata

If Metadata is required, Fig. 17 displays. If Metadata is not required, go to Step 5.



Fig. 17: Metadata Screen

What is Metadata? The Administrator can design a Metadata screen. The values you enter/select, e.g., a billing code, are added as document information to the scanned image. Note that an asterisk (*) indicates a required setting.

To select/enter Metadata, proceed as follows:

1. Press field, drop-down or button.
2. Enter document information.
3. Repeat 1 - 2, as needed.
4. When finished, press [Destination].

Step 5: Select Service and Set Distribution Parameters

The Service Menu for the Project selected in Step 2 displays.



Fig. 18: Service Menu

Note

- If only one Service exists, the Destination Selection screen displays (Fig. 19 or Fig. 20).

Send to Email

1. From the Service Menu, press [Send to Email]. Fig. 19 displays.

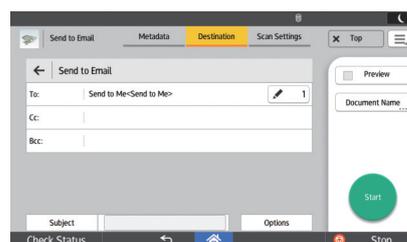


Fig. 19: Email Destination Selection Screen

2. Press [**To**], [**Cc**], or [**Bcc**].
3. Select destination email addresses...

Search

- a. Press [**Search**].
- b. Enter search string, e.g., “s” for “smith”.

Note

 - To display all available addresses, do not enter a search string.
- c. Press [**Run Search**]. Search results are displayed.
- d. Select the check box of a destination to be added.
- e. To perform another search, press [×], and then repeat b-d.
- f. Press [**OK**].
- g. Go to 4.

Manual Entry

- a. Press [**Manual Entry**].
- b. Enter an email address, and then press [**OK**] in the text input field.
- c. To enter other addresses, press the text input field, and then repeat b.
- d. When finished, press [**OK**] at the top right of the screen, and then go to 4.
4. Press [**Subject**], and enter Subject text for the email.
5. Press [**OK**].
6. Press [**Options**], and choose [**Divide Email**], [**Notification**], and [**Priority**] settings. For details, see *GlobalScan NX User's Guide*.
7. Press [**OK**].
8. Go to **Step 6**.

Remove Email Destination(s)

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.

Note

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

The following example procedure is based on the Send to Folder Service.

1. From the Service Menu, press [**Send to Folder**]. **Fig. 20** displays.

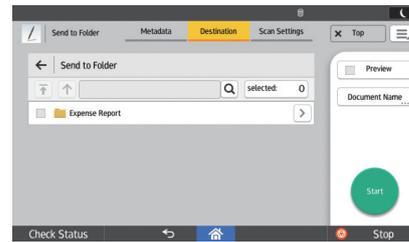


Fig. 20: Folder Destination Selection Screen

2. Select destination folders...

Select from List

- a. Select the check box for a folder to be added. To cancel selection, clear the check box.
- b. Go to **Step 6**.

Search

- a. Press [].
- b. Enter search string, e.g., “a” for “archive”.

Note

- To display all folders/subfolders, do not enter a search string.

- c. Press [**Search**].

- d. Select the check box for a folder to be added. To cancel selection, clear the check box.

Note

-  indicates subfolders are available. Press the icon to display subfolder, and select.
- To return to root folder, press [].

- e. To perform another search, press [×], and then repeat b-d.
- f. Press [**OK**].
- g. Go to **Step 6**.

Remove Folder Destination(s)

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

1. From the Service Menu, press [**Send to Printer**]. **Fig. 21** displays.



Fig. 21: Printer Selection Screen

- 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.
- Specify the number of copies to print.
You can print up to 999 copies at one time.

Step 6: Set Other Scan Parameters

One or more of the following additional Distribution Parameters can be set:

- **Document Name** • **Scan Settings** • **Scan Size** • **Filters**

Note

- Depending on Administrator settings, other scan parameters may or may not be required.
- The Scan Settings screen can be customized by the Administrator, thus selections may vary.

Document Name

The specified name identifies the email attachment or file.

Proceed as follows:

- Press **[Document Name]**.
- Enter name, and then press **[OK]**.

Note

- The Administrator can preset the name. Editing is possible, unless set read-only.

Scan Settings

Proceed as follows:

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

Filters

For details, please refer to *GlobalScan NX User's Guide*.

Step 7: Start Scan

- Confirm that the destinations are correct. If necessary, press **[Destination]** to open the Service Menu screen, and then press **[ 1]** or the Number of selected folders button.
- 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]**.

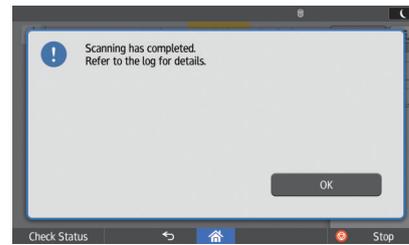
Limitation

- If this function is not available, **[Preview]** will not be displayed on the MFP display panel.
- Press **[Start]**.
The document is scanned and distributed.
When scanning has finished, a confirmation message will appear on the MFP display panel.

Note

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

MFP display panel



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

Note

- If performing a Batch Scan, place the next set of documents on the ADF and press **[Continue]** to start scan. Repeat until all pages are scanned. When finished, press **[Finish]**.
- If you pressed **[Preview]** in 2, check the scanned images, and then press **[Send]**.

Step 8: Exit Project

Once the scanning process is complete, press **[Top]**. The Group/Project screen displays.

Step 9: Review Job Log

The Job Log provides details about the scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc. See **Fig. 22**.

Date / Time	Project Name	Document Name	User Name	Page(s)	Status
12/25/2015 17:00	Send to Folder	20151225170046		12	Ready
12/25/2015 16:58	Send to Folder	20151225165856		6	Ready
12/25/2015 16:55	Send to Folder	20151225165515		1	Ready

Fig. 22: 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:

- Press **[**] at the top right of the screen, and then select **[Job Log]**.
- Check the logs, and then press **[Exit]** to exit.

Glossary

- **Distribution Parameter** - A parameter that is set to a Service/Filter prior to document distribution, e.g., destination email address, Document Name, resolution, etc.
- **Filter** - A Filter represents a set of criteria that defines input/output. For example, the PDF Filter creates a searchable, password-protected PDF file. Filter availability is determined by the Administrator.
- **Group** - Groups are displayed in a list on the MFP display panel, allowing you to select specific Projects registered with the Group.
- **Project** - Projects are displayed as buttons on the MFP display panel, allowing you to select a Service.

