Scan and Fax Manager DocumentMall Plug-in User’s Guide

The Scan and Fax Manager DocumentMall Plug-in is a Scan and Fax Manager (SFM) plug-in that distributes documents scanned using a multifunctional device (MFP) to DocumentMall.

This plug-in enables distribution of documents to DocumentMall, automatic generation of a distribution folder, and association of document information with DocumentMall.

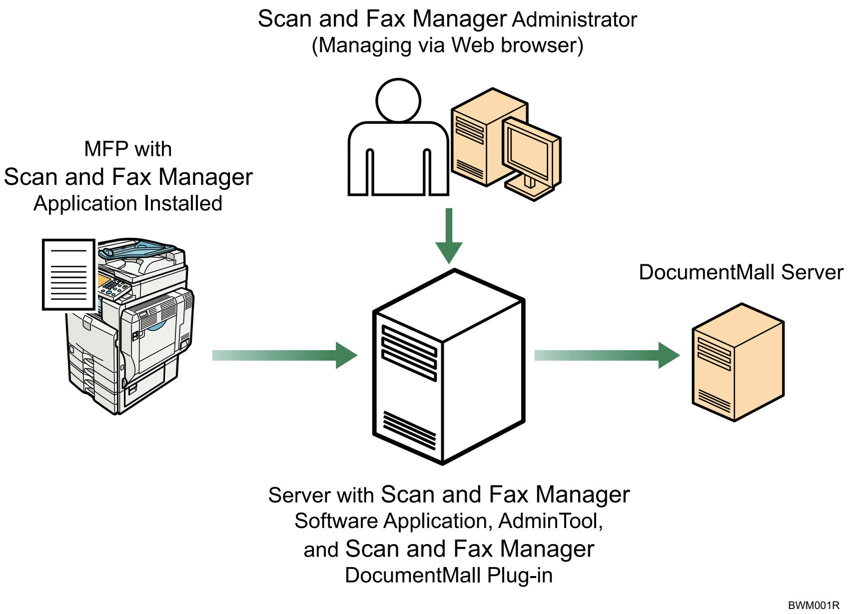

Fig. 1: Scan and Fax Manager DocumentMall Plug-in workflow

Note

- This plug-in is displayed as "Send to DocumentMall" on the MFP control panel.
- This manual explains the operation procedures for the DocumentMall Plug-in. For details about the operation procedures for other services/filters, see *Scan and Fax Manager User’s Guide*.

Introduction

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

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- Do not remove or insert any disk while operating this software.

Trademarks

DocumentMall is a trademark of Ricoh Americas Corporation.

Before You Begin

Abbreviations

The following abbreviations are used in this guide.

Product / Name	Abbreviation
Scan and Fax Manager	SFM
Multifunctional Device	MFP, device
Scan and Fax Manager DocumentMall Plug-in	DocumentMall Plug-in

<When using the Standard Operation Panel>

Step 1: Placing the Original

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

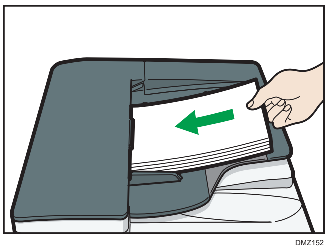


Fig. 2: ADF

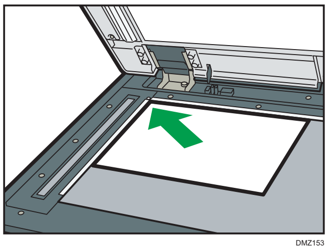


Fig. 3: Exposure Glass

Step 2: Logging in to a Device

1. Log in to a device.

Note

- For details, see "3. Login/Logout", *RICOH Streamline NX User's Guide*.

2. Select the group tab you require.

3. Select the project button you require.

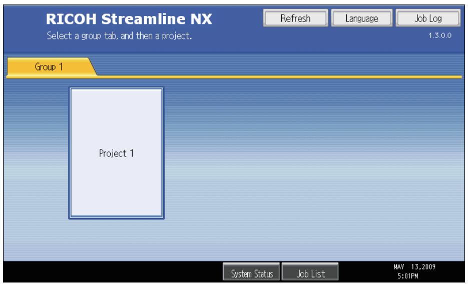


Fig. 4: Group/Project screen

Step 3: Selecting/Entering Metadata

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

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

Step 4: Selecting a Service

The Service Menu for the project selected in "Step 2: Logging in to a device" appears.

1. Press [**Send to DocumentMall**].

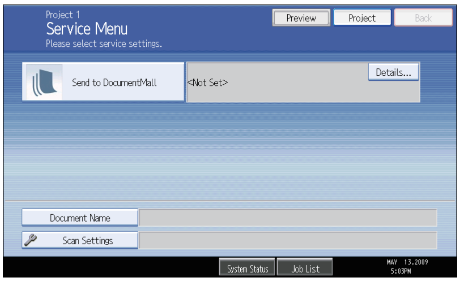


Fig. 5: Service Menu

Note

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

Step 5: Specifying a Destination

Send to DocumentMall Screen Overview

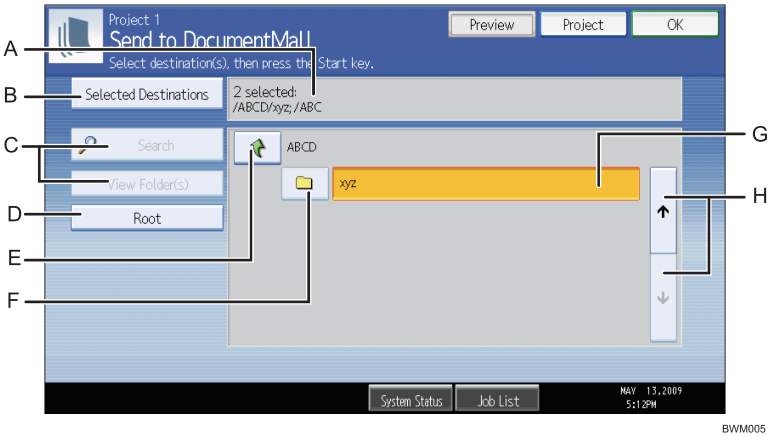


Fig. 6: Send to DocumentMall screen

A. Selected Folder(s)

The number of selected destinations and the absolute path to the selected folder are displayed.

B. Selected Destinations

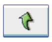
Display a list of the destination folders currently selected.

C. Search, View Folder(s)

Not available in the DocumentMall Plug-in.

D. Root

Return to the screen displaying the root folders.

E. 

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

F. 

A folder containing subfolders. Click this button to view the subfolders.

G. Folder Name

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

H. Scroll Key

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

Procedure

From Send to DocumentMall screen (Fig. 6), proceed as follows:

1. Select destination folder(s).
2. Press [**OK**].

Step 6: Setting the Scan Parameters

Note

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

Document Name

This name identifies the e-mail attachment or file.
From the Service Menu (Fig. 5), proceed as follows:

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

Note

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

Scan Settings/Scan Size

From the Service Menu (Fig. 5), proceed as follows:

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

   Note

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

Filters

For details about how to specify other filters, see *Scan and Fax Manager User's Guide*.

Step 7: Start the Scan

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

   The original is scanned and the resulting scan file is distributed.

Step 8: Exit the Project

When scanning finishes, press the [**Project**] button (see Fig. 7). The Group/Project screen (Fig. 4) will appear.

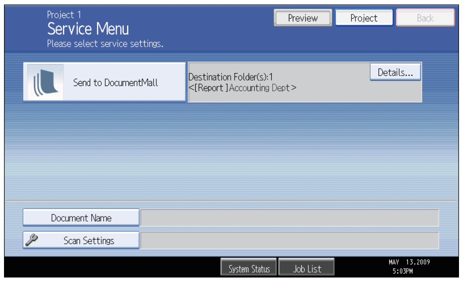


Fig. 7: Service Menu

Step 9: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.
The content of the Job Log is determined by the administrator. Depending on the administrator's settings, you will be able to view the job log of every project or a specific project only.
To view the Job Log, proceed as follows:

1. Press [**Job Log**].
2. Select the project whose job log you want to view.
3. When finished, press [**OK**] to close the Job Log.

<When using the Smart Operation Panel>

Step 1: Placing the Original

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

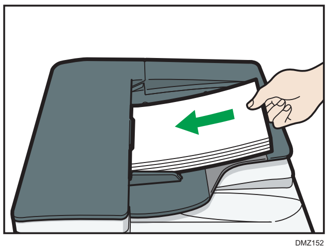


Fig. 8: ADF

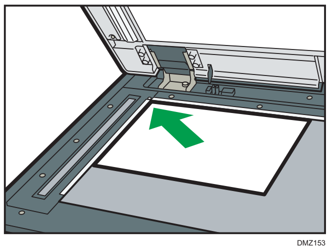


Fig. 9: Exposure Glass

Step 2: Logging in to a Device

1. Log in to a device.

Note

- For details, see "3. Login/Logout", *RICOH Streamline NX User's Guide*.

2. Press the Group Selection button and select a Group.

3. Select the project button you require.

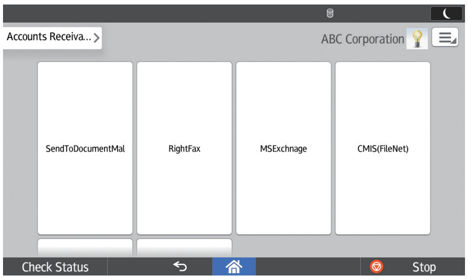


Fig. 10: Group/Project screen

Step 3: Selecting/Entering Metadata

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

1. Select the relevant fields, drop-down menus, or buttons.

2. Enter the document information.

3. Repeat steps 1 - 2 as necessary.

4. When finished, press [**Destination**].

Step 4: Selecting a Service

The Service Menu for the project selected in "Step 2: Logging in to a device" appears.

1. Press [**Send to DocumentMall**].

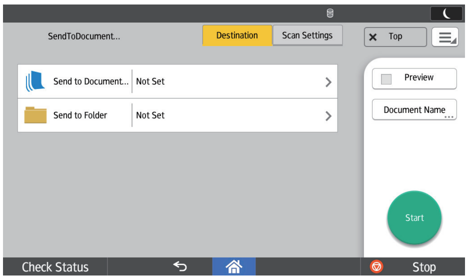


Fig. 11: Service Menu

Note

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

Step 5: Specifying a Destination

Send to DocumentMall Screen Overview

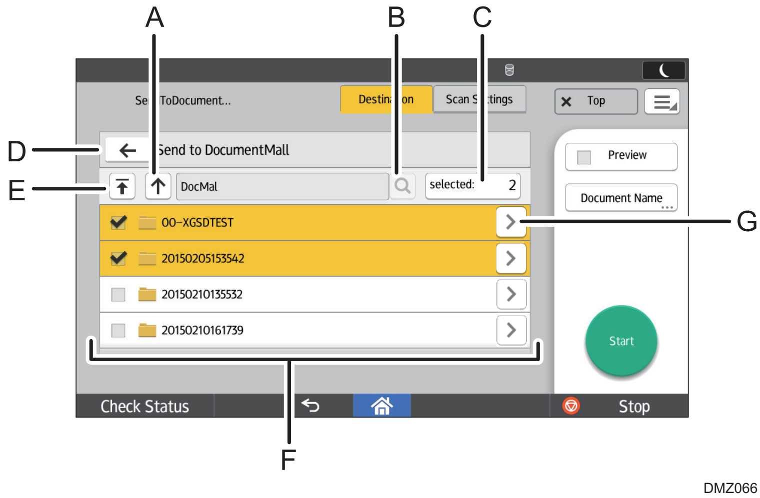


Fig. 12: Send to DocumentMall screen

A. ↑

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

B. 🔍

Not available in the DocumentMall Plug-in.

C. Selected Folder(s)

The number of selected folders is displayed. Pressing this button displays a list of selected folders.

D. ←

Returns to the Service Menu screen.

E. ⤒

Return to the screen displaying the root folders.

F. Folder List

A list of the folders that can be specified as a destination displays here.

G. >

Press this button to view the subfolders.

Procedure

From Send to DocumentMall screen (Fig. 12), proceed as follows:

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

Note

If necessary. press [>] to display subfolders.

Step 6: Setting the Scan Parameters

Note

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

Document Name

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

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

Note

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

Scan Settings

Proceed as follows:

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

   Note

   - For details about Scan Settings, see *Scan and Fax Manager User's Guide.*

Filters

For details about how to specify other filters, see *Scan and Fax Manager User's Guide*.

Step 7: Start the Scan

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

   Note

   To see more details, press the Number of selected folders button.
2. Press [**Start**].

   Note

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

Step 8: Exit the Project

When scanning finishes, press [**Top**]. The Group/Project screen will appear.

Step 9: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.
The content of the Job Log is determined by the administrator.
To view the Job Log, proceed as follows:

1. Press [☰] at the top right of the screen, and then select [Job Log].
2. Check the logs, and then press [**Exit**] to close the Job Log.