

# **Scan and Fax Manager**

**Operating Instructions** 

Administrator's Guide

# **Guides for This Solution**

The following manuals are available for the RICOH Streamline NX system.

#### User's Guide

- RICOH Streamline NX
- RICOH Streamline NX (Advanced UI)

#### Administrator's Guide

- RICOH Streamline NX
- Authentication and Accounting Manager (Server)
- Authentication and Accounting Manager (Embedded)
- Secure Print Manager (Server)
- Secure Print Manager (Embedded)
- Scan and Fax Manager (this guide)

#### Installation Guide

RICOH Streamline NX

#### **Operations Guide**

• Report Generator



• Adobe® Acrobat® or Adobe® Reader® is necessary to view PDF documents.

# **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.
- Contents of this document are subject to change without notice.
- No part of this document may be duplicated, replicated, reproduced in any form, modified or quoted without prior consent of the supplier.

## () Limitation

- Do not install the Scan and Fax Manager software on the computer on which GlobalScan NX has been installed, and vice versa. Scan and Fax Manager and GlobalScan NX cannot be used together on the same computer.
- Do not install the Scan and Fax Manager software on the computer on which the data folder for GlobalScan NX remains, and vice versa.
- The compatibility of the Scan and Fax Manager with GlobalScan NX is not guaranteed.
  - Scan and Fax Manager cannot be used as the Load Balance server or Secondary Delivery server for GlobalScan NX, and vice versa.
  - The profile or backup data of GlobalScan NX cannot be used with Scan and Fax Manager, and vice versa.
  - Optional plug-ins for GlobalScan NX cannot be used with Scan and Fax Manager, and vice versa.

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# **TABLE OF CONTENTS**

Guides for This Solution	1
Important	2
Trademarks	3
1. INTRODUCTION	
How to Read This Guide	11
Symbols	11
Abbreviations	11
Scan and Fax Manager Feature Highlights	13
2. ABOUT SCAN AND FAX MANAGER	
Scan and Fax Manager Features Summary	17
Scan and Fax Manager System Overview	19
Key Terms (When Using the Standard Operation Panel)	20
System Setting Terms	20
MFP Configuration Terms	23
Key Terms (When Using the Smart Operation Panel)	30
System Setting Terms	30
MFP Configuration Terms	32
3. QUICK START	
Performing Initial Setup	39
Step 1: AdminTool Login	40
About Login Status	40
Step 2: Add a Profile	42
Step 3: Add a Group	45
Step 4: Add a Project	50
Step 5: Add a Service/Create a Flow	57
Step 6: Configure the Service	61
Step 7: Confirm the Configuration of the MFPs	66
4. ADMINTOOL CONFIGURATION	
Configuring Scan and Fax Manager Parameters	71
About Profile Settings	72
Editing Profile Properties	72
Importing/Exporting Profiles	78
Deleting a Profile	80

Copying and Converting Profiles	81
About Group Settings (When Using the Standard Operation Panel)	84
Group/Project Screen Overview	85
Changing a Group Name	88
Changing Group Display Order	89
Adding a New Screen Page	90
Deleting a Screen Page	90
Hiding a Group	91
Deleting a Group	93
About Group Settings (When Using the Smart Operation Panel)	94
Group/Project Screen Overview	94
Changing a Group Name	97
Changing Group Display Order	98
Hiding a Group	99
Deleting a Group	100
About Project Settings	102
Editing Project Properties	103
Moving a Project Button	110
Resizing a Project Button	112
Adding Text to a Group Screen	115
Changing Project Button Display Order	118
Moving a Project to Another Screen Page	120
Moving a Project to Another Group	121
Importing Profile/Project Icons	122
Deleting a Project	127
About Flows	129
Working with Services/Filters in the Flow	132
About Services.	138
Service Summary	139
Accessing Property Settings Screens	143
Service Properties	147
Send to Email Service	148
Send to Folder Service	165

Send to FTP Service	179
Send to Printer Service	186
Send to WebDAV Service	189
Service Folder and File Naming Rules	199
Specifying Folder and File Names Using Metadata	199
Other File Naming Conditions	202
About Filters	204
Filter Summary	205
Accessing Property Settings Screens	207
Filter Properties	211
Displaying Filter Buttons on the MFP Service Menu Screen (Standard Operation Panel Only)	211
PDF Converter Filter	213
Enhanced PDF Converter Filter	220
Image Converter Filter	229
Image Correction Filter	236
Archiver Filter	242
OCR Filter	244
Section Specify Filter	248
Section Splitter Filter	252
XML Transformer Filter	254
Flow Redirect Filter	257
Metadata Converter Filter	260
Metadata Replacement Filter	263
PDF Stamper Filter	267
About Distribution Parameters	280
Distribution Parameter Screen Overview	280
Opening/Navigating Distribution Parameter Screens	283
Changing Display Position of a Distribution Parameter	291
Transferring a Distribution Parameter to Another Screen	291
Hiding a Distribution Parameter	292
Setting Email Distribution Parameters	293
Setting Folder Distribution Parameters	301
About One-touch Scan	305

About Scan Settings	308
Scan Size	318
OCR Scanned PDF	327
About Other Settings	329
About Metadata	335
Changing Input Component Display Order	343
Hiding an Input Component	345
Deleting an Input Component	345
About Device Properties.	347
About Inbound FAX Transfer	348
Localizing the AdminTool	353
5. MANAGING LOGS	
System Log	355
System Log Settings	358
Job Log	360
6. MANAGING JOBS	
Job Queue	367
Error Queue	371
Job Settings	376
7. MAINTENANCE SETTING	
System Control Settings	381
Stop/Start Service	381
Setting Server Disk Space	383
Maintenance Settings	386
Performing a Manual Backup	389
Configuring Automatic Backups	391
Downloading a Backup File	396
Uploading a Backup File	398
Restoring a Backup	399
Performing a Recovery	401
Deleting a Backup File	402
Initializing the System	403
Batch Execution of Maintenance	404

## 8. SYSTEM CONFIGURATION

General Settings	409
Service Settings (Output Service/Filter Service)	411
Authentication and Accounting Manager	412
Specifying the Authentication and Accounting Manager	412
Administrator Settings	415
Error Notification Email Address	415
About User Mode	418
Managing the Server Certificate	420
Obtaining and Installing a Server Certificate	421
IIS - SSL On/Off	428
Managing the Site Certificate	431
Managing the Private Keys	433
Replacement Table Settings	434
Adding a Replacement Table	435
Editing a Replacement Table	438
Managing Replacement Table Entries	439
Deleting a Replacement Table	441
Exporting/Importing a Replacement Table	441
Failover - Secondary Delivery Server	446
Secondary Delivery Server Settings	446
Registering a Secondary Delivery Server	447
Removing a Secondary Delivery Server	450
Making a Secondary Delivery the Primary Delivery Server	451
Load Balancing	453
Load Balance Server Settings	455
Registering Load Balance Servers	456
Removing Load Balance Servers	458
Kerberos Option	460
Plug-in Information Menu	462
9. APPENDIX	
Active Directory Authentication	463
File Formats	464

Input/Output Formats for the Image Converter Filter	466
Metadata Specifications	468
About Regular Expressions	474
Flow Examples	477
Include Document URLs in an Email	477
Creating Subfolders when Saving Scanned Files	479
Redirecting a Flow	482
Extracting and Saving Metadata as XML	485
Sending Metadata in an Email as HTML	486
Extracting Document Sections	487
Using the Image Converter Filter	490
List of TCP/UDP Ports	493
When Not Using SSL	493
When Using SSL	495
Ports for RMI	496
Ports for SNMP	497
Troubleshooting	498
Glossary of Terms	499
Scan and Fax Manager Feature	501
Template	504
INDEX	505

# 1. INTRODUCTION

This guide provides instructions on the administration of Scan and Fax Manager, a powerful scanning solution that enables connected multifunctional devices (MFPs) to seamlessly and securely merge paper documents into an electronic workflow.

# How to Read This Guide

In order to familiarize yourself with the many capabilities of Scan and Fax Manager, we recommend that you read this guide in its entirety. You will then be prepared to design and administer workflows that enable your MFP users to address their document processing needs.



• Keep the Scan and Fax Manager Installation media in a safe place for future reference.

## 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 and tabs displayed on the computer screen or keys on the MFP control panel.

#### **Abbreviations**

The following abbreviations are used in this guide to shorten content.

Product/Name	Abbreviation
Scan and Fax Manager	SFM
Multifunctional Device	MFP or device

# Scan and Fax Manager Feature Highlights

Scan and Fax Manager is a software solution designed to enable connected MFPs to join in network scanning operations. As a fully-scalable solution, Scan and Fax Manager seamlessly integrates with your network to cost-efficiently capture, index, manage, and distribute large volumes of business documents. With the connected MFPs providing high-speed network scanning capabilities, paper documents are quickly converted into easily shared digital files. Once in electronic form, the file(s) can be distributed to destinations around the corner or around the globe.

Feature	Description
MFP Support	Supports control of connected MFPs without the need for a dedicated server PC.
	Supports up to 2000 MFPs.
Easy-to-Use AdminTool	The Administrator controls all Service, Filter, and MFP settings through the flexible AdminTool utility, which is accessed using a standard Web browser.
Flexible Flow	The Administrator can freely construct a Flow to address specific document processing needs. In addition, using the Flow Redirect Filter, it is possible to transfer a job to the Document Distribution Flow of another Project.
Simple User Interface	The straightforward graphical user interface (UI) reduces steps taken to complete tasks, allowing for fast, intuitive MFP operation.
Customizable MFP Display Panel	UI button size, position, labels, and icons are all fully customizable through the AdminTool. In addition, specify which Distribution Parameters should be hidden or read-only.
ACL Configuration	Supports ACL configuration for each scan project separately. When configured, the scan project cannot be used by users who are not granted access.
SSL (Secure Sockets Layer) Support	By installing a Server Certificate from a trusted Certificate Authority (CA), and Site Certificate, the data path between the Scan and Fax Manager AdminTool (Web browser) and MFP is secured (encrypted). The document data path between the MFP and remote destination is also protected, further ensuring that confidential information stays that way.

Feature	Description
Send to Email	Sends scanned images to one or more email addresses. Includes Send to Me, a feature whereby the scanned image is automatically sent to the logon user's email address.
Send to Folder	Sends scanned images to one or more local and/or network folder(s)/subfolder(s). Includes Send to Home, a feature whereby the scanned image is automatically sent to the logon user's Home directory.
Send to FTP	Sends scanned images to one or more network folders on an FTP server, which is ideal for on-demand file sharing in mixed Operating System environments, for example, Windows and Unix.
Send to WebDAV	Sends scanned image to one or more specified WebDAV sites, which enables authorized users to more easily collaborate by enabling document check-in/out. Versioned document can be shared with others.
One-touch Scan	Creates a Project with predefined Distribution Parameters. This enables the user to execute a job at the touch of a button, for example, scan invoices, employment applications, etc., to a network folder.
Email/Folder Search	Users can search the LDAP/LDAPS server for specific addresses, or all addresses, saving time over manual entry. Folder search is also supported, returning either specific or all folder destinations.
Metadata Entry	Scan and Fax Manager uses Metadata, also called document information, to classify documents for indexing and subsequent searching/retrieval purposes. As a document management tool, Metadata is used within Services/Filters to capture user-relevant information (in XML format). In addition, Metadata can be pre-set for each Project and automatically added to documents. Furthermore, Filters can perform replacement task, for example changing numeric Metadata input into a company/department name.
File Formats	Supports the following file formats:
	Color: TIFF, JPEG, PDF, BMP, GIF, PNG B&W: TIFF, TIFF-F, PDF, BMP, GIF, PNG

Feature	Description
Filters	Offers additional Filters, including Archive, OCR, and Section Specify.
Image Processing	Supports additional image processing features, such as Auto Orientation.
Server Management	Supports Error Notification (via email), Data Backup/Restore, System Initialization, etc.
Failover	Automatically switches processing from the Primary Delivery Server to the specified Secondary Delivery Server in the event that the Primary Delivery Server fails.
Load Balancing	Distributes the job workload among several servers in order to increase processing efficiency.



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

# 2. ABOUT SCAN AND FAX MANAGER

Scan and Fax Manager 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. Scan and Fax Manager can process and deliver documents scanned by the MFP and documents received by fax.

# Scan and Fax Manager Features Summary

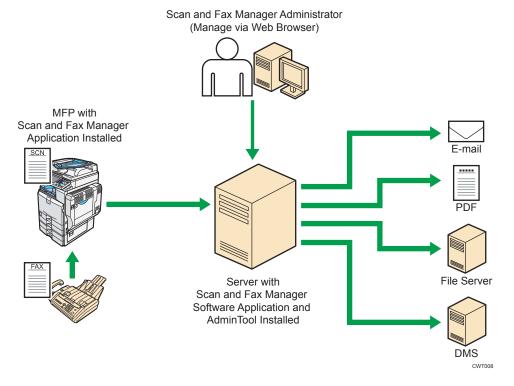
The high-quality images can be distributed using a variety of Services, including Send to Email, Send to Folder, Send to FTP, and Send to WebDAV, even indexed and linked to a back-end Document Management System (DMS). In doing so, the device running the Scan and Fax Manager application leverages your 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.

# Mportant !

MFPs' Auto-Off Timer needs to be set to 5 minutes or longer as long as Scan and Fax Manager is
installed. This limitation is caused by the way applications are loaded on an MFP. If an MFP enters
sleep mode before an application and its associated software finish starting up, the MFP might not
work correctly.

Fig.: Scan and Fax Manager Workflow



# Scan and Fax Manager System Overview

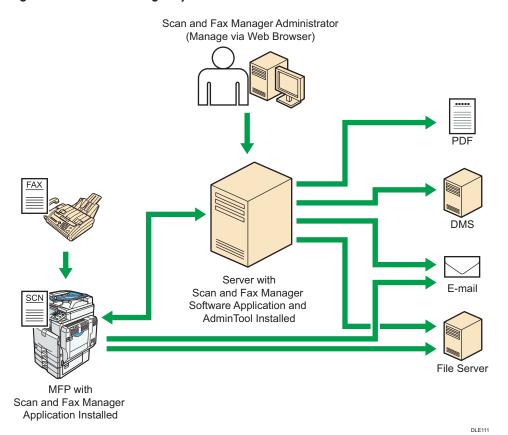
Designed as a pluggable and scalable software solution, Scan and Fax Manager allows you to implement a document management solution that fits your organization's system integration and budgetary requirements.

Scan and Fax Manager supports the configuration and management of up to 2000 MFPs. Scan and Fax Manager offers the most advanced feature set for document capture and distribution, including additional Filters and file formats, as well as value-added options.

Scan and Fax Manager requires a dedicated Server PC to maintain all the system settings and data necessary for document indexing and distribution. All Services and related processes necessary for document distribution are performed by the Server PC.

Also, the Send to Folder and Send to Email services can be executed without a dedicated server computer. These services do not require server computers, so that higher levels of security can be provided to distribute documents.

Fig.: Scan and Fax Manager System Structure



19

# Key Terms (When Using the Standard Operation Panel)

In this section, terms specific to Scan and Fax Manager are divided into two categories, System Settings Terms and MFP Configuration Terms.

## **System Setting Terms**

The following terms apply to Scan and Fax Manager functions that control system-wide functionality.

#### AdminTool

The AdminTool is a software utility that enables the Scan and Fax Manager Administrator to establish all network and MFP configuration and management settings. This easy to use, Webbased application allows for creation of Profiles, Groups/Projects, and Delivery Flows, as well as the selection and configuration of Services/Filters. Once configured, Scan and Fax Managerenabled MFPs can join in network-scanning operations.

#### Service

A Service represents a distribution method used during document processing. For example, if a user is sending a scanned image to an email address, he/she selects the Project button containing the Send to Email Service.

The Administrator adds Services to a Project in order to design a particular document distribution task. Services added to a Project are then displayed as buttons on the MFP display panel. The user simply selects the desired button to open the associated Service, and then sets the necessary Distribution Parameters. Note that if the selected Project contains only one Service, the Service Menu screen automatically displays.

Fig.: Send to Email Service Menu Screen



#### Service Menu

A Service Menu is displayed on the MFP display panel. The user selects a Service by pressing the desired button. The available Services, as well as Service button labels and display sequence, are configured by the Administrator.

Fig.: Service Menu Layout - MFP Display Panel

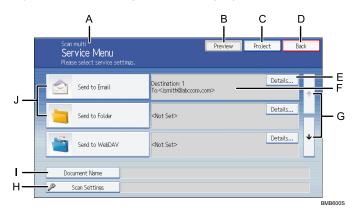


Table: Service Menu Screen Overview

	ltem	Description
A	Application Bar	The Project Name, Screen Title, and operational tips appear here. It is also possible to import a custom icon to appear in the upper left-hand corner, for example, a company logo.
В	[Preview]	Displays the scanned images so that you can confirm the contents before starting delivery.
С	[Project]	Returns to the Group/Project Screen.
D	[Back]	This button is only enabled if Metadata exists. In that case, press this button to open the Metadata screen.
Е	[Details]	Displays the list of currently selected addresses. After pressing [Details], a list of all selected destinations displays. Press [Summary] to return to the Service Menu screen.
F	Selected Destinations	Displays the number of selected addresses, along with addresses that have been entered/selected.
G	[↑][↓]	Scrolls up/down through available Services.
Н	[Scan Settings]	Provides access to Scan Settings, Scan Size, and if applicable, Filter settings. Scan presets will then display in the Scan Settings field, as space allows.

	ltem	Description
		<ul> <li>Note</li> <li>To display items in the [Scan Settings] field, you must first move the items to the [Selected Item(s) List] field on the [Other Settings] screen, which is accessed from the Project settings screen. For details, see page 329 "About Other Settings".</li> </ul>
ı	[Document Name]	Opens the letter keys on the display panel for file name entry. The entered Document Name identifies the image, whether the destination is email or a folder. The Administrator can set a default Document Name, if necessary. If the user does not enter a Document Name, the system will automatically affix the date/time of scanning as the Document Name.  • Note  • Depending on Administrator settings, this button may be disabled (grayed out) on the MFP display panel.
J	Service Buttons	Allows access to available Send-to functions.  Note  If the Service is marked with an asterisk (*), it has been set as a "Required Entry". As such, the user must set the Distribution Parameters before scanning can take place.

#### Filter

A Filter represents a set of criteria that defines input/output, controlling how the document is processed. For example, if the PDF Converter Filter - which supports searchable, password protected PDF creation - is added to a Project's Flow, the resulting file will be rendered in PDF format.



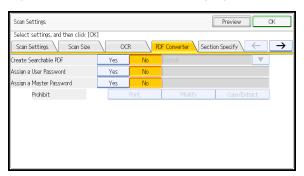
 When a Filter is added to a Project, it is necessary to establish settings specific to that Filter, via the AdminTool. In addition, some Filters may require user input from the MFP display panel.

# **■** Reference

• See page 204 "About Filters".

2

Fig.: PDF Converter Filter - MFP Display Panel

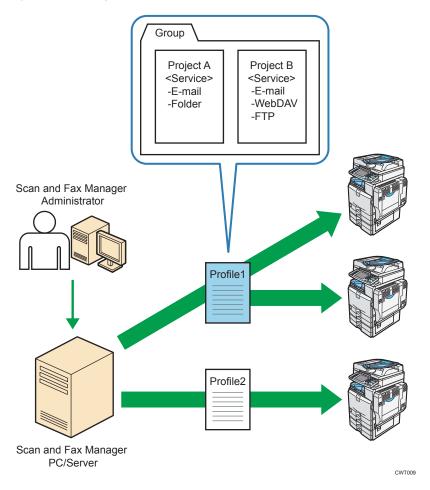


## **MFP Configuration Terms**

#### **Profile**

A Profile is a set of parameters that are applied to the MFP. Using the AdminTool, the Administrator configures a Profile and associates it with an MFP. Once a Profile is associated with an MFP, the Groups/Projects created within the Profile are available to the user. Group tabs and Project buttons provide access to Services, such as Send to Email and Send to Folder. The relationship among Profiles, Projects, and Services is illustrated in the figure as follows:

Fig.: Profile > Project > Service Workflow



#### Group

A Group allows the Administrator to group Projects registered with a Profile. You can add Groups to a Profile by creating a new Group or editing an existing Group, according to application needs. For example, you can group the Projects of a Profile based on their job type, names, etc. This Group will be useful when a Profile has multiple registered Projects. Groups are displayed as tabs on the MFP display panel.



Fig.: AdminTool Project/Group Screen

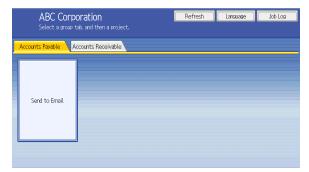
#### **Project**

A Project refers to a document distribution task and is configured by the Administrator to address specific application needs. For example, the Sales Department sends proposals to prospective clients using the Send to Email Service. The Legal Department archives briefs and depositions, using the Send to Folder Service. Depending on the task, the user presses the associated Project button on the MFP display panel.

For each Project, the Administrator specifies the Distribution Parameters, including the distribution method (Send to Email/Folder, etc.), file format (TIFF, JPEG, PDF, etc.), resolution (200dpi, 300dpi, etc.), and so on. The scanned document will be sent with these settings to the specified destination(s). Depending on system configuration, some settings may be changed by the user prior to transmission. For instance, if the user wants to change the file format from TIFF to PDF, the file format is changed within the Scan Settings screen on the MFP display panel.

After selecting a Project button from the Project Menu (Fig. "Project Menu - MFP Display Panel"), the MFP's display panel reflects the available Services (Fig. "Service Menu - MFP Display Panel").





25

Fig.: Service Menu - MFP Display Panel

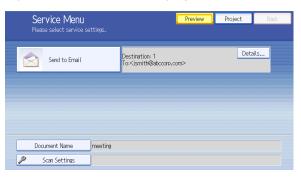


Fig.: Letter Keys on the Display Panel



#### One-touch Scan

A One-touch Scan is a Project in which all document Distribution Parameters are pre-defined by the Administrator. For example, individual Projects for each user in the workgroup, can be created. The user in the marketing department, for instance, selects a Project button to open the Send to Email Service. Another user in the accounting department selects a Project button to open the Send to Folder Service, and so forth.

When Distribution Parameters, such as the destination email address and/or folder, file format, etc., are predefined, the user is not required to select/enter settings; the Service Menu buttons are disabled (grayed-out), as shown in the figure below. As such, the user simply places the document on the Automatic Document Feeder (ADF) or Exposure Glass, and then presses the [Start] key; scanning is initiated.

Note that use of the One-touch Scan function is intended for tasks in which the parameters for document distribution remain the same, for example, the email address and/or folder destination remain the same. Any Project can be set as a One-touch Scan.

2

Fig.: Service Menu for One-touch Scan - MFP Display Panel



#### **Distribution Parameter**

A Distribution Parameter is a parameter that is set to a Service/Filter and is used for document distribution. Distribution Parameters are configurable using the AdminTool and/or MFP display panel.

For example, with the AdminTool, you can predefine Send to Email Distribution Parameters with a default [To] address and file format, while leaving [Cc] and [Subject] lines available for the user to define from the device display panel. This enables users to select a Project button and scan directly to a predefined destination, a feature called One-touch Scan.

Thus, if the user often sends itemized bills to accounting, the administrator can specify the email address of the accounting department manager as a predefined Distribution Parameter. This means that users will not have to enter the address at the MFP prior to scanning - saving time and effort.

#### Flow

The AdminTool is used to create a Flow for a Project. A Flow represents a document distribution process and is required in order to direct Scan and Fax Manager's job processing order.

By establishing the correct Flow, Scan and Fax Manager can efficiently and accurately perform the requested conversions. For instance, users have the flexibility to perform a single scan operation, with the resulting files sent to, for example, email and folder destinations - in that order; the target destination can receive a TIFF file by email and also receive the same document as a PDF file deposited directly to the specified folder.

Fig.: Delivery Flow



#### Metadata

Scan and Fax Manager uses Metadata to classify documents for indexing and subsequent searching/retrieval tasks. As a document management tool, Metadata is used within Services/Filters to capture user-relevant information (in XML format).

27

Scan and Fax Manager supports two kinds of Metadata, also called document information, basic and custom.

Basic Metadata

Standard document information is automatically captured by Scan and Fax Manager during the scanning process. This process occurs in the background, i.e., user input is not generally required.

Custom Metadata

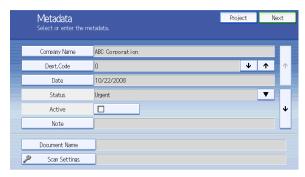
The document information is designed/added to a Project by the Administrator, using various input field types, such as text boxes and/or drop-down lists. The user, from the MFP display panel, can enter certain values prior to scanning the document.



 During design of custom Metadata fields, the input value can be left blank, allowing for user input, or set as a default value via the AdminTool, though the user is free to change the entry.

In the figure below, the administrator has predefined four Metadata fields, Company Name, Index, Report Date, and Report Type. The button label, for example, Company Name, and predefined text, for example, ABC Corporation, is set via the AdminTool. This document information can be edited by the user, if necessary, and then captured and indexed along with the scanned file, allowing the user to more efficiently archive/retrieve files.

Fig.: Metadata - MFP Display Panel



#### Section

When a multi-page document is scanned at the MFP, each resulting document page is called a Section. For example, when the Section Specify Filter has been added to a Project, the target is a "Section", not a "page". As such, each "Section" is a separate file; each file can consist of any number of pages.

• Example 1 (Single-Page TIFF)

When a five-page document is scanned and distributed in the Single-Page TIFF file format, the resulting document will have five Sections.

Fig.: Document Sections - Single-Page TIFFs



BMB016S

• Example 2 (Multi-Page TIFF)

When a five-page document is scanned and distributed in the Multi-Page TIFF file format, the resulting document will have just one Section.

Fig.: Document Section - Multi-Page TIFF



BMB017S

• Example 3 (Multiple Filters in Flow)

If Filters are used, and there is more than one Section in the resulting file, each Section can have a different file format.

Fig.: Document Sections - Different File Formats



BMB018S

# Key Terms (When Using the Smart Operation Panel)

In this section, terms specific to Scan and Fax Manager are divided into two categories, System Settings Terms and MFP Configuration Terms.

## **System Setting Terms**

The following terms apply to Scan and Fax Manager functions that control system-wide functionality.

#### AdminTool

The AdminTool is a software utility that enables the Scan and Fax Manager Administrator to establish all network and MFP configuration and management settings. This easy to use, Webbased application allows for creation of Profiles, Groups/Projects, and Delivery Flows, as well as the selection and configuration of Services/Filters. Once configured, Scan and Fax Managerenabled MFPs can join in network-scanning operations.

#### Service

A Service represents a distribution method used during document processing. For example, if a user is sending a scanned image to an email address, he/she selects the Project button containing the Send to Email Service.

The Administrator adds Services to a Project in order to design a particular document distribution task. Services added to a Project are then displayed as buttons on the MFP display panel. The user simply selects the desired button to open the associated Service, and then sets the necessary Distribution Parameters.

Fig.: Send to Email Service Menu Screen



 If the selected Project contains only one Service and metadata entry is not required, the Service Menu screen is automatically displayed.

#### Service Menu

A Service Menu is displayed on the MFP display panel. The user selects a Service by pressing the desired button. The available Services, as well as Service button labels and display sequence, are configured by the Administrator.

Fig.: Service Menu Layout - MFP Display Panel

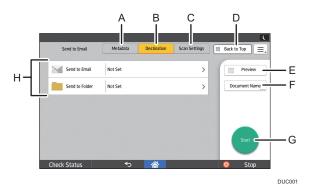


Table: Service Menu Screen Overview

	ltem	Description
A	[Metadata]* 1	This button is enabled only when Metadata entry is required. Pressing this button opens the Metadata screen.
В	[Destination]	Displays the Service Menu screen.
С	[Scan Settings]	Displays the Scan Settings screen. In the Scan Settings screen, you can specify the Scan Settings, Scan Size, and if applicable, Filter settings.
D	[Top]	Logs out of the Project and returns to the Group/Project screen.
Е	[Preview]	Select the check box for [Preview] before pressing [Start] to display print previews of the scanned image before sending it.
F	[Document Name] *1	Opens the letter keys on the display panel for file name entry. The entered Document Name identifies the image, whether the destination is email or a folder. The Administrator can set a default Document Name, if necessary. If the user does not enter a Document Name, the system will automatically affix the date/time of scanning as the Document Name.
G	[Start]	Start scanning.
Н	Service Buttons	Allows access to available Send-to functions.

ltem	Description
	<ul> <li>• If the Service is marked with an asterisk (*), it has been set as a "Required Entry". As such, the user must set the Distribution Parameters before scanning can take place.</li> </ul>

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

#### **Filter**

A Filter represents a set of criteria that defines input/output, controlling how the document is processed. For example, if the PDF Converter Filter - which supports searchable, password protected PDF creation - is added to a Project's Flow, the resulting file will be rendered in PDF format.

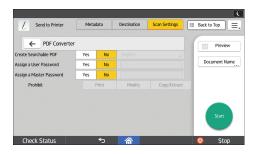


 When a Filter is added to a Project, it is necessary to establish settings specific to that Filter, via the AdminTool. In addition, some Filters may require user input from the MFP display panel.

# Reference

• See page 204 "About Filters".

Fig.: PDF Converter Filter - MFP Display Panel



## **MFP Configuration Terms**

#### **Profile**

A Profile is a set of parameters that are applied to the MFP. Using the AdminTool, the Administrator configures a Profile and associates it with an MFP. Once a Profile is associated with an MFP, the Groups/Projects created within the Profile are available to the user. Groups and Projects provide access to Services, such as Send to Email and Send to Folder. The relationship among Profiles, Projects, and Services is illustrated in the figure as follows:.

CWT009

Group
Project A
<Service>
-E-mail
-Folder
Profile1
Project B
<Service>
-E-mail
-WebDAV
-FTP
Profile2

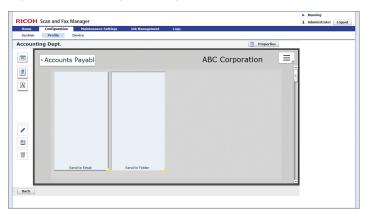
Fig.: Profile > Project > Service Workflow

#### Group

Scan and Fax Manager PC/Server

A Group allows the Administrator to group Projects registered with a Profile. You can add Groups to a Profile by creating a new Group or editing an existing Group, according to application needs. For example, you can group the Projects of a Profile based on their job type, names, etc. This Group will be useful when a Profile has multiple registered Projects. Groups are displayed in a list on the MFP display panel.

Fig.: AdminTool Project/Group Screen



#### **Project**

A Project refers to a document distribution task and is configured by the Administrator to address specific application needs. For example, the Sales Department sends proposals to prospective clients using the Send to Email Service. The Legal Department archives briefs and depositions, using the Send to Folder Service. Depending on the task, the user presses the associated Project button on the MFP display panel.

For each Project, the Administrator specifies the Distribution Parameters, including the distribution method (Send to Email/Folder, etc.), file format (TIFF, JPEG, PDF, etc.), resolution (200dpi, 300dpi, etc.), and so on. The scanned document will be sent with these settings to the specified destination(s). Depending on system configuration, some settings may be changed by the user prior to transmission. For instance, if the user wants to change the file format from TIFF to PDF, the file format is changed within the Scan Settings screen on the MFP display panel.

After selecting a Project button from the Project Menu (Fig. "Project Menu - MFP Display Panel"), the MFP's display panel reflects the available Services (Fig. "Service Menu - MFP Display Panel").



 If Authentication is enabled, the user must log in to the Project by entering a user name/ password, etc., via the letter keys on the display panel (figure "Letter Keys on the MFP Display Panel").

Fig.: Project Menu - MFP Display Panel



2

Fig.: Service Menu - MFP Display Panel



Fig.: Letter Keys on the Display Panel



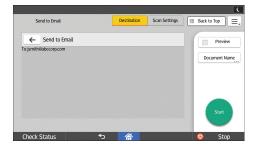
#### One-touch Scan

A One-touch Scan is a Project in which all document Distribution Parameters are pre-defined by the Administrator. For example, individual Projects for each user in the workgroup, can be created. The user in the marketing department, for instance, selects a Project button to open the Send to Email Service. Another user in the accounting department selects a Project button to open the Send to Folder Service, and so forth.

When Distribution Parameters, such as the destination email address and/or folder, file format, etc., are predefined, the user is not required to select/enter settings. As such, the user simply places the document on the Automatic Document Feeder (ADF) or Exposure Glass, and then presses [Start]; scanning is initiated.

Note that use of the One-touch Scan function is intended for tasks in which the parameters for document distribution remain the same, for example, the email address and/or folder destination remain the same. Any Project can be set as a One-touch Scan.

Fig.: Service Menu for One-touch Scan - MFP Display Panel



#### **Distribution Parameter**

A Distribution Parameter is a parameter that is set to a Service/Filter and is used for document distribution. Distribution Parameters are configurable using the AdminTool and/or MFP display panel.

For example, with the AdminTool, you can predefine Send to Email Distribution Parameters with a default [To] address and file format, while leaving [Cc] and [Subject] lines available for the user to define from the device display panel. This enables users to select a Project button and scan directly to a predefined destination, a feature called One-touch Scan.

Thus, if the user often sends itemized bills to accounting, the administrator can specify the email address of the accounting department manager as a predefined Distribution Parameter. This means that users will not have to enter the address at the MFP prior to scanning - saving time and effort.

#### Flow

The AdminTool is used to create a Flow for a Project. A Flow represents a document distribution process and is required in order to direct Scan and Fax Manager's job processing order.

By establishing the correct Flow, Scan and Fax Manager can efficiently and accurately perform the requested conversions. For instance, users have the flexibility to perform a single scan operation, with the resulting files sent to, for example, email and folder destinations - in that order; the target destination can receive a TIFF file by email and also receive the same document as a PDF file deposited directly to the specified folder.

Fig.: Delivery Flow



#### Metadata

Scan and Fax Manager uses Metadata to classify documents for indexing and subsequent searching/retrieval tasks. As a document management tool, Metadata is used within Services/Filters to capture user-relevant information (in XML format).

Scan and Fax Manager supports two kinds of Metadata, also called document information, basic and custom.

#### · Basic Metadata

Standard document information is automatically captured by Scan and Fax Manager during the scanning process. This process occurs in the background, i.e., user input is not generally required.

#### Custom Metadata

The document information is designed/added to a Project by the Administrator, using various input field types, such as text boxes and/or drop-down lists. The user, from the MFP display panel, can enter certain values prior to scanning the document.

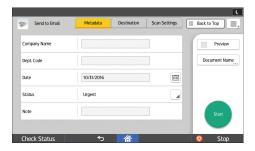


During design of custom Metadata fields, the input value can be left blank, allowing for
user input, or set as a default value via the AdminTool, though the user is free to change
the entry.

In the figure below, the administrator has predefined the "Date" field. Labels such as "Company Name" and "Dept. Code" and predefined text such as "Urgent" are set via the AdminTool.

This document information can be edited by the user, if necessary, and then captured and indexed along with the scanned file, allowing the user to more efficiently archive/retrieve files.

Fig.: Metadata - MFP Display Panel



#### Section

When a multi-page document is scanned at the MFP, each resulting document page is called a Section. For example, when the Section Specify Filter has been added to a Project, the target is a "Section", not a "page". As such, each "Section" is a separate file; each file can consist of any number of pages.

• Example 1 (Single-Page TIFF)

When a five-page document is scanned and distributed in the Single-Page TIFF file format, the resulting document will have five Sections.

Fig.: Document Sections - Single-Page TIFFs



BMB016S

• Example 2 (Multi-Page TIFF)

When a five-page document is scanned and distributed in the Multi-Page TIFF file format, the resulting document will have just one Section.

Fig.: Document Section - Multi-Page TIFF



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Example 3 (Multiple Filters in Flow)
 If Filters are used, and there is more than one Section in the resulting file, each Section can have a different file format.

Fig.: Document Sections - Different File Formats



BMB018S

# 3. QUICK START

This chapter is a quick tutorial on how to configure Scan and Fax Manager's AdminTool, specifically, you will learn how to establish system and MFP settings that enable the connected device(s) to perform network scanning operations.

# **Performing Initial Setup**

You must complete the following seven steps, in sequence:

- Step 1: AdminTool Login
- Step 2: Add a Profile
- Step 3: Add a Group
- Step 4: Add a Project
- Step 5: Add a Service/Create a Flow
- Step 6: Configure the Service
- Step 7: Configure the MFPs

After successfully completing these steps, you will gain an understanding of how the Scan and Fax Manager system works. You are then prepared to explore the next chapter, page 71 "ADMINTOOL CONFIGURATION", to learn how to configure settings that further enhance MFP functionality.

### **Important**

- SFM functions correctly even if the status of SFM is indicated as Suspend on the Extended Feature Settings screen in the Startup Setting tab on the MFP display panel.
- Note that some settings are established on the System Level or Profile Level. Settings created on the
  System Level are automatically copied to each new Profile, saving time. If the settings are changed
  at the Profile Level, they will be unique to that specific Profile, for instance, one user group may
  require authentication (login), while another does not.

# Reference

• See page 71 "ADMINTOOL CONFIGURATION".

# Step 1: AdminTool Login

The AdminTool is a Web-based software utility that enables the Scan and Fax Manager Administrator to establish all network and MFP configuration and management settings. This easy-to-use application allows for creation of Profiles, Groups/Projects, and Delivery Flows, as well as the selection of Services/Filters. Once configured, Scan and Fax Manager-enabled MFPs can join in network-scanning operations.



- General users, those without administrative privileges, can log in to the AdminTool in User Mode.
   However, users can only access/move between his/her own jobs and logs, i.e., all, completed or error Job Logs. Other capabilities of the AdminTool are not available.
- You cannot log in as Administrator while another user is already connected to the server using the administrative privilege.
- If you refresh (typically by pressing the F5 key) or close the browser window without first logging out, you will have to wait three minutes or restart the Scan and Fax Manager service before you can log in again.

# Reference

• See page 412 "Authentication and Accounting Manager".

Administrators can enter the AdminTool of Scan and Fax Manager from Administration Manager only. For details on the login procedures, refer to the RICOH Streamline NX Administrator's Guide.



- Even if you apply the server configuration setting to Scan and Fax Manager while other administrator logs in to the AdminTool with administrative privileges, it will fail.
- If using the AdminTool URL, you cannot log in to the AdminTool with administrative privileges but
  with user privileges. For details on logging in to the AdminTool of Scan and Fax Manager using the
  URL via a web browser, refer to the RICOH Streamline NX User's Guide.

# **About Login Status**

The upper right corner of the AdminTool screen displays important information regarding login status.

### Fig.: Login Status



Please review the table below to learn about each item, and the related function.

### **Table: Login Status**

Table: Logii	ltem	Description
A	Server Status	Displays the current state of the Scan and Fax Manager Server, either [Running] or [Suspended]. Click, [Running] to display the System Control screen. Here, you can start/stop the Scan and Fax Manager Server from processing distribution jobs. The system itself is not stopped, processing of distribution jobs is just temporarily stopped. Incoming jobs are held in the Waiting queue. They will not be processed until you restart job processing.  • Note  • Unavailable in User Mode.  • Reference  • See page 381 "System Control Settings".  • See page 418 "About User Mode".
В	[Logout]	Logs out of the AdminTool.
С	Administrator	Displays the login user's name. By default, the login name is "Administrator". Click the icon/name to display the Administrator Settings screen.  • Note  • Displays the login user's name in User Mode.  • See page 418 "About User Mode".

# Reference

• See page 415 "Administrator Settings".

# Step 2: Add a Profile

A Profile defines the document distribution Flow of an MFP. Operation of the Scan and Fax Manager-enabled MFP is controlled by the Profile, thus identifies the specific Groups, Projects, and Services for the device, in short, which Send-to features and associated functions are available to the user at the MFP display panel.

In this step, you will create a Profile called "Accounting Dept.". To do so, proceed as follows:

1. Click [Home], and then the [Profile] shortcut.

Fig.: AdminTool Home Page



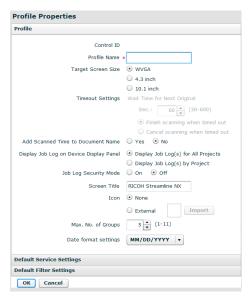
The Profile List displays.

Fig.: Profile List



2. Click [Create]. The Profile Properties screen displays.

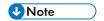
Fig.: Profile Properties Screen



Required items are indicated by a red asterisk (\*).

If you did not enter the required settings, and then click [OK], the associated fields will appear in red highlight.

Enter the Profile Name, for example, "Accounting Dept.".



• A Profile Name that is already in use can be entered.



- The maximum length of the Profile Name is 128 characters.
- 4. Enter a Screen Title for display on the Application Bar. This entry displays on the MFP display panel. In the figure below, the Screen Title is ABC Corporation.

Fig.: MFP Display panel (Standard Operation Panel)







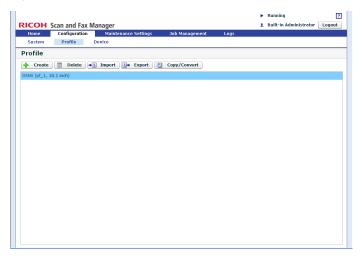
 When customizing the Application Bar, check that the MFP display panel displays the Screen Title as you wish.

**○** Limitation

**U** Note

- The maximum length of the Screen Title is 50 characters.
- 5. Click [OK]. The Profile List displays, along with the newly-created Profile, "Accounting Dept.".

Fig.: Profile List



You have successfully created a Profile. Please proceed to Step 3: Add a Group.



• For additional details about Profile settings, see page 72 "About Profile Settings".

# Step 3: Add a Group

A Group is a way to organize Projects within a Profile. Adding Projects to each Group and selecting the Group with Projects you want to use, you can access them quickly.

In this step, you will create two Groups within the "Accounting Dept." Profile: "Accounts Payable" and "Accounts Receivable". To do so, proceed as follows:

 On the Profile List, double-click the Profile Name, for example, "Accounting Dept.". The Group/Project screen displays.

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



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

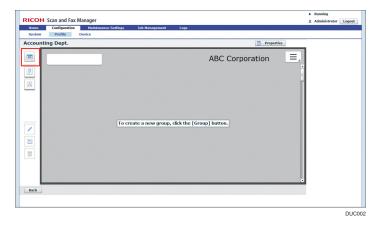


### 2. Click the New Group button.

Fig.: New Group (Standard Operation Panel)

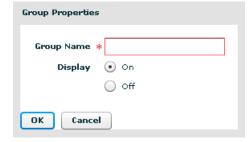


Fig.: New Group (Smart Operation Panel)



The Group Properties screen displays.

Fig.: Group Properties Screen



#### 3. Enter the Group Name, for example, "Accounts Payable".



• The maximum length of a Group Name is 128 characters.

#### Fig.: Group Properties Screen



#### 4. Select the [Display] status.

Select [On] to display the Group tab on the MFP display panel. When using the Smart Operation Panel, select [On] to display the group name in the Group list on the MFP display panel. Select [Off] to hide the Group tab (or group names in the Group list). The Group tab will not be visible to the user.

# Reference

- See page 91 "Hiding a Group".
- 5. Click [OK] to save the settings.



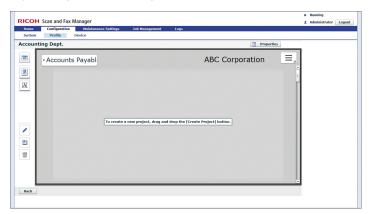
• Click [Cancel] to exit, without saving the settings.

The Group screen now displays the "Accounts Payable" tab. When Smart Operation Panel is used, "Accounts Payable" is displayed in the Group list.

Fig.: Group Tab (Standard Operation Panel)



#### Fig.: Group List (Smart Operation Panel)

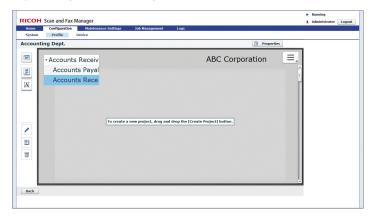


6. Repeat 2 - 5 to add another Group. The Group "Accounts Receivable" is added.

Fig.: Group Tab (Standard Operation Panel)



Fig.: Group List (Smart Operation Panel)



You have successfully added two Groups. Please proceed to Step 4: Add a Project.



• For additional details about Group settings, see page 72 "About Profile Settings".

# Step 4: Add 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. Projects display on the MFP display panel, enabling the user to select the desired Service, for instance, Send to Email.

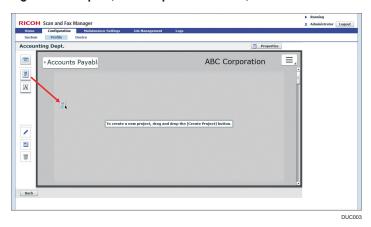
In this step, you will add two Projects, one called "Send to Email" will be added to the "Accounts Payable" Group, another called "Send to Folder" will be added to the "Accounts Receivable" Group. To do so, proceed as follows:

 Click the New Project button, and then drag and drop to the "Accounts Payable" Group/ Project screen.

Fig.: New Project (Standard Operation Panel)



Fig.: New Project (Smart Operation Panel)



The Project Properties screen displays (Fig. "Project Properties Screen").



- The Scan and Fax Manager system will not allow you to add a Project unless you first create
  a Group. If you attempt to do so, an error symbol displays.
- The maximum number of Projects that can be added to a Profile is increased from 100 to 500.
- MFPs that have a 4-line display panel only support Profiles that contain 100 or fewer Projects.
   Do not assign any Profiles that contain more than 100 Projects to a 4-line display panel MFP.

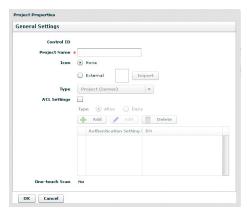
#### Fig.: Project Error



### Reference

• See page 45 "Step 3: Add a Group".

### Fig.: Project Properties Screen



In [Type], the buttons for transitions to the screens of Scan and Fax Manager (Project), Secure Print Manager and the standard MFP functions such as copy or facsimile, etc. can be specified.

# 

 If the settings related to a Project (Serverless) is not displayed, contact your service representative.

Table: Project Properties Screen - Type

Item	Description
[Project (Server)], [Project (Serverless)]	Select this to create a button for using Scan and Fax Manager. When [Project (Server)] is selected, a document distribution process is executed on the dedicated server. When [Project

ltem	Description
	(Serverless)] is selected, documents can be distributed without using the dedicated server computer.
	Select [Project (Server)] to enable both [ACL Settings] and [One-touch Scan], or select [Project (Serverless)] to enable [One-touch scan].
	<b>↓</b> Note
	Only the [Send to Email] or [Send to Folder] service can be added to a Project (Serverless).
	<ul> <li>If an older version Project has been imported, [Type] is set to [Project (Server)].</li> </ul>
	<ul> <li>In Administration Manager, click [Policy] under Scan and Fax Manager to apply the settings to the device after configuring a Project (Serverless) is completed. For details, see "Policy Settings", RICOH Streamline NX Administrator's Guide.</li> </ul>
	<ul> <li>If you log in to the MFP using the cached user information, the Project specified on ACL is not available.</li> </ul>
	Select to create a button for selecting the Secure Print Manager (Embedded).
	If selected, [ACL Settings] and [One-touch Scan] will be disabled.
[Secure Print Manager]	<b>↓</b> Note
(Standard Operation Panel only)	The procedures for setting a name and icon for the button are the same as for a Project button. For details, see page 103 "Editing Project Properties".
	<ul> <li>The Flow Editor screen will not be displayed even if the button for Secure Print Manager is double-clicked on the [Profile] screen. For details, see page 57 "Step 5: Add a Service/Create a Flow".</li> </ul>
[Copy], [Document Server], [Facsimile], [Printer], [Scanner]	Select to create a button for selecting the standard MFP functions of copy, document server, fax, printer and scanner.
(Standard Operation Panel only)	If selected, [ACL Settings] and [One-touch Scan] will be disabled.

ltem	Description
	<ul> <li>Note</li> <li>The procedures for setting a name and icon for the button are the same as for a Project button. For details, see page 103 "Editing Project Properties".</li> <li>The Flow Editor screen will not be displayed even if the buttons you have created are double-clicked on the [Profile] screen. For details, see page 57 "Step 5: Add a Service/Create a Flow".</li> </ul>



- [Type] can be set only when adding a new Project. The setting item will be disabled on the screen for editing a Project Properties.
- The buttons created for [Project] and [Secure Print Manager] are enabled in any models of MFPs. If selecting other functions in [Type], only a button for [Copy] or no buttons are enabled depending on the MFP models. In this case, an error message will appear. For MFPs that do not support the function, refer to the following list.

Available Buttons	Device Model
	Aficio MP 4000 / 5000
	Aficio MP C6000 / C7500
	Aficio MP 2550 / 3350
	Aficio MP 4001 / 5001
No buttons are enabled.	Aficio MP 2851 / 3351
	Aficio MP C2800 / C3300
	Aficio MP C4000 / C5000
	Aficio MP C2050 / C2550
	Aficio MP 6001 / 7001 / 8001 / 9001
Only a button for [Copy] is enabled.  • Note	Aficio MP C6501 / C7501
	Aficio MP C2051 / C2551
This is available only when the latest	Aficio MP C3001 / C3501
firmware has been installed on an MFP.	Aficio MP C4501 / C5501

Available Buttons	Device Model
	Aficio MP C300 / C400
	Aficio MP 2352 / 2852 / 3352
	Aficio SP 5200S / 5210SF / 5210SR



- If Scan and Fax Manager is not available, only buttons except [Project] will be enabled.
- 2. Enter the Project Name, for example, "Send to Email".



- Projects can be named as you wish, so while this example uses "Send to Email" and "Send to Folder" as Project names, you may use, for example, a department, individual or workgroup name.
- 3. Click [OK]. A "Send to Email" button displays.

Fig.: "Send to Email" button (Standard Operation Panel)





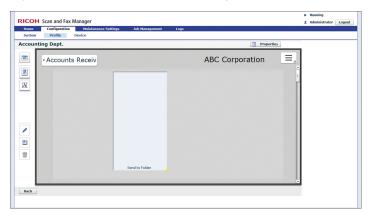


- 4. Select the "Accounts Receivable" Group tab. When Smart Operation Panel is used, select "Accounts Receivable" from the Group list.
- 5. Repeat 1 3, using "Send to Folder" as the Project Name. A "Send to Folder" button displays.

Fig.: "Send to Folder" button (Standard Operation Panel)



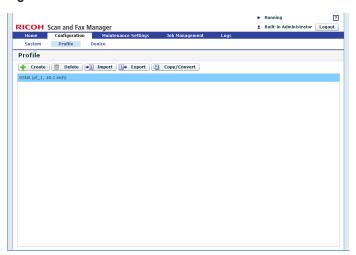
Fig.: "Send to Folder" button (Smart Operation Panel)



The "Accounts Receivable" Group screen now includes a Project button called "Send to Folder".

6. Click [Back], and return to the Profile list screen.

#### Fig.: Profile List



You have successfully added two Projects. Please proceed to "Step 5: Add a Service/Create a Flow".



• For additional details, see page 72 "About Profile Settings".

# Step 5: Add a Service/Create a Flow

A "Flow" represents a document distribution process for a Project. Each Project must have a Flow containing the required Services for the Project.

#### Flow Rules

- A Flow must contain at least one Service or the Flow Redirect Filter.
- A Flow can have multiple Services, which are performed one by one, i.e., from the beginning
  of the Flow to the end.
- A Flow must end with a Service, not a Filter, with the exception of the Flow Redirect Filter.



 Only the [Send to Email] or [Send to Folder] service can be added to a Project (Serverless).

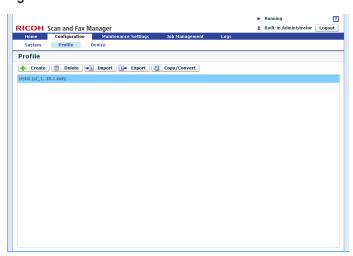
### Reference

• See page 204 "About Filters".

In this step, you will create a Flow containing the Email Service required to run the Project called "Send to Email". To do so, proceed as follows:

1. On the Profile list, double-click the Profile Name.

Fig.: Profile List



2. If necessary, select the "Accounts Payable" Group tab. When Smart Operation Panel is used, select "Accounts Payable" from the Group list.

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



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



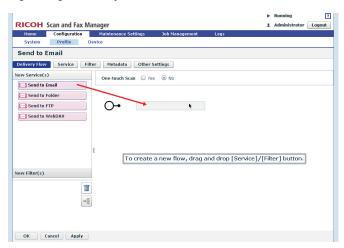
Double-click on the "Send to Email" Project button. The Project Configuration screen displays.

Fig.: Project Configuration Screen



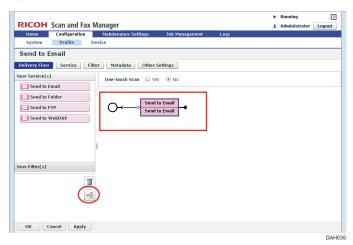
4. Drag and drop the Send to Email Service to the Flow Editor screen by clicking [Send to Email] and positioning the Service as shown below.

Fig.: Drag and Drop Service to Flow Editor screen



The Send to Email Service is added to the Flow Editor screen.

Fig.: Send to Email Added to Flow



**U**Note

• To automatically align the Service(s) in the Flow Editor screen, click the Alignment button (circled above).

You have successfully added a Service to the Flow. Please proceed to Step 6: Configure the Service.



For additional details about Service/Flow settings, see page 129 "About Flows" and page 138 "About Services".

# Step 6: Configure the Service

A Service represents a document distribution method and is added to a Project. Users can then select the Project from the MFP display panel by simply selecting the desired Project button, which then opens the associated Service Menu. See the figure below.

The Send to Email Service, for example, allows the MFP user to send scanned images directly to one or more email addresses as an attachment. During scanning, the paper-based document is digitized and converted to the selected file format, for instance, TIFF, JPEG, PDF, etc. The email recipients can view, print, forward, archive or delete the attached files.

Fig.: Service Menu Display - MFP Display Panel (Standard Operation Panel)

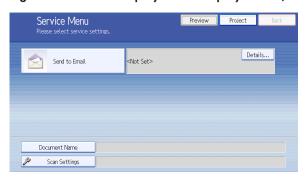
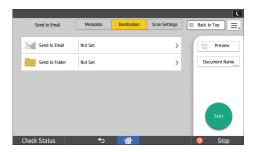


Fig.: Service Menu Display - MFP Display Panel (Smart Operation Panel)



In this step, we will establish the Send to Email settings on the Profile Level. As mentioned, some settings are established on the System Level or Profile Level. Settings created on the System Level are automatically copied to each new Profile, saving time. If the settings are changed at the Profile Level, they will be unique to that specific Profile, for instance, one user group may require authentication (login), while another does not.

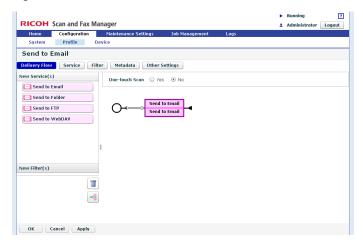
# ■ Reference

• See page 71 "ADMINTOOL CONFIGURATION".

To configure the Send to Email Service, proceed as follows:

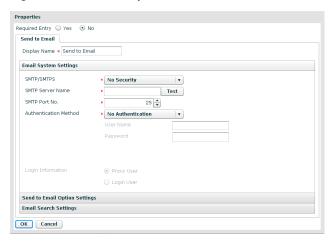
1. Double-click the Send to Email Service on the Flow Editor screen.

Fig.: Send to Email Service



The Send to Email Properties screen displays.

Fig.: Send to Email Properties Screen



2. In the Display Name field, specify the name of the Service. This entry will appear on the MFP display panel.



- The maximum length of the Display Name is 30 characters.
- 3. Select/enter the following settings:
  - SMTP/SMTPS

Select one of the following encryption methods to use with the SMTP server.

- [No Security]
- [SMTPS (SMTP over SSL)]

• [SMTPS (StartTLS)]

The following explains the procedures when selecting [No Security].

For details about configuring the [SMTPS (SMTP over SSL)] or [SMTPS (StartTLS)] setting, see page 148 "Send to Email Service".

• [SMTP Server Name]

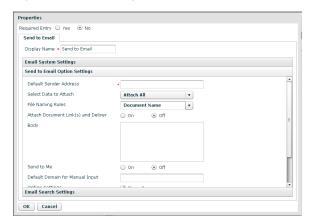
Enter the IP address or host name of the SMTP(S) Server.

• [SMTP Port No.]

Specify the port number of the SMTP Server. The default value is 25.

 Click the Send to Email Option Settings accordion button (bottom of screen). The Option Settings screen displays.

Fig.: Send to Email Option Screen



5. Specify the Default Sender Address.



- This is the default email address of the sender which is set to the "From" field as the sender's
  address. If the email address of the sender can be obtained from the login information for the
  Project, i.e., the email address of the sender is registered with the user profile of the
  Authentication Server (LDAP and Active Directory only), the obtained email address will be
  automatically set as the email address of the sender.
- 6. Next, scroll down to display the Option Settings check boxes. Select one or more of the following boxes:
  - [Show Cc]

Enables users to specify a Courtesy Copy destination.

• [Show Bcc]

Enables users to specify a Blind Courtesy Copy destination.

• [Show ReplyTo]

Enables users to specify a ReplyTo address.

[Enable Manual Address Entry]
 Enables users to input a destination via the letter keys on the display panel.

This action enables both the AdminTool's Output Services screen (Fig. "Send to Email Main Screen - Admin Tool") and MFP display panel (Fig. "Send to Email Main Screen - MFP display panel") with the selected features.

Fig.: Send to Email Main Screen - AdminTool

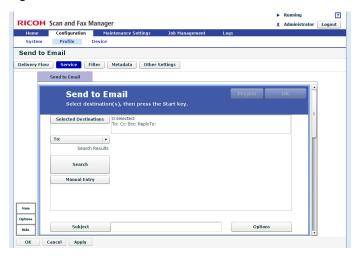


Fig.: Send to Email Main Screen - MFP Display Panel (Standard Operation Panel)

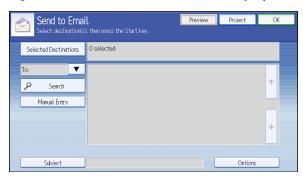


Fig.: Send to Email Main Screen - MFP Display Panel (Smart Operation Panel)





- If you do not enable these settings, the AdminTool and MFP display panel only display the
  [To] destination, i.e., [Cc]/[Bcc]/[ReplyTo] selections do not display in the drop-down, and
  [Manual Entry] is grayed out when the Standard Operation Panel is used, and is not
  displayed when the Smart Operation Panel is used.
- With [Manual Entry] disabled, the user can only search the corporate address book (via an LDAP server) for the destination email address. To enable the Search function, establish the necessary Email Search Settings.

# Reference

- See page 129 "About Flows", page 138 "About Services".
- See page 280 "About Distribution Parameters".
- 7. Click [OK] to save the settings, and return to the Delivery Flow screen.

You have successfully completed the basic settings for the Send to Email Service. Please proceed to page 66 "Step 7: Confirm the Configuration of the MFPs".



For additional details about Service/Flow settings, see page 129 "About Flows", page 138
 "About Services".

# Step 7: Confirm the Configuration of the MFPs

You have completed configuration of basic AdminTool settings. The next step is to identify the MFPs that are to join in Scan and Fax Manager operations. For example, you will select each device's default Profile.

For details about the procedures for adding devices to the Device List, see the documentation for Administration Manager.

1. Click [Home], and then the [Device] shortcut.

#### Fig.: AdminTool Home Page



The Device List displays the settings of Scan and Fax Manager-enabled MFPs.

In the RICOH Streamline NX system, the device configurations are managed and distributed by/ from Administration Manager. You can use the [Device] button on the [Home] page to confirm the device configuration.



 Administration Manager cannot distribute device configurations to Scan and Fax Manager that is set as the Load Balance server or Secondary Delivery server.

Fig.: Device List

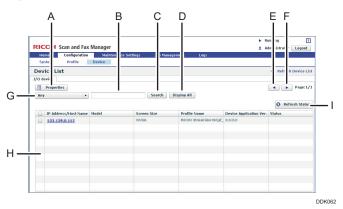


Table: Device List

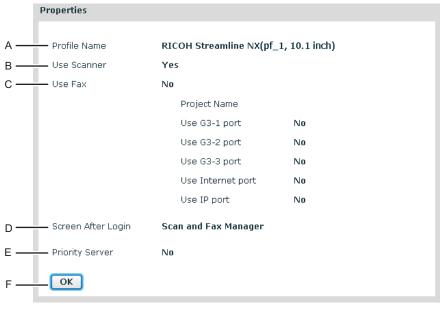
	ltem	Description
А	[Properties]	Displays the Properties screen.
В	Search Entry	Enters a keyword for searching.
С	[Search]	Searches device(s) under certain conditions.
D	[Display All]	Displays all devices.
Е	Previous Page	Goes to previous page of the device list view.
F	Next Page	Goes to next page of the device list view.
G	Field Selection	Selects a field for searching.  Candidate items:  Any  IP Address/Host Name,  Device Name  Model  Device Group  Screen Size  Profile Name  Device Application Ver.
Н	Device List	The Device List shows a list of Scan and Fax Manager- enabled MFPs. By default, this list is ordered by IP address. The list contains the following data:

	ltem	Description
		IP Address/Host Name
		Model
		Screen Size
		Profile Name
		• Status
		Device Application Ver.
		Indicates the version of Scan and Fax Manager ESA application that is installed on the MFP.
		Note
		<ul> <li>Adding or deleting devices and importing or exporting device information can be specified in the Administration Manager.</li> </ul>
I	[Refresh Status]	Updates the Device List.

2. Click [Properties], and then confirm the device properties.

The Properties screen appears.

Fig.: Device Properties Screen



DSP00

### **Table: Device Properties**

	Field	Description
А	[Profile Name]	Shows the profile name currently being set.
В	[Use Scanner]	Indicates whether or not to use scanner (Yes/No).
С	[Use Fax]	Indicates whether or not to use fax (Yes/No).
		Shows the project name used on fax and indicates whether or not the port is to be used (Yes/No), if "Yes" is set.
		■ Reference
		See page 348 "About Inbound FAX Transfer".
		See page 305 "About One-touch Scan".
D	[Screen After Login]	Shows the name of the application displayed after logging in to the device. Either of the following two applications is displayed:
		Scan and Fax Manager
		Secure Print Manager
		Smart Operation Panel Home
Е	[Priority Server]	Shows the name of the server to be used when a secondary server is being set.
		If a secondary server is not set, this label does not display any information.
F	[OK]	Closes the Properties screen.

## 3. Click [OK].

## 4. ADMINTOOL CONFIGURATION

This chapter explains how to configure additional Scan and Fax Manager parameters, those that further enhance and customize Scan and Fax Manager to your specific application needs.

# Configuring Scan and Fax Manager Parameters

This chapter explains the following procedures.

- About Profile Settings
- About Group Settings
- About Project Settings
- About Flows
- About Services
- About Filters
- About Distribution Parameters
- About One-touch Scan
- About Scan Settings
- About Other Settings
- About Metadata
- About Inbound FAX Transfer
- Configuring Projects for Use on 4-Line LCD Display Panel MFPs

### Mportant (

• In order to follow the procedures outlined in this chapter, you should complete Steps 1-7; specifically you must be able to access a Profile, Group, and Project.

#### Reference

• See page 39 "QUICK START".

## **About Profile Settings**

As noted, a Profile defines the document distribution Flow of an MFP, i.e., identifies the Groups, Projects, and Services available to the user at the MFP display panel.

Unlike Groups and Projects, a Profile works in the background to control network scan operations, thus the user does not see or select a Profile at the MFP display panel.

The table below summarizes what is covered in this section.

#### **Table: Module Summary**

Module	Explains how to
Editing Profile Properties	Specify/edit default settings that control a Profile, for example Profile Name, Add Scan Time to Document Name, etc.
Importing and Exporting Profiles	Import and export Profiles to and from other Scan and Fax Manager systems.
Deleting a Profile	Delete a previously-added Profile from the Scan and Fax Manager system.
Duplicating and Converting Profiles	Create new profiles by duplicating existing profiles. A profile for WVGA screen can also be converted to a whole new profile for 10.1 inch.

## **■** Reference

• See page 42 "Step 2: Add a Profile".

## **Editing Profile Properties**

To edit Profile Properties, proceed as follows:

4

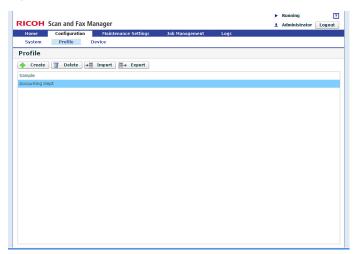
1. Click [Home], and then the [Profile] shortcut.

Fig.: Profile Properties Screen



The Profile List displays.

Fig.: Profile List



2. Double-click the Profile Name, for example "Accounting Dept.", and then click [Properties].

Fig.: Properties Button (Standard Operation Panel)



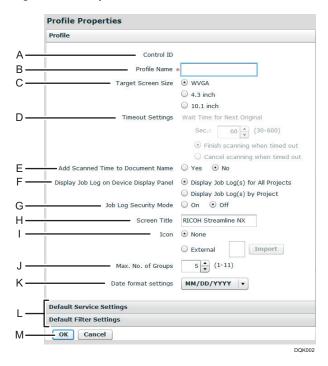
#### Fig.: Properties Button (Smart Operation Panel)



The Profile Properties screen displays.

3. Specify the Profile settings, as outlined in the table below.

#### Fig.: Profile Properties Screen



**Table: Profile Properties** 

	ltem	Description
Α	[Control ID]	This is the system-assigned, read-only Profile ID.
В	[Profile Name]	Specify the Profile Name.
		<b>◆</b> Note
		A name that is already in use can be entered.
		<b>Q</b> Limitation
		The maximum length of the Profile Name is 128 characters.

	ltem	Description
С	[Target Screen Size]	<ul> <li>Specify the screen size of the target machine to distribute documents.</li> <li>[WVGA]  Creates a profile that distributes documents to a machine with a WVGA screen.</li> <li>[4.3 inch]  Creates a profile that distributes documents to a machine with a 4.3-inch screen.</li> <li>[10.1 inch]  Creates a profile that distributes documents to a machine with a 10.1-inch screen.</li> </ul>
		<ul> <li>You cannot change the screen size after the profile is created.</li> <li>When the Smart Operation Panel (Advanced UI) is used, select [10.1 inch].</li> </ul>
D	[Timeout Settings]	<ul> <li>[Wait Time for Next Original]         Specify how long the MFP waits for the next original to be placed when scanning by using the exposure glass or when scanning a large number of documents.         You can also specify whether the MFP finishes or cancels scanning before a time-out occurs.         When the Preview function is used, the MFP displays preview images for the time specified here, and then starts sending scanned documents or cancels sending, according to the setting.     </li> <li>Note</li> <li>This setting is available only when [10.1 inch] is selected for [Target Screen Size].</li> </ul>
Е	[Add Scanned Time to Document Name]	Specify whether or not to add a scanned time information to the Document Name, indicating the time scanning took place.  • [Yes]  A timestamp is added to the Document Name, for example, "Expense_Report_yyyymmddhhmmss".

	ltem	Description
		• [No]
		A timestamp is not added to the Document Name.
F	[Display Job Log on Device Display Panel]	Specify which Job Logs the user can browse from the MFP display panel.
	(Standard Operation	• [Display Job Log(s) for All Projects]
	Panel only)	• [Display Job Log(s) by Project]
G	[Job Log Security Mode]	Specify whether or not to mask sensitive parts of the Job Log on the MFP display panel.
		• [On]
		The Document Name and User Name are masked with asterisks (*****).
		• [Off]
		All Job Log properties are unmasked (displayed).
Н	[Screen Title]	Specify text to display on the Application Bar, which appears on the MFP display panel.
		Note
		When customizing the Application Bar, check that the MFP display panel displays the text as you wish.
		Limitation
		The maximum length of the Screen Title is 50 characters.
I	[lcon]	Specify whether or not to apply an icon next to the Screen Title on the Application Bar, e.g., a company logo.
		• [None]
		An icon is not displayed.
		• [External]
		Click [Import] to browse to/select a file (icon image) to display on the Application Bar.
		■ Reference
		See page 122 "Importing Profile/Project Icons".

	ltem	Description
J	[Max. No. of Groups] (Standard Operation Panel only)	Specify the number of Group tabs that displays on a single screen of the MFP display panel. (Default: 5, Minimum: 1, Maximum: 11)  • Note  • When the Standard Operation Panel is used and there are more Group tabs to display, horizontal scroll buttons display on the AdminTool and MFP display panel.  • When the Standard Operation Panel is used and a single screen has multiple Group tabs to display, the tab width will narrow, and the Group Name(s) may be truncated.  • Reference  • See page 45 "Step 3: Add a Group".  • See page 84 "About Group Settings (When Using
K	[Date format settings]	the Standard Operation Panel)".  Specify the display format of the date to be applied to the MFP display panel.  • [MM/DD/YYYY]  • [DD/MM/YYYY]  • [YYYY/MM/DD]
L	[Default Service Settings]	Use this accordion button to open the Default Output Service Settings screen.  • Reference  • See page 129 "About Flows", page 138 "About Services".
	[Default Filter Settings]	Use this accordion button to display the Default Filter Service Settings.    Reference
М	[OK]	Saves screen settings.
	[Cancel]	Exits, without saving settings.



 In the RICOH Streamline NX system, the authentication is managed integrally by Administration Manager.

#### Reference

- For details on the authentication setting, refer to the RICOH Streamline NX Administrator's Guide.
- 4. Click [OK] to save the Profile settings, and return to the Group/Project screen.



- Click [Cancel] to exit, without saving the settings.
- 5. Click [Back] to return to the Profile List.

#### **Importing/Exporting Profiles**

You can export and import Profiles to and from other Scan and Fax Manager systems.



Only logging off is possible during Profile import/export. Do not attempt any other operations
while an import/export operation is in progress.

#### **Exporting a Profile**

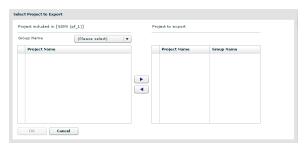
You can export a Profile for use in other Scan and Fax Manager systems. Use the following procedure to export a Profile.

- If necessary, click [Home], and then the [Profile] shortcut.
   The Profile List appears.
- 2. Click [Export].
- 3. Select an export method.



- [Export the Whole Profile]: Export all Groups and Projects contained in a selected Profile.
- [Specify Group/Project and Export]: Export specified Groups and Projects contained in a selected Profile (see step 5).
- 4. In [Profile Name], select the Profile you want to export, and then click [OK].

If you selected [Specify Group/Project and Export], use the following procedure to specify which Groups and Projects to export.



- 1. Select a Group from the drop-down list.
- Select the check boxes of the Projects you want to export, click [▶], and then click [OK].



- Repeat this procedure to add Projects from other Groups.
- If you selected [Export the Whole Profile], step 5 is omitted.
- 6. When the message confirming that you want to download the Profile appears, click [OK].
- Select a folder to save the exported Profile in, enter a name for the file, and then click [Save].

The exported data will be saved.

8. When the export completes, click [OK] on the confirmation window.

#### Importing a Profile

You can import the Profiles of other Scan and Fax Manager systems. Use the following procedure to import a Profile.



- Only Profiles from the same edition and version of Scan and Fax Manager can be imported.
- Do not import a Profile from a Scan and Fax Manager system that has different options installed. If you do, errors might occur when you send a document.
- You cannot import data which does not have a screen size item to a machine with a 4.3-inch screen.
- If necessary, click [Home], and then the [Profile] shortcut.
   The Profile List appears.
- 2. Click [Import].

The import method selection window appears.



- 3. Select an import method, and then click [OK].
  - [Create as a New Profile]: Create a new Profile that contains the imported data.
  - [Add to Existing Profile]: Add the imported Groups and Projects to an existing Profile. To
    merge imported Groups and Projects into an existing Profile, specify the destination Profile in
    [Profile Name]. Groups and Projects merged into an existing Profile are added after the last
    Group contained in the destination profile. The properties of the imported Profile are not
    imported when you merge the Profile into an existing Profile.
- 4. Select the Profile data that you want to import, and then click [Open].
- 5. When the import completes, click [OK] on the confirmation window.



If the imported Profile contains Replacement Tables that have the same name as a Replacement
Table that is already present in the import destination, a number in parentheses (for example,
 "(1)") will be appended to the name of the imported Replacement Table.

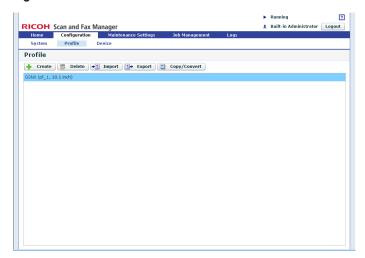
## **Deleting a Profile**

To delete a Profile from the Scan and Fax Manager system, proceed as follows:

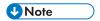
1. If necessary, click [Home], and then the [Profile] shortcut. The Profile List displays.

2. Click the Profile Name. To select multiple items hold down the SHIFT or CTRL key, and then click the Profile Name.

Fig.: Profile List



- 3. Click [Delete]. A deletion confirmation message displays.
- 4. Click [OK] to delete the Profile.



- Click [Cancel] to exit, without deleting the Profile.
- If you delete a Profile associated with an MFP, the setting of MFP you established will no
  longer function correctly. (So before deleting it, please confirm the settings of MFP and
  Replacement Table, and write them down if needed.) In that case, associate the MFP with an
  enabled (existing) Profile in the Device Management Screen. Also, if Profiles used in the
  Replacement Table are deleted, it is necessary to re-assign Replacement Table items in the
  Replacement Table Setting screen.

## Reference

- See page 66 "Step 7: Confirm the Configuration of the MFPs".
- See page 347 "About Device Properties".
- See page 434 "Replacement Table Settings".

## **Copying and Converting Profiles**

You can copy or convert up to 10 Scan and Fax Manager profiles at a time.

You can copy profiles using either of the following methods: copying the existing profiles or converting WVGA profiles to 10.1-inch screen profiles, and then copying the profiles.

Convert profiles, for example, when replacing an MFP with a 10.1-inch screen for a machine with an WVGA screen, or when newly implementing an MFP with a 10.1-inch screen and applying the same configuration as the existing WVGA profile.

1. Select [Home], and then select [Profile].

The list of profiles appears.

2. From the list, select the name of the profile to be copied. To select one profile or more, select the profiles while pressing the [Shift] or [Ctrl] key.

Figure: Profile list



3. Select [Copy/Convert].

The screen for selecting the copy method appears.

Figure: Copy method selection screen



- [Copy profile without modifying it]
   Select this setting to copy the selected profiles without making any changes to their settings.
- [Copy WVGA profile and convert it to a 10.1 inch profile]
   Select this setting to convert the selected profile to a 10.1-inch profile, and then copy it. You can only convert WVGA profiles. You cannot convert 4.3-inch profiles.
- 4. Select the copy method, and then select [OK].

The conversion process starts.

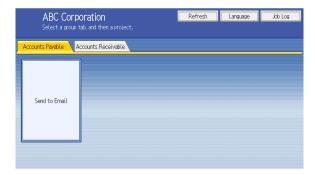


- Copied profiles are named in the format "Original profile name Copy (Profile ID, Screen size)".
- The setting of the conditional branching flow filter that is specified in [Default Filter Settings] of the profile will not be carried over to the copied/converted profile.
- When converting a profile that was created in Scan and Fax Manager version 2.5.X.X to a 10.1-inch profile, you need to open the converted profile, and then save it again.

# About Group Settings (When Using the Standard Operation Panel)

As noted, a Group is a way to organize Projects within a Profile. Once added to the system, the Group appears as a user-selectable tab on the MFP display panel. You add Projects to each Group according to your users' application needs.

Fig.: Group Tab - MFP Display Panel (Standard Operation Panel)



The table below summarizes what is covered in this section.

#### **Table: Module Summary**

Module	Explains how to
Group/Project Screen Overview	Use the Function Pane to create Scan and Fax Manager building blocks - Groups and Projects.
Changing a Group Name	Change a Group Name, i.e., the Group tab label that appears on the MFP display panel.
Changing Group Display Order	Place the Group tabs in the desired order, i.e., how they are to appear on the MFP display panel.
Adding a New Screen Page	Add a new page to the Group/Project screen, for example, when more space is required to display Projects.
Deleting a Screen Page	Delete a screen page from the Group/Project screen.
Hiding a Group	Hide a Group, i.e., the Group works in the background to, for example, forward inbound fax messages.
Deleting a Group	Delete a Group from the Scan and Fax Manager system.

## Reference

• See page 45 "Step 3: Add a Group".

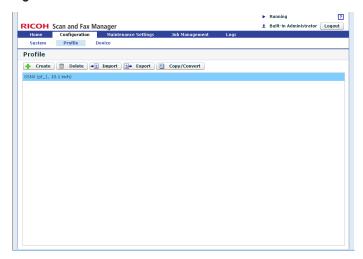
#### 4

### **Group/Project Screen Overview**

This section covers the layout and additional features associated with the Group/Project screen.

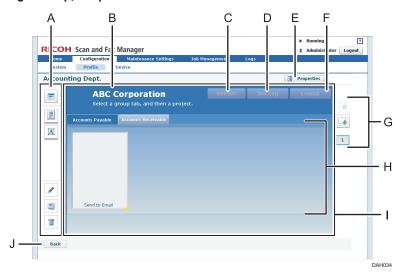
1. Click [Home], and then the [Profile] shortcut. The Profile List screen displays.

Fig.: Profile List



- 2. Double-click the Profile Name, for example, "Accounting Dept.". The Group/Project screen for the selected Profile displays.
- 3. Review the Group/Project screen layout/features, as outlined in the table below.

Fig.: Group/Project Screen



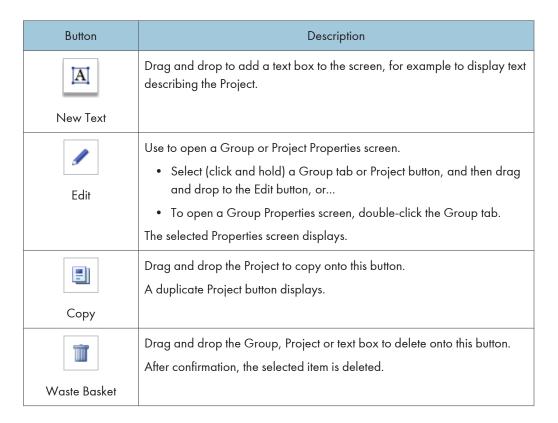
## Table: Group/Project Screen

	ltem	Description
A	Group/Project Function Buttons	Use these buttons to add, edit, copy, and delete Groups and Projects, as well as add explanatory text.
		For details about the buttons, see the following table, "Group/Project function buttons".
		<b>☆Important</b>
		To view Tooltips, roll your mouse over the button.
		<ul> <li>To the right of the Group/Project Function Buttons is a scroll bar. If you make the window smaller, so some buttons are not displayed, use the scroll bar.</li> </ul>
В	Application Bar	The Screen Title, and possibly imported icon appear on the Application Bar, which is visible on the MFP display panel. These settings are customized via the Profile Properties screen.
		<b>□</b> Reference
		See page 72 "About Profile Settings".
С	[Refresh]	Displays on the MFP display panel and allows the user to update settings, for example, if changes to the Profile have been made by the Administrator.
		This button, which displays on the MFP display panel, is not accessible from the AdminTool screen.
D	[Job Log]	Allows the user to view job logs of Scan and Fax Manager.
		This button is not accessible from the AdminTool screen.
Е	[Properties]	Displays the Profile Properties screen.
		<b>☐</b> Reference
		See page 72 "About Profile Settings".
F	[Logout]	Allows the user to log out of Scan and Fax Manager.
		This button is not accessible from the AdminTool screen.
G	New Screen Page Button	If you plan to add more Projects to a Group than one screen can display, click the New Screen Page button to add a new screen. Each screen is listed numerically. To open a screen, click the button, for example,

	ltem	Description
		<ul> <li>Limitation</li> <li>A maximum of 10 Screen Pages can be added to each Group.</li> <li>Reference</li> <li>See page 90 "Adding a New Screen Page".</li> </ul>
	Delete Screen Page Button	After two or more Screen Pages are added, the Delete Screen Page button displays directly above the New Screen Page button. Click (select) the Screen Page you would like to delete, and then click the Delete Screen Page button.    Reference
Н	Group/Project Screen	This area displays Group tabs and Project buttons, as they are selected from the Group/Project Function buttons.
	Group Tab Scroll Buttons	If the number of Groups exceeds the screen capacity, tab scroll buttons display. Click either button to scroll right or left.
I	MFP Screen	This area emulates what the user will see on the MFP display panel.
J	[Back]	Click this button to save settings, and return to the Profile List screen. All settings are immediately applied to the Profile, and cannot be cancelled.

## **Group/Project function buttons**

Button	Description
	Adds a new Group to the Group/Project screen.
New Group	
	Drag and drop to add a Project to the newly-added Group.
New Project	



## **Changing a Group Name**

To edit the Group name, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Double-click the Group tab. The Group Properties screen displays.



• To open the Group Properties screen, you can also drag and drop the Group tab to the Edit button.

#### 4

#### Fig.: Group Properties Screen



4. Edit the Group Name, and then click [OK].



• Click [Cancel] to exit, without saving the setting.



• The maximum length of the Group Name is 128 characters.

## **Changing Group Display Order**

When two or more Group tabs are displayed, you can control the sequence of tabs, via drag and drop, enabling you to place tabs in order of priority.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Select (highlight) the Group tab, and hold it.
- 4. Drag and drop the Group tab to the position you want.

Fig.: Group Tab



In the figure as follows, the display sequence was reversed, so "Accounts Receivable" displays first. The new Group tab sequence will be reflected on the MFP display panel.



 To move a Group tab to the right of another Group tab, drag and drop it onto the right half of the target tab. To move a Group tab to the left of another Group tab, drag and drop it onto the left half of the target tab.

#### Fig.: Group Tab





• Movement of Group tabs from left-to-right or right-to-left is supported.

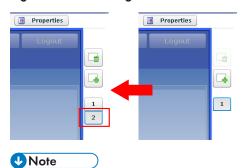
## Adding a New Screen Page

You can add up to 10 screens to each Group so that the user, at the MFP display panel, can scroll through the available Projects.

To add a new Screen Page, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, select the Group tab.
- 4. Click the New Screen Page button. A new screen page is added to the selected Group.

Fig.: New Screen Page Button



- After two or more pages are added, the Waste Basket button is enabled, allowing you to delete a page, as outlined in the next section.
- 5. Click [Back] to save the settings, and return to the Profile List.

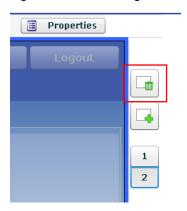
## Deleting a Screen Page

When two or more Screen Pages are added to the Group/Project screen, a Delete Screen Page button displays directly above the New Screen Page button.

To delete a Screen Page, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, select the Group tab.
- Open the Screen Page you wish to delete, for example, click . The page number is highlighted.
- 5. Click the Delete Screen Page button.

Fig.: Delete Screen Page Button



Click [OK] to confirm the deletion. The selected Screen Page is deleted from the Group/ Project screen.



- Click [No] to exit, without deleting the Screen Page.
- If the Screen Page to be deleted contains Projects, the confirmation dialog will appear again, in order to prevent necessary Projects from being deleted.
- 7. Click [Back] to save the settings, and return to the Profile List.

#### Hiding a Group

It is possible to hide a Group, which means that the Group tab will not display on the MFP's Project selection screen. Though the Group is not visible to the users, it is available to the Scan and Fax Manager system (internally) and the Administrator.

For example, a hidden Group can be used as the destination Project for the Flow Redirect Filter. Another example is if you create a Project for the purpose of forwarding fax messages received by the MFP. In either case, the user need not access the function from the MFP display panel.



• See page 257 "Flow Redirect Filter".

- See page 348 "About Inbound FAX Transfer".
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Double-click the Group tab. The Group Properties screen opens.



 Another way to open the Group Properties screen is to drag and drop the Group tab to the Edit button.

Fig.: Group Properties Screen



4. Select [Off].

Fig.: Group Properties Screen



5. Click [OK] to save the setting, and return to the Group/Project screen.



· Click [Cancel] to exit, without saving the setting.



 The Group tab label turns from white to black (see the figure), indicating that the Group display feature is turned [Off], thus the Group is not accessible to the user from the MFP display panel. In short, white Group names indicate visible Groups; black Group names indicate invisible Groups.



6. Click [Back] to save the settings, and return to the Profile List.

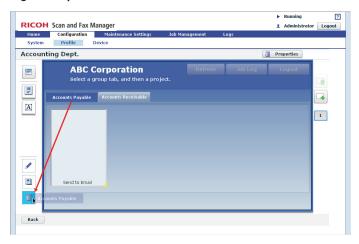
#### **Deleting a Group**

Deleting a Group erases the Group entirely. Any Projects, and special settings registered with the Group, are also deleted, and cannot be recovered.



- If the Group targeted for deletion contains one or more Projects or text boxes, a confirmation dialog will appear twice, offering an opportunity to exit the procedure, i.e., retain the Project(s).
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Click (select) the Group tab, and hold it.
- 4. Drag and drop the Group tab to the Waste Basket button.

Fig.: Group Tab



5. Click [OK] to confirm deletion. The Group is deleted, and the screen refreshes.



- Click [Cancel] to exit, without deleting the Group.
- Again, if one or more Projects exist within the Group, another confirmation dialog box displays to alert you that Project exists in the selected Group. Click [OK] to confirm the deletion, or [Cancel] to exit, without deleting the Group.
- 6. Click [Back] to save the settings, and return to Profile List.

# About Group Settings (When Using the Smart Operation Panel)

As noted, a Group is a way to organize Projects within a Profile. When a group is added, it is displayed as a user-selectable tab in the Group list on the MFP display panel. You add Projects to each Group according to your users' application needs.

Fig.: Group List - MFP Display Panel



The table below summarizes what is covered in this section.

#### **Table: Module Summary**

Module	Explains how to
Group/Project Screen Overview	Use the Function Pane to create Scan and Fax Manager building blocks - Groups and Projects.
Changing a Group Name	Change a group name. The changed name is included in the Group list on the MFP display panel.
Changing Group Display Order	Change the order of group names in the Group list. The order of group names on the MFP display panel is also changed accordingly.
Hiding a Group	Hide a Group, i.e., the Group works in the background to, for example, forward inbound fax messages.
Deleting a Group	Delete a Group from the Scan and Fax Manager system.

## Reference

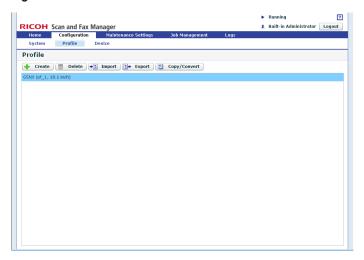
• See page 45 "Step 3: Add a Group".

## Group/Project Screen Overview

This section covers the layout and additional features associated with the Group/Project screen.

1. Click [Home], and then the [Profile] shortcut. The Profile List screen displays.

Fig.: Profile List



- 2. Double-click the Profile Name, for example, "Accounting Dept.". The Group/Project screen for the selected Profile displays.
- 3. Review the Group/Project screen layout/features, as outlined in the table below.

Fig.: Group/Project Screen

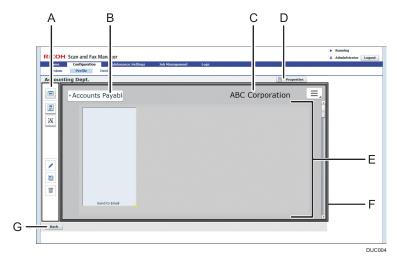


Table: Group/Project Screen

	ltem	Description
Α	Group/Project Function	Use these buttons to add, edit, copy, and delete Groups
	Buttons	and Projects, as well as add explanatory text.

	ltem	Description
		For details about the buttons, see the following table, "Group/Project function buttons".    Important   Important
		To view Tooltips, roll your mouse over the button.
		<ul> <li>To the right of the Group/Project Function Buttons is a scroll bar. If you make the window smaller, so some buttons are not displayed, use the scroll bar.</li> </ul>
В	Group List	Click this item to display the list of group names. When a group is selected, the group is displayed on the Group/Project screen.
С	Application Bar	The Screen Title, and possibly imported icon appear on the Application Bar, which is visible on the MFP display panel. These settings are customized via the Profile Properties screen.    Reference
		See page 72 "About Profile Settings".
D	[Properties]	Displays the Profile Properties screen.
		<b>■</b> Reference
		See page 72 "About Profile Settings".
Е	Group/Project Screen	This area displays the Project buttons as you select them from the Group/Project Function buttons.
		You can place project buttons for up to ten screens vertically.
F	MFP Screen	This area emulates what the user will see on the MFP display panel.
G	[Back]	Click this button to save settings, and return to the Profile List screen. All settings are immediately applied to the Profile, and cannot be cancelled.

## **Group/Project function buttons**

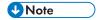
Button	Description
	Adds a new Group to the Group/Project screen.

Button	Description	
New Group		
	Drag and drop to add a Project to the newly-added Group.	
New Project		
[ <u>A</u> ]	Drag and drop to add a text box to the screen, for example to display text describing the Project.	
New Text		
Edit	Use to open a Group or Project Properties screen.  Select (click and hold) a Group or a Project button, and then drag and drop it onto the Edit button, or  You can also display a Group Properties screen by double-clicking the group name in the Group list.	
	The selected Properties screen displays.	
	Drag and drop the Project to copy onto this button.  A duplicate Project button displays.	
Сору		
Ī	Drag and drop the Group, Project or text box to delete onto this button.  After confirmation, the selected item is deleted.	
Waste Basket		

## Changing a Group Name

To edit the Group name, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Double-click the group name in the Group list. The Group Properties screen displays.



• You can also open the Group Properties screen by dragging the group name from the Group list and dropping it onto the Edit button.

#### Fig.: Group Properties Screen



4. Edit the Group Name, and then click [OK].



• Click [Cancel] to exit, without saving the setting.



• The maximum length of the Group Name is 128 characters.

## **Changing Group Display Order**

If the Group list contains two or more group names, you can change the order of the group names by dragging and dropping.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Select (highlight) the group name in the Group list, and hold it.
- 4. Drag and drop the group name to the position you want.

Fig.: Group List



In the figure as follows, the display sequence was reversed, so "Accounts Receivable" displays first. The new group name sequence will be reflected on the MFP display panel.



 To move a group name to a position directly above another group name, drag and drop it onto the other group name.

#### Fig.: Group List





• Ordering of Group names from top-to-bottom or bottom-to-top is supported.

#### Hiding a Group

If a group is hidden, the group name is also hidden in the Group list on the MFP screen for project selection. Though the Group is not visible to the users, it is available to the Scan and Fax Manager system (internally) and the Administrator.

For example, a hidden Group can be used as the destination Project for the Flow Redirect Filter. Another example is if you create a Project for the purpose of forwarding fax messages received by the MFP. In either case, the user need not access the function from the MFP display panel.

## Reference

- See page 257 "Flow Redirect Filter".
- See page 348 "About Inbound FAX Transfer".
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Double-click the group name in tne Group list. The Group Properties screen opens.



• Another way to open the Group Properties screen is to drag the group name from the Group list and drop it onto the Edit button.

Fig.: Group Properties Screen



4. Select [Off].

#### Fig.: Group Properties Screen



5. Click [OK] to save the setting, and return to the Group/Project screen.



• Click [Cancel] to exit, without saving the setting.



"(Hide)" is appended to the end of the appropriate group name in the Group list. This
indicates that the group with "(Hide)" at the end of its name is hidden on the MFP display
panel.



6. Click [Back] to save the settings, and return to the Profile List.

## Deleting a Group

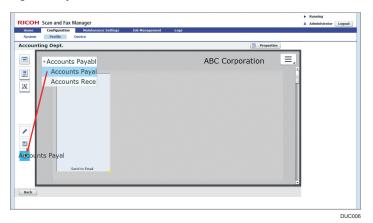
Deleting a Group erases the Group entirely. Any Projects, and special settings registered with the Group, are also deleted, and cannot be recovered.



- If the Group targeted for deletion contains one or more Projects or text boxes, a confirmation dialog will appear twice, offering an opportunity to exit the procedure, i.e., retain the Project(s).
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. Click (select) the Group list, and hold it.

4. Drag the group name from the Group list and drop it onto the Waste Basket button.

Fig.: Group List



5. Click [OK] to confirm deletion. The Group is deleted, and the screen refreshes.



- Click [Cancel] to exit, without deleting the Group.
- Again, if one or more Projects exist within the Group, another confirmation dialog box displays to alert you that Project exists in the selected Group. Click [OK] to confirm the deletion, or [Cancel] to exit, without deleting the Group.
- 6. Click [Back] to save the settings, and return to Profile List.

## **About Project Settings**

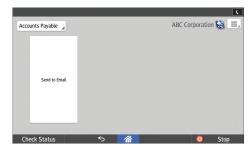
As noted, a Project refers to a document distribution task, for example, Send to Email, and is configured by the Administrator to address application needs of a specific user group.

Once added to the system, the Project appears as a user-selectable button on the MFP display panel.

Fig.: Project Button - MFP Display Panel (Standard Operation Panel)



Fig.: Project Button - MFP Display Panel (Smart Operation Panel)



The table below summarizes what is covered in this section.

Table: Module Summary

Module	Explains how to
Editing Project Properties	Specify/edit default settings that control a Project, for example, Project Name, Project Icon, etc.
Moving a Project Button	Position Project buttons correctly on the Group/Project screen.
Resizing a Project Button	Change the size of a Project button.
Adding Text to a Group Screen	Insert text boxes that provide user's with additional information about a Project.

Module	Explains how to
Changing Project Button Display Order	Place the Project buttons in the desired order, i.e., how they are to appear on the MFP display panel.
Moving a Project to Another Screen Page	Move a Project from one Screen Page to another.



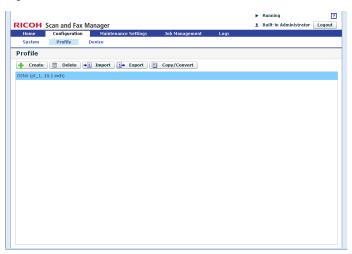
• See page 50 "Step 4: Add a Project".

## **Editing Project Properties**

To edit an existing Project Properties, proceed as follows:

1. Click [Home], and then the [Profile] shortcut. The Profile List screen displays.

#### Fig.: Profile List



2. Double-click the Profile Name, for example, "Accounting Dept.". The Group/Project screen displays.

Fig.: Project Properties Screen (Standard Operation Panel)



Fig.: Project Properties Screen (Smart Operation Panel)



3. Click (select) the Project button, for example, "Send to Email", and hold it.

4. Drag and drop the Project button to the Edit button.

Fig.: Project Properties Screen (Standard Operation Panel)

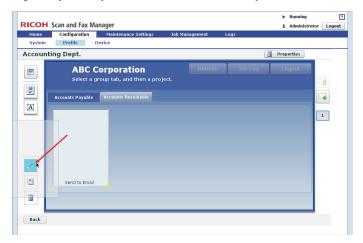
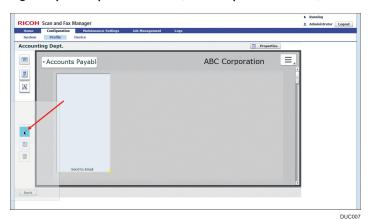


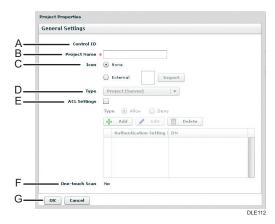
Fig.: Project Properties Screen (Smart Operation Panel)



The Project Properties screen displays.

5. Specify the Project settings, as outlined in the table below.

Fig.: Project Properties Screen



**Table: Project Properties** 

	ltem	Description
Α	[Control ID]	This is the system-assigned Project ID, which is read-only.
В	[Project Name]	Specify the Project Name. This text appears as the Project button label on the MFP display panel.  Note  A name that is already in use can be entered.  Limitation  The maximum length of the Project Name is 128 characters.  The project name is saved separately for each language. For example, when you login to Admin Tool in English and change the project name, the change you have made is not applied to the project name that appears when you login to Admin Tool in any language other than English.
С	[lcon]	Specify whether or not to use a custom icon, for example, a company logo that will display on the Project button along with the Project Name.  • [None]  No icon is displayed.  • [External]  Click [Import] to browse to/select a file (icon image) to display on the Project button.

	Item	Description
		₿ Reference
		See page 122 "Importing Profile/Project Icons".
D	[Type]	Select a project type.  To distribute documents directly from an MFP without using a dedicated server computer, select [Project (Serverless)].  Note  If you use [Project (Serverless)], contact your sales or service representative.
E	[ACL Settings]	Authentication and Accounting Manager has supported multiple authentication servers. The access by the selected group to each of the multiple servers specified in the Authentication and Accounting Manager servers can be specified.  • ACL Settings  If a check box is selected, the ACL setting is enabled.  • Type  If [Allow] or [Deny] is clicked, an access to a specified project is allowed or denied.  • [Add]  If clicked, [ACL Settings] dialog box appears. The ACL setting can be added.  • [Edit]  If clicked after selecting the ACL setting on the list, the [ACL Settings] dialog box appears. The selected setting can be edited.  • Note  • If more than one setting is selected, this button will be grayed out.  • [Delete]  If clicked after selecting the ACL setting on the list, a confirmation message appears. Click [OK] to delete the selected setting.  • ACL Settings List

	ltem	Description
		An authentication setting name and a domain name of a user group applied to the ACL setting are displayed in [Authentication Setting] and [DN] respectively.  • [ACL Settings] will be enabled only when the [Project] is
		selected for [Type].
F	[One-touch Scan]	This read-only field indicates either [Yes] or [No], indicating whether or not the Project has been set as a One-touch Scan.  • See page 305 "About One-touch Scan".
G	[OK]	Saves settings.
	[Cancel]	Exits, without saving settings.



 In the RICOH Streamline NX system, the user authentication is required before opening the Home (Project selection) screen. The authentication for each Project cannot be set in Scan and Fax Manager.

## ■ Reference

 For details on setting the user authentication, refer to the RICOH Streamline NX Administrator's Guide.

Fig.: ACL Settings Screen



**Setting the ACL Function** 



• This function cannot be used with the LDAP authentication if the attribute has not been specified for the group which a user belongs to.

#### Table: ACL Settinas

ltem	Description
[Authentication Setting Name]	Select an authentication server specified in the Authentication and Accounting Manager server from the pull-down list.
	Select a method to specify a group to apply the ACL function to from [Search] or [Manual Entry].
	When Selecting [Search]:
	<b>♦</b> Note
	This function is not available if the Authentication and Accounting Manager server has not been specified in [Authentication and Accounting Manager] on the [System Settings] screen, or if Scan and Fax Manager cannot access to the server for some reasons.
	<ol> <li>Enter a key word for the group to be searched for in the text box, and then click [Search].</li> </ol>
[DN]	Group names and the distinguish names will be displayed in the search result list.
	2. Select an item in the search result list.
	When Selecting [Manual Entry]:
	Enter the distinguished name of a group manually using up to 1000 characters.
	<b>↓</b> Note
	If the distinguished name is automatically displayed in the text box, you can edit it manually.
	If the entered value is not in the format for distinguished name, an error message is displayed.

6. Click [OK] to save the settings, and return to the Group/Project screen.



- Click [Cancel] to exit, without saving the settings.
- 7. Click [Back] to return to the Profile List.

If adding more than one Project to a Group, it is important that the Project buttons do not overlap, as each newly-added Project will automatically display on the left side of the screen. If the Project buttons are not arranged properly, the settings cannot be saved.



If the Project buttons do overlap, the Project can still be saved. However, the MFP display panel
will not display the buttons correctly. Care should be taken to ensure that the buttons display on the
MFP as you wish.

To move a Project button, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Click (select) the Project button, and hold it.
- 5. Drag and drop the Project button to the position you want.



• The two figures below illustrate incorrect and correct Project button placement.

#### Fig.: Incorrect Project Button Placement (Standard Operation Panel)



Fig.: Incorrect Project Button Placement (Smart Operation Panel)

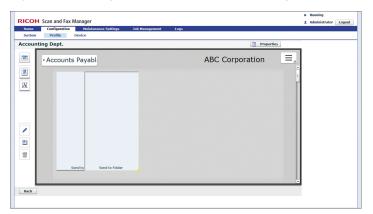
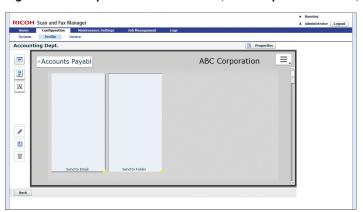


Fig.: Correct Project Button Placement (Standard Operation Panel)



Fig.: Correct Project Button Placement (Smart Operation Panel)



To change the size of the Project button, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Resize the Project button by dragging from the lower right-hand corner.

Fig.: Resize Project Button



The number of Project buttons that will display on a single Screen Page is dependent on the size of the button. Review the table below for more information.

**Table: Project Button Configuration** 

Button Size	Screen Page Capacity	Icon Support
Large	1 × 4: One row of up to four buttons	Yes
Medium	2 × 4: Two rows of up to four buttons	Yes
Small (Standard Operation Panel)	4 × 4: Four rows of up to four buttons	No
Small (Smart Operation Panel)	4 × 4: Four rows of up to four buttons	Yes



- The Administrator has full control over button size, so the screen layouts described in the table above are just suggested guidelines. In other words, you can place various size buttons on a single Screen Page.
- When using the MultiLink-Panel, you can place project buttons for up to 10 screens vertically.

## ■ Reference

• See page 122 "Importing Profile/Project Icons".

Fig.: 1 × 4: One row of up to four buttons (Standard Operation Panel)

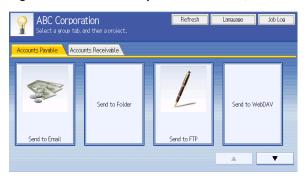


Fig.: 1 × 4: One row of up to four buttons (Smart Operation Panel)



Fig.: 2 × 4: Two rows of up to four buttons (Standard Operation Panel)



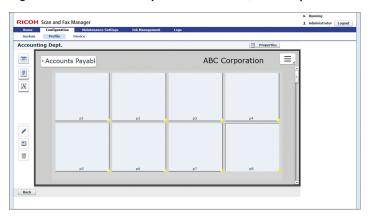
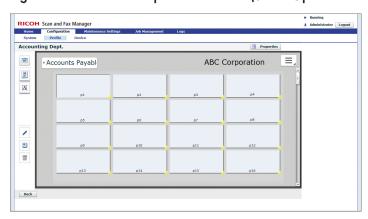


Fig.: 4 × 4: Four rows of up to four buttons (Standard Operation Panel)



Fig.: 4 × 4: Four rows of up to four buttons (Smart Operation Panel)



5. When finished arranging the buttons, click [Back] to save the settings, and return to the Profile List.

#### 4

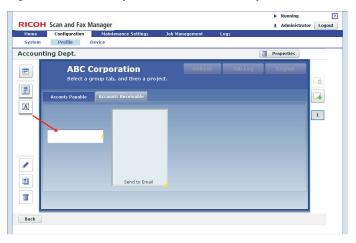
## Adding Text to a Group Screen

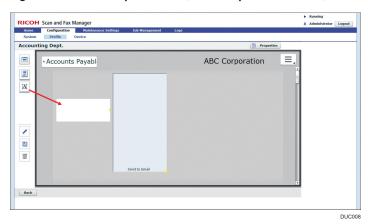
Text can be added to a Group screen, for example, you can insert additional information about a Project, which displays on the MFP display panel, perhaps instructions to assist the user.

## Limitation

- The maximum text box entry is 100 characters.
- Within the text box, changing of font size, color, etc., is not supported.
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Drag and drop the New Text button to the Group/Project screen, specifically, to the left or right side of the Project button.

Fig.: Add Text to Project Button (Standard Operation Panel)





#### 5. Type the text.

**U**Note

- The text box, when displayed on the MFP display panel, does not support line feed, i.e., longer strings of text should be divided into separate text boxes in order to display correctly. As such, it is recommended that you repeat 4 5 to enter individual lines. See Fig. "Correct Text Box Entry".
- The text box should not overlap the Project button, as this layout will not display correctly on the MFP display panel. See Fig. "Incorrect Text Box Placement".

Fig.: Correct Text Box Entry (Standard Operation Panel)



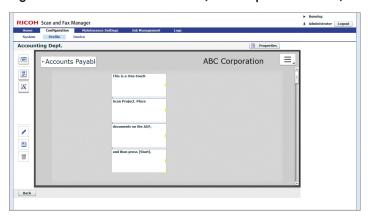
Fig.: Correct Text Box Entry (Smart Operation Panel)



Fig.: Incorrect Text Box Placement (Standard Operation Panel)



Fig.: Incorrect Text Box Placement (Smart Operation Panel)



- To change the display position of the text box, click (select) the box, and hold, then drag and drop to another location on the screen.
- The appearance of the Group/Project screen may be different from the appearance of target MFP display panel, thus, when adding text, confirm that the text is displayed on the MFP as you wish.
- To delete a text box, click (select) the text box, and hold, then drag and drop to the Waste Basket button.
- To edit text box entries, click on the text box and edit, as needed.
- To resize a text box, click the yellow area, and hold, then drag to the right or left.

## **Changing Project Button Display Order**

It is possible to change the display order of Project buttons. The button sequence should be based on which functions are used most often. For instance, if users are more often scanning document to email, you can place the "Send to Email" Project button first, i.e., to far left.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Click (select) the Project button, and hold it.
- 5. Drag and drop the Project button to the position you want.

#### Fig.: Change Project Button Display Order (Standard Operation Panel)

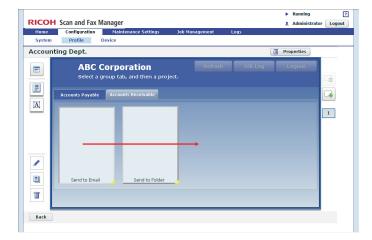
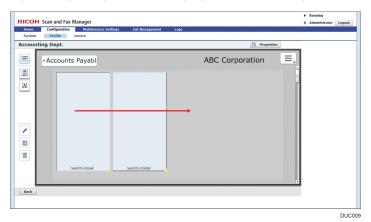


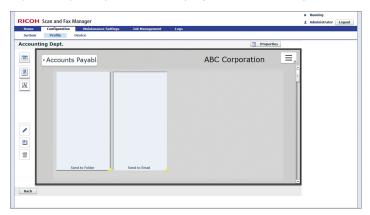
Fig.: Change Project Button Display Order (Smart Operation Panel)



In this example, "Send to Email" now displays on the far left of the Group/Project screen, as well as the MFP display panel.

Fig.: Change Project Button Display Order (Standard Operation Panel)





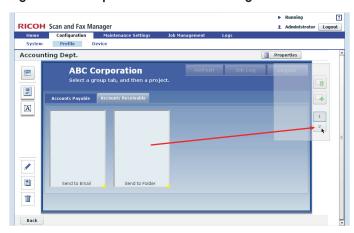
6. Click [Back] to save the settings, and return to the Profile List.

## Moving a Project to Another Screen Page

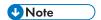
To move a Project from one Screen Page to another, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab.
- 4. Click (select) the Project button, and hold it.
- 5. Drag and drop the selected Project button to the desired Screen Page.

Fig.: Move a Project to Another Screen Page



The selected Project moves to the target Screen Page. The selected Screen Page opens, displaying the repositioned Project.



- After moving the Project to a new Screen Page, confirm that the Project/text does not overlap.
- 6. Click [Back] to save the settings, and return to the Profile List.



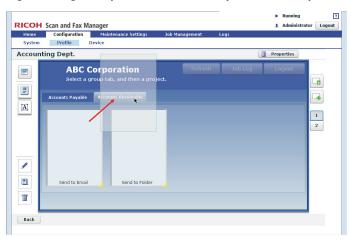
 When using the MultiLink-Panel, you can also place project buttons on other pages, by scrolling vertically.

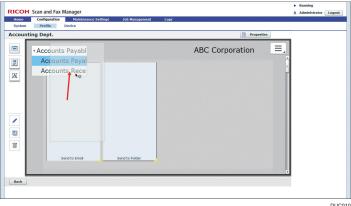
## Moving a Project to Another Group

It is possible to move a Project from one Group to another. Again, this is helpful if, for example, you wish to associate a Project with another Group, within the same Profile. To do so, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. With group names listed in the Group list, select the Project button, and then drag and drop the project onto the destination group name.

Fig.: Moving a Project to Another Group (Standard Operation Panel)





The Project disappears from the current Group and appears in the new Group.



- After moving the Project to a new Screen Page, confirm that the Project/text does not overlap.
- 5. Click [Back] to save the settings, and return to the Profile List.

## **Importing Profile/Project Icons**

The Scan and Fax Manager Installation media contains built-in icons for use within Profiles and Projects, adding color and interest to the AdminTool and MFP display panel. You can also import an icon of your choice, for example, a company logo, provided the image meets the specification requirements listed in table "Profile/Project Icon Specification Requirements" at the end of this module.

Profile icons display on the Application Bar, adjacent to the Screen Title (Fig. "Profile/Project Icons - AdminTool"). Project icons display on the Project button itself (Fig. "Profile/Project Icons - MFP Display panel").

Fig.: Profile/Project Icons - AdminTool (Standard Operation Panel)



Fig.: Profile/Project Icons - AdminTool (Smart Operation Panel)



Fig.: Profile/Project Icons - MFP Display Panel (Standard Operation Panel)







- The built-in icons are available in two sizes:
  - 128-x-128 pixels

Use for Projects.

- 64-x-64 pixels
   Use for Profiles/Projects.
- If the Project button itself is too small, an icon cannot be applied to it. See table "Project Button/ Icon Support".

## Reference

- See page 112 "Resizing a Project Button".
- See table "Profile/Project Icon Specification Requirements".

#### Table: Project Button/Icon Support

rabio. Felati Senen, reen esppen		
Button Size	Screen Page Capacity	Icon Support
Large	1 × 4: One row of up to four buttons	Yes
Medium	2 × 4: Two rows of up to four buttons	Yes
Small (Standard Operation Panel)	4 × 4: Four rows of up to four buttons	No
Small (Smart Operation Panel)	4 × 4: Four rows of up to four buttons	Yes

To import an icon of your choice, proceed as follows:

 Insert the Scan and Fax Manager Installation media into the PC/server running Scan and Fax Manager.

Δ

2. Create a new Profile/Project, or edit an existing Profile/Project.



- See page 42 "Step 2: Add a Profile" or page 50 "Step 4: Add a Project".
- See page 72 "About Profile Settings" or page 102 "About Project Settings".
- 3. Open the Profile's Properties screen or the Project's Properties Screen.

Fig.: Profile Properties Screen

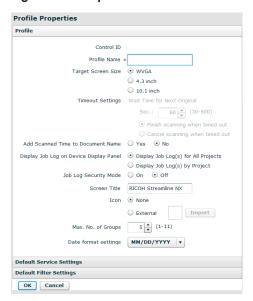
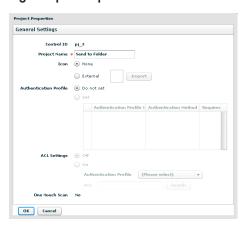
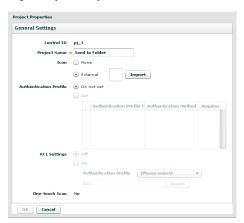


Fig.: Project Properties Screen



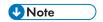
4. For the [Icon] setting, select [External].

#### Fig.: Project Properties Screen



- 5. Click [Import].
- 6. Browse to the following folder on the Scan and Fax Manager Installation media.

X:\Setup\ScanandFaxManager\Samples\icons



- "X" is the drive letter of the installation media.
- 7. Select an icon and click [Open].
- 8. Click [OK].
- The image automatically displays. If necessary, repeat this procedure for another Profile/ Project.

Table: Profile/Project Icon Specification Requirements

File Format	JPEG (.jpeg, .jpg), PNG(.png)
Size	Profile
	Minimum Height: 16 pixels; Width: 16 pixels
	Maximum Height: 64 pixels; Width: 64 pixels
	Project
	Minimum Height: 32 pixels; Width: 32 pixels (4.3 inch)
	Maximum Height: 64 pixels; Width: 64 pixels (4.3 inch)
	<ul> <li>Minimum Height: 64 pixels; Width: 64 pixels (WVGA)</li> </ul>
	Maximum Height: 128 pixels; Width: 128 pixels (WVGA)
	Minimum Height: 48 pixels; Width: 48 pixels (10.1 inch)
	Maximum Height: 180 pixels; Width: 180 pixels (10.1 inch)

File Format	JPEG (.jpeg, .jpg), PNG(.png)
	<ul> <li>• If the above icon size conditions are not met, the image cannot be imported.</li> </ul>
Color	<ul> <li>24-bit colors</li> <li>Note</li> <li>If you specify an icon image with more than 24-bit colors, the image will still be displayed in 24-bit colors.</li> </ul>
Background Color	For a custom icon, specify to match the button background color (seen in MFP display panel) as follows:  • Profile  RGB (64, 90, 167)  • Project  RGB (236, 242, 248).



An imported original icon will not be retained on the system persistently. If [Built-in] for not using an
icon is specified after importing an original icon, the imported original icon will be removed from
the system.

## **Deleting a Project**

To remove a Project from the Group, proceed as follows:



- This procedure will erase the Project entirely; the Project cannot be recovered.
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Click the Project button, and hold it.

Fig.: Deleting a Project (Standard Operation Panel)

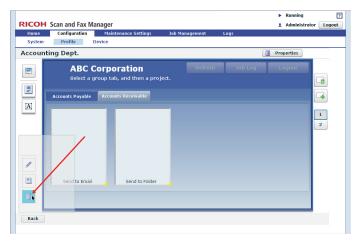
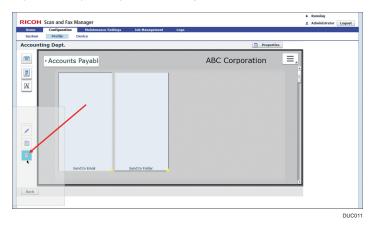


Fig.: Deleting a Project (Smart Operation Panel)



6. Click [OK] to confirm the deletion.



- Click [Cancel] to exit, without deleting the Profile.
- 7. Click [Back] to save the settings, and return to the Profile List.

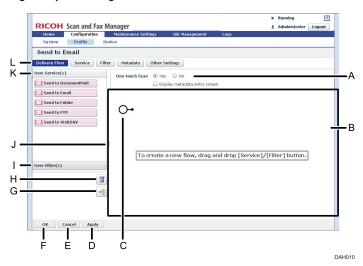
#### 4

# **About Flows**

Flows specify how a document is processed and distributed after it has been scanned. Filters in a Flow modify the data by converting it, modifying Metadata, and performing other functions. Services define how and where data is distributed. Possible destinations include network folders or sending the data by email.

The figure shows the Project Configuration Screen, where you can design a Flow for a Project.

Fig.: Project Configuration Screen



**Table: Delivery Flow** 

Idble: Delivery Flow		
	ltem	Description
А	One-touch Scan	To set the Project as a One-touch Scan, select Yes. If you select Yes, it is necessary to preset all parameters from the AdminTool.
		If you select [Yes], a check box for specifying whether to display the Metadata entry screen will appear. If you select this check box and Metadata entry is set for the Project, the Metadata entry screen will appear on the MFP display panel when a user selects One-touch Scan Project.
		Reference     See page 305 "About One-touch Scan".
В	Flow Editor Screen	This area is where the Project's Flow is created by dragging and dropping Services and Filters from the New Output Services and New Filter Services lists.

	ltem	Description
С	Start Position	This symbol indicates the start position of the Flow, which progresses from left to right. Each Flow can contain one or more Services and Filters.
D	[Apply]	Saves only.
Е	[Cancel]	Exits, without saving settings.
F	[OK]	Saves settings, and return to the Group/Project screen.
G	Alignment	Automatically arranges the Services/Filters in an orderly manner.
Н	Waste Basket	To remove Services/Filters, select the item and drag and drop to the Waste Basket button.
I	New Filter(s)	Use these buttons to select a Filter. This list will collapse when the New Output Services tab is selected. Toggle back and forth, as needed.  • The listed items depends on your Scan and Fax Manager configuration, i.e., whether or not custom or optional Filters
		have been installed.  Reference
J	Split Bar	See page 204 "About Filters".  Drag this bar left or right to change the size of the Flow Editor screen.
K	New Service(s)	Use these buttons to select a Service. This list will collapse when the New Filter Services list is selected. Toggle back and forth, as needed.  •• Note
		The listed items depends on your Scan and Fax Manager configuration, i.e., whether or not custom or optional plugins (for example RightFax) have been installed.

	ltem	Description
		<b>☐</b> Reference
		See page 138 "About Services".
L	Setting Buttons	Delivery Flow
		Configure the Delivery Flow for the Project by adding, configuring and removing Services and Filters.
		Service
		Configure settings for Services in the Delivery Flow.
		<b>■</b> Reference
		See page 138 "About Services".
		See page 280 "About Distribution Parameters".
		Filter
		Configure settings for Filters in the Delivery Flow, as well as settings for the file format, resolution, document size, etc.
		☐ Reference
		See page 204 "About Filters".
		See page 280 "About Distribution Parameters".
		Metadata
		Set fields that will provide additional information regarding the scan job.
		■ Reference
		See page 335 "About Metadata".
		Other Settings
		Set, for example, a default Document Name that will be applied to all scanned images.
		<b>☐</b> Reference
		See page 329 "About Other Settings".

## Working with Services/Filters in the Flow

You can add, move, delete and change the display names for Services and Filters in the Flow.

Flows can be linear or tree-structured. Linear Flows contain no branches; the scanned data is processed by every Service and Filter in the Flow. Fig. "Linear Flow" shows an example of a linear Flow. Tree-structured Flows contain branches; the scanned data is processed separately for each branch, and the resulting data will be different for each branch. Fig. "Tree-structured Flow" shows an example of a tree-structured Flow.

Fig.: Linear Flow

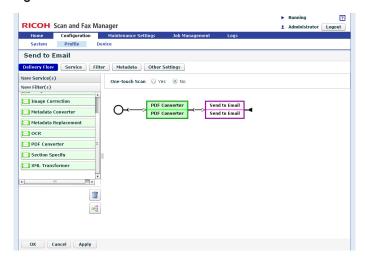
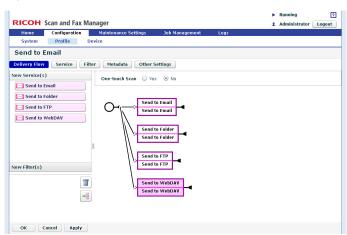


Fig.: Tree-structured Flow



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The Flow cannot be saved if it ends with a Filter, with the exception of the Flow Redirect Filter. A
caution icon will display. A Service must be present after a Filter.

 Adding a Service or Filter may not be possible, depending on the Service/Filter you wish to add, or the structure of the Flow.



• Up to 10 items can be added to a Project.

## Reference

- See page 138 "About Services".
- See page 204 "About Filters".

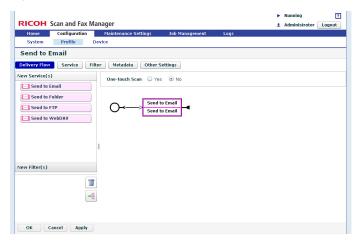
#### Adding a Service/Filter to the Flow

This section describes the various ways to add a new Service/Filter to a Flow.

#### To add a Service/Filter to a blank Flow

Drag the Service or Filter that you want to add to the Flow from the left pane and drop it in the Flow Editor Screen. A new branch will be added from the Start Position.

Fig.: One Service in a Flow

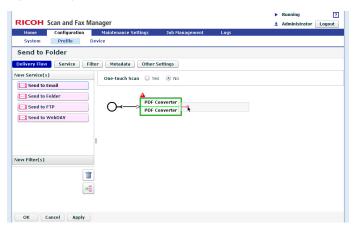


#### To add a Service/Filter to the end of a Flow

Drag a Service or Filter from the left pane and drop it on the connector coming out of the last Service/Filter in the flow.

4

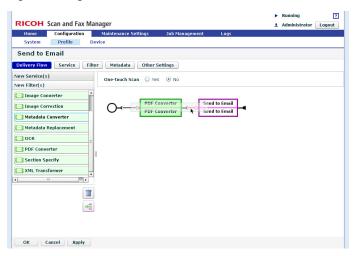
Fig.: Adding a Service to the End of a Flow



#### To add a Service/Filter to the middle of a Flow

Drag a Service or Filter from the left pane and drop it on the connector that connects the two items between which you want to add the Service/Filter.

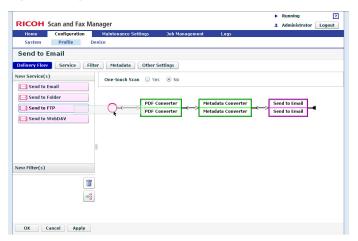
#### Fig.: Inserting a Filter into a Flow



#### To add a Service/Filter as a new branch

Drag a Service or Filter from the left pane and drop it on top of the Service/Filter from which you want to create a branch.

Fig.: Creating a New Branch





- Dropping a Service/Filter on a blank area creates a new branch from the Start Point.
- If Services/Filters become hidden or overlap when adding new Services/Filters, click the Alignment button to arrange them in an orderly manner.

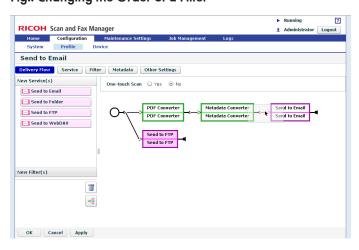
## Changing Display Position of a Service/Filter

This section describes how to rearrange Services/Filters in a Flow.

#### To change the order of Services/Filters

Drag a Service/Filter in the Flow and drop it on the connector that connects the two items between which you want to add the Service/Filter. To move the Service/Filter to the end of a Flow, drop it on the connector coming out of the last Service/Filter in the Flow.

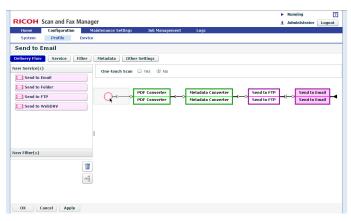
Fig.: Changing the Order of a Filter



#### To move a Service/Filter and create a new branch

Drag a Service or Filter in the Flow and drop it on top of the Service/Filter from which you want to create a branch.

#### Fig.: Creating a New Branch





• If Services/Filters become hidden or overlap when moving Services/Filters, click the Alignment button to arrange them in an orderly manner.

## Removing a Service/Filter

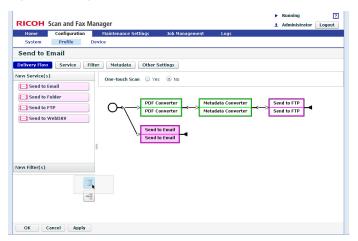
This section describes how to remove a Service/Filter from a Flow.

When deleting a Service/Filter from the Flow, the Services/Filters that are present before and after the Service/Filter are automatically connected.

#### To remove a Service/Filter from a Flow

Drag the Service/Filter that you want to remove to the Waste Bucket icon.

Fig.: Removing a Service/Filter



Alternately, you can click a Service/Filter to select it, and then click the Waste Bucket icon.

A dialog displays to confirm the deletion. Click [Yes] to delete the Service/Filter. Click [Cancel] to cancel the operation.

#### Changing a Service/Filter's Display Name

To make Scan and Fax Manager operation intuitive for the user, the Service/Filter Display Name that appears on the MFP display panel can be modified. For instance, you may wish to change a Service's Display Name from "Send to Email" to "Email" or "Marketing Email".

- 1. Click the Service/Filter to select it.
- 2. Click the Display Name of the Service/Filter. The Display Name will become editable.
- 3. Type a new display name.
- 4. Press ENTER.
- **∩** Limitation
  - The maximum length of a Service/Filter's Display Name is 30 characters.



- The text at the upper portion of the Service/Filter box is the Display Name; the text in the lower portion is the Service/Filter type. Only the Display Name can be modified.
- The Display Name can also be changed through the Service/Filter Properties screen.

## **About Services**

Services can be used to specify how and where documents are saved. For example, documents can be saved on an FTP server with the Send to FTP Service. This section describes the different Services and how to configure them.



• If you have configured properties for Services at the system or profile level, those properties will be used as the default values for any Services you add to a flow.

# **Service Summary**

The following table provides an overview of each Service.

Service Name	Description	
Send to Email	Enables MFP users to send scanned documents to specified recipients via email.	
Send to Folder	Enables MFP users to save scanned documents to shared network folders. You can also save documents locally on the server. You specify destination folders by using the AdminTool.	
Send to FTP	Enables MFP users to upload scanned documents to FTP servers. You specify FTP servers and folders by using the AdminTool.	
Send to Printer	Enables MFP users to print data using the printers installed on the server.  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.	
	The Send to Printer Service is performed using a printer driver installed on the Scan and Fax Manager server, so the printer driver setting is required if sending a print job to an MFP on which a printer driver for Scan and Fax Manager is installed.	
	A login user authenticated for scanning may differ from that for printing or a user who has a user account.	
	To print in a device on which the Secure Print Manager is installed or to print with the direct port print function, the following settings are needed:	
	<ol> <li>On the desktop, click [Start] -&gt; [Run]. Enter "services.msc", and then click [OK].</li> </ol>	
	The [Services] dialog box appears.	
	2. Double-click [Streamline NX Scan and Fax Manager].	
	The [Streamline NX Scan and Fax Manager Properties] dialog box appears.	
	3. Click the [Log On] tab, select [This account], and then enter the information of user who has installed the RICOH Streamline NX Scan and Fax Manager in [This account], [Password] and [Confirm password]. Click [Apply], and then [OK].	
	The [Streamline NX Scan and Fax Manager Properties] dialog box closes.	

Service Name	Description
	Right-click [Streamline NX Scan and Fax Manager], and then click [Restart], or restart a computer.
	() Limitation
	<ul> <li>A printer driver must be installed in the computer/server that Scan and Fax Manager is installed.</li> </ul>
Send to WebDAV	Enables MFP users to upload scanned documents to WebDAV folders. You specify WebDAV folders by using the AdminTool.
Send to RightFax	Enables MFP users to fax or email scanned documents to the specified destinations via a fax server.
	<b>↓</b> Note
	Use the Streamline NX Activation Tool to activate this plugin.
	■ Reference
	For details on using the Send to RightFax function, refer to the Scan and Fax Manager RightFax Plug-in Administrator's Guide.
Send to SharePoint	Enables MFP users to distribute scanned documents to Microsoft Office SharePoint Server.
	<b>↓</b> Note
	Use the Streamline NX Activation Tool to activate this plugin.
	<b>■ Reference</b>
	<ul> <li>For details on using the Send to SharePoint function, refer to the Scan and Fax Manager MS SharePoint Server Plug-in Administrator's Guide.</li> </ul>
Send to SharePoint (Enhanced)	Enables MFP users to distribute scanned documents to Microsoft Office SharePoint Server.
	<b>♦</b> Note
	Use the Streamline NX Activation Tool to activate this plugin.
	■ Reference
	<ul> <li>For details on using the Send to SharePoint function, refer to the Scan and Fax Manager MS SharePoint Server Plug-in Administrator's Guide.</li> </ul>
Send to DocumentMall	Enables MFP users to distribute scanned documents to DocumentMall, automatic generation of a distribution folder, and association of document information with DocumentMall.

Service Name	Description
	<ul> <li>Use the Streamline NX Activation Tool to activate this plugin.</li> </ul>
	<ul> <li>For details on using the Send to DocumentMall function, refer to the Scan and Fax Manager DocumentMall Plug-in Administrator's Guide.</li> </ul>

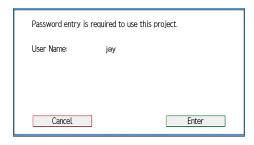
## Reference

- See page 148 "Send to Email Service".
- See page 165 "Send to Folder Service".
- See page 179 "Send to FTP Service".
- See page 186 "Send to Printer Service".
- See page 189 "Send to WebDAV Service".

#### **Password Entry**

In the RICOH Streamline NX system, password entry may be required to use the plug-in functions depending on the authentication settings in the Authentication and Accounting Manager server.

Fig.: Password Entry Screen



The password entry screen may be displayed when using the following plug-in functions:

- Send to Email
  - Login user authentication for SMTP or POP before SMTP
  - Login user authentication for mail address search
- Send to Folder
  - Login user authentication for distribution
  - Login user authentication for the Send to Home distribution
  - Login user authentication for folder browsing
  - Login user authentication for folder search

#### · Send to FTP

- Login user authentication for distribution
- Login user authentication for folder browsing
- Login user authentication for folder search
- Send to SharePoint
  - Login user authentication for distribution
  - Login user authentication for folder browsing
- Send to WebDAV
  - Login user authentication for distribution
  - Login user authentication for folder browsing
  - Login user authentication for folder search



• When the Project to be distributed using the login user information is set for Flow Redirect, if the login password cannot be obtained, the password entry screen will not be displayed and the distribution will fail.

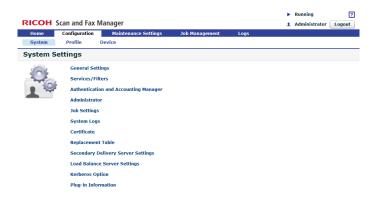
# **Accessing Property Settings Screens**

There are 3 levels at which you can configure the properties for Services: the System Level, Profile Level, and Project Level. This section explains how to access the properties for each level. This section also explains how to access the Output Service Properties screens for Services.

#### **Entering/Editing Service Properties for the System**

- 1. Click [Home], and then click the [System] shortcut.
- 2. Click [Services/Filters].

Fig.: System Settings Screen



3. Click [Set] next to the Service you want configure.



- 4. Edit the properties as desired.
- 5. Click [OK] to save the settings.
- 6. Click [Back] to save the settings and return to the System Settings screen.

## Entering/Editing Service Properties for a Profile

- 1. Click [Home], and then click the [Profile] shortcut.
- 2. Double-click the desired Profile.
- 3. Click [Properties] in the upper-right corner of the screen.

Fig.: Properties Button (Standard Operation Panel)

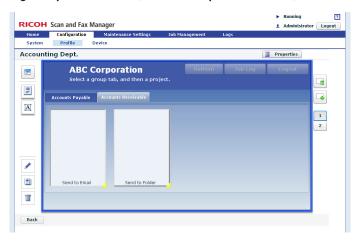
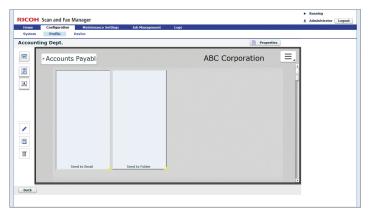


Fig.: Properties Button (Smart Operation Panel)



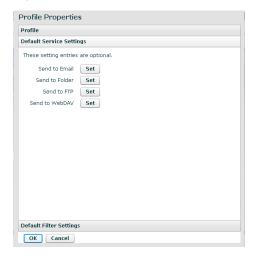
4. Click the [Default Service Settings] accordion button.

Fig.: Default Output Service Settings

Profile Properties	
Profile	
Control ID	
Profile Name	*
Target Screen Size	WVGA
	<ul><li>4.3 inch</li></ul>
	○ 10.1 inch
Timeout Settings	Wait Time for Next Original
	Sec.: 60 (30-600)
	Finish scanning when timed out
	Cancel scanning when timed out
Add Scanned Time to Document Name	○ Yes • No
Display Job Log on Device Display Panel	Display Job Log(s) for All Projects
	O Display Job Log(s) by Project
Job Log Security Mode	○ on · off
Screen Title	RICOH Streamline NX
Icon	None
	O External Import
Max. No. of Groups	5 (1-11)
Date format settings	MM/DD/YYYY   •
Default Service Settings	
Default Filter Settings	
OK Cancel	

5. Click [Set] next to the Service you want to configure.

Fig.: Set Button



- 6. Edit the properties as desired.
- 7. Click [OK] to save the settings and return to the Group/Project screen.

## Entering/Editing Service Properties for a Project

- From the Profile screen, double-click the desired Profile, select the desired Group within the Profile, and then double-click the desired Project. The Flow screen displays.
- 2. Double-click the lower half of a Service. The Properties screen will display.
- 3. Edit the properties as desired.
- 4. Click [OK] to save the settings and return to the Flow Editor screen.

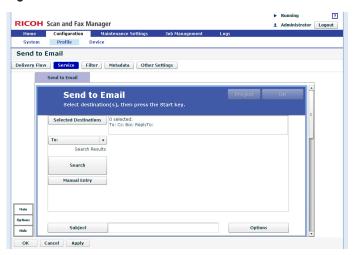


 See page 133 "Adding a Service/Filter to the Flow" and page 135 "Changing Display Position of a Service/Filter".

#### **Entering/Editing Output Services**

In a Project, click [Service]. The Service screen will display.
 The Service tabs are automatically added when a Service is added to the Flow.

Fig.: Service Screen



- 2. Click the tab for the Service you want to edit.
- 3. Configure and move the Distribution Parameters as desired.
- 4. Click [OK] to save the settings and return to the Group selection screen.

# Reference

For details about the Distribution Parameters, see page 280 "About Distribution Parameters".

#### 4

# **Service Properties**

This section explains the details about the various Services and properties of each Service. Properties must be set for the Service before it is operational within the Flow.



• For an overview of each Service Type, see page 139 "Service Summary".

# Send to Email Service

The Send to Email Service can be used to send scanned documents to recipients via email. Also, you can further enhance the security by using S/MIME for email distribution.

The Send to Email Service settings are divided into 3 screens. Use the accordion buttons to access the different settings.

- [Email System Settings]
   Configure SMTP server settings.
- [Send to Email Option Settings]

Configure email message settings, such as what data to attach, the message body, etc.

[Email Search Settings]
 Configure LDAP server settings to allow MFP users to use the address book. Also, configure S/MIME.

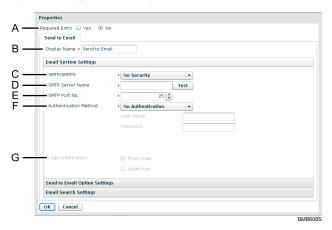
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- To use S/MIME, install Scan and Fax Manager Embedded
   (sfm\_serverless\_smime\_option-2.x.x.x.zip) for S/MIME on the device. The following restrictions
   apply when Scan and Fax Manager Embedded for S/MIME is installed:
  - Do not install Scan and Fax Manager Embedded for S/MIME and the standard version of Scan and Fax Manager – Embedded at the same time.
  - The standard version of Scan and Fax Manager Embedded cannot be updated to Scan and Fax Manager – Embedded for S/MIME. First uninstall the standard version, and then install Scan and Fax Manager – Embedded for S/MIME.
  - To use Advanced UI, install the standard Streamline NX Embedded (for SOP) on the device even when you are using S/MIME.
- When S/MIME is used, the following restrictions apply:
  - Supported Machine Models: MP C4503/C5503/C6003 series, MP C401 series, MP 301 series
  - The MFP will always be in "In-Distribution" status.
  - Set a value of 48 MB or larger in the Heap Size setting under the Extended Feature Settings.
     For details about the Heap Size setting, see "Extended Feature Settings" in the manuals that were provided with the MFP.
- If the settings related to S/MIME are not displayed, contact your service representative.

#### **Configure Email System Settings**

In the Email System Settings screen, configure the SMTP server settings. For details about the settings, see the table below.

Fig.: Email System Settings Screen



**Table: Email System Settings** 

	ltem	Description
A	[Required Entry] (Project settings only)	Select whether to require that this Service be used.  • [Yes]  When scanning, at least one email address must be specified in the recipient list.  • [No]  Allows the flow to continue even if no email addresses are specified in the recipient list.
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
С	SMTP/SMTPS	Select the security method to use when connecting to the SMTP server.  • [No Security]  Uses a standard SMTP connection (no encryption).  • [SMTPS (SMTP over SSL)]  Uses secure SMTP over an SSL connection.  • [SMTPS (StartTLS)]  Uses secure SMTP using TLS.

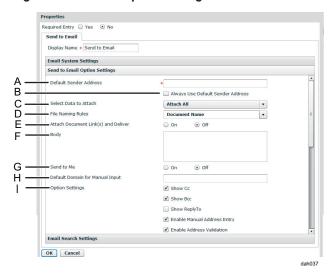
	ltem	Description
		<ul> <li>For [SMTPS (SMTP over SSL)], the Certificate you are using must be registered with the system beforehand. (See page 431 "Managing the Site Certificate".) If not, an error will occur during email transmission.</li> <li>For [SMTPS (StartTLS)], the SMTP server you are using must support StartTLS. If not an error will occur during email transmission.</li> </ul>
D	[SMTP Server Name]	Enter the IP address or host name of the SMTP(S) Server.  Click [Test] to test the connection to the SMTP server you have specified.
Е	[SMTP Port No.]	Enter the port number to use.  Note  The default port number for non-secure SMTP is 25. The default port number for SMTPS (SMTP over SSL) is 465.
F	[Authentication Method]	<ul> <li>Select the authentication method to use from the following.</li> <li>[No Authentication] Authentication is not used.</li> <li>[SMTP-AUTH] Authenticates with the SMTP server. Enter the account information in [User Name] and [Password] for authentication with the SMTP server.</li> <li>[POP before SMTP] Authenticates with a POP server. Enter the POP server information in [POP Server Name] (IP address or host name) and [POP Port No.] (default 110), and account information in [User Name] and [Password] for authentication with the POP server. Click [Test] to test the connection to the POP server you have specified.</li> </ul>
G	[Login Information]	Select the type of account that is used to log in to the SMTP server when using [SMTP-AUTH] or [POP before SMTP] for authentication. Select from the following:

ltem	Description
	• [Proxy User]
	Uses the login information entered in [User Name] and [Password] for authentication.
	• [Login User]
	Uses the login information for the Project for authentication.

## **Configure Send to Email Option Settings**

In the Send to Email Option Settings screen, configure settings such as the content of email messages and options to permit or forbid certain operations on the MFP display panel. For details about the settings, see the table below.

Fig.: Send to Email Option Settings Screen



**Table: Send to Email Option Settings** 

	ltem	Description
A	[Default Sender Address]	Enter the default email address of the sender. This address will be set as the sender of the email message if the MFP user's email address cannot be obtained.
		When using LDAP or Active Directory authentication, if the email address of the MFP user can be obtained from the login information for the Project, then that email address will be set as the sender. The email address of the user must be registered with the user profile on the Authentication Server.

	ltem	Description
В	[Always Use Default Sender Address]	If checked, the "Default Sender Address" is always used, even if the user's email address is retrieved from the authentication server.
С	[Select Data to Attach]	Select the data to attach to the email message.  • [Attach All]  • [Attach First Page Only]  • [Do Not Attach]  • [Select Data to Attach] under [Send to Email Option Settings] is unavailable for a Project (Serverless). The setting is set to [Attach All].
D	[File Naming Rules]	Specify the file name of the attachment. You can specify the name of the file using the following methods:  • Directly enter the desired file name.  • Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only major Metadata items can be selected in the drop-down list.  FReference  • For details about File Naming Rules, see page 199  "Specifying Folder and File Names Using Metadata".
Е	[Attach Document Link(s) and Deliver]	Select whether or not to include URLs to the locations where the document was saved by other Services (for example, Send to FTP).  • [On]  Adds URLs to the body of the email message.  • [Off]  Does not add URLs to the email message.  • In order to use this setting, you must add at least one of the Send to Folder, Send to FTP, or Send to WebDAV Services to the flow before the Send to Email Service.

	ltem	Description
		☐ Reference
		<ul> <li>If you use the Send to Folder Service, see the Send to Folder StartPoint Path Settings for details about creating URLs instead of file paths for the documents' locations.</li> </ul>
F	[Body]	Enter the email body text you would like delivered with each scanned document. For example, "This email is from ABC Corporation".
		<b>U</b> Note
		<ul> <li>If you do not enter any text in this field, no text will be used as the mail body. In this case, the mail body is empty if there's no "resultURL" part.</li> </ul>
		<ul> <li>Metadata of the scanned file, except for "resultURL", can be used as the body text of e-mail.</li> </ul>
		<b>☐</b> Reference
		<ul> <li>Refer to "Metadata Specifications" for details of Metadata items.</li> </ul>
G	[Send to Me]	Select whether the MFP user is added to the recipient list.
		• [On]
		If the MFP user's email address can be obtained from the login information for the Project, "Send to Me" will be automatically added to the "To" field of the initial recipient list.
		The user's email address can be obtained under the following conditions:
		<ul> <li>The Project uses Active Directory Authentication or LDAP Authentication with [Active Directory] specified in the [Server Type] setting.</li> </ul>
		<ul> <li>In the RICOH Streamline NX system, the Send to Me function is available for using email addresses obtained from the Authentication and Accounting Manager server.</li> </ul>
		• [Off]
		The email address of the MFP user will not be added to the destination addresses.

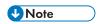
	ltem	Description
		!Limitation
		This feature only functions when Active Directory or LDAP is used as the Project authentication method. If you are using a different authentication method, even if you select this feature it will not function.
Н	[Default Domain for Manual Input]	Enter the default email domain name to append to manually entered email addresses.
		Example:
		Default Domain: GSNXCorp.com
		User Input: john
		Result email address: john@GSNXCorp.com
		If the MFP user enters an email address including the domain name, the default domain will not be appended.
		<b>U</b> Note
		You can enter the domain name with or without the "@"     mark.
I	[Option Settings]	Select additional options.
		• [Show Cc]
		Allows MFP users to enter addresses in the CC field.
		• [Show Bcc]
		Allows MFP users to enter addresses in the BCC field.
		• [Show ReplyTo]
		Allows MFP users to enter a Reply-to address.
		[Enable Manual Address Entry]
		Allows MFP users to manually enter email addresses.
		If not selected, [Manual Entry] on the Send to Email Output Service screen will be grayed out on the Standard Operation Panel, and will not be displayed on the Smart Operation Panel.
		• [Enable Address Validation]
		If the check box is selected, an Email address is validated when entering it manually on the operation panel or sending scanned data.

# Reference

- See page 165 "Send to Folder Service".
- See page 179 "Send to FTP Service".
- See page 189 "Send to WebDAV Service".
- See page 468 "Metadata Specifications".

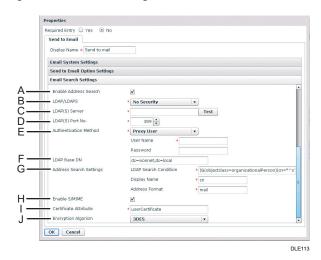
#### **Configure Email Search Settings**

In the Email Search Settings screen, configure LDAP server settings to allow MFP users to search an LDAP address book. Also, configure S/MIME. For details about the settings, see the table below.



 To allow the user to search and display the address book on the MFP display panel or use S/ MIME for email distribution, configure the LDAP server settings.

## Fig.: Email Search Settings



**Table: Email Search Settings** 

	ltem	Description
A	[Enable Address Search]	Select this option to enable MFP users to search for email addresses in the address book stored on an LDAP server.
В	[LDAP/LDAPS]	Select the security method to use when connecting to the LDAP server.
		• [No Security]
		Uses a standard LDAP connection (no encryption).
		• [LDAPS (LDAP over SSL)]
		Uses secure LDAP over an SSL connection.

	ltem	Description
		• [LDAPS (StartTLS)]
		Uses secure LDAP using TLS.
		<b>☆ Important</b>
		<ul> <li>For [LDAPS (LDAP over SSL)], the Certificate you are using must be registered with the system beforehand.</li> <li>(See page 431 "Managing the Site Certificate".) If not, an error will occur when trying to obtain the address book.</li> </ul>
		<ul> <li>For [LDAPS (StartTLS)], the LDAP server you are using must support StartTLS. If not an error will occur when trying to obtain the address book.</li> </ul>
С	[LDAP(S) Server]	Enter the IP address or host name of the LDAP server.
		Click [Test] to test the connection to the LDAP server you have specified.
D	[LDAP(S) Port No.]	Enter the port number to use.
		<b>U</b> Note
		<ul> <li>The default port number for LDAP is 389. The default port number for LDAPS (LDAP over SSL) is 636.</li> </ul>
E	[Authentication Method]	Select the type of account that is used to log in to the LDAP server. Select from the following:
		• [Login User]
		Project login information is used for authentication.
		• [Proxy User]
		Uses the login information entered in [User Name] and [Password] for authentication.
		• [No Authentication]
		Authentication is not used.
		<b>♣</b> Note
		<ul> <li>To view the address book via AdminTool, [User Name] and [Password] must be entered even if [Login User] is selected.</li> </ul>
F	[LDAP Base DN]	Enter the Base DN.
		Entry Example: cn=users, dc=ricoh, dc=co, dc=jp

	ltem	Description
G	[Address Search Settings]	Configure the criteria for searching the address book.  • [LDAP Search Condition]  Specify the LDAP search syntax. The default value is:  (&(objectclass=organizationalPerson)(cn=*^s*)  (mail=*)).  "^s" is replaced with the specified keyword.  For examples of how to specify search conditions, see  "LDAP Search Condition Examples" below.  • [Display Name]  Specify the LDAP attribute for the display name of each item in the address list.  The LDAP attributes which are separated by a "," mark can be entered such as sn, givenName, mailaddress.  The default attribute is "cn" (common name).  • [Address Format]  Specify the LDAP attribute for the email address of each item in the address list. The default value is "mail".
Н	[Enable S/MIME]	<ul> <li>Select this to enable S/MIME.</li> <li>Note</li> <li>If you selected the check box, the certificate that is stored in the LDAP server is required to encrypt the message, and the LDAP server settings must be configured. Also, [LDAP Base DN] can be left blank if the check box is selected.</li> <li>To use S/MIME, specify [Certificate Attribute] and [Encryption Algorithm], and then select the [Enable S/MIME] check box in the Send to Email Options Screen. For details about the settings, see page 280 "About Distribution Parameters".</li> <li>In order to receive an encrypted e-mail, you need to use a mail client software that supports the encryption algorithm (3DES or AES128).</li> </ul>
I	[Certificate Attribute]	Enter the certificate attribute in [Certificate Attribute].

	ltem	Description
		Enter the certificate attribute in [Certificate Attribute]
		using up to 1000 characters.
J	[Encryption Algorithm]	Select [3DES] or [AES128] in [Encryption Algorithm].

#### **LDAP Search Condition Examples**

The following are examples of using the wildcard character, "\*", to modify the search condition.

- 1. If cn=\*^s\* is used, a search for "les" matches:
  - charles smith
  - lester frank
  - Lorraine Lester
  - Steven Morales

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

- 2. If **cn=^s\*** is used, a search for "les" matches:
  - lester frank
  - Lester, lorraine

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

- 3. If **cn=\*^s** is used, a search for "les" matches:
  - Smith, charles
  - steven morales

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

#### MFP Configuration Screen - Send to Email Service

On this screen, you can configure the appearance of the MFP display panel, and preset email recipients and other information for the Send to Email Service. You can also limit which items are available to MFP users.

# Reference

 For details about configuring and limiting the settings on the MFP display panel, see page 280 "About Distribution Parameters".



Fig.: MFP Configuration Screen - Send to Email Service

Table: MFP Configuration Screen - Send to Email Service - General

	ltem	Description
A	[Selected Destinations]	Displays a list of the email destinations currently selected. You can click addresses in this list to remove them. Click [Reset All] to clear all selected addresses.
		If the Send to Me feature is enabled, the [Selected Destinations] list will display "Send to Me". This means that the scanned document will be delivered to the user's email address, as well as any other selected destinations.
В	[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].  Use [ReplyTo] to specify the address you want replies to be sent to, if it is different from the sender.
С	[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,

	Item	Description
	Item	Description  1. A search for "*les*" matches:  • charles smith  • lester frank  • Lorraine Lester  • 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.
		<ul> <li>3. A search for "*les" matches: <ul> <li>Smith, charles</li> <li>steven morales</li> </ul> </li> <li>The search string ("les") may only appear at the end of the name.</li> <li>Note</li> <li>[Enable Address Search] must be selected in the Email Search Settings screen to use this function. See table "Email Search Settings" above.</li> </ul>
D	[Manual Entry]	Click this button to manually enter an email address to add to the recipient list  Note  • [Enable Manual Address Entry] must be selected in the Send to Email Option Settings screen.  • If you entered a domain name in [Default Domain for Manual Input] in the Send to Email Option Settings screen, that value will be appended to addresses entered without a domain. This feature is convenient if most recipients have the same domain (for example, recipients within the same company).

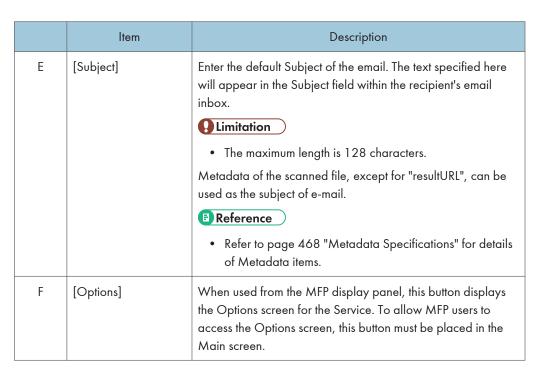


Fig.: MFP Configuration Screen - Send to Email Service - Option

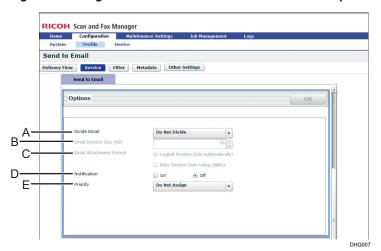


Table: MFP Configuration Screen - Send to Email Service - Options

	and the second s		
	ltem	Description	
Α	[Divide Email]	Select a method for dividing the email.	
		• [Do Not Divide]	
		Sends all scanned data in one email.	
		• [Page Divide]	

	Item	Description
		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. The received divided data will be restored if the email software supports this data restoring function.
		<b>♣</b> Note
		<ul> <li>This option will be unavailable if [Do Not Attach] is selected for the [Select Data to Attach] item in the Email Option Settings screen.</li> </ul>
В	[Email Division Size (KB)]	Enter the size to split documents into when dividing email using the [Size Divide] method.
		<b>♥</b> Note
		<ul> <li>This option is only available when [Size Divide] is selected for [Divide Email].</li> </ul>
С	[Email	When [Logical Division (Join Automatically)] is selected:
	Attachment Format]	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 the MFP user's e-mail address can be acquired from the authentication server, a failure notification will be sent to the MFP user. In this case, we recommend scanning the data again with a lower resolution setting to reduce the size of each file.
		₩Note
		The e-mail address that the failure notification is sent to is the same address used for the Send to Me function.
		When [Byte Division (Join Using Utility)] is selected:
		<ul> <li>Data-heavy scan jobs will be divided into multiple incomplete parts that must be restored by the recipient's email application.</li> </ul>
		<ul> <li>Data-heavy scan jobs will always be divided into parts that are small enough to be sent as e-mail attachments.</li> </ul>

	ltem	Description
		() Limitation
		<ul> <li>High Compression PDF and Searchable PDF formats are not supported by the e-mail distribution service for a Project (Serverless).</li> </ul>
		In a job flow, if a PDF file created by the "PDF Converter" plug-in or the "Image Converter" plug-in is sent via Send to Email using the Divide Email function after being processed by the "Image Correction" plug-in, there are cases where PDF file creation will fail. In such a case, arrange the job flow in the following manner.
		Add the "Image Converter" plug-in between the existing "Image Correction" plug-in and "Image Converter" or "PDF Converter" plug-in.
		<ol> <li>Configure a file format other than "File Format Selected on [Scan Settings] Tab" or "TIFF (Uncompressed, single- page/multi-page)" from Image Format List in the newly added "Image Converter" plug-in.</li> </ol>
D	[Notification]	Selects whether or not to use receipt notification that To/Cc/Bcc destinations received the email. This function only works when the mail server of the destination supports receipt notification.
		• [On]
		Makes To/Cc/Bcc destinations send a receipt notification that they received the email.
		• [Off]
		Disables receipt notification.
		The notification is sent as follows:
		The Scan and Fax Manager attempts to send the notification to the MFP user.
		<ol> <li>If the MFP user's email address is not available, the Scan and Fax Manager attempts to send the notification to the Administrator. The Administrator's email address is set in the Administrator Settings screen. See page 415 "Error Notification Email Address".</li> </ol>
		<ol> <li>If the Administrator's email address is not available, the Scan and Fax Manager attempts to send the notification to the default sender specified in [Default Sender Address] in the Send to Email Option Settings screen.</li> </ol>

# Send to Folder Service

The Send to Folder Service allows MFP users to send scanned documents directly to a selected folder on a network device.

MFP users can perform the following operations through the Send to Folder Service:

• Send to Folder

The user can save documents on shared network folders.

Send to Home

If Active Directory is used as the Project authentication method, the user can save documents in his/her home directory using the Send to Home function.

In the RICOH Streamline NX system, the Send to Home function is available for using home holder information obtained from the Authentication and Accounting Manager server.



- The following types of shared folders can be set as destinations:
  - Shared folders on PCs running Windows.
  - UNIX operating system run by Samba supporting NTLM v2.
  - Local folders of the server PC.
- Even if a local folder is specified as the destination of the Send to Folder service for a Project (Serverless), the setting will be ignored on the MFP.

The Send to Folder Service settings are divided into 2 screens. Use the accordion buttons to access the different settings.

• [Add/Delete StartPoint Path]

Add, edit, and delete StartPoint Paths (root folders).

• [Send to Home Folder]

Enable or disable the Send to Home Folder function.

#### Add/Delete StartPoint Path

Add, edit and delete StartPoint Paths (root folders). For details about the settings, see the table below.

## Fig.: Add/Delete StartPoint Path Screen

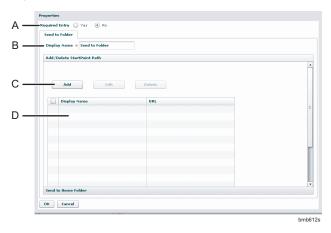


Table: Add/Delete StartPoint Path Settings

Item Description [Required Entry] Select whether to require that this Service be used. (Project settings only) • [Yes] When scanning, at least one destination folder must be specified in the destinations list. • [No] Allows the flow to continue even if no destination folders are specified in the destinations list. В [Display Name] Enter the display name for this Service. Limitation (Project settings only) • The maximum length is 30 characters. Use these buttons to add new root folders, edit existing root C [Add]/[Edit]/ folders, and delete root folders. [Delete] • [Add] Adds a new root folder. • [Edit] Modifies the settings of the selected root folder. • [Delete] Deletes all selected root folders. D **Root Folder List** Displays a list of the registered root folders.

ltem	Description
	Use the check boxes to select root folders to edit or delete root folders. Select the check box on the first row/column to select all root folders.

## **Configure StartPoint Path Settings**

When you click [Add] or [Edit] on the Add/Delete StartPoint Path screen, the [General Settings] screen displays. For details about the settings, see the table below.

Fig.: Add/Edit StartPoint Path Screen - General Settings

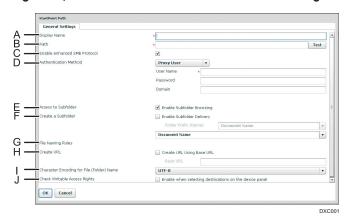
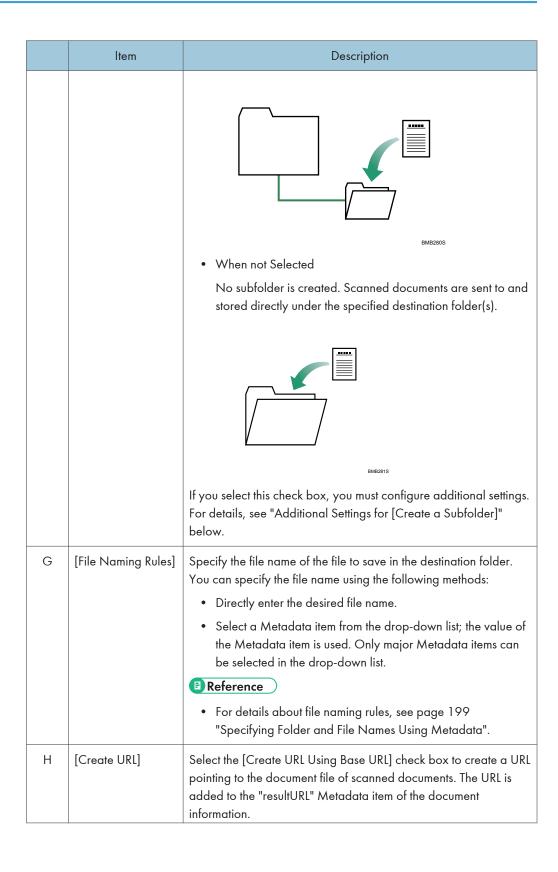


Table: Add/Edit StartPoint Path Settings - General Settings

	ltem	Description
A	[Display Name]	Enter a display name for the folder.  Characteristics in the folder.
		The maximum length is 128 characters.
В	[Path]	Enter the path of the destination folder in UNC format.  • Example: \\192.168.1.1\SharedFolderName  All folders contained in the path you enter will be available as destinations.
		Click [Test] to test the connection to the folder you have specified.  • Note  • Local folders can be specified as the destination folders.  When entering local folders, use the absolute paths for each platform.  • Example

	ltem	Description
		Windows: C:\LocalFolder
С	[Enable enhanced SMB protocol]	When this check box is selected, the highest version of SMB supported by both environments shown below is used.  • The environment of the computer using Scan and Fax Manager  • The environment of the computer to which the folder at the remote destination belongs  If this check box is not selected, SMB1.0 is used.
		₩Note
		<ul> <li>This check box is not displayed for Projects (Serverless). The SMB version used for Projects (Serverless) is the version supported by the computer environment to which the destination folder belongs.</li> </ul>
		<ul> <li>For the following MFP models, SMB 1.0 is used for Projects (Serverless):         Aficio MP 4000/4000B/5000/5000B/LD040/LD040B/LD050/LD050B/9040/9040b/9050/9050b, Aficio MP 2550/2550B/3350/3350B/LD425/LD425B/LD433/LD433B/9025/9025B/9033/9033B, Aficio MP C6000/C7500/LD260c/LD275c/C6055/C7570, Aficio MP C6501/C7501/LD365C/LD375C/C9065/C9075, Aficio MP C2800/C3300/LD528C/LD533C, Aficio MP C4000/C5000/LD540C/LD550C, Aficio MP C2050/C2550/LD520C/LD525C, Aficio MP C3001/C3501/LD630C/LD635C/C9130/C9135, Aficio MP C4501/C5501/LD645C/LD655C/C9145/C9155, Aficio MP C2051/C2551/LD620C/LD625C/C9120/C9125, Aficio MP C300/C400/LD130C/LD140C, Aficio MP 6001/7001/8001/9001/LD360/LD370/LD380/LD390/9060/9070/9080/9090, Aficio MP 6001SP/7001SP/8001SP/9001SP/LD360sp/LD370sp/LD380sp/LD390sp/9060sp/9070sp/9080sp/9090sp, Aficio MP 4001/5001/LD140/LD150/9240/9250, Aficio MP 2851/3351/LD528/LD533/9228/9233, Aficio SP 5200S/5210SF/5210SR, Aficio MP 2352SP/2852SP/3352 SP, Aficio MP W2401/W3601/GWD3006/LW426/3406WD</li> </ul>

	ltem	Description
		To use an SMB Protocol of a higher version than SMB1.0 when this check box is selected, install the following:
		.NET Framework 4 or later
		Visual C++ Redistributable for Visual Studio 2015
		<ul> <li>To perform authentication using a Kerberos ticket when this check box is selected, specify the path to be entered in the [Path] column, using the FQDN.</li> </ul>
		To perform authentication using a Kerberos ticket when the domain of the user is different from the domain of the folder at a remote destination, configure the settings by using a tool. For details, see "CONFIGURING SERVER SOFTWARE", Streamline NX Server Software Installation & Configuration Guide.
D	[Authentication Method]	Select the authentication method to use. The information specified here is used to access the destination folder and save scanned documents:
		• [Proxy User]
		Uses the information specified in [User Name], [Password], and [Domain] for authentication.
		• [Login User]
		Uses the login information for the Project for authentication.
		<b>◆</b> Note
		Even if you select [Login User], enter [User ID] and [Password] in order to browse folders via the AdminTool.
		<ul> <li>For the Send to Home Folder function, the login information for the Project is used to store scanned documents on a Home directory, even if [Proxy User] is selected.</li> </ul>
Е	[Access to Subfolder]	Select the [Enable Subfolder Browsing] check box to allow MFP users to browse subfolders and select them as destinations.
F	[Create a Subfolder]	Select the [Enable Subfolder Delivery] check box to create a subfolder under the destination folders.
		When Selected
		A folder is automatically created under the destination folder, and scanned documents are stored in that subfolder(s).



	ltem	Description
		When Selected
		A unique URL is created for a scanned document and added to the "resultURL" Metadata item. You must enter the base URL in [Base URL]. For example:
		URL in StartPoint: \\192.168.1.1\targetPath
		Destination folder: \\192.168.1.1\targetPath\myfolder
		File name: doc.tif
		Base URL: http://samplemyurl.com/path1
		Result URL: http://samplemyurl.com/path1/myfolder/ doc.tif
		<b>U</b> Note
		<ul> <li>If [Create a Subfolder] is selected, the URL of the created subfolder will be added to the "resultURL" Metadata. If [Create a Subfolder] is not selected, the URLs of all Sections (files) of a scanned document are added to "resultURL".</li> </ul>
		When not Selected
		The "resultURL" Metadata item will be added to the document information. For example:
		Result URL: \\192.168.1.1\targetPath\myfolder\doc.tif
I	[Character Encoding for File (Folder) Name]	Select the character encoding methods from the drop-down list.  The following character encoding methods are supported:  UTF-8  Latin-1
J	[Check Writable Access Rights]	Select this check box to confirm write-access privileges for the destination folder when selecting destinations on the MFP display panel.

## Additional Settings for [Create a Subfolder]

• [Folder Prefix (Name)]

Specify the name of the subfolder. It is possible to create nested subfolders by including the path separator. For instance, if you enter "abc\xyz", then the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this case, scanned documents are saved in "xyz".

• [Add Suffix to Folder Name]

Select this option to add a suffix to the subfolder if one already exists with the same name. The suffix will be a number from 1 to 9999. The suffix is incremented until a unique file name is found. If the suffix exceeds 9999, an error will occur.

If this option is not selected and a subfolder already exists with the same name, then no subfolder is created, and scanned documents are saved in the existing folder.

You can specify the name of a subfolder you create using the following methods:

- Directly enter the desired folder name.
- Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only
  major Metadata items can be selected in the drop-down list.



- For details about folder naming rules, see page 199 "Specifying Folder and File Names Using Metadata".
- For details about Metadata, see page 468 "Metadata Specifications".

#### **Configure Send to Home Folder Settings**

Click [Send to Home Folder] at the bottom of the screen to open the Send to Home Folder screen.

# Limitation

 Send to Home Folder is always available when LDAP authentication is used even if Active Directory is not selected as [Server Type].



• The attribute for Home Folder must be "homeDirectory".

Fig.: Send to Home Folder Screen

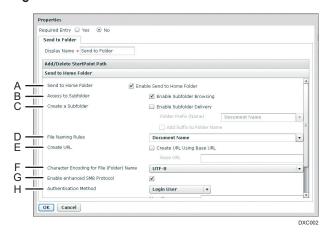


Table: Send to Home Folder Settings

	ltem	Description
A	[Send to Home Folder]	Select the [Enable Send to Home Folder] check box to enable distribution of scanned documents to the MFP user's home folder.
		If the home folder information of the user can be obtained from the Authentication Server, "Send to Home" will be automatically added to the initial Selected Destination list.
		The Send to Home Folder function uses the user's login information to distribute documents to the user's home folder. Also, set the authentication method to [Proxy User] on the properties screen to write the document as a different user. A distribution error will occur if the user is not granted write access to his/her home folder.
В	[Access to Subfolder]	Select the [Enable Subfolder Browsing] check box to allow MFP users to browse subfolders and select them as destinations.
С	[Create a Subfolder]	Select the [Enable Subfolder Delivery] check box to create a subfolder under the destination folders.  • When Selected  A folder is automatically created under the destination folder, and scanned documents are stored in that subfolder(s).
		<ul> <li>When not Selected         No subfolder is created. Scanned documents are sent to and stored directly under the specified destination folder(s).     </li> </ul>

	ltem	Description
		If you select this check box, you must configure additional settings. For details, see "Additional Settings for [Create a Subfolder]" below.
D	[File Naming Rules]	Specify the file name of the file to save in the destination folder. You can specify the file name using the following methods:  • Directly enter the desired file name.  • Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only major Metadata items can be selected in the drop-down list.    Reference   For details about file naming rules, see page 199   "Specifying Folder and File Names Using Metadata".
E	[Create URL]	Select the [Create URL Using Base URL] check box to create a URL pointing to the document file of scanned documents. The URL is added to the "resultURL" Metadata item of the document information.
F	[Character Encoding for File (Folder) Name]	Select the character encoding.
G	[Enable enhanced SMB protocol]	When this check box is selected, the highest version of SMB supported by both environments shown below is used.  The environment of the computer to which the home folder belongs  The environment of the computer to which the folder at the remote destination belongs

ltem	Description
	If this check box is not selected, SMB1.0 is used.  • Note
	This check box is not displayed for Projects (Serverless). The SMB version used for Projects (Serverless) is the version supported by the computer environment to which the destination folder belongs.
	<ul> <li>For the following MFP models, SMB 1.0 is used for Projects (Serverless):</li></ul>
	To use an SMB Protocol of a higher version than SMB1.0 when this check box is selected, install the following:
	<ul><li>.NET Framework 4 or later</li><li>Visual C++ Redistributable for Visual Studio 2015</li></ul>

	ltem	Description
		<ul> <li>To perform authentication using a Kerberos ticket when this check box is selected, specify the path to the home folder, using the FQDN.</li> </ul>
		To perform authentication using a Kerberos ticket when the domain of the user is different from the domain of the home folder, configure the settings by using a tool. For details, see "CONFIGURING SERVER SOFTWARE", Streamline NX Server Software Installation & Configuration Guide.
Н	[Authentication Method]	Select the authentication method to use. The information specified here is used for authentication to access a home folder.



• These items are enabled only when [Enable Send to Home Folder] is checked in the screen.

With these settings, you can specify Home Folder in more detail such as browsing sub folders from MFP or file naming rules, just as with a usual StartPoint Path.



• These settings become effective only when the login user's home folder is obtained.

#### MFP Configuration Screen - Send to Folder Service

On this screen, you can configure the appearance of the MFP display panel and preset destination folders for the Send to Folder Service. You can also limit which items are available to MFP users.



 For details about configuring and limiting the settings on the MFP display panel, see page 280 "About Distribution Parameters".

Running

Running

Administrator Logout

Home Configuration Maintenance Settings Job Management Logs

System Profile Device

Send to Email

Delivery Flow Service Filter Metadata Other Settings

Send to Folder

Send to Folder

Select destination(s), then press the Start key.

Selected Destinations O selected:

Search Search

Fig.: MFP Configuration Screen - Send to Folder Service

Table: MFP Configuration Screen - Send to Folder Service

Ė

	ltem	Description
A	[Selected Destinations]	Displays a list of the destination folders currently selected. You can click folders in this list to remove them.
В	[Search]	Searches for destination folders.  Any destination folders that match the specified search string can be searched.
		Example
		A search for " <b>s</b> " matches:
		Share Folder
		Send folder
		• Folder <b>S</b> ale <b>s</b>
		If you enter a space, all folders will be searched for.
С	[View Folder(s)]	Returns to folder view after performing a search.
D	[Root]	Returns to the screen displaying the root folders.
Е	Folder Browser	Click folders displayed in the browser to add them to the Selected Destinations list.
		The buttons in the browser have the following meanings:
		•

DAH012

ltem	Description
	Displays the folders on the upper location. This button is disabled in root folder view.
	The folder contains subfolders. Click this button to view the subfolders.
	The folder does not contain any subfolders.

### 4

### Send to FTP Service

The Send to FTP Service allows MFP users to send scanned documents to one or more specified FTP servers.

Once a document is uploaded to the FTP server, anyone with access to the FTP server can access the files. Storing files on an FTP server enables geographically dispersed workgroups to easily collaborate with colleagues, and allows businesses to easily share information with employees, clients, vendors, etc.



- SFTP (SSH2) is supported.
- Scanned documents are named using specific naming conventions. See page 199 "Service Folder and File Naming Rules".
- To use a private key to establish a secure connection with the Send to FTP Service, see page 433
   "Managing the Private Keys".

The Send to FTP Service settings are set via the Add/Delete StartPoint Path, where you can add, edit, and delete StartPoint Paths (root folders).

#### Add/Delete StartPoint Path

Add, edit and delete StartPoint Paths (root folders). For details about the settings, see the table below.

Fig.: Add/Delete StartPoint Path Screen

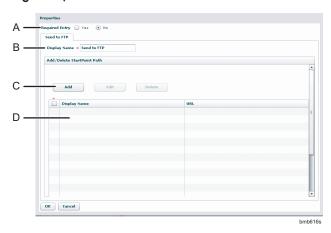


Table: Add/Delete StartPoint Path Settings

	ltem	Description
A	[Required Entry] (Project settings only)	Select whether to require that this Service be used.  • [Yes]
	(ge oge o, /	When scanning, at least one FTP folder must be specified in the destinations list.

	Item	Description
		[No]     Allows the flow to continue even if no FTP folders are specified in the destinations list.
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
С	[Add]/[Edit]/ [Delete]	Use these buttons to add new root folders, edit existing root folders, and delete root folders.  • [Add]  Adds a new root folder.  • [Edit]  Modifies the settings of the selected root folder.  • [Delete]  Deletes the selected root folders.
D	Root Folder List	Displays a list of the registered root folders.  Use the check boxes to select root folders to edit or delete root folders. Select the check box on the first row/column to select all root folders.

### **Configure StartPoint Path Settings**

When you click [Add] or [Edit] on the Add/Delete StartPoint Path screen, the [General Settings] screen displays. For details about the settings, see the table below.

Fig.: Add/Delete StartPoint Path Screen - FTP Settings

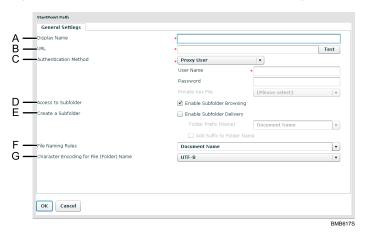


Table: Add/Delete StartPoint Path Settings-General Settings

	ltem	Description
A	[Display Name]	Enter the display name for the root folder.  Limitation
		The maximum length is 128 characters.
В	[URL]	Enter the path to the FTP destination folder.
		Examples
		ftp://ftp.gsnxcorp.net/
		• ftp://192.168.1.1:21/home/user/
		sftp://ftp.gsnxcorp.biz/data/ (for secure FTP)
		Click [Test] to test the connection to the folder you have specified.
С	[Authentication	Select the authentication method to use from the following:
	Method]	• [Proxy User]
		Uses the information specified in [User Name] and [Password] for authentication.
		<b>₩</b> Important
		<ul> <li>If the FTP server is managed by a domain user under IIS, the user name for the proxy user must be entered as "<domain>\<user name="">".</user></domain></li> </ul>
		• [Login User]
		Uses the login account for the Project for authentication.

	ltem	Description
	nem	Description
		[Use Certificate] (for SFTP only)  A certificate is automatically selected from the registered certificates. For this setting, the following information must be specified:
		• [User ID]
		• [Password]
		Enter the password for Private Key File.
		• [Private Key File]
		• [Anonymous]
		Depending on FTP server settings, the password may be required. If a password is required for Anonymous authentication in the FTP server settings, enter the password in this field. If a password is not required, leave this field blank.
		<b>■</b> Reference
		For details about using Private Key files, see page 433     "Managing the Private Keys".
D	[Access to Subfolder]	Select the [Enable Subfolder Browsing] check box to allow MFP users to browse subfolders and select them as destination folders.
E	[Create a Subfolder]	Select the [Enable Subfolder Delivery] check box to create a subfolder under the destination folders.  • When Selected  A folder is automatically created under the destination folder(s), and scanned documents are stored in that subfolder.
		BMB280S  • When not Selected

	ltem	Description
		No subfolder is created. Scanned documents are sent to and stored directly under the specified destination folder(s).
		BMB281S
		If you select this check box, you must configure additional settings. For details, see "Additional Settings for [Create a Subfolder]" below.
F	[File Naming Rules]	Specify the file name of the file to save on the FTP server. You can specify the name of the file using the following methods:
		Directly enter the desired file name.
		<ul> <li>Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only major Metadata items can be selected in the drop-down list.</li> </ul>
		<b>☐</b> Reference
		<ul> <li>For details about file naming rules, see page 199</li> <li>"Specifying Folder and File Names Using Metadata".</li> </ul>
G	[Character Encoding for File	Select the character encoding methods you require from the drop-down list.
	(Folder) Name]	The following character encoding methods are supported:  • UTF-8
		• Latin-1

### Additional Settings for [Create a Subfolder]

• [Folder Naming Rules]

Specify the name of the subfolder. It is possible to create nested subfolders by including the path separator. For instance, if you enter "abc/xyz", then the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this case, scanned documents are saved in "xyz".

Select this option to add a suffix to the subfolder if one already exists with the same name. The suffix will be a number from 1 to 9999. The suffix is incremented until a unique file name is found. If the suffix exceeds 9999, an error will occur.

If this option is not selected and a subfolder already exists with the same name, then no subfolder is created, and scanned documents are saved in the existing folder.

You can specify the name of a subfolder you create using the following methods:

- Directly enter the desired folder name.
- Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only
  major Metadata items can be selected in the drop-down list.

### Reference

 For details about folder naming rules, see page 199 "Specifying Folder and File Names Using Metadata".

#### MFP Configuration Screen - Send to FTP Service

On this screen, you can configure the appearance of the MFP display panel and preset destination folders for the Send to FTP Service. You can also limit which items are available to MFP users.

### Reference

 For details about configuring and limiting the settings on the MFP display panel, see page 280 "About Distribution Parameters".

Fig.: MFP Configuration Screen - Send to FTP Service

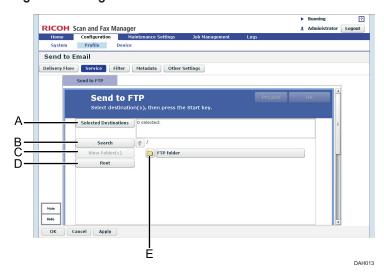


Table: MFP Configuration Screen - Send to FTP Service

	Item	Description
А	[Selected Destinations]	Displays a list of the destination folders currently selected. You can click folders in this list to remove them.
В	[Search]	Searches for destination folders.
		Any destination folders that match the specified search string can be searched.
		Example
		A search for " <b>s</b> " matches:
		Share Folder
		Send folder
		• Folder Sales
		If you enter a space, all folders will be searched for.
С	[View Folder(s)]	Returns to folder view after performing a search.
D	[Root]	Returns to the screen displaying the root folders.
Е	Folder Browser	Click folders displayed in the browser to add them to the Selected Destinations list.
		The buttons in the browser have the following meanings:
		•
		Displays the folders on the upper location. This button is disabled in root folder view.
		The folder contains subfolders. Click this button to view the subfolders.
		The folder does not contain any subfolders.

# **Send to Printer Service**

On the Send to Printer Service Settings screen, configure the settings for the header/footer as necessary.



• This service cannot work with a device that has installed Streamline NX SDK application. Do not send a job to a device that has installed Streamline NX.

Fig.: Send to Printer Service Settings Screen

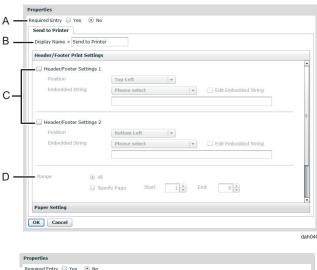




Table: Send to Printer Service Settings Screen

	ltem	Description
А	[Required Entry]	Select whether to require that this Service be used.
	(Project settings only)	• [Yes]

	ltem	Description
		When scanning, the MFP user must select a printer to print to.  • [No]  Allows the flow to continue even if no printer is selected.
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
С	[Header/Footer Settings 1]/[Header/ Footer Settings 2]	Select the appropriate check boxes to configure the first and/or second header/footer setting. When you select a check box, the following settings become available:  • [Position]  Select the position of the header/footer from the following: [Top Left], [Top Center], [Top Right], [Bottom Left], [Bottom Center], and [Bottom Right]  • [Embedded String]  Specify the header/footer text using one of the following methods:  • Select the [Edit Embedded String] check box and enter the text of the header/footer directly in the text box.  • Select a Metadata item from the drop-down list. This value will be used when printing. Only major Metadata items are available in the list. For details about Metadata, see "Metadata Specifications".  • Note  • You cannot specify the same header/footer position for both [Header/Footer Settings 1] and [Header/Footer Settings 2].
D	[Range]	Specify the pages on which the header/footer text will be embedded.  • [All]  Embed the header/footer on all pages.  • [Specify Page]  Embed the header/footer on all pages within the range specified with [Start] and [End].

	ltem	Description
Е	[Paper Size]	Specify the paper size using one of the following methods:  • [Comply with printer driver settings]  The driver default will be used.  • [Auto select paper to fit image size]  The driver will select the appropriate paper size from the image size.

### 4

### Send to WebDAV Service

The Send to WebDAV Service allows MFP users to send scanned documents to one or more specified WebDAV servers.

If your organization currently utilizes a third-party Document Management System (DMS) that supports WebDAV, the Send to WebDAV Service allows MFP users to save scanned documents directly to the repository.



- HTTP and HTTPS are supported.
- Scanned documents are named using specific naming conventions. See page 199 "Specifying Folder and File Names Using Metadata".

The Send to WebDAV Service settings are divided into 2 screens. Use the accordion button to access the different settings.

- [Add/Delete StartPoint Path]
   Add, edit, and delete StartPoint Paths (root folders).
- [HTTP Proxy Server]
   Configure proxy server settings if you are accessing the WebDAV folder through a proxy server.

#### Add/Delete StartPoint Path

Add, edit and delete StartPoint Paths (root folders). For details about the settings, see the table below.

Fig.: Add/Delete StartPoint Path Screen

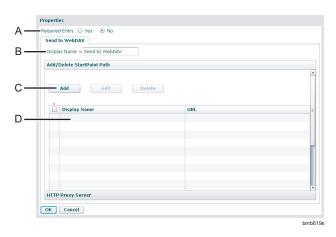


Table: Add/Delete StartPoint Path Settings

		3
	ltem	Description
Α	[Required Entry]	Select whether to require that this Service be used.

	ltem	Description
	(Project settings only)	<ul> <li>[Yes] When scanning, at least one WebDAV folder must be specified in the destinations list.</li> <li>[No] Allows the flow to continue even if no WebDAV folders are specified in the destinations list.</li> </ul>
В	[Display Name] (Project settings only)	Enter the display name for this Service.  Limitation  The maximum length is 30 characters.
С	[Add]/[Edit]/[Delete]	Use these buttons to add new root folders, edit existing root folders, and delete root folders.  • [Add]  Adds a new root folder.  • [Edit]  Modifies the settings of the selected root folder.  • [Delete]  Deletes all selected root folder.
D	Root Folder List	Displays a list of the registered root folder.  Use the check boxes to select root folders to edit or delete root folders. Select the check box on the first row/column to select all root folders.

### **Configure StartPoint Path Settings**

When you click [Add] or [Edit] on the Add/Delete StartPoint Path screen, the WebDAV Folder Settings screen displays. For details about the settings, see the table below.

Fig.: Add/Edit StartPoint Path Screen - WebDAV Folder Properties

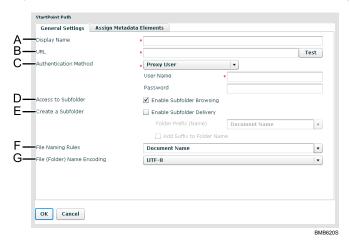
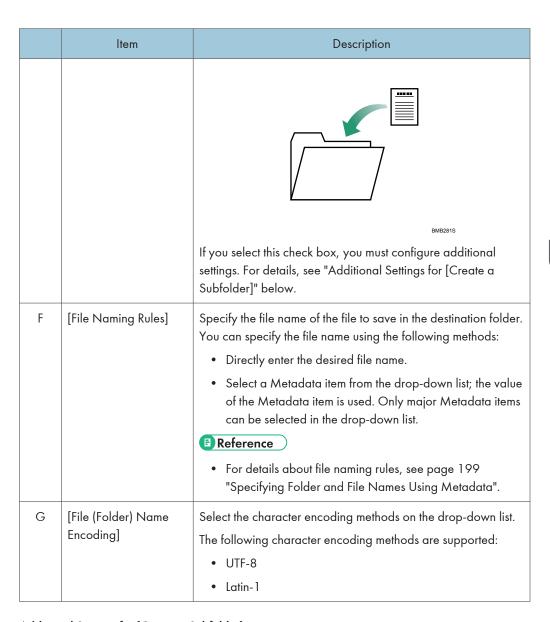


Table: Add/Edit StartPoint Path Settings-WebDAV Folder Properties

	ltem	Description
A	[Display Name]	Enter the display name of the root folder.  Limitation  The maximum length is 128 characters.
В	[URL]	Enter the path to the WebDAV destination folder.  Examples  • http://webdav.gsnxcorp.com/  • http://192.168.1.1:8080/john/docs/  • https://webdav.gsnxcorp.biz/users/jane (for SSL connection)  Click [Test] to test the connection to the folder you have specified.
С	[Authentication Method]	Select the authentication method to use from the following:  • [Proxy User]  Uses the information specified in [User Name] and [Password] for authentication.  • Important  • If the WebDAV server is managed by a domain user under IIS, the user name for the proxy user must be entered as " <domain>\<user name="">".</user></domain>

	ltem	Description
		<ul> <li>If the password contains more than 14 characters, an error will occur and the document will not be sent.</li> </ul>
		• [Login User]
		Uses the login account for the Project for authentication.
		• [Anonymous]
		Uses an anonymous account.
D	[Access to Subfolder]	Select the [Enable Subfolder Browsing] check box to allow MFP users to browse subfolders and select them as destination folders.
Е	[Create a Subfolder]	Select the [Enable Subfolder Delivery] check box to create a subfolder under the destination folders.  • When Selected
		A folder is automatically created under the destination folder(s), and scanned documents are stored in that subfolder.
		BMB280S
		When not Selected
		No subfolder is created. Scanned documents are sent to and stored directly under, the specified destination folder.



#### Additional Settings for [Create a Subfolder]

When this option is selected, configure the following settings:

- [Folder Prefix (Name)]
  - Specify the name of the subfolder. It is possible to create nested subfolders by including the path separator. For instance, if you enter "abc/xyz", then the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this case, scanned documents are saved in "xyz".
- [Add Suffix to Folder Name]

Select this option to add a suffix to the subfolder if one already exists with the same name. The suffix will be a number from 1 to 9999. The suffix is incremented until a unique file name is found. If the suffix exceeds 9999, an error will occur.

If this option is not selected and a subfolder already exists with the same name, then no subfolder is created, and scanned documents are stored in the existing folder.

You can specify the name of a subfolder you create using the following methods:

- Directly enter the desired folder name.
- Select a Metadata item from the drop-down list; the value of the Metadata item is used. Only
  major Metadata items can be selected in the drop-down list.



 For details about folder naming rules, see page 199 "Specifying Folder and File Names Using Metadata".

### **Configure Metadata Elements**

On the [Assign Metadata Elements] tab, you can create a mapping between document Metadata items and WebDAV properties. For details about the settings, see the table below.



 Depending on the destination server's specifications, metadata assignment might not work properly.

Fig.: Add/Edit StartPoint Path Screen - Assign Metadata Elements

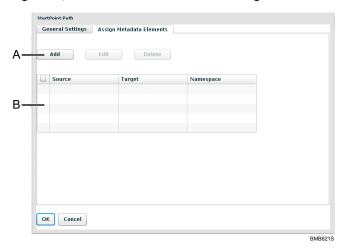


Table: Add/Edit StartPoint Path Screen - Assign Metadata Elements

	ltem	Description
Α	[Add]/[Edit]/[Delete]	Use these buttons to add new Metadata mappings, edit existing Metadata mappings, and delete Metadata mappings.

	ltem	Description
		• [Add]
		Creates a new mapping.
		• [Edit]
		Modifies the settings of the selected mapping.
		• [Delete]
		Deletes all selected mappings.
В	Metadata Mapping List	Displays a list of the assigned Metadata mappings.
		Use the check boxes to select mappings to edit or delete mappings. Selecting the check box in the title row selects all mappings.

### Add/Edit Metadata Elements

When you click [Add] or [Edit] on the Assign Metadata Elements tab, the [Add Assigned Metadata Elements] screen displays. For details about the settings, see the table below.

Fig.: Add/Edit Assigned Metadata Elements Screen



Table: Add/Edit Assigned Metadata Elements

	ltem	Description
A	[Source]	Select a document Metadata item from the drop-down list, or enter one manually.
В	[Target]	Enter the name of the corresponding WebDAV property.
С	[Namespace]	Enter the namespace of the WebDAV property.

### Mapping Example

For this example, assume that the document name is "Document 1.tif".

- [Source]: Document Name (selected from the drop-down list)
- [Target]: doc\_name
- [Namespace]: ns1

The document information will be set in the WebDAV server as follows:

<ns1:doc\_name>Document1.tif</ns1:doc\_name>



If a scanned file is successfully stored on the WebDAV server, then the job is regarded as a
successful, even if Metadata assignment fails. Therefore, no retry is attempted for such a job.
However, the Metadata assignment failure will be logged in the System Log.



• See page 468 "Metadata Specifications".

### **Configure HTTP Proxy Server Settings**

If you are using a proxy server to access a WebDAV folder that is outside your company's firewall, enter the proxy server's information. All items are required when using a proxy server. For details about the settings, see the table below.

Fig.: HTTP Proxy Server Screen

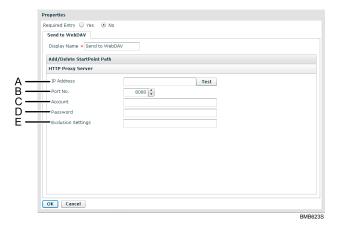


Table: HTTP Proxy Server Settings

	ltem	Description
А	[IP Address]	Enter the IP address or host name of the proxy server.
		Click [Test] to test the connection to the proxy server you have specified.
В	[Port No.]	Enter the port number to use.
		<b>♣</b> Note
		The default port is 8080.
С	[Account]	Enter the login account that is used to log in to the proxy server.
D	[Password]	Enter the account password.

	Item	Description
Е	[Exclusion Settings]	Enter any IP address and domain names for which the proxy server is not used. Separate each entry with a semicolon (;).
		You can specify classes of IP addresses and domain names by using as asterisk (*).
		Examples
		<ul> <li>*.gsnxcorp.com (addresses such as www.gsnxcorp.com, ftp.gsnxcorp.com, etc.)</li> </ul>
		• 192.168.*.*
		*.gsnxsample.* (addresses such as ftp.gsnxsample.net, www.gsnxsample.biz, etc.)

### MFP Configuration Screen - Send to WebDAV Service

On this screen, you can configure the appearance of the MFP display panel and preset destination folders for the Send to WebDAV Service. You can also limit which items are available to MFP users.

### Reference

 For details about configuring and limiting the settings on the MFP display panel, see page 280 "About Distribution Parameters".

Fig.: MFP Configuration Screen - Send to WebDAV Service

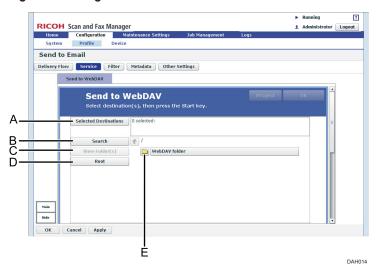


Table: MFP Configuration Screen - Send to WebDAV Service

	ltem	Description	
А	[Selected Destinations]	Displays a list of the destination folders currently selected. You can click folders in this list to remove them.	
В	[Search]	Searches for destination folders.	
		Any destination folders that match the specified search string can be searched.	
		Example	
		A search for " <b>s</b> " matches:	
		Share Folder	
		Send folder	
		Folder Sales	
		If you enter a space, all folders will be searched for.	
С	[View Folder(s)]	Returns to folder view after performing a search.	
D	[Root]	Returns to the screen displaying the root folders.	
Е	Folder Browser	Click folders displayed in the browser to add them to the Selected Destinations list.	
		The buttons in the browser have the following meanings:	
		•	
		Displays the folders on the upper location. This button is disabled in root folder view.	
		The folder contains subfolders. Click this button to view the subfolders.	
		The folder does not contain any subfolders.	

### Reference

• See page 280 "About Distribution Parameters".

#### 4

# Service Folder and File Naming Rules

This section explains how to specify names for files and folders.

### Specifying Folder and File Names Using Metadata

You can use Metadata, such as the date the file was created or the user who created the document, in the names of files and folders.

The simplest way of specifying a file or subfolder name is by entering a literal file name or basic Metadata item on the settings screen for each Service (Send to E-mail, Send to Folder/FTP/WebDAV). Alternatively, you can use one of the following more advanced methods:

- Enter a custom Metadata item
   Enclose the Metadata item name (ID) in curly brackets ("{", "}"). Use this method to enter
   Metadata items that are not available in the drop-down list of basic Metadata items.
- Combine literal character strings with Metadata

Enter a file name that consists of a combination of literal character strings and Metadata. Enclose the names of Metadata items in curly brackets ("{", "}").

For example, if you enter "Report({userName})", and the value of the Metadata item "userName" is "john", then the resulting file name will be "Report(john)".



• If you want to include curly brackets in the file name, use double brackets.

For example, if you enter "file { draft} } ", the resulting file name will be "file { draft} \]".

### Reference

• For details about Services, see page 138 "About Services".

### Formatting numbers in Metadata

Items of numerical Metadata, such as the page count and horizontal resolution, can be formatted if you include them in file names. You can specify the number of spaces (the padding) a number occupies, and whether the padding is space-padded or 0-padded.

### Limitation

 Only whole numbers can be formatted. If a number includes a decimal point, the numbers following the decimal point will be omitted.

The following table explains how to format numbers.

Input Example	Explanation
{tagName:Nxx}	Display the number so that it occupies at least xx spaces. If xx is greater than the number of digits in the number, the extra space is space-padded.
	Example:
	Input: "file{page:N3}"
	Where the value of "page" is 12.
	Output: "file 12.tif"
{tagName:N0xx}	Display the number so that it occupies at least xx spaces. If xx is greater than the number of digits in the number, the extra space is 0-padded.
	Example:
	Input: "{page:N05}_file"
	Where the value of "page" is 12.
	Output: "00012_file.tif"

The following table shows several examples of output for various values of the hypothetical tag "metatag". (Underscores represent blank spaces.)

Value of "metatag"	Input	Output
12	{metatag:N4}	12
	{metatag:NO4}	0012
123456	{metatag:N4}	123456
	{metatag:NO4}	123456
-12	{metatag:N4}	12
	{metatag:NO4}	-012
abcde	{metatag:N4}	0
	{metatag:NO4}	0000
123abcde	{metatag:N4}	_123
	{metatag:NO4}	0123
123.45	{metatag:N4}	_123

Value of "metatag"	Input	Output
	{metatag:NO4}	0123
1 2	{metatag:N4}	1
(space between 1 and 2)	{metatag:NO4}	0001



- Any blank spaces before or after a Metadata value are automatically trimmed. For example, "123
   "(blank space before and after the number) is treated as "123".
- If the format specification contains a letter other than N, for example {x:Cxx}, the Metadata is treated as if no format were specified.
- If the format for a number format is incorrect, for example {x:Nabcde} or {x:N}, the number is treated as if "N04" were specified.

### Reference

• For details about Metadata items, see page 468 "Metadata Specifications".

### Formatting dates in Metadata

Metadata, such as "generationEpoch" and "registrationEpoch" that reports dates expressed in milliseconds can be formatted into human-readable dates when used in file names.

The following table explains how to format dates:

Input Example	Explanation
{tagName:Dxxxx}	Display the date using the local time zone set on your computer, in the format specified by xxxx.
{tagName:Uxxxx}	Display the date using UTC (universal coordinated time) in the format specified by xxxx.

"xxxx" is a string of characters that specify how to format the date. The following table explains the available characters:

Character	Meaning
У	Year
М	Month
d	Day of the month

### Example:

If the date and time represented in the hypothetical Metadata item "metatag" is "Thursday October 30, 2008 2:37 PM Eastern Standard Time", the following formats produce the given result.

Format	Result
{metatag:DyyyyMMdd}	20081030
{metatag:DddMMyyyyHHmm}	301020081437
{metatag:UddMMyyyyHHmm}	301020081837
{metatag:DMMddyyhhmmss}	103008023700

### **U**Note

- Any numerical value can be converted into a date using the above method.
- If the format specification contains a letter other than D or U, for example {x:Cxx}, the Metadata is treated as if no format were specified.
- If the format for a date format is incorrect, for example {x:Uaabb}, the output is undefined.

### Reference

For details about Metadata items, see page 468 "Metadata Specifications".

### Other File Naming Conditions

Depending on certain conditions, a suffix might be appended to the output file name.

The following rules determine when and how a suffix is appended:

 If a document contains multiple Sections, a four-digit, zero-padded suffix indicating the Section is appended to the file name. The format becomes "basename\_XXXX", where XXXX is the Section number.

### 4

### Example

If a document contains three Sections and its basename is "FileName", the following files will be created:

FileName\_0001.tif, FileName\_0002.tif, FileName\_0003.tif



- If a document contains more Sections than can be expressed using four digits, the entire Section number is appended.
- If a file with the same name already exists in the destination folder, a bracketed suffix is added to the file name. For example: FileName\_0001(1).tif; FileName\_0001(2).tif.

The suffix is incremented until a unique file name is found. If the suffix exceeds 9999, an error will occur.



 This process requires time, and the time required increases as the number of files with the same name increases. For this reason, for best performance, you should avoid using duplicate names.

# **About Filters**

A Filter represents a set of criteria that defines input/output, controlling how the document is processed, thus extending Scan and Fax Manager functionality. The PDF Converter Filter, for example, can be added to a Project's Flow in order to convert a scanned image into a PDF file. This section describes the different Filters and how to configure them.



- Only the [Send to Email] or [Send to Folder] service can be added to a Project (Serverless).
- If you have configured properties for Filters at the system or profile level, those properties will be used as the default values for any Filters you add to a flow.

# Filter Summary

The following table provides an overview of each Filter.

Filter Name	Description
PDF Converter	Converts the scanned image to a PDF.
Enhanced PDF Converter	Converts the scanned image to a PDF.
Image Converter	Converts a document into a different file format data specified by the Administrator or user.
Image Correction	Performs image correction operations on scanned documents.
Archiver	Archives scanned documents in the specified format.
OCR	Converts scanned data into text files using OCR software. Also supports auto orientation and the creation of a file name.
Section Specify	Extracts any Sections from a Document.
Section Splitter	Split a job including multiple sections into jobs including sections specified for "Number of Sections" on the MFP's control panel.
XML Transformer	Extracts the document Metadata information as XML data.
Flow Redirect	Transfer a job from a certain document distribution flow of a Project to another Project.
Metadata Converter	Converts the value of the specified Metadata item of the input document, and changes the value a Metadata item based on the value of a different Metadata item.
Metadata Replacement	Validates the value of specified Metadata of the input document and modifies certain parts of the value of a Metadata item.
Barcode Separator/Index	The following types of barcodes are supported. Linear barcodes: Code39 Standard ASCII, Code39 Extended ASCII, Code128, EAN 8, EAN 13, Interleaved 2 of 5, Code 2 of 5, Codabar(NW7) 2- Dimensional barcodes: PDF417, DataMatrix, QR
	Use the Streamline NX Activation Tool to activate this plugin.
	Reference
	For details on procedures for using the filter, refer to the Scan and Fax Manager Barcode Plug-in Administrator's Guide.

Filter Name	Description
PDF Stamper	Converts the scanned image to a PDF with the specified text or image embedded.

### Reference

- See page 280 "About Distribution Parameters".
- See page 213 "PDF Converter Filter".
- See page 220 "Enhanced PDF Converter Filter".
- See page 229 "Image Converter Filter".
- See page 236 "Image Correction Filter".
- See page 242 "Archiver Filter".
- See page 244 "OCR Filter".
- See page 248 "Section Specify Filter".
- See page 252 "Section Splitter Filter".
- See page 254 "XML Transformer Filter".
- See page 257 "Flow Redirect Filter".
- See page 260 "Metadata Converter Filter".
- See page 263 "Metadata Replacement Filter".
- See page 267 "PDF Stamper Filter".

# **Accessing Property Settings Screens**

There are 3 levels at which you can configure the properties for Filters: the System Level, Profile Level, and Project Level. This section explains how to access the properties for each level. This section also explains how to access the Filter Service Properties screens for Filters.

#### **Entering/Editing Filter Properties for the System**

- 1. Click [Home], and then click the [System] shortcut.
- 2. Click [Services/Filters].

Fig.: System Settings Screen



- 3. Click [Default Filter Settings].
- 4. Click [Set] next to the Filter you want configure.



5. Edit the properties as desired.

- 6. Click [OK] to save the settings.
- 7. Click [Back] to save the settings and return to the System Settings screen.

### Entering/Editing Filter Properties for a Profile

- 1. Click [Home], and then click the [Profile] shortcut.
- 2. Double-click the desired Profile.
- 3. Click [Properties] in the upper-right corner of the screen.

### Fig.: Properties Button (Standard Operation Panel)

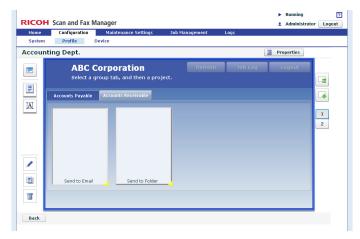
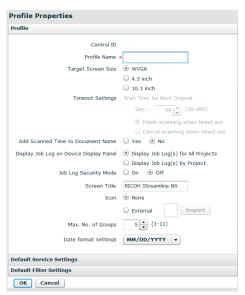


Fig.: Properties Button (Smart Operation Panel)



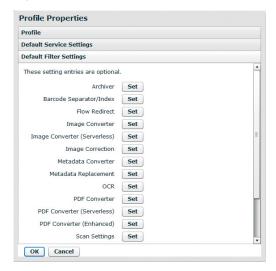
4. Click the [Default Filter Settings] accordion button.

Fig.: Default Filter Service Settings



5. Click [Set] next to the Filter you want to configure.

Fig.: [Set] Buttons



- 6. Edit the properties as desired.
- 7. Click [OK] to save the settings, and click [OK] return to the Group selection screen.

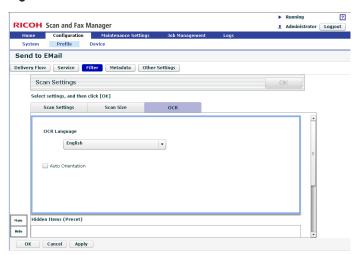
### Entering/Editing Filter Properties for a Project

- From the Profile screen, double-click the desired Profile, select the desired Group within the Profile, and double-click the desired Project. The Flow Editor screen displays.
- 2. Double-click the lower half of the Filter. The properties screen will display.
- 3. Edit the properties as desired.
- 4. Click [OK] to save the settings and return to the Flow Editor screen.
- Reference
  - See page 133 "Adding a Service/Filter to the Flow" and page 135 "Changing Display Position of a Service/Filter".

### **Entering/Editing Filter Services**

In a Project, click [Filter]. The Filter Service screen will display.
 The Filters tabs are automatically added when a Filter is added to the Flow.

#### Fig.: Filters Screen



- 2. Click the tab for the Filter you want to edit.
- 3. Configure and move the Distribution Parameters as desired.
- 4. Click [OK] to save the settings and return to the Group selection screen.

### Reference

For details about the Distribution Parameters, see page 280 "About Distribution Parameters".

#### 4

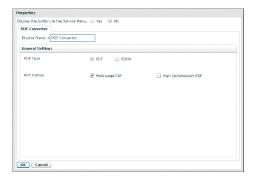
# **Filter Properties**

This section explains the details about the various Filters and properties of each Filter. Properties must be set for the Filter before it is operational within the Flow.

# Displaying Filter Buttons on the MFP Service Menu Screen (Standard Operation Panel Only)

The following is the Filter Properties Screen.

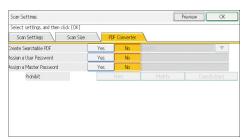
Fig.: Filter Properties Screen



When [Yes] is selected for [Display the button on the Service Menu], the filter's button is displayed on the MFP Service Menu screen, allowing the users to directly move to the filter's setting screen.



When [No] is selected for [Display the button on the Service Menu], the users press the Scan Settings button appeared at the bottom of the Service Menu screen to move to the filter list screen and select the filter to change the settings.



- The two methods (conventional and new) cannot be specified at a time.
- No filter button will be displayed for One-touch Scan project regardless of the setting.

### Reference

• For an overview of each Filter Type, see page 205 "Filter Summary".

Λ

# **PDF Converter Filter**

The PDF Converter Filter can be used to convert the scanned image into a PDF file.

#### Supported Formats (Input Data)

The following file formats are supported as input data by the PDF Converter Filter.

F	ile Format
TIFF	
TIFF-F	
DCX	
ВМР	
JPEG	
PNG	
GIF	



- The following file formats are supported as input data by [PDF Converter (Serverless)].
  - TIFF (MMR, single-page), JPEG
- If a document in an unsupported format is passed to this Filter, the conversion process will fail and an error will be generated.

### Convertible Formats (Output Data)

The following file formats are supported as output data by the PDF Converter Filter.

File Format	PDF version
Image PDF	1.3
High Compression PDF	1.3
Searchable PDF	1.3
Password-protected PDF	1.4



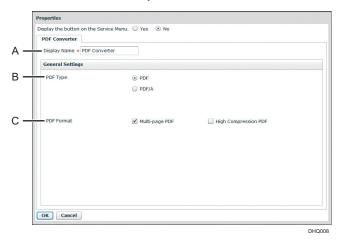
- The following file formats are supported as output data by [PDF Converter (Serverless)].
  - Image PDF (PDF version: 1.4), Password-protected PDF (PDF version: 1.4)

When you select several output formats listed above together into one PDF file, the PDF file
version conforms to the higher version. For example, the PDF version of a searchable PDF that
is password protected will be 1.4.

### **PDF Converter Filter Properties Screen**

The following is the PDF Converter Filter Properties screen

### **PDF Converter Filter Properties Screen**



**Table: PDF Converter Filter Properties** 

	ltem	Description
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[PDF Type]	Select the PDF type.  PDF  PDF/A  Limitation  If PDF/A is selected as the PDF type, MFP users can create only image PDFs. MFP users cannot create searchable PDFs or assign passwords to PDFs.  Note  If PDF/A is selected as the output format, all settings on the [PDF Converter] tab will be unavailable on the MFP display panel.
С	[PDF Format]	Specify the PDF format.

ltem	Description
	If [Multi-page PDF] is selected, a multi-page PDF will be created. If not selected, the image will be converted to a single-page PDF.
	If [High Compression PDF] is selected, a high-compression PDF will be created.



• Under the General Settings of [PDF Converter (Serverless)], the following settings can be specified:

• PDF Type: PDF, PDF/A

• PDF Format: PDF (Single-Page), PDF (Multi-Page)

• The color depth of the PDF/A file that is created by PDF Converter Filter is as follows:

Scan type	Color depth
Text	1 bit
Text/Line Art	1 bit
Text/Photo	1 bit
Photo	1 bit
Gray Scale	8 bit
Text/Photo (Full color)	24 bit
Glossy Photo (Full color)	24 bit

### MFP Configuration Screen - PDF Converter Filter

On this screen, you can configure the appearance of the MFP display panel and preset PDF settings for the PDF Converter Filter. You can also limit which items are available to MFP users.



 For details about configuring and limiting the settings on the MFP display panel, see page 280 "About Distribution Parameters".

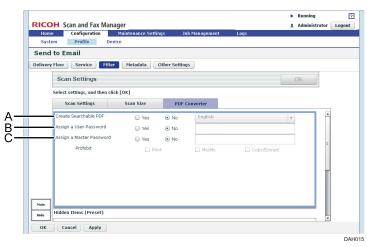


Table: MFP Configuration Screen - PDF Converter Filter

A [C   C   ] A'' '	Description
PDF]  If [Yes] is select document, and Searchable PE necessary to so the drop-down  [English]  [German]  [Italian]  [Spanish]  [Dutch]  [Portugue]  [Norweg]  [Russian]  [Simplifie	er to create a Searchable PDF.  cted, the text data will be extracted from the dothe document will be converted to a DF file (with text data). In addition, it is elect the language for the text extraction from in list:  a]  []  []  []  []  []  []  []  []  []

	ltem	Description
		If [No] is selected, the scanned document will be converted to an Image PDF file (with no text data).
В	[Assign a User Password]	Allows the user to create a PDF that requires a password to open.
		If the user selects [Yes], he/she must enter a password in the adjacent field.
		() Limitation
		The maximum length is 32 characters.
С	[Assign a Master Password]	Allows the user to restrict others from printing, modifying, or copying text and graphics from the PDF file by assigning a password.
		If the user selects [Yes], he/she 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 functions.
		• [Print]
		• [Modify]
		• [Copy/Extract]
		() Limitation
		The maximum length of the password is 32 characters.

# **☆ Important**

• If you assign both a user password and a master password, the passwords must be different. If the passwords are the same, an error will occur.

The following attributes can be set for PDF passwords:

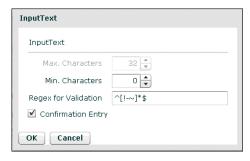
ltem	Description
[Max. Characters]	Maximum length of a password. Fixed to 32 characters.
[Min. Characters]	Minimum length of a password. Select from 0 to 32 characters.
[Regex for Validation]	Regular expression to be used to check the password entered.

Follow the instructions below:

- 1. Open the MFP Configuration screen for PDF Converter filter from AdminTool.
- 2. Double click the textbox of the password that you want to set the attributes, [Assign a User Password] or [Assign a Master Password].



3. In the dialog that appears, specify each item appropriately and click the [OK] button.

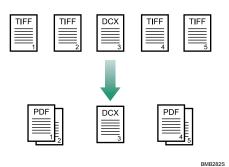


### **PDF Converter Filter Process Conditions**

- When input data consists of unprocessable data only:
   The data is not converted and is passed to the next step in the flow. An error is not generated.
- When input data contains some files with unprocessable data:

The unprocessable data is not converted into the PDF file and remains in the output document as it is. For example, when you want to convert the 4 single-page TIFF files and 1 DCX file into 1 multi-page PDF file, the result will be as follows.

Fig.: PDF Converter Filter Example



• When an internal error occurs:

The conversion process fails and the remaining part of the Flow cannot be executed.

If a document in an unsupported format is passed to this Filter:

The conversion process will fail and an error will be generated.



• The original scanned data will be deleted when the conversion is completed successfully.

# **Enhanced PDF Converter Filter**

The PDF Converter Filter can be used to convert the scanned image into a PDF file.

### Supported Formats (Input Data)

The following file formats are supported as input data by the Enhanced PDF Converter Filter.

File Format
IFF
IFF-F
DCX
3MP
PEG
NG
GIF
DF



- If a document in an unsupported format is passed to this Filter, the conversion process will fail and an error will be generated.
- PDF can be input only via HotFolder Plug-in.
- BMP (OS/2) V1 and BMP (OS/2) V2 are not supported.
- TIFF-F (32-bit) is not supported.
- Although all documents scanned with MFP are supported, the conversion process will fail if
  the documents are input via HotFolder Plug-in.

### Convertible Formats (Output Data)

The following file formats are supported as output data by the Enhanced PDF Converter Filter.

File Format	PDF version
Image PDF	1.3
	1.4
High Compression PDF	1.3

Δ

File Format	PDF version
Searchable PDF	1.3
Password-protected PDF	1.4



• When you select several output formats listed above together into one PDF file, the PDF file version conforms to the higher version. For example, the PDF version of a searchable PDF that is password protected will be 1.4.

### PDF Converter (Enhanced) Properties Screen

The following is the PDF Converter (Enhanced) Properties screen

### PDF Converter (Enhanced) Properties Screen

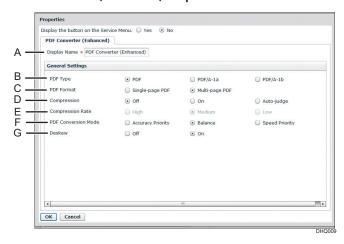


Table: PDF Converter (Enhanced) Properties

	Di Convener (Ennancea) Proporties	
	ltem	Description
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[PDF Type]	Select the PDF type.  • PDF  • PDF/A-1a  • PDF/A-1b

	ltem	Description
		<ul> <li>Limitation</li> <li>If PDF/A-1a or PDF/A-1b is selected as the PDF type, MFP users can create only image PDFs. MFP users cannot assign passwords to PDFs.</li> <li>Note</li> <li>If PDF/A-1a or PDF/A-1b is selected as the output format, all settings on the [PDF Converter (Enhanced)]</li> </ul>
С	[PDF Format]	tab will be unavailable on the MFP display panel.  Specify the PDF format.  If [Single-page PDF] is selected, a single-page PDF will be created.  If [Multi-page PDF] is selected, a multi-page PDF will be created.
D	[Compression]	Specify the compression setting.  If [Off] is selected, a PDF will be created without a compression.  If [On] is selected, a compression PDF will be created according to the setting specified for [Compression Rate].  If [Auto-judge] is selected, whether or not to compress a PDF will be determined by the original content.
E	[Compression Rate]	Specify the ratio of the compression.  • [High]  • [Medium]  • [Low]  • Limitation  • This setting is available if [On] or [Auto] is selected for [Compression].
F	[PDF Conversion Mode]	Specify the PDF conversion mode.  • [Accuracy Priority]  • [Balance]  • [Speed Priority]

	ltem	Description
		<ul> <li>Note</li> <li>The effect may not work depending on an original content although the setting is specified.</li> </ul>
G	[Deskew]	Specify the skew correction setting.  If [On] is selected, a PDF will be created with the skew correction applied.
		If the image is rotated by applying the skew correction process, the resulting margins will be added to the image and filled in with black. As the result of the margins, the size of the output image will be larger than the original document size.
		If [Off] is selected, a PDF will be created without any skew correction applied.



• The color depth of the PDF/A file created by Enhanced PDF Converter Filter is as follows:

Scan type	Color depth
Text	1 bit
Text/Line Art	1 bit
Text/Photo	1 bit
Photo	1 bit
Gray Scale	8 bit
Text/Photo (full color)	24 bit
Glossy Photo (full color)	24 bit

### MFP Configuration Screen - Enhanced PDF Converter Filter

On this screen, you can configure the appearance of the MFP display panel and preset PDF settings for the Enhanced PDF Converter Filter. You can also limit which items are available to MFP users.



 For details about configuring and limiting the settings on the MFP display panel, see page 280 "About Distribution Parameters".

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Fig.: MFP Configuration Screen - Enhanced PDF Converter Filter

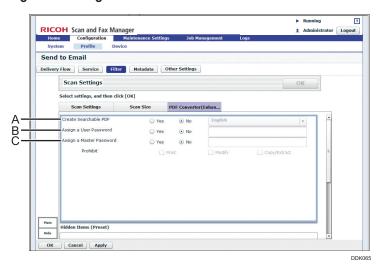


Table: MFP Configuration Screen - Enhanced PDF Converter Filter

	ltem	Description
Α	A [Create Searchable PDF]	Allows the user 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]

	ltem	Description
		<ul> <li>[Traditional Chinese]</li> <li>[Japanese]</li> <li>[Swedish]*1</li> <li>[Polish]*1</li> <li>[Hungarian]*1</li> <li>[Czech]*1</li> <li>[Finnish]*1</li> <li>[Thai]*1</li> <li>[Greek]*1</li> <li>[Korean(Hangul)]*1</li> <li>[Catalan]*1</li> <li>[Turkish]*1</li> <li>[Arabic]*2</li> <li>[Hebrew]*2</li> <li>[Vietnamese]*2</li> <li>*1 To display the language, double-click the drop-down list, and then specify the language which you want to display.</li> <li>*2 This feature requires activation for the Streamline NX Additional OCR Language Option.</li> <li>If [No] is selected, the scanned document will be converted to an Image PDF file (with no text data).</li> </ul>
В	[Assign a User Password]	Allows the user to create a PDF that requires a password to open.  If the user selects [Yes], he/she must enter a password in the adjacent field.  Limitation  • The maximum length is 32 characters.
С	[Assign a Master Password]	Allows the user to restrict others from printing, modifying, or copying text and graphics from the PDF file by assigning a password.  If the user selects [Yes], he/she must enter a password in the adjacent field. And then, select the items next to [Prohibit] to

ltem	Description
	require the PDF reader to enter the master password to use those functions.
	• [Print]
	• [Modify]
	• [Copy/Extract]
	() Limitation
	The maximum length of the password is 32 characters.



• If you assign both a user password and a master password, the passwords must be different. If the passwords are the same, an error will occur.

The following attributes can be set for PDF passwords:

ltem	Description
[Max. Characters]	Maximum length of a password. Fixed to 32 characters.
[Min. Characters]	Minimum length of a password. Select from 0 to 32 characters.
[Regex for Validation]	Regular expression to be used to check the password entered.  • ^[!-~]*\$ is set by default, indicating alphanumeric characters and symbols can be used for a password.
[Confirmation Entry]	Specify whether or not to enable confirmation entry of password to prevent incorrect input.  When selected, the user must enter their password twice when scanning a document.

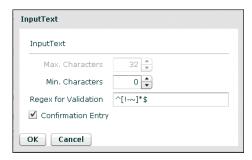
Follow the instructions below:

1. Open the MFP Configuration screen for Enhanced PDF Converter filter from AdminTool.

2. Double click the textbox of the password that you want to set the attributes, [Assign a User Password] or [Assign a Master Password].



3. In the dialog that appears, specify each item appropriately and click the [OK] button.



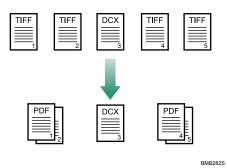
### **Enhanced PDF Converter Filter Process Conditions**

When input data consists of unprocessable data only:
 The data is not converted and is passed to the next step in the flow. An error is not generated.

• When input data contains some files with unprocessable data:

The unprocessable data is not converted into the PDF file and remains in the output document as it is. For example, when you want to convert the 4 single-page TIFF files and 1 DCX file into 1 multi-page PDF file, the result will be as follows.

Fig.: Enhanced PDF Converter Filter Example



When an internal error occurs:

The conversion process fails and the remaining part of the Flow cannot be executed.

If a document in an unsupported format is passed to this Filter:

The conversion process will fail and an error will be generated.

### **○** Limitation

- It is not possible to deliver a PDF file created by PDF Converter (Enhanced) if SFNX performs Send to Email with Logical Division.
- Placing PDF Converter (Enhanced) and PDF Converter into the same delivery flow is not supported.
- Placing PDF Converter (Enhanced) and Image Correction into the same delivery flow is not supported.



• The original scanned data will be deleted when the conversion is completed successfully.

#### 4

# **Image Converter Filter**

The Image Converter Filter can be used to convert a document into a different file format data.

### Supported Formats (Input Data)

The following file formats are supported as input data by the Image Converter Filter.

File Format
TIFF (MH, single-page)
TIFF (MR, single-page)
TIFF (MMR, single-page)
TIFF (Uncompressed, single-page)
TIFF (MH, multi-page)
TIFF (MR, multi-page)
TIFF (MMR, multi-page)
TIFF (Uncompressed, multi-page)
TIFF-F (MH, single-page)
TIFF-F (MR, single-page)
TIFF-F (MMR, single-page)
TIFF-F (MH, multi-page)
TIFF-F (MR, multi-page)
TIFF-F (MMR, multi-page)
DCX (single-page)
DCX (multi-page)
BMP (Uncompressed)
JPEG
PNG
GIF

- The following file formats are supported as input data by [Image Converter (Serverless)].
  - TIFF (MMR, single-page)

# Convertible Formats (Output Data)

The following file formats are supported as output data by the Image Converter Filter.

File Format
TIFF (MH, single-page)
TIFF (MR, single-page)
TIFF (MMR, single-page)
TIFF (Uncompressed, single-page)
TIFF (MH, multi-page)
TIFF (MR, multi-page)
TIFF (MMR, multi-page)
TIFF (Uncompressed, multi-page)
TIFF-F (MH, single-page)
TIFF-F (MR, single-page)
TIFF-F (MMR, single-page)
TIFF-F (MH, multi-page)
TIFF-F (MR, multi-page)
TIFF-F (MMR, multi-page)
DCX (single-page)
DCX (multi-page)
BMP (Uncompressed)
JPEG
PNG
GIF

### File Format

File Format selected on the MFP display panel by the user



- The following file formats are supported as output data by [Image Converter (Serverless)].
  - TIFF (MMR, multi-page), File Format selected on the MFP display panel by the user

# Reference

- For details about limitations for Input data/Output data, see page 466 "Input/Output Formats for the Image Converter Filter" in the Appendix.
- For details on letting the user select the output format, see page 490 "Using the Image Converter Filter" in the Appendix.

### **Image Converter Filter Properties Screen**

The following is the Image Converter Filter Properties screen.

### **Image Converter Filter Properties Screen**

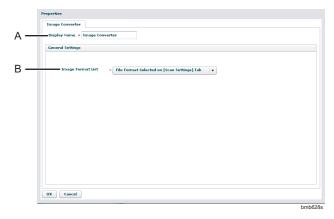


Table: Image Converter Filter Properties

	ltem	Description
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[Image Format List]	Select the output format from the drop-down list.  • [File Format Selected on [Scan Settings] Tab]  • [TIFF (MH, single-page)]  • [TIFF (MR, single-page)]

ltem	Description
	• [TIFF (MMR, single-page)]
	<ul> <li>[TIFF (Uncompressed, single-page)]</li> </ul>
	• [TIFF (MH, multi-page)]
	• [TIFF (MR, multi-page)]
	• [TIFF (MMR, multi-page)]
	• [TIFF (Uncompressed, multi-page)]
	• [TIFF-F (MH, single-page)]
	• [TIFF-F (MR, single-page)]
	• [TIFF-F (MMR, single-page)]
	• [TIFF-F (MH, multi-page)]
	<ul> <li>[TIFF-F (MR, multi-page)]</li> </ul>
	• [TIFF-F (MMR, multi-page)]
	• [DCX (single-page)]
	• [DCX (multi-page)]
	• [BMP (Uncompressed)]
	• [JPEG]
	• [PNG]
	• [GIF]

# 

When you preset the output format, the format selection that the MFP user makes on the MFP
display panel is ignored. Therefore, it is recommended to hide the [File Format] component on
the [Scan Settings] tab by moving it to the [Hidden Items (Preset)] screen to not confuse the
user.

# ■ Reference

• See page 490 "Using the Image Converter Filter" in the Appendix.



- Under the General Setting of [Image Converter (Serverless)], the following settings can be specified:
  - Image Format List: TIFF (MMR, multi-page), File format selected on [Scan Settings] tab

### MFP Configuration Screen - Image Converter Filter

There are no MFP configuration settings for this Filter.

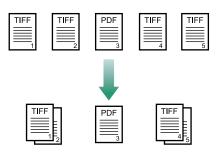
### **Image Converter Filter Process Conditions**

• When input data consists of unprocessable data only:

The data is not converted and is passed to the next step in the flow. An error is not generated.

· When input data contains some files with unprocessable data:

The unprocessable data cannot be converted into the specified format file and remains in the output document as it is. For example, when you want to convert the 4 single-page TIFF files and 1 PDF file into 1 multi-page TIFF file, the result will be as follows.



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When an internal error occurs:

The conversion process fails and the remaining part of the Flow cannot be executed.



• The original data will be deleted when the conversion is completed successfully.

#### About Document Formats and the Image Converter Filter

When the MFP scans a document, the initial format for the document is either TIFF or JPEG, depending on the scan settings of the MFP, as follows:

- Black & White: TIFF (MMR, single-page)
- Grayscale/Color: JPEG

The image is processed in these formats by all Services/Filters preceding an Image Converter Filter. If the Image Converter Filter is not in the Flow, the output will be in the default format (TIFF/ JPEG), regardless of the format that the MFP user selects. Figs. x-x shows the formats that are output with different Flows.

Fig.: Black & White, user selects PNG with Image Converter Filter

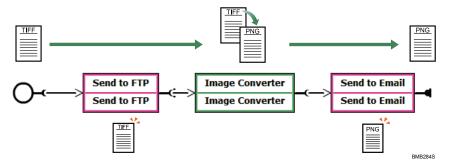


Fig.: Black & White, user selects PNG without Image Converter Filter

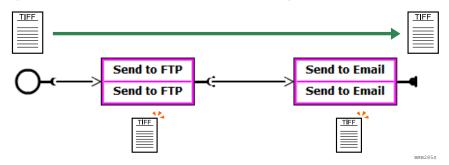


Fig.: Grayscale/Color, user selects GIF with Image Converter Filter

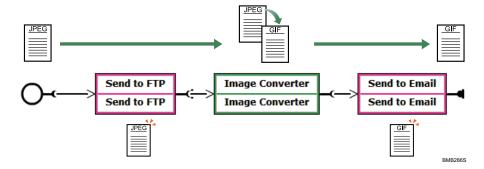
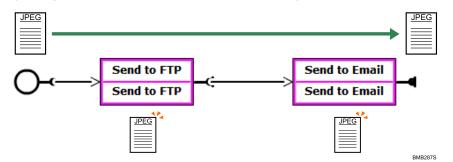


Fig.: Grayscale/Color, user selects GIF without Image Converter Filter





 When not using the Image Converter Filter, the format selection that the MFP user makes on the MFP display panel is ignored. Therefore, it is recommended to hide the [File Format] component on the [Scan Settings] tab by moving it to [Hidden Items (Preset)] to not confuse the user.

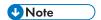
# **Image Correction Filter**

Using the Image Correction Filter, you can improve scanned images.

### Supported Formats (Input Data)

The following file formats are supported as input data by the Image Correction Filter.

File Format
TIFF (MH, single-page)
TIFF (MR, single-page)
TIFF (MMR, single-page)
TIFF (Uncompressed, single-page)
TIFF (MH, multi-page)
TIFF (MR, multi-page)
TIFF (MMR, multi-page)
TIFF (Uncompressed, multi-page)
TIFF-F (MH, single-page)
TIFF-F (MR, single-page)
TIFF-F (MMR, single-page)
TIFF-F (MH, multi-page)
TIFF-F (MR, multi-page)
TIFF-F (MMR, multi-page)
DCX (single-page)
DCX (multi-page)
BMP (Uncompressed)
JPEG
PNG
GIF



• If an unsupported file format is entered, the data is directly output without being processed by the Image Correction Filter.

### Convertible Formats (Output Data)

The following file formats are supported as output data by the Image Correction Filter.

File Format
TIFF (MH, single-page)
TIFF (MR, single-page)
TIFF (MMR, single-page)
TIFF (Uncompressed, single-page)
TIFF (MH, multi-page)
TIFF (MR, multi-page)
TIFF (MMR, multi-page)
TIFF (Uncompressed, multi-page)
DCX (single-page)
DCX (multi-page)
BMP (Uncompressed)
JPEG
PNG
GIF

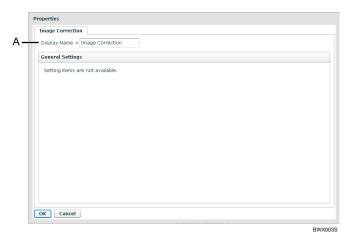


• TIFF-F format files are not supported for output data. If a TIFF-F format file is input, the output will be a TIFF format file.

# **Image Correction Filter Properties Screen**

The following is the Image Correction Filter Properties screen.

### Fig.: Image Correction Filter Properties Screen



**Table: Image Correction Filter Properties** 

	ltem	Description
А	[Display Name]	Enter the display name for the Filter.
	(Project Settings	() Limitation
	only)	The maximum length is 30 characters.

### MFP Configuration Screen - Image Correction Filter

On this screen, you can configure the appearance of the MFP display panel and preset options. You can also limit which items are available to MFP users.

Fig.: MFP Configuration Screen - Image Correction Filter

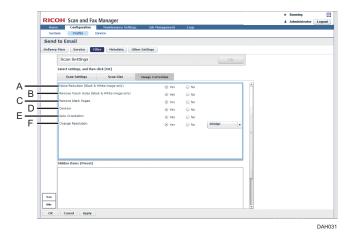
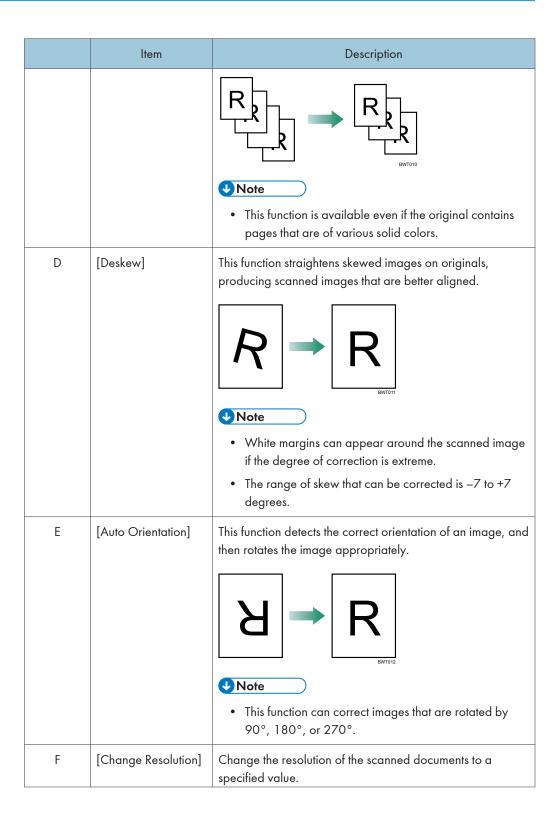


Table: MFP Configuration Screen - Image Correction Filter

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



ltem	Description
	Note
	<ul> <li>The values you can specify are: 100 dpi, 200 dpi, 300 dpi, 400 dpi, and 600 dpi.</li> </ul>
	The resolution will not be changed if the resolution of the scanned document is less than the specified value.



• The following table shows the relationship between the number of punch holes whose shadows can be removed, punch hole size, and paper size.

Punch holes	Pitch	Paper size
2	80 mm	A3, A4, A5, B4, B5, B6
3	108 mm	$8^{1}/_{2} \times 11$ inch, A4
	89 mm	7 x 9 inch
	70 mm	$6^{1}/_{2} \times 8^{1}/_{2}$ inch
4	57 mm	B5
	80 mm	A4
	20 mm, 70 mm	A4

# **Archiver Filter**

The Archiver Filter can be used to archive scanned documents in the specified format. For example, if your organization must retain all email correspondence, each scanned document can be converted into a .zip or .tgz file.



• A document is archived into an archive file regardless of the number of Sections it has.

### Supported Formats (Input Data)

The Archiver Filter supports all formats that are supported by the Scan and Fax Manager.

### Convertible Formats (Output Data)

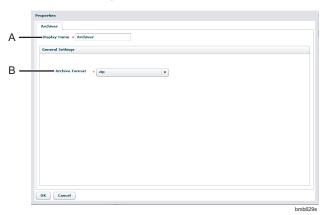
The following archive formats are supported as output data by the Archiver Filter.

- zip
- tgz (Tar compressed with gzip)

### **Archiver Filter Properties Screen**

The following is the Archiver Filter Properties screen.

### **Archiver Filter Properties Screen**



**Table: Archiver Filter Properties** 

	ltem	Description
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[Archive Format]	Select the archive format from the drop-down list:  • zip

ltem	Description
	• tgz

### MFP Configuration Screen - Archiver Filter

There are no MFP configuration settings for this Filter.

### **Archiver Filter Process Condition**

• When an internal error occurs:

The conversion process fails and the remaining part of the Flow cannot be executed.



• The original data will be deleted when the conversion is completed successfully.

# **OCR Filter**

The OCR Filter converts scanned data into text data using OCR software. This Filter also supports auto orientation, and can create a file name for the document based on text extracted from the first page of the scanned data.

### Supported Formats (Input Data)

The following file formats are supported as input data by the OCR Filter.

- TIFF
- TIFF-F
- DCX
- BMP
- JPEG
- PNG
- GIF

### Convertible Formats (Output Data)

If you are converting the file into text, the following file formats are supported as output by the OCR Filter.

- RTF
- XIS
- XLSX
- DOCX

If you are only using the auto-orientation feature, the output format is the same as the input format.

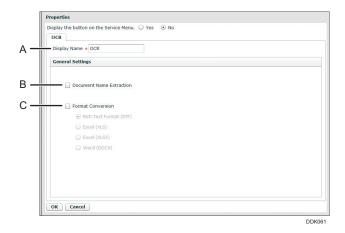
# Limitation

- When you use the format conversion function, if the input format of the file is not one of the supported input formats, the output format will be the same as the input format.
- When [Auto Orientation] is enabled and input data is TIFF-F format, the output data will be
  converted to TIFF format. However, the compression method (for example, MMR, MH, etc.)
  will be the same as the original input data.

### **OCR Filter Properties Screen**

The following is the OCR Filter Properties screen.

# **OCR Filter Properties Screen**



**Table: OCR Filter Properties** 

	ltem	Description
Α	[Display Name]	Enter the display name for the Filter.
	(Project Settings only)	Limitation
		The maximum length is 30 characters.
В	[Document Name Extraction]	Select this option to use key words on the first page of the scanned document to create the file name.  Q Limitation
		The maximum length of the file name is 128 characters.
С	[Format Conversion]	Select this option to convert the file to the specified format. The output file contains the text extracted from the document.
		• [Rich Text Format (RTF)]
		Converts the file to Rich Text Format.
		• [Excel (XLS)]
		Converts the file to an Excel spreadsheet.
		• [Excel (XLSX)]
		Converts the file to an Excel 2007 XML-based file format (.xlsx).
		• [Word (DOCX)]
		Converts the file to a Word 2007 XML-based document format (.docx).

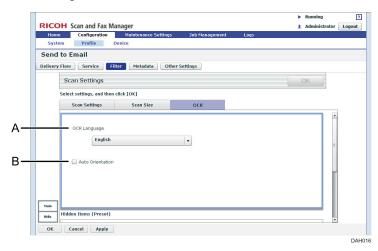
### MFP Configuration Screen - OCR Filter

On this screen, you can configure the appearance MFP display panel and preset the language and orientation detection for the OCR Filter. You can also limit which items are available to MFP users.



 For details about configuring and limiting the settings on the MFP display panel, see page 280 "About Distribution Parameters".

### MFP Configuration Screen - OCR Filter



### Table: MFP Configuration Screen - OCR Filter

	ltem	Description
Α	[OCR Language]	Select the language for OCR from the drop-down list:  • [English]  • [German]  • [French]  • [Italian]  • [Spanish]
		• [Dutch]

	ltem	Description
		• [Danish]
		• [Portuguese]
		• [Norwegian]
		• [Russian]
		• [Simplified Chinese]
		• [Traditional Chinese]
		• [Japanese]
		• [Korean(Hangul)]
В	[Auto Orientation]	Select this option to enable the automatic orientation adjustment of the scanned data.
		If selected, the OCR Filter determines the orientation of the scanned data based on the results of the OCR operation, and rotates it automatically.

### **OCR Filter Process Conditions**

• When input data contains unprocessable data:

The OCR process is skipped and the remaining part of the Flow will be executed.

• When the input data contains some files with unprocessable data:

The files with unprocessable data are skipped.

• When an internal error occurs:

The OCR process fails and the remaining part of the Flow cannot be executed. The error will be logged in the Job Log.

The Section Specify Filter can be used to extract any Sections from a Document. For example, it can be used when every received fax has a cover sheet on the first page, and you would like to send the document excluding the cover sheet. In addition, it is useful when you scanned a brochure and you would like to send the body page excluding its cover.

### Reference

 For details about Sections, see page 23 "MFP Configuration Terms" (Standard Operation Panel) or page 32 "MFP Configuration Terms" (Smart Operation Panel).

### Supported Formats (Input Data)

The Section Specify Filter supports all formats that are supported by the Scan and Fax Manager.

### Convertible Formats (Output Data)

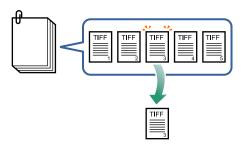
Output data format will be the same as the input data.

### **Target of Section Specify Filter**

The target of the Section Specify Filter is Sections, but not pages.

• Example 1 (Multiple single-page Sections)

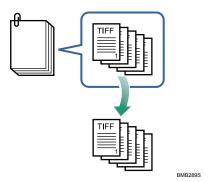
When a Document (Input Data) consists of 5 single-page TIFF files (5 Sections), and the specified target is the third Section of the Document, the third Section file will be extracted. The rest of the Sections will be deleted.



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Example 2 (One multi-page Section)

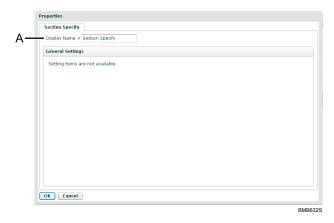
When a Document (Input Data) consists of 1 multi-page TIFF file (1 Section), and the specified target is the first Section of the Document, the first Section (not the first page) will be extracted.



### **Section Specify Filter Properties Screen**

The following is the Section Specify Filter Properties screen.

### **Section Specify Filter Properties screen**



**Table: Section Specify Filter Properties** 

		. •
	ltem	Description
Α	[Display Name]	Enter the display name for the Filter.
	(Project Settings	() Limitation
	only)	The maximum length is 30 characters.

### MFP Configuration Screen - Section Specify Filter

On this screen, you can configure the appearance of the MFP display panel and preset the Sections to extract for the Section Specify Filter. You can also limit which items are available to MFP users.

Fig.: MFP Configuration Screen - Section Specify Filter

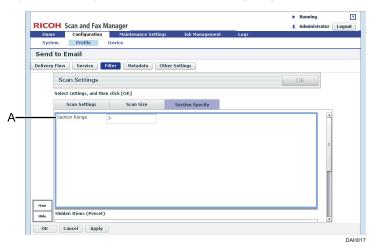


Table: MFP Configuration Screen - Section Specify Filter

		•	1 /
		Item	Description
	Α	[Section Range]	Specify the target Sections to be extracted from the Document.  The default is "1-", i.e., all Sections.

### **Section Range Specification Examples**

It is necessary to input numbers in the adjacent field in order to specify the extracted Section.

The following examples are for a Document consisting of 5 Sections.

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 to 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).

Entry Example	Result
(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. Sections 6-8 are 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).



• The rest of the Sections in the Document will be deleted when the conversion is completed successfully.

# **Section Splitter Filter**

The Section Splitter Filter can be used to split a job including multiple sections into jobs including sections specified for "Number of Sections" on the MFP's control panel.

#### Supported Formats (Input Data)

The Section Specify Filter supports all formats that are supported by the Scan and Fax Manager.

#### Convertible Formats (Output Data)

Output data format will be the same as the input data.

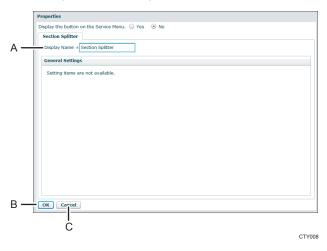
#### **Target of Section Specify Filter**

The target of the Section Specify Filter is Sections, but not pages.

#### **Section Splitter Filter Properties Screen**

The following is the Section Splitter Filter Properties Screen.

#### Section Splitter Filter Properties Screen

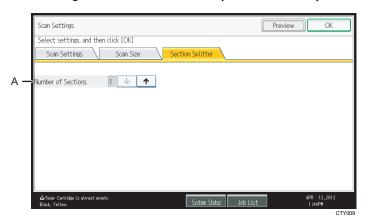


#### **Table: Section Splitter Filter Properties**

	ltem	Description
А	[Display Name]	Enter the display name.
В	[OK]	Save the settings and exit.
С	[Cancel]	Exit without saving the settings.

#### 4

# Scan Settings screen of MFP's control panel - Section Splitter Filter



# Scan Settings screen of MFP's control panel - Section Splitter Filter

	Item	Description
A	[Number of Sections]	Specify the number of sections for split between 1 and 500.

# **XML Transformer Filter**

The XML Transformer Filter can be used to extract the document Metadata information as XML data. An XSL file (a style sheet for XML) can be specified to convert the original Metadata of scanned documents to other formats such as HTML, CSV.

#### Supported Formats (Input Data)

 The XML Transformer Filter supports all formats that are supported by the Scan and Fax Manager.

#### Convertible Formats (Output Data)

- The output data format will be the same as the input data. In addition, the Metadata can be output to the following formats:
  - XML
  - The format targeted by the XSL file



- To use the XML Transformer Filter, you must create an XSL file (style sheet for converting the XML file) in advance depending on the usage.
- You can use sample XSL files in the following folder of the Scan and Fax Manager Installation media. ("X" is the drive letter of the installation media.)
  - X: \samples\StyleSheets\
- This Filter converts the Metadata of the document only, not the original document.

# Limitation

- XSL style sheet files for the XML Transformer Filter must be saved using the UTF-8 character encoding method.
- The XSL file must be compliant with the following. Otherwise, the Flow will fail:
  - XSL Transformations (XSLT) Version 1.0
  - XML Path Language (XPath) Version 1.0

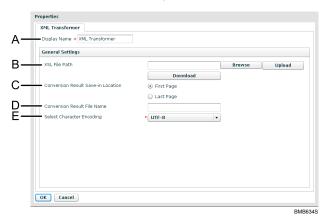
# ■ Reference

 For details about the format of the Metadata (XML format), see page 468 "Metadata Specifications".

#### **XML Transformer Filter Properties Screen**

The following is the XML Transformer Filter Properties screen.

# **XML Transformer Filter Properties Screen**



**Table: XML Transformer Filter Properties** 

	Item	Description
A	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[XSL File Path]	Click [Browse] to select the XSL file to be used for the XML Transformer Filter. To apply the settings, click [Upload]. To download the XSL file, click [Download].
		If no XSL file is specified, the original Metadata (XML) will be added to the document.
		<b>₩</b> Important
		<ul> <li>Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.</li> </ul>
		() Limitation
		<ul> <li>You can replace an existing XSL file by uploading a new one, but you cannot delete an XSL file from the Filter. If you want to remove the XSL file (so that Metadata is output in its native XML format), you must remove the Filter from the flow and add a new one.</li> </ul>
		<b>↓</b> Note
		On the Properties screen of the XML Transformer Filter, when you click [Upload], the XSL file path field always displays the name "dest.xsl", instead of the actual name of the specified file.

	Item	Description
С	[Conversion Result Save-in Location]	Select where to add the converted document information.  If [First Page] is selected, the converted document information will be added to the first Section of the document.  If [Last Page] is selected, it will be added to the last Section of the document.
D	[Conversion Result File Name]	Enter a file name for the converted document information. Make sure to add the extension at the end of the name.  If this field is left blank, the file name that the MFP user inputs on the MFP display panel will be used. If the user does not input a file name, the timestamp (yyyymmddhhmmss) will be used.  • If you do not include an extension in the file name, no extension is added. In addition, no extension is added when the user does not input a file name.
E	[Select Character Encoding]	Select the character encoding methods from the drop-down list.  The following character encoding methods are supported:  • UTF-8  • Latin-1

# MFP Configuration Screen - XML Transformer Filter

There are no MFP configuration settings for this Filter.

#### 4

# Flow Redirect Filter

The Flow Redirect Filter can be used to transfer a job from a certain document distribution flow of a Project to another Project. For example, it is useful if you want to distribute fax documents to different destinations depending on the TSI code of each fax document.

#### Supported Formats (Input Data)

The Flow Redirect Filter supports all formats that are supported by the Scan and Fax Manager.

#### Convertible Formats (Output Data)

Output data format will be the same as the input data.



- Flow Redirection can be used up to 10 times per job.
- Attempting to redirect more times than is supported causes the job to fail.
- To use the Flow Redirect Filter, Replacement Tables must be created in advance. See page 434
  "Replacement Table Settings".

# **⚠** Limitation

- The transfer destinations must be One-touch Scan Projects that are in the same Profile as the Flow Redirect Filter.
- A redirected Project cannot be redirected again to another Project.

#### Flow Redirect Filter Properties Screen

The following is the Flow Redirect Filter Properties screen.

Fig.: Flow Redirect Filter Properties Screen

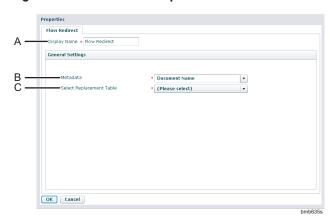


Table: Flow Redirect Filter Properties

	ltem	Description
Α	[Display Name]	Enter the display name for the Filter.

	ltem	Description
	(Project Settings only)	<b>Q</b> Limitation
		The maximum length is 30 characters.
В	[Metadata]	Select the target Metadata item from the drop-down list or enter an item name (ID) directly into the list box. This is used to compare the target Metadata item (for example, Document Name) of the document with the value of the [Comparison Target String] set in the Replacement Table.  • When you want to utilize a custom Metadata item or basic Metadata item that is not displayed in the dropdown list as the target Metadata item, you need to enter the item name (ID) of the Metadata item in the list box.
С	[Select Replacement Table]	Select the preset Replacement Table to be used for the flow redirection from the drop-down list.  This table decides which destination the document is to be transferred to.



- See page 468 "Metadata Specifications".
- See page 434 "Replacement Table Settings".

### MFP Configuration Screen - Flow Redirect Filter

There are no MFP configuration settings for this Filter.

#### Flow Redirect Filter Process Conditions

 When the value of the target Metadata of the document does not match the settings of the selected [Comparison Target String]:

The flow redirection process fails, and the failure will be logged in the System Log.

 When the Flow contains a different distribution process in addition to the one that is followed by the Flow Redirect Filter, and the flow redirection process fails:

The different distribution process will be executed and the failure will be logged in the System Log.

• When a destination Project requires authentication login:

The login information of the original Project will be used for authentication login.

 If the authentication is accepted, but a destination Project contains features that are not authorized for the user, the flow redirection process fails and the failure will be logged in the System Log.

• When a destination Project has been removed:

The flow redirection process fails and the failure will be logged in the System Log. Even if there is a new Project whose name is the same as the deleted one, the flow redirection process fails.

When the destination Project's name has been changed:
 Flow redirection will complete successfully, even if the destination's name has been changed.

 When the destination Project contains the Image Converter Filter and [File Format Selected on [Scan Settings] Tab] is selected on the property screen of the Image Converter Filter:
 The file format selected by the user on the MFP display panel will be the format to which the

Reference

• For details about error logs, see page 355 "System Log".

document is converted by the Filter.

# Metadata Converter Filter

The Metadata Converter Filter can be used to convert the value of a specified Metadata item of the input document, and to change the value of a Metadata item based on the value of a different Metadata item, using rules specified in a Replacement Table. For example, when the Metadata of the input document contains a department number of the Company, this Filter can convert the department number to a department name.

#### Supported Formats (Input Data)

 The Metadata Converter Filter supports all formats that are supported by the Scan and Fax Manager.

#### Convertible Formats (Output Data)

• The output data format will be the same as the input data.



- To use the Metadata Converter Filter, Replacement Tables must be created in advance. page 434
   "Replacement Table Settings".
- This Filter only modifies document Metadata. It does not modify the contents of scanned images.

#### Metadata Converter Filter Properties Screen

The following is the Metadata Converter Filter Properties screen.

#### Metadata Converter Filter Properties screen

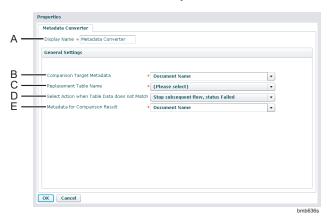


Table: Metadata Converter Filter Properties

	Item	Description
Α	[Display Name]	Enter the display name for the Filter.
	(Project Settings	() Limitation
	only)	The maximum length is 30 characters.

	Item	Description
В	[Comparison Target Metadata]	Select the input target Metadata item from the drop-down list, or enter an item name (ID) directly into the list box. This is used to compare the target Metadata item (for example, Document Name) of the document with the value of [Comparison Target String] set in the Replacement Table
		<b>♣</b> Note
		<ul> <li>When you want to use a custom Metadata item or basic Metadata item that is not displayed in the drop-down list as the target Metadata item, you need to enter the item name (ID) of the Metadata item in the list box.</li> </ul>
		<ul> <li>An error will occur if a Metadata item with the specified item name (ID) does not exist in the document during distribution.</li> </ul>
С	[Replacement Table Name:]	Select the Replacement Table to be used for the Metadata Converter Filter from the drop-down list.
		This table determines how Metadata is changed.
D	[Select Action when Table Data does not Match]	Select the method of how to treat the Flow when the value of the target Metadata of the document does not match the settings of the selected Comparison Target String.
		• [Continue flow using default values]
		The target Metadata item will be replaced using the value of [Default Output] in the Replacement Table, and the flow will continue uninterrupted. If [Default Output] has not been set yet, the output value will be blank. The job will be logged as successful in the Job Log.
		<ul> <li>[Continue flow without performing replacement]</li> </ul>
		This option allows you to continue the Flow without replacing the value of Metadata items that do not match any entries in the Replacement Table.
		• [Skip subsequent flow, status Succeeded]
		The following remaining processes in the Flow will be skipped, and no error will be logged in the System Log. The job will be logged as successful in the Job Log.
		If there is a branch in the Flow before the Metadata Converter Filter, the data will be processed normally in the other branches.
		• [Stop subsequent flow, status Failed]

	ltem	Description
		The Flow fails.
Comparison enter ar Result] the valu with the accordi Replace		Select the output target Metadata item from the drop-down list, or enter an item name (ID) directly into the list box. This is used to replace the value of the target Metadata item (for example, Document Name) with the value of the output Metadata (for example, User Name) according to the rules of [Comparison Target String] set in the Replacement Table.
		When you want to use a custom Metadata item or basic     Metadata item that is not displayed in the drop-down list as the     target Metadata item, you need to enter the item name (ID) of the     Metadata item in the list box.
		If a Metadata item with the specified item name (ID) does not exist, it will be added and its value will be set to the output value.

### ■ Reference

- See page 468 "Metadata Specifications".
- See page 434 "Replacement Table Settings".

#### MFP Configuration Screen - Metadata Converter Filter

There are no MFP configuration settings for this Filter.

#### **Metadata Converter Filter Process Conditions**

 When the Replacement Table is not specified or removed from the system, or the document does not have the specified Metadata items:

The conversion process fails and the failure will be logged in the System Log.

 When the value of the target Metadata of the document does not match the settings of the selected Comparison Target String:

The conversion process will be treated as the selected method in [Select Action when Table Data does not Match].

# Reference

• For details about error logs, see page 355 "System Log".

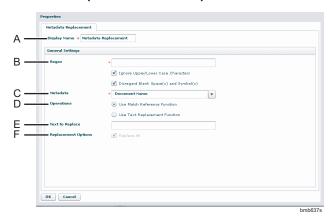
The Metadata Replacement Filter can be used to validate the value of specified Metadata of the input document and to modify certain parts of the value of a Metadata item. For example, it can be used to remove hyphens from a phone number, validate an email address, or change all uppercase letters in an item to lowercase. Unlike the Metadata Converter Filter, Replacement Tables are not necessary for this Filter.

#### Metadata Replacement Filter Properties Screen

The following is the Metadata Replacement Filter Properties screen.

#### Metadata Replacement Filter Properties screen

Metadata Replacement Filter



**Table: Metadata Replacement Filter Properties** 

	ltem	Description
А	[Display Name] (Project Settings only)	Enter the display name for the Filter.  Limitation  The maximum length is 30 characters.
В	[Regex]	Enter the regular expression for checking or replacing the value of the Metadata items.  • [Ignore Upper/Lower Case Characters]  If enabled, a letter's case is ignored (for example, "a" is the same as "A").  • [Disregard Blank Space(s) and Symbol(s)]  If enabled, spaces and unnecessary symbols in the Regex are not recognized.

	ltem	Description
С	[Metadata]	Select the target Metadata item from the drop-down list or enter an item name (ID) directly into the list box. This is used to compare the target Metadata item (for example, Document Name) of the document with the value of [Regex], and the value of the target Metadata item will be replaced.
		<b>U</b> Note
		When you want to use a custom Metadata item or basic Metadata item that is not displayed in the drop-down list as the target Metadata item, you need to enter the item name (ID) of the Metadata item in the list box.
D	[Operations]	Select the operation for this Filter from the following:
		[Use Match Reference Function]
		The specified Metadata item's value is compared with the regular expression specified in [Regex].
		[Use Text Replacement Function]
		The specified Metadata item's value is compared with the regular expression specified in [Regex] and replaced with the value specified in [Text to Replace].
Е	[Text to	Enter the text to replace the value of the target Metadata with.
	Replace]	Limitation
		This feature is available when [Use Text Replacement Function] is selected.
F	[Replacement Options]	Select [Replace All] to replace each text string that matches the regular expression.
		If not selected, only the first match is replaced.
		() Limitation
		This feature is available when [Use Text Replacement Function] is selected.

# **■** Reference

• See page 468 "Metadata Specifications".

# MFP Configuration Screen - Metadata Replacement Filter

There are no MFP configuration settings for this Filter.

#### **Regular Expression Usage Examples**

In addition to the regular expressions explained in page 474 "About Regular Expressions", the following special variables can be used for modification by the Metadata Replacement Filter.

Variables	Description	
\$1, \$2,	The part that matches a group in the regular expression.	
\$&	The whole part that matches the regular expression.	

The followings are regular expression usages for checking and replacing the value of the target Metadata item.

• Example 1 (To check if a phone number in the document is valid)

It is assumed that valid phone numbers include the following:

0123-45-6789

301-555-2345

080-9999-4321

- [Regex]: \d{2,4}-\d{2,4}-\d{4}
- [Operations]: [Use Match Reference Function] is selected
- Example 2 (To remove hyphens from a telephone number)

It is assumed that telephone numbers have the following structure:

(2-4 digits)-(2-4 digits)-(4 digits)

For example, to remove all '-' from 0123-45-6789:

- [Regex]: -
- [Operations]: [Use Text Replacement Function] is selected
- [Text to Replace]: (blank)
- [Replace All]: selected

The converted results are as follows:

0123456789

 Example 3 (To change a document's name from the format "yyyymmddhhmmss" to "yyyymmdd")

This example shows how to remove the portion of a file name that represents the time the file was created, and leave only the date portion.

For example, a file created on November 12, 2008, 4:41:00 PM might have the file name "20081112164100".

To truncate the time portion (164100), use the following settings:

- [Regex]: (.{8})(.\*)
- [Operations]: [Use Text Replacement Function] is selected
- [Text to Replace]: \$1
- [Replace All]: selected

The converted results are as follows:

20081112

• Example 4 (To extract a specific portion of a document name)

This example shows how to extract a specific portion of a document name.

For example, to extract the portion "2008" from a document whose name is

"extracted\_20081110135026", use the following settings:

• [Regex]: (.\*)(.{4})(.{10})

Select both [Ignore Upper/Lower Case Characters] and [Disregard Blank Space(s) and Symbol(s)].

- Operations: [Use Text Replacement Function] is selected
- [Text to Replace]: \$2
- [Replace All]: selected

The converted results are as follows:

2008

# Reference

• See page 474 "About Regular Expressions" in the Appendix.

#### Metadata Replacement Filter Process Condition

When the specified Metadata item does not exist in the Metadata of the input document:
 The conversion process will be skipped and the Flow will continue. The Job Log will indicate that processing was successful, but the System Log will indicate that this Filter was skipped.

# Reference

• For details about error logs, see page 355 "System Log".

# **PDF Stamper Filter**

The PDF Stamper Filter can be used to create a PDF file with the specified text or image embedded.

You can select a stamp type from Bates Stamp, Image Stamp, Text Watermark, or Image Watermark.

The following table shows output image samples using each stamp type:

Stamp Type	Output Image
Bates Stamp	XXXXXX  XXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Image Stamp	XXXXX
Text Watermark	XXXXX

Stamp Type	Output Image
Image Watermark	XXXXX  XXXXXXXXXXXXXXXXX  XXXXXXXXXXXX

#### Supported Formats (Input Data)

The following file formats are supported as input data for the PDF Stamper Filter.

File Format
TIFF
ВМР
PDF



- If an encrypted PDF file is passed to this Filter, the conversion process will fail and an error will be generated.
- If a document in an unsupported format is passed to this Filter, the process will be skipped.
- For details about file formats which are not supported by this filter, see Readme.
- If a PDF file is input via HotFolder Plug-in, the version and additional functions of the PDF file such as tagged PDF are removed.

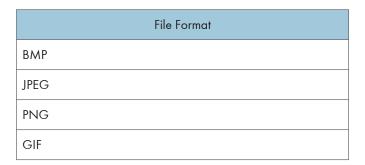
#### Convertible Formats (Output Data)

The following file formats are supported as output data by the PDF Stamper Filter.

File Format	PDF version
PDF	1.4

#### Supported Formats (Stamp Image)

The following file formats are supported as data to be registered to the PDF Stamper Filter.





 For details about file formats which are not supported as data to be registered to this filter, see Readme.

#### **PDF Stamper Properties Screen**

Follow the instructions below:

1. Click [System] on the AdminTool Home Page.

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

2. Click [PDF Stamper] on the System Settings Screen.

The PDF Stamper Settings screen is displayed.

3. Click [Add] or [Edit] on the PDF Stamper Settings screen.

#### Fig.: PDF Stamper Settings Screen (General Tab)

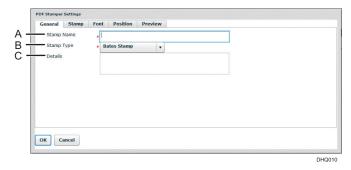


Table: PDF Stamper Settings (General Tab)

	ltem	Description
А	[Stamp Name]	Enter the display name for the Filter.
		<ul><li>The maximum length is 128 characters.</li></ul>
В	[Stamp Type]	Select a stamp type to be embedded.

	ltem	Description
		• [Bates Stamp]
		A text stamp with counter.
		• [Image Stamp]
		An image stamp.
		• [Text Watermark]
		A text stamp as a watermark.
		• [Image Watermark]
		An image stamp as a watermark.
С	[Details]	Enter a description for this Filter.
		Limitation
		The maximum length is 250 characters.

Fig.: PDF Stamper Settings Screen (Stamp Tab for Bates Stamp)

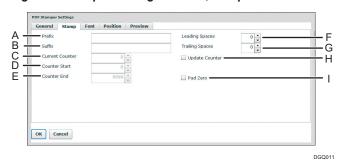


Table: PDF Stamper Settings (Stamp Tab for Bates Stamp)

	ltem	Description
А	[Prefix]	Enter the text to precede the counter number.
		Entry Example: Prefix
		Display Example: Prefix0001
		() Limitation
		The maximum length is 128 characters.
В	[Suffix]	Enter the text to follow the counter number.
		Entry Example: Suffix
		Display Example: Prefix0001Suffix

	ltem	Description
		Limitation
		The maximum length is 128 characters.
С	[Current Counter] (Edit screen)	The current counter is displayed.  If "Update Counter" is selected, this will be editable.  Limitation
		<ul> <li>If the number specified for "Current Counter" is not between the number specified for "Counter Start" and the number specified for "Counter End", you cannot save the setting.</li> </ul>
D	[Counter Start]	Specify the counter start number.  Limitation  The maximum counter value is 2147483646.
E	[Counter End]	Specify the counter end number.  ! Limitation   Page 1   Page 2   Page 2
		The maximum counter value is 2147483646.
F	[Leading Spaces]	The number of spaces between the prefix and counter.  •• Note
		The space width varies depending on "Font Size" specified in the "Font" tab.
		<b>Q</b> Limitation
		The maximum value is 100.
G	[Trailing Spaces]	The number of spaces between the counter and suffix.  •• Note
		The space width varies depending on "Font Size" specified in the "Font" tab.
		<b>Q</b> Limitation
		The maximum value is 100.
Н	[Update Counter] (Edit screen)	If "Update Counter" is selected, "Current Counter" will be editable.

	ltem	Description
I	[Pad Zero]	If the "Pad Zero" check box is selected, zeros will be added to a counter number so that the number of digits becomes equal to the number of digits specified for "Counter End".
		Example:
		<ul> <li>If this check box is selected and the number of the specified digits is 4:</li> </ul>
		1 will be shown as 0001.
		If this check box is not selected:
		1 will be shown as 1.

Fig.: PDF Stamper Settings Screen (Stamp Tab for Image Stamp)

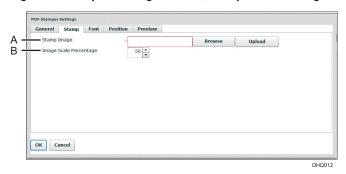


Table: PDF Stamper Settings (Stamp Tab for Image Stamp)

	ltem	Description
A	[Stamp Image]	Select an image file to be embedded.  To select an image file, click [Browse], and then click [Upload].
В	[Image Scale Percentage]	Specify the magnification rate of the image file to be embedded.  Limitation  The maximum value is 300.

4

Fig.: PDF Stamper Settings Screen (Stamp Tab for Text Watermark)

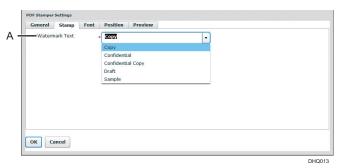


Table: PDF Stamper Settings (Stamp Tab for Text Watermark)

	ltem	Description
А	[Watermark Text]	Enter a text for a watermark text manually or select a watermark text from the following:
		• [Copy]
		• [Confidential]
		[Confidential Copy]
		• [Draft]
		• [Sample]

# Fig.: PDF Stamper Settings Screen (Stamp Tab for Image Watermark)

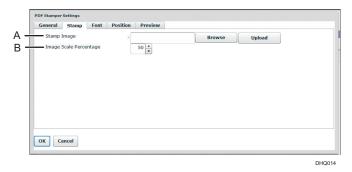
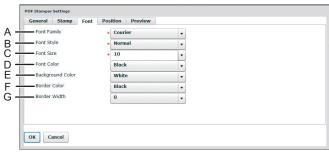


Table: PDF Stamper Settings (Stamp Tab for Image Watermark)

- and the state of		
	ltem	Description
Α	[Stamp Image]	Select an image file to be embedded.
		To select an image file, click [Browse], and then click [Upload].

Fig.: PDF Stamper Settings Screen (Font Tab for Bates Stamp and Text Watermark)



DHQ01

Table: PDF Stamper Settings (Font Tab for Bates Stamp and Text Watermark)

	ltem	Description
Α	[Font Family]	Select a font family:
		• [Courier]
		• [Helvetica]
		• [Times Roman]
В	[Font Style]	Select a font style:
		• [Normal]
		• [Bold]
		• [Italic]
		• [Bold Italic]
С	[Font Size]	Specify a font size between 6 and 500.
D	[Font Color]	Select a font color:
		• [Black]
		• [White]
		• [Red]
		• [Green]

	ltem	Description
		<ul> <li>[Blue]</li> <li>[Cyan]</li> <li>[Magenta]</li> <li>[Yellow]</li> <li>[Orange]</li> <li>[Pink]</li> <li>[Gray]</li> <li>[Light Gray]</li> <li>[Dark Gray]</li> </ul>
Е	[Background Color] (for Bates Stamp)	Select a background color.
F	[Border Color] (for Bates Stamp)	Select a border color.
G	[Border Width] (for Bates Stamp)	Select a border width between 0 and 5.

Fig.: PDF Stamper Settings Screen (Position Tab)

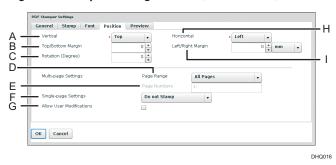


Table: PDF Stamper Settings (Position Tab)

	ltem	Description
А	[Vertical]	Select the vertical position of the image.  • [Top]
		[Middle]     [Bottom]
		If [Middle] is selected, "Top/Bottom Margin" cannot be configured.

	ltem	Description
		If [Image Watermark] or [Text Watermark] is selected for the stamp type, this item cannot be configured.
В	[Top/Bottom Margin]	Enter the margin value up to 600 mm (25 inch).  If [Image Watermark] or [Text Watermark] is selected for the stamp type, this item cannot be configured.
С	[Rotation(Degree)]	Enter the rotation angle between 0 and 359 degrees.
D	[Page Range] (Multi-page Settings)	Specify the target pages to be stamped for the document:  • [All Pages]  • [Specified Pages]  • [First Page]  • [Last Page]  • [Even Pages]  • [Odd Pages]
Е	[Page Numbers] (Multi-page 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 are 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-
F	[Single-page Settings]	Specify whether or not to embed a stamp into single page documents:  • [Not Stamp]  • [Stamp All]
G	[Allow User Modifications]	Choose whether or not to allow users to edit the items of "Page Range" and "Page Numbers" on the MFP display panel.
Н	[Horizontal]	Select the horizontal position of the image.  • [Left]

	ltem	Description
		• [Center]
		• [Right]
		If [Center] is selected, "Left/Right Margin" cannot be configured.
		If [Image Watermark] or [Text Watermark] is selected for the stamp type, this item cannot be configured.
I	[Left/Right Margin]	Enter the margin value up to 600 mm (25 inch).  If [Image Watermark] or [Text Watermark] is selected for the stamp type, this item cannot be configured.

Fig.: PDF Stamper Settings Screen (Preview Tab)



Table: PDF Stamper Settings (Preview Tab)

	ltem	Description
Α	[Page Size]	Select the preview paper size from the drop-down list.
В	[Page Orientation]	Select the preview paper orientation.
С	[Show Preview]	Display a preview for a sample 5-page document. The document used for the preview is a sample and is not the actual scanned document.  Note  The background color in previews will be white. If "White" is selected for "Font Color" of a watermark text,
		you cannot see the watermark text on the preview.

# **PDF Stamper Filter Properties Screen**

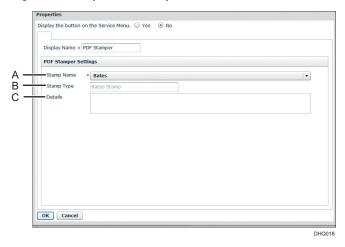
Follow the instructions below:

- 1. Click [Home], and then the [Profile] shortcut on the AdminTool Home Page.
- 2. Double-click the desired Profile on the Profile List.
- Select the desired Group within the Profile, and then double-click on the desired Project.
- 4. Drag PDF Stamp Filter from the left pane and drop it on the connector coming out of the last Service/Filter in the flow.
- 5. Double-click the lower half of the Filter.

The PDF Stamper Filter Properties screen will display.

The following is the PDF Stamper Filter Properties screen.

Fig.: PDF Stamper Filter Properties Screen



**Table: PDF Stamper Filter Properties** 

	ltem	Description
А	[Stamp Name]	Select a stamp setting.
В	[Stamp Type]	This is displayed automatically if "Stamp Name" is specified.  The stamp type configured for the PDF Stamper Settings screen (General Tab) is displayed.
С	[Details]	This is displayed automatically if "Stamp Name" is specified.  The description entered for the PDF Stamper Settings screen (General Tab) is displayed.

# Limitation

• You cannot place the same Bates stamp type in a tree-structured flow.

- If you upload an image file as [Image Stamp] or [Image Watermark] and the size exceeds the specified size, you cannot upload it.
- The Bates stamp type is not supported by Load Balance Server or Secondary Delivery Server.



- For details about prohibited characters for [Prefix], [Suffix], and [Watermark Text] in the Stamp Tab, see Readme.
- If you want to use PDF Stamper for color documents, you need to place PDF Converter (Enhanced) or PDF Converter prior to PDF Stamper in the delivery flow.
- If you want to convert multiple jobs into a multiple page document and use PDF Stamper for the
  document, you need to place Image Converter Filter, PDF Converter (Enhanced) or PDF Converter
  prior to PDF Stamper in the delivery flow.
- If you select [Bates Stamp], the sequential counter is assigned in accordance with the order of the jobs that are performed, instead of the order of the documents that are scanned.
- If the counter reaches the maximum value, an error occurs.
- [Page Divide] and [Size Divide] functions in [Divide Email] are not supported for multiple page PDF.

# **About Distribution Parameters**

This feature is used by the Administrator to control different aspects of the Scan and Fax Manager user interface, such as the settings to be enabled (visible on the MFP display panel) or default settings to be set for each item. How the user accesses those settings and whether or not to use S/MIME can also be specified.

Unless otherwise indicated, Distribution Parameter values must be entered within the following ranges:

- String
   Up to 1,000 characters.
- Number
   2147483648 to -2147483647
- Date/Time 0000/01/01 00:00:00 to 9999/12/31 23:59:59
- Year/Month/Date Hour: Minute: Second
   The date and time settings may be limited depending on the input item. For example, there may be an input item to which you cannot set seconds. If you set seconds to such an input item, the settings will be nullified, meaning that it will be accepted as "00".

These limitations are applied to input values specifiable within the Scan and Fax Manager AdminTool; the possible ranges of input values specifiable on the operation panel are different.

#### Distribution Parameter Screen Overview

This section is an overview of the AdminTool's Distribution Parameter screens, specifically, the General, Options Screen, and [Hidden Items (Preset)] screens. Each screen emulates what the user sees on the MFP display panel, making it easy to configure the system to address users' primary application needs.

#### Main Screen

This screen reflects the Service's main settings. In Fig. "Send to Email Main Screen - Admin Tool", for example, the Send to Email Main Screen offers destination entry, selection and search functions needed for email distribution. In Fig. "Send to Email Destination Selection Screen - MFP Display Panel", the MFP user sees the corresponding settings.

Fig.: Send to Email Main Screen - AdminTool

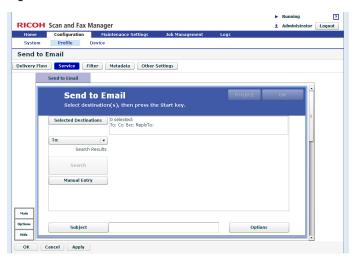


Fig.: Send to Email Destination Selection Screen - MFP Display Panel (Standard Operation Panel)



Fig.: Send to Email Destination Selection Screen - MFP Display Panel (Smart Operation Panel)



#### **Options Screen**

This screen offers additional Send to Email Distribution Parameters, such as Error Notification and Priority Level, i.e., those used less often. [Options] is located on the lower right of the MFP display

panel (Fig. "Send to Email Options Screen - MFP Display Panel"). When the user presses this button, the AdminTool settings are reflected (Fig. "Send to Email Options Screen - AdminTool").

Fig.: Send to Email Options Screen - AdminTool

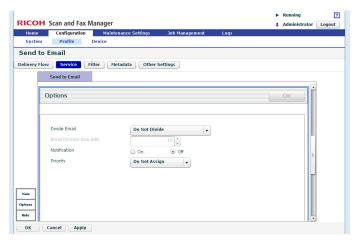


Fig.: Send to Email Options Screen - MFP Display Panel (Standard Operation Panel)

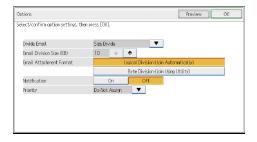


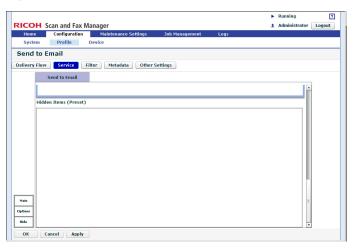
Fig.: Send to Email Options Screen - MFP Display Panel (Smart Operation Panel)



#### Hidden Items (Preset) Screen

This screen is used by the Administrator to hide Distribution Parameters, for instance, if you do not want users to modify an email Subject line, that field can be placed on the [Hidden Items (Preset)] screen.





# **Opening/Navigating Distribution Parameter Screens**

This section covers how to open/navigate the Distribution Parameter screens, and provides details regarding the General, Options Screen, and [Hidden Items (Preset)] screens.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- Double-click the Profile Name, for example "Accounting Dept.", to open the Group/ Project screen.
- 3. If necessary, click the Group tab or a group name in the Group list, such as "Accounts Payable", to open the Project(s) associated with the Group.

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

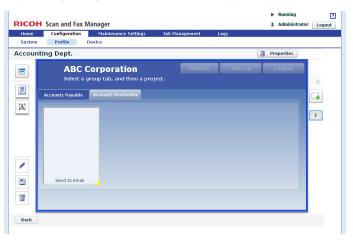
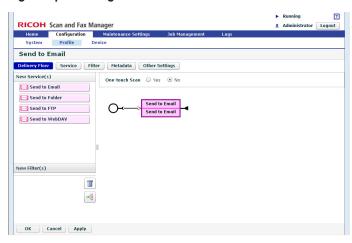


Fig.: Group/Project Screen (Smart Operation Panel)



- 4. Double-click the Project button.
- 5. Click [Service].

Fig.: Project Configuration Screen



The Send to Email Output Service Settings displays.

# 6. Review the Main Screen settings, as outlined in the table below.

Fig.: Send to Email Main Screen

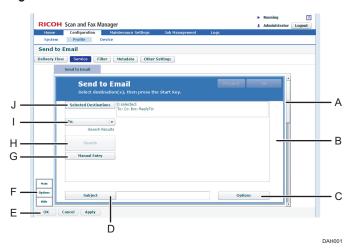


Table: Send to Email Main Screen

	ltem	Description
А	Scroll Bar	Displays the Options Screen and [Hidden Items (Preset)] screen.
В	Main Screen	This area emulates what the user will see on the MFP display panel, and can be customized to display/hide Distribution Parameters, as needed.
С	[Options]	When used from the MFP display panel, this button displays the Options screen for the Service. To allow MFP users to access the Options screen, this button must be placed in the Main Screen.
D	[Subject]	Enter the default Subject of the email. The text specified here will appear in the Subject field within the recipient's email inbox.  Limitation  The maximum length is 128 characters.
Е	[OK]	Saves settings, and return to the Group/Project screen.
	[Cancel]	Exits, without saving settings.
	[Apply]	Saves only.

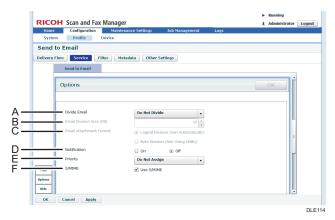
	ltem	Description
F	Screen Component Transfer Zone	The Transfer Zone allows the user to move screen components between the General, Options Screen, and [Hidden Items (Preset)] screens. This zone remains visible at all times, regardless of scrolling action.
G	[Manual Entry] * 1	Manually enter an email address to add to the recipient list  Note
		[Enable Manual Address Entry] must be selected in the Send to Email Option Settings screen.
		If you entered a domain name in [Default Domain for Manual Input] in the Send to Email Option Settings screen, that value will be appended to addresses entered without a domain. This feature is convenient if most recipients have the same domain (for example, recipients within the same company).
Н	[Search]	Searches the Email Address List for the destination email addresses.
		<b>U</b> Note
		[Enable Address Search] must be selected in the Email Search Settings screen to use this function. See table "Email Search Settings" above.
I	[To]/[Cc] *1/[Bcc] *1/ [ReplyTo] *1	Select the destination type for email addresses. And then enter/select email addresses that will be added to the field next to [Selected Destinations].
		Use [ReplyTo] to specify the address you want replies to be sent to, if it is different from the sender.
J	[Selected Destinations]	Displays a list of the email destinations currently selected. You can click addresses in this list to remove them. Click [Reset All] to clear all selected addresses.  •• Note
		If the Send to Me feature is enabled, the [Selected Destinations] list will display "Send to Me". This means that the scanned document will be

ltem	Description
	delivered to the user's email address, as well as any other selected destinations.

<sup>\* 1</sup> This setting is enabled via the Email Properties screen. See page 148 "Send to Email Service".

7. Use Scroll Bar to display the Options Screen.

Fig.: Send to Email Options Screen



8. Review the Options Screen settings, as outlined in the table below.

Table: Send to Email Options Screen

Table:	able: Send to Email Options Screen		
	ltem	Description	
Α	[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. The received divided data will be restored if the email software supports this data restoring function.	
		When [Size Divide] is selected for [Divide Email], data- heavy scan jobs will be divided into parts, each within the size specified in [Email Division Size (KB)]. Each part	

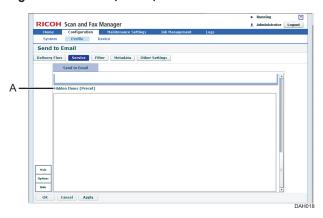
	ltem	Description
		will then be sent as an attachment to an individual e- mail.
		These settings allow you to specify whether to divide the scanned data into complete files or into multiple incomplete parts that must be restored by the recipient's email application in order to be opened. The new settings are indicated by the red rectangle in the following figure.
		! Limitation
		If you use Divide E-Mail, insert [Image Converter] or [PDF Converter] before [Send to Email] in the delivery flow.
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]	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 the MFP user's e-mail address can be acquired from the authentication server, a failure notification will be sent to the MFP user. In this case, we recommend scanning the data again with a lower resolution setting to reduce the size of each file.
		<b>↓</b> Note
		The e-mail address that the failure notification is sent to is the same address used for the Send to Me function.
		When [Byte Division (Join Using Utility)] is selected:
		<ul> <li>Data-heavy scan jobs will be divided into multiple incomplete parts that must be restored by the recipient's email application.</li> </ul>

	ltem	Description
		Data-heavy scan jobs will always be divided into parts that are small enough to be sent as e-mail attachments.  Limitation  High Compression PDF and Searchable PDF
		formats are not supported by the e-mail distribution service for a Project (Serverless).
D	[Notification]	Selects whether or not to use receipt notification that To/Cc/Bcc destinations received the email. This function only works when the mail server of the destination supports receipt notification.  • [On]  Makes To/Cc/Bcc destinations send a receipt
		notification that they received the email.
		• [Off]
		Disables receipt notification.
		The notification is sent as follows:
		The Scan and Fax Manager attempts to send the notification to the MFP user.
		2. If the MFP user's email address is not available, the Scan and Fax Manager attempts to send the notification to the Administrator. The Administrator's email address is set in the Administrator Settings screen. See page 415 "Error Notification Email Address".
		If the Administrator's email address is not available, the Scan and Fax Manager attempts to send the notification to the default sender specified in [Default Sender Address] in the Send to Email Option Settings screen.
Е	[Priority]	Select the priority to assign to the email from the following:
		• [Do Not Assign]
		• [1 (High)]
		• [2]
		• [3 (Standard)]

	ltem	Description
		• [4] • [5 (Low)]
F	[S/MIME]	To use S/MIME, select the [Use S/MIME] check box.  •• Note
		When S/MIME is being used, the Email Division feature cannot be used.    Reference   Reference
		To use S/MIME for email distribution, configure the Send to Email service. For details about the settings, see page 148 "Send to Email Service".

9. Use Scroll Bar to display the [Hidden Items (Preset)] screen.

Fig.: Hidden Items (Preset) Screen



10. Review the [Hidden Items (Preset)] screen settings, as outlined in the table below.

Table: Hidden Items (Preset) Screen

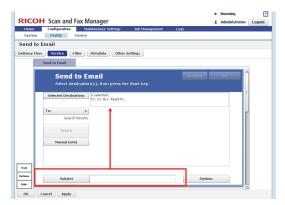
	ltem	Description
A	Hidden Items (Presets)	One or more Distribution Parameters that have been set, i.e., a value has been applied to the parameter, can be hidden from the users' view.

### **Changing Display Position of a Distribution Parameter**

In this section, you will learn how to change the display position of a Distribution Parameter, for example, take the Subject field and place it at the top of the Main Screen, for easy access by the user at the MFP display panel. In this way, you can change the display order of settings to streamline workflow.

1. From the Main Screen, select a setting, for example, the Subject field and drag and drop it to the new position.

Fig.: Main Screen



The Subject field is automatically placed in the new position on the Main Screen. The MFP display panel also reflects this new field position.



- This same procedure can be applied to any setting on the General, Options Screen, or [Hidden Items (Preset)] screen.
- To reverse this process, simply drag and drop back to its original position.

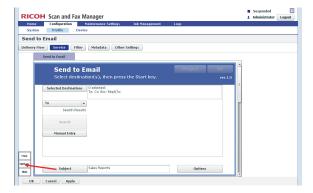
# Transferring a Distribution Parameter to Another Screen

In this section, you will learn how to transfer a setting, for example, take a setting from the Main Screen and place it on the Options Screen. This enables the Administrator to establish setting priority. In other words, if access to a setting is not required, it can be placed on the Options Screen, thus is only visible to the user if he/she presses [Options] on the MFP display panel.



 The structure of the Screen Component Transfer Zone varies according to the screen format of the Service/Filter. If the Service/Filter has an Options screen, the Screen Component Transfer Zone will have a three-screen structure. If the Service/Filter does not have an Options screen, the Screen Component Transfer Zone will have a two-screen structure. But the Screen Component Transfer Zone of a BizForm will always have a two-screen structure. drop the setting to the Options Screen, via the Screen Component Transfer Zone.

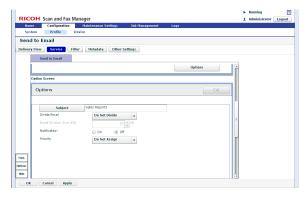
Fig.: Main Screen



The Subject field is automatically transferred to the Options Screen.

From the Main Screen, select a setting. For example, you have predefined the Subject as
"Sales Reports", and the user need not view this setting. In that case, simply drag and

Fig.: Options Screen



A user now accesses the Subject field through [Options] on the MFP display panel.

# Hiding a Distribution Parameter

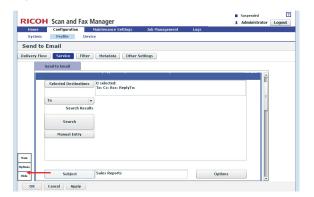
In this section, you will learn how to hide a setting, for example, take a setting from the Main Screen and place it in the [Hidden Items (Preset)] screen. This enables the Administrator to predefine settings that cannot be modified by the user at the MFP display panel. For example, if the Subject field has a predefined as "Confidential", that field can be placed on the [Hidden Items (Preset)] screen, thus will not be visible to the user.

A warning message will display to notify you that the [Hidden Items (Preset)] screen contains some errors. Also, on the relevant [Hidden Items (Preset)] screen, the Screen Components containing errors will appear in red highlight.



- If the Project is a One-touch Project, be sure to pre-set the value of all Screen Components, not only those placed on the [Hidden Items (Preset)] screen.
- 1. Drag and drop, for example, a predefined Subject field to the [Hidden Items (Preset)] screen, via the Screen Component Transfer Zone.

Fig.: Main Screen



The Subject field is automatically transferred to the [Hidden Items (Preset)] screen.

This action will hide the setting, i.e., the field will not display on the MFP display panel.



- This same procedure can be applied to any setting on the Main Screen or Options Screen.
- To reverse this process, simply drag and drop the setting to the desired screen via the Screen Component Transfer Zone.

### **Setting Email Distribution Parameters**

If users often send emails to a specific destination, for instance, expense reports to the accounting department, the Administrator can specify the email address of the accounting manager, as a preset [To] Distribution Parameter. This means that users do not have to enter the address at the MFP display panel prior to scanning - saving time and effort.

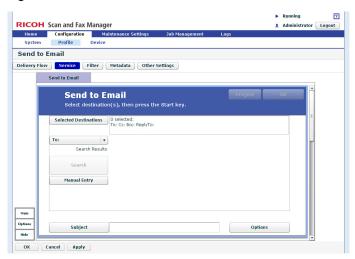
Likewise, you can set default subject text for the email as a preset Distribution Parameter. The specified text will appear in the Subject field within the recipient's email inbox, allowing him/her to quickly determine the attachment content. For instance, you may wish to identify each email message with a Subject field that reads, "Expense Report". The user can view or edit this default text from the MFP display panel, prior to scanning.

#### Preset Email Destination(s)

1. Open the Project Configuration screen.

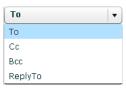
- 2. If necessary, click [Home], and then the [Profile] shortcut.
- 3. Double-click the Profile Name, for example "Accounting Dept.", to open the Group/ Project screen.
- 4. If necessary, click the Group tab (or the group name in the Group list when using Smart Operation Panel), for example "Accounts Payable", to open the Project(s) associated with the Group.
- 5. Double-click the Project button. For example "Send to Email".
- 6. Click [Service]. The Distribution Parameter screen displays.

Fig.: Send to Email Distribution Parameter Screen



7. To specify an email destination other than "To", click the [To] drop-down.

Fig.: Email Destination Drop-down List



**U**Note

 If [Cc], [Bcc], and/or [ReplyTo] do not appear in the drop-down, the selection(s) have not been enabled.

**■** Reference

- See page 61 "Step 6: Configure the Service".
- 8. Enter the target destination email address using one of the following methods:
  - Search

If Email Search Settings are established, you have the ability to search your corporate address book for target destinations.



- See page 148 "Send to Email Service".
- 1. Click [Search]. The letter keys on the display panel displays.
- Enter search character(s), for example "sm" for "Smith". Note that if you do not enter anything on the letter keys on the display panel, the search will return all addresses on the LDAP server.
- 3. Click [OK].
- 4. Select one or multiple addresses in the list.

#### Manual Entry

Key the email address in manually, via the letter keys on the display panel.

- 1. Click [Manual Entry].
- 2. Enter the email address, for example "jsmith@gsnxcorp.com".

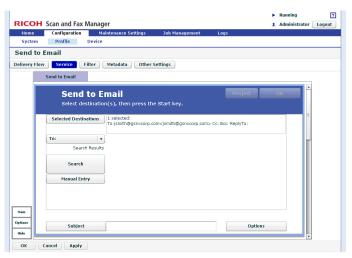
Fig.: Email "To" Destination



- 3. Click [OK].
- 4. Repeat 1-3 to enter another address, if necessary.

The selected/entered addresses appear in the [Selected Destinations] field.

### Fig.: Selected Addresses



9. Repeat 7 - 8 to select another destination, for example a "CC" destination.

If you wish to preset Subject text, proceed. If not, click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

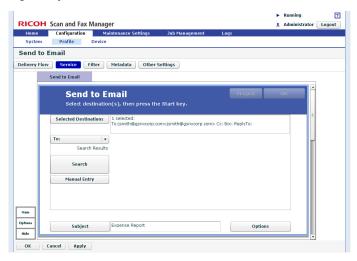
### **Predefining Email Subject Text**

The predefined Subject text will appear in the Subject field within the recipient's email inbox, allowing him/her to quickly determine the attachment content. The user can view or edit this default text from the MFP display panel, prior to scanning.

1. If necessary, scroll down to display the Subject field.

Click on the Subject field, and then enter the default Subject text, for example, "Expense Report".

Fig.: Subject Field



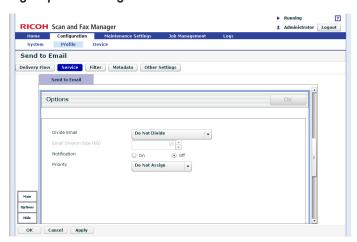
3. If you wish to set additional email Distribution Parameters for the Project, proceed. If not, click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

#### **Specifying Option Settings**

The Option Settings screen displays additional Distributions Parameters, for example Priority, Notification, etc.

1. If necessary, scroll down to display the Options screen.

Fig.: Options Settings Screen



- 2. Specify the following settings:
  - [Divide Email]

- [Email Division Size (KB)]
- [Notification]
- [Priority]

### Reference

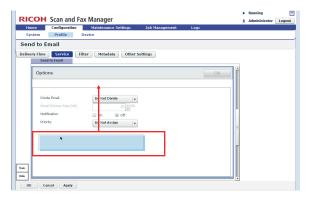
- For details on each setting, see page 148 "Send to Email Service".
- 3. To change display position of Distribution Parameters, proceed. If not, click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

#### Changing a Distribution Parameter's Display Position

To move the Distribution Parameters within the Main Screen or Options Screen, proceed as follows:

- 1. Click (select) the Distribution Parameter.
- 2. Drag and drop the parameter to the position you want.

Fig.: Display Position of Distribution Parameter



The Distribution Parameter is displayed in the new position.

3. To prioritize MFP display panel components, proceed. If not, click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

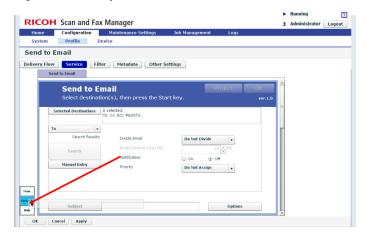
#### **Changing Distribution Parameter Priority**

To place less frequently-used features on the Options Screen, proceed as follows:

1. Click (select) and hold the Distribution Parameter you wish to move.

2. Drag and drop the Distribution Parameter to the Options Screen using the Screen Component Transfer Zone.

Fig.: Screen Component Transfer Zone

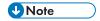


3. If you wish to hide one or more Distribution Parameters, proceed. If not, click [Apply], or [OK], to return to the Group/Project screen.

#### **Hiding a Distribution Parameter**

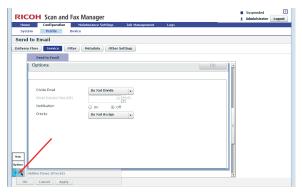
It is possible to hide a Distribution Parameter, such that the user cannot view the setting on the MFP display panel. The parameter will not display on the Main Screen or Options screen.

1. Set the value of the parameter you wish to hide.



- You must pre-set the value of any Distribution Parameter you place on the [Hidden Items (Preset)] screen. This value will be applied to all email messages executed using the Project.
- You cannot save the Project without first specifying the value, i.e., if you click [OK] or [Apply], an alert message will display.
- 2. Click (select) and hold the Distribution Parameter you wish to hide.

Fig.: Screen Component Transfer Zone





- To return a Distribution Parameter to the Main Screen or Options Screen, use drag and drop to place the parameter on the appropriate screen, via the Screen Component Transfer Zone.
- If you place all the Distribution Parameters on the [Hidden Items (Preset)] screen, behavior of the Service/Filter on the MFP display panel will be as follows:

#### Service

The Service button, for example Send to Email, on the Service Menu screen is grayed out on the Standard Operation Panel, and will not be displayed on the Smart Operation Panel. This means that the Destination Selection screen will not appear on the MFP's display panel, thus is not accessible to the user. The user can only check the preset destination addresses via the Summary screen and the Detail screen.

#### Filter

When the Standard Operation Panel is used, [Scan Settings] is grayed out. This means that all Distribution Parameters (for all Filters) are preset, thus are not accessible to the user.

When the Smart Operation Panel is used, you can display the Scan Settings screen, but all setting items are grayed out and you cannot change them.

4. Click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

### **Setting Folder Distribution Parameters**

If users often archive documents, such as vendor invoices, sales order forms, etc., the Administrator can predefine the folder destinations. This means that users will not have to select a folder at the MFP display panel prior to scanning - saving time and effort. The entered folder destinations automatically display on the MFP display panel, when the user selects the Send to Folder Service.

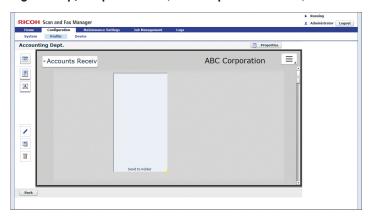
#### **Preset Folder Destinations**

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name, for example "Accounting Dept.", to open the Group/ Project screen.
- 3. If necessary, click the Group tab (or the group name in the Group list when using Smart Operation Panel), for example "Accounts Receivable", to open the Project(s) associated with the Group.

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

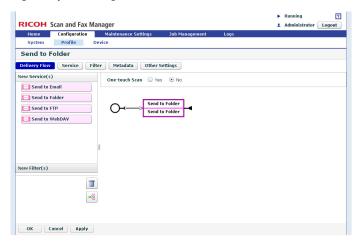


Fig.: Group/Project Screen (Smart Operation Panel)



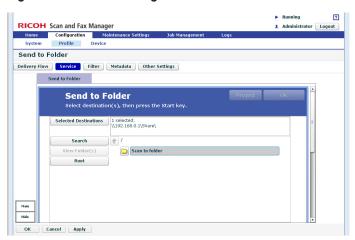
- 4. Double-click the Project button. In the figure above, the Project is called "Send to Folder".
- 5. Click [Service].

Fig.: Project Configuration Screen



The Services screen displays. If necessary, select the Send to Folder Service tab.

Fig.: Send to Folder Configuration Screen



- 6. Specify a default target folder destination(s).
- 7. Click [Search].
- 8. Enter the name of the folder you want to search for. Note that if you do not enter anything on the letter keys on the display panel, the search will return all destination folders.
- 9. Click [OK].

#### 10. Select one or multiple folders in the list.

The Selected Destination field displays predefined folder destinations.

Fig.: Selected Folder Destinations



To change display position of Distribution Parameters, proceed. If not, click [Apply], and then click [OK], to return to the Group/Project screen.

#### **Hiding a Distribution Parameter**

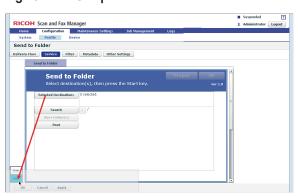
It is possible to hide a Distribution Parameter, such that the user cannot view the setting on the MFP display panel. The parameter will not display on the Main Screen.

- 1. Click (select) the setting you wish to hide.
- 2. Set the value of the parameter you selected.



- You must pre-set the value of any Distribution Parameter you place on the [Hidden Items (Preset)] screen. This value will be applied to all scanned documents using the Project.
- You cannot save the Project without first specifying the value, i.e., if you click [OK] or [Apply], an alert message will display.
- 3. Drag and drop the Distribution Parameter to [Hide] in the Screen Component Transfer Zone.

Fig.: Screen Component Transfer Zone





- To return a Distribution Parameter to the Main Screen, use drag and drop to place the parameter on the appropriate screen via the Screen Component Transfer Zone.
- If you place all the Distribution Parameters on the [Hidden Items (Preset)] screen, behavior of the Service/Filter on the MFP display panel will be as follows:

#### Service

The Service button, for example, Send to Folder, on the Service Menu screen is grayed out on the Standard Operation Panel, and will not be displayed on the Smart Operation Panel. This means that the Destination Selection screen will not appear on the MFP's display panel, thus is not accessible to the user.

#### Filter

When the Standard Operation Panel is used, [Scan Settings] is grayed out. This means that all Distribution Parameters (for all Filters) are preset, thus are not accessible to the user.

When the Smart Operation Panel is used, you can display the Scan Settings screen, but all setting items are grayed out and you cannot change them.

4. If you wish to make a Distribution Parameter uneditable, proceed. If not, click [Apply], or [OK], to return to the Group/Project screen.

# **About One-touch Scan**

One-touch Scan is a Project where all Distribution Parameters have been pre-defined by the Administrator. For example, individual Projects - one for each user or group of users - can be created. For instance, users in the marketing department can select a Project button to "Send to Email". Another user in the accounting department can select a Project button to "Send to Folder", and so forth.

When Distribution Parameters, such as the destination email addresses and/or folders, file format, etc., are predefined, the user cannot change settings. The scan job starts immediately. As such, use of a One-touch Scan is intended for tasks in which the parameters for document distribution do not change. However, you can still allow the user to enter Metadata. Any Project can be set as a One-touch Scan.

### 

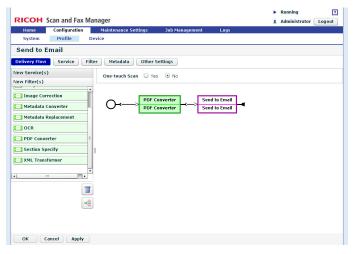
- One-touch Scan cannot be cancelled for the following types of Project:
  - Projects specified as a destination Project in a Replacement Table.
     The setting cannot be cancelled even if the Replacement Table is not specified in the Flow Redirect Filter.
  - Projects that are selected for processing inbound fax documents.

### Reference

- For details about Replacement Tables, see page 434 "Replacement Table Settings".
- For details about processing inbound faxes, see page 348 "About Inbound FAX Transfer".
- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile name.
- If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.

4. Double-click the target Project button.

Fig.: Project Configuration Screen

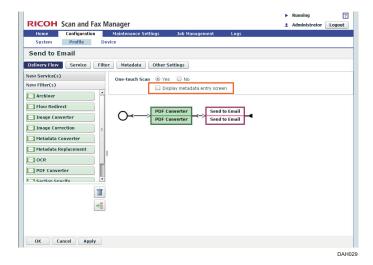


5. Click [Yes] adjacent to One-touch Scan.



- A message appears warning you that cancelling (reversing) this setting might not be possible.
   Click [OK] to make the setting, or [Cancel] to cancel it.
- If you try to cancel the One-touch Scan setting but the setting for the Project cannot be changed, a message notifying you of this will appear and the setting will remain set to [Yes].
- 6. If you want to allow the user to enter Metadata on the MFP display panel, select the [Display metadata entry screen] check box.

Fig.: Display metadata entry screen



7. Click [Apply] to save the settings, or [OK] to return to the Group/Project screen.

### Mportant (

• The necessary parameters must be preset for a Project identified as One-touch Scan. If the parameters are not set, a warning message displays.

The Project is now available to the user as a One-touch Scan. He/she need only place the document on the MFP's Automatic Document Feeder (ADF), enter Metadata if enabled, and press the [Start] key. If authentication is required, the user needs to first log in to the Project.

# **About Scan Settings**

Scan settings include parameters that are applied to the image during document capture, for example, resolution, file format, simplex/duplex, etc. The settings you choose here appear on the MFP display panel by default. The user may choose to set a different setting than those available by default.



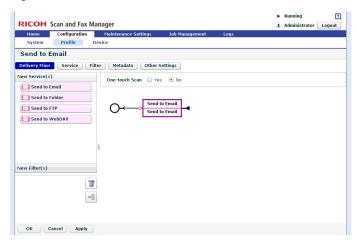
- The [Scan Settings] tab is automatically added to every new Project.
- Default Scan Settings can be set on the System or Profile Level.
- Using the AdminTool, it is possible to hide (or display in gray for the Smart Operation Panel) one or
  more Scan Setting. In that event, the user cannot adjust the scan parameters, i.e., default values set
  within the AdminTool are applied to the image. This may be useful if you wish to limit color or high
  resolution scanning.
- The available scan settings are dependent on the capabilities of the target device. For example, if the user chooses Color as the Scan Type, the device must support color scanning, otherwise the image is rendered in black & white.
- Unlike other Filters, at the Project level, no dialog appears even if the user double-clicks the tab of
  this Scan Settings screen (the Filters screen). However, at System/Profile level, a dialog (screen)
  appears that allows the user to set the default values of resolution, etc.

In this example, we will establish Scan Settings for the "Send to Email" Project within the "Accounts Payable" Group.

- 1. Click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name, for example "Accounting Dept.".
- Click the Group tab (or the group name in the Group list when using Smart Operation Panel), for example "Accounts Payable".
- 4. Double-click the Project button, for example "Send to Email".

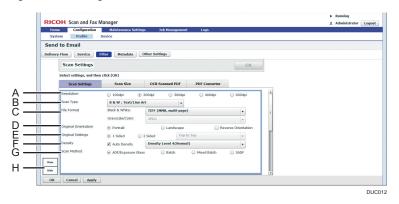
#### 5. Click [Filter].

Fig.: Filter Service



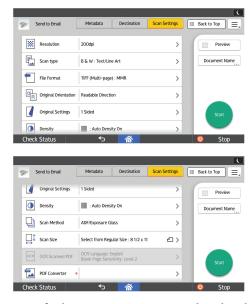
The Scan Settings screen for "Send to Email" displays.

Fig.: Scan Settings Screen



**U** Note

 When the Smart Operation Panel is used, scan settings parameters such as scan settings, scan size, and filters are all displayed in the Scan Settings screen, not in separate tabs as they appear in the AdminTool.



6. Specify the Scan Settings, as outlined in the table below.



• If you specify a value that the MFP cannot support, the default value will be applied instead.

**Table: Scan Settings** 

	ltem	Description
A	[Resolution]	Specify the default resolution to display as the default on the MFP display panel, either 100dpi, 200dpi, 300dpi, 400dpi, or 600dpi.
		Specify 200dpi 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]	Specify the Scan Type to display on the MFP display panel from the following:  • [Black & White: Text]
		• [Black & White: Text/Line Art]
		• [Black & White: Text/Photo]
		• [Black & White: Photo]
		• [Gray Scale]

	ltem	Description
		<ul> <li>[Full Color: Text/Photo]</li> <li>[Full Color: Glossy Photo]</li> <li>[Auto Color Select]</li> <li>Note</li> <li>The user can only select one mode (Black &amp; White, Grayscale or Full Color) to apply to the document during scanning.</li> <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 black and</li> </ul>
		white, TIFF file is output.
		Within the Scan Type properties, if you deselect all Black & White format check boxes, the Black & White File Format drop-down may still display Black & White settings on both the AdminTool and MFP display panel. This scenario also applies if you deselect all Color format check boxes. In that case, the Grayscale/Color File Format drop-down may still display Grayscale/Color settings on both the AdminTool and MFP display panel. To correct the above scenarios, it is suggested that you first select the [Scan Type] settings, either all Black & White check boxes or all Grayscale/Color check box, and then the associated File Formats will automatically populate the associated drop-down.
С	[File Format]	Scan and Fax Manager supports a variety of file formats, so to simplify the [Black & White:] and [Grayscale/Color:] drop-down lists, the default formats have been separated into visible and invisible groups. If you wish to add an invisible format to the visible list, double-click on the file format line, for example Black & White. The available settings display. To select/deselect a format, check/uncheck the associated box. Selected formats will automatically appear in the drop-down list within the Scan Settings screen in both the AdminTool and MFP display panel.

	ltem	Description
		<b>□</b> Reference
		See page 464 "File Formats".
D	[Original Orientation]	When using the ADF, specify the document orientation. Select [Portrait] or [Landscape]. Alternatively, select the [Reverse Orientation] check box.
		Standard Operation Panel
		[Portrait] is displayed as [Portrait/Readable] on the MFP display panel, and [Landscape] is displayed as [Landscape/Unreadable].
		You can select one of the following two options in the MFP display panel: [Portrait/Readable] and [Landscape/Unreadable].
		Smart Operation Panel
		[Portrait] is displayed as [Readable Direction] on the MFP display panel, and [Landscape] is displayed as [Unreadable Direction (90 Degrees Counterclockwise)].
		If the [Reverse Orientation] check box is selected, [Portrait] appears as [Unreadable Direction (180 Degrees)] and [Landscape] appears as [Unreadable Direction (90 Degrees Clockwise)].
		You can select one of the following four options in the MFP display panel: [Readable Direction], [Unreadable Direction (90 Degrees Counterclockwise)], [Unreadable Direction (180 Degrees)], and [Unreadable Direction (90 Degrees Clockwise)].
		<b>↓</b> Note
		Depending on the model, the image is not scanned upside down even if [Readable Direction] is selected. If you are using such a model, there are only two options available in the MFP display panel: [Readable Direction] and [Unreadable Direction (90 Degrees Counterclockwise)].
		When using Standard Operation Panel, [Reverse Orientation] is not displayed.

	ltem	Description
		<ul> <li>To enable [Reverse Orientation] after importing an older version of a profile, or if an overwrite installation has been applied over an older version of the management tool, open the profile with this version and save it again.</li> <li>When distributing JPEG images with a project (Serverless), the image will not be scanned upside down even if [Reverse Orientation] is selected.</li> </ul>
Е	[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.
		<b>U</b> 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.
		<ul> <li>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].</li> </ul>
F	[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 the following Density Levels from the drop-down list. Selected items display on the MFP display panel.
		• [Density Level 1 (Light)]
		• [Density Level 2]
		• [Density Level 3]
		• [Density Level 4(Normal)]
		• [Density Level 5]
		• [Density Level 6]
		• [Density Level 7(Dark)]

	ltem	Description
		UNote
		When [Auto Density] is enabled, images within 10 mm from the edges of the original may appear faded.
G	[Scan Method] (for the Standard Operation Panel)	Specify the default Scan Method, or how the user will scan the original on the MFP. If you wish to limit selections, double-click on [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 original 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 will wait until additional originals are placed.
		[SADF] (Semi-automatic Document Feeder)
		Scans multiple page originals as a single file 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.

	ltem	Description
		<b>U</b> Note
		If the maximum document volume exceeds the MFP's capacity, the documents are not sent.
G	[Scan Method] (for the Smart Operation Panel)	Specify the default Scan Method, or how the user will scan the original on the MFP. If you wish to limit selections, double-click on [Scan Method].
		[ADF/Exposure Glass]
		Normal scan operation from the Automatic Document Feeder or exposure glass.
		• [Batch]
		Scans multi-page originals placed either on the ADF or on the exposure glass as a single job.
		If [Batch] is selected, scanning starts after you place additional originals and press [Continue]. When all the originals have been scanned, press [Finish].
		Regardless of the default settings, MFP waits until additional originals are placed.
		[SADF] (Semi-automatic Document Feeder)
		Scans multiple page originals as a single file 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 [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.
		<b>♦</b> Note
		If the maximum document volume exceeds the MFP's capacity, the documents are not sent.
Н	Screen Component Transfer Zone	The Screen Component Transfer Zone allows the user to move screen components between the Main Screen and [Hidden Items (Preset)] screens. This zone remains visible at all times, regardless of scrolling action.

# 7. When finished, click [Apply] to save the settings.

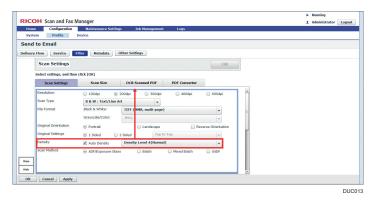
8. If you would like to change the display position of a scan setting, proceed. If not, click [Apply], or [OK], to return to the Group/Project screen.

#### Changing a Scan Setting's Display Position

To move a setting within the Main Screen, proceed as follows:

- 1. Click (select) the Scan Setting.
- 2. Drag and drop the setting to the position you want.

Fig.: Display Position of Scan Settings



The Scan Setting is displayed in the new position.

3. If you wish to hide one or more Scan Setting, proceed. If not, click [Apply], or [OK], to return to the Group/Project screen.

#### Hiding a Scan Setting

It is possible to hide a Scan Setting, such that the user cannot view the setting on the MFP display panel. The parameter is not displayed or grayed out.

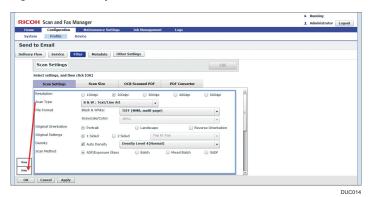
- 1. Click (select) the Scan Setting you wish to hide.
- 2. Set the value of the parameter you selected.



- You must pre-set the value of any Scan Setting you place on the Hidden Items (Preset) screen. This value is then applied to all scanned documents using the Project.
- You cannot save the Project without first specifying the value, i.e., if you click [OK] or [Apply], an alert message displays.

3. Drag and drop the setting to [Hide] in the Screen Component Transfer Zone.

Fig.: Screen Component Transfer Zone



Note

- To return a Distribution Parameter to the Main Screen, use drag and drop to place the parameter on the appropriate screen via the Screen Component Transfer Zone.
- If you place all the Distribution Parameters on the Hidden Items(Preset) screen, behavior of the Service/Filter on the MFP display panel is as follows:
  - Service

The Destination Selection screen will not appear on the MFP's display panel, thus is not accessible to the user. The user can only check the preset destination addresses via the Summary screen and the Detail screen.

Filter

The Scan Settings screen (a tab page) does not appear on the display panel. If there are no Scan Settings screens to display, i.e., if all the Distribution Parameters of all the Filters are preset, [Scan Settings] on the previous screen becomes invalid, indicating that there are no pages to display.

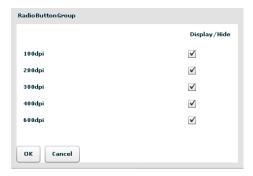
When the Smart Operation Panel is used, you can display the Scan Settings screen, but all setting items are grayed out and you cannot change them.

4. If you wish to make a Scan Setting uneditable, please continue. If not, click [Apply], or [OK], to return to the Group/Project screen.

#### Making a Scan Setting Uneditable

You can make Scan Setting uneditable, as needed. For instance, you can control which Resolution settings to display on the display panel. For instance, you may want to prevent use of low resolution (100dpi) or high resolution (600dpi) settings. In that event, simply click the [Filter] tab > [Scan Settings] tab, and then double-click [Resolution] to display the Property screen; select only the desired check boxes.

#### Fig.: Resolution Property Screen



- 1. To make this parameter uneditable, clear the check box, and then click [OK].
- 2. When finished with configuration of all Distribution Parameters, click [Apply] to save the settings, and then click [OK], to return to the Group/Project screen.

#### Scan Size

The [Scan Size] tab is available through [Filter]. This setting enables you to select the original size, for example, [Auto Detect], [Mixed Sizes], etc. Like [Scan Settings], the [Scan Size] tab is automatically added to every new Project.



• A default Scan Size can be set on the System or Profile Level.

To select a default Scan Size on the MFP display panel, proceed as follows:

1. From the [Scan Settings] screen, click [Scan Size] tab. If necessary, see items 1 - 4 in the previous section.

The Scan Size screen displays.

Fig.: Scan Size Screen (Standard Operation Panel)

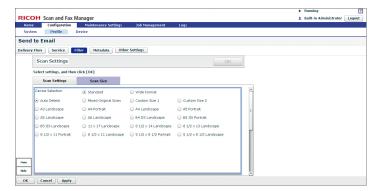
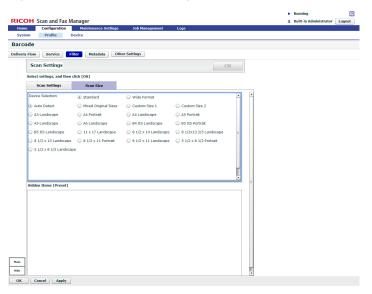


Fig.: Scan Size Screen (Smart Operation Panel)



Each scan size is displayed as a separate button on the MFP display panel. If another setting is not specified, the default setting is [Auto Detect].



- The scan sizes that can be specified may differ depending on the MFP. Select the profile that matches the MFP you are using.
- When [Target Screen Size] of the profile is [10.1 inch], and [Standard] is selected in [Device Selection] of the project that is being applied to a wide-format machine, the paper sizes such as A2 and A1 that can only be used on wide-format machines will not be shown on the screen of the MFP.
- 2. If you wish to change the default Scan Size, choose one of the following settings:

#### Standard Operation Panel

Sidilidad Operation Failer		
[Mixed Original Sizes]* ]	[B5 JIS Portrait]	
[Custom Size 1]*2	[B5 JIS Landscape]	
[Custom Size 2]*2	[11 × 17 Landscape]	
[A3 Landscape]	[8 1/2 × 14 Landscape]	
[A4 Portrait]	[8 1/2 × 13 Landscape]	
[A4 Landscape]	[8 1/2 × 11 Portrait]	
[A5 Portrait]	[8 1/2 × 11 Landscape]	
[A5 Landscape]	[5 1/2 × 8 1/2 Portrait]	
[A6 Landscape] <sup>*3</sup>	[5 1/2 × 8 1/2 Landscape]	

[B4 JIS Landscape]

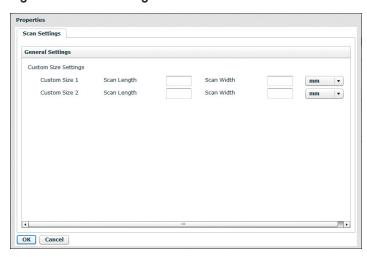
### **Smart Operation Panel**

[Mixed Original Sizes]*1	[B5 JIS Portrait]
[Custom Size 1]*2	[B5 JIS Landscape]
[Custom Size 2]*2	[11 × 17 Landscape]
[A3 Landscape]	[8 1/2 × 14 Landscape]
[A4 Portrait]	[8 1/2 × 13 2/5 Landscape] *4
[A4 Landscape]	[8 1/2 × 13 Landscape]
[A5 Portrait]	[8 1/2 × 11 Portrait]
[A5 Landscape]	[8 1/2 × 11 Landscape]
[A6 Landscape] <sup>*3</sup>	[5 1/2 × 8 1/2 Portrait]
[B4 JIS Landscape]	[5 1/2 × 8 1/2 Landscape]

<sup>\*1</sup> Depending on the MFP you are using, [Mixed Original Sizes] may not be used even if the setting is supported in the machine's standard function.

Double-clicking the [Scan Settings] or [Scan Size] tab displays a screen on which you can specify a custom size setting.

Fig.: Custom Size Settings Screen



<sup>\*2</sup> If [Custom Size 1] or [Custom Size 2] is selected, the [Auto select paper to fit image size] function in Send to Printer Service becomes invalid.

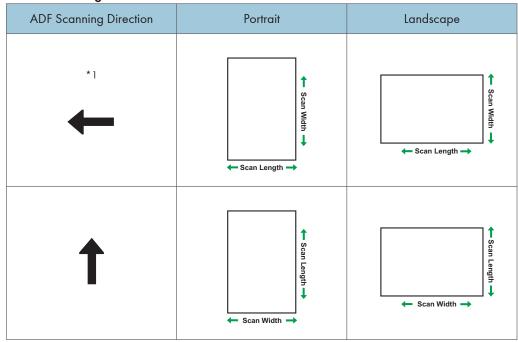
 $<sup>^{\</sup>star3}$  [A6 Landscape] is available only when scanning using the Exposure Glass.

<sup>\*4</sup> This item appears only when [Target Screen Size] of the profile is [10.1inch].

If a value is specified for [Custom Size 1] or [Custom Size 2], the value will be displayed as the default scan size.

For details about the scan length and scan width for custom sizes, see the following table.

Table: Scan Length and Scan Width for Custom Sizes



<sup>\*1</sup> On Smart Operation Panel, scanning is always treated as if it is performed in this direction.

The orientation reference point for scanning custom size paper varies depending on whether scanning is performed using the Automatic Document Feeder (ADF) or Exposure Glass:

If the ADF you are using is adjustable for both scan length and width.: Middle of the original document in the left-right (landscape) orientation

If the ADF you are using is adjustable for either scan length or width.: Top left of the original document



• The landscape orientation of an original document is vertical to the scanning direction.

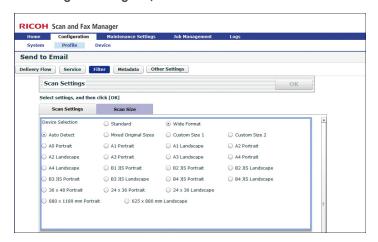
Exposure Glass: Top right of the original document

For details about the orientation reference point for scanning custom size paper, see the following table.

Table: Orientation Reference Points for Scanning Custom Size Paper

Scanning Method	Orientation Reference Point for Scanning Custom Size Paper (indicated with green arrow)
Exposure Glass	Original Document:  R Original Document Set on the Exposure Glass:
If the ADF you are using is adjustable for both scan length and width.	→ R
If the ADF you are using is adjustable for either scan length or width.	R

3. When [Wide Format] is selected in [Device Selection], if you want to change the default Scan Size, choose one of the following settings (The available wide-format sizes differ according to the region.):

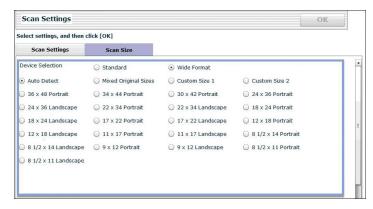


Standard Operation Panel

Mixed Original Sizes, Custom Size 1, Custom Size 2, A0 Portrait, A1 Portrait, A1 Landscape, A2 Portrait, A2 Landscape, A3 Portrait, A3 Landscape, A4 Portrait, A4 Landscape, B1 JIS Portrait, B2 JIS Portrait, B2 JIS Landscape, B3 JIS Portrait, B3 JIS Landscape, B4 JIS Portrait, B4 JIS Landscape, 36 × 48 Portrait, 24 × 36 Portrait, 24 × 36 Landscape, 880 × 1189 mm Portrait, 625 × 880 mm

• Smart Operation Panel

Mixed Original Sizes, Custom Size 1, Custom Size 2, A0 Portrait, A1 Portrait, A1 Landscape, A2 Portrait, A2 Landscape, A3 Portrait, A3 Landscape, A4 Portrait, A4 Landscape, A5 Portrait, A5 Landscape, A6 Landscape, B1 JIS Portrait, B2 JIS Portrait, B2 JIS Landscape, B3 JIS Portrait, B3 JIS Landscape, B4 JIS Portrait, B4 JIS Landscape, B5 JIS Portrait, B5 JIS Landscape, 36 × 48 Portrait, 24 × 36 Portrait, 24 × 36 Landscape, 880 × 1189 mm Portrait, 625 × 880 mm Landscape



• Standard Operation Panel

Mixed Original Sizes, Custom Size 1, Custom Size 2,  $36 \times 48$  Portrait,  $34 \times 44$  Portrait,  $30 \times 42$  Portrait,  $24 \times 36$  Portrait,  $24 \times 36$  Landscape,  $22 \times 34$  Portrait,  $22 \times 34$  Landscape,  $18 \times 24$  Portrait,  $18 \times 24$  Landscape,  $17 \times 22$  Portrait,  $17 \times 22$  Landscape,  $12 \times 18$  Portrait,  $12 \times 18$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape

• Smart Operation Panel

Mixed Original Sizes, Custom Size 1, Custom Size 2,  $36 \times 48$  Portrait,  $34 \times 44$  Portrait,  $30 \times 42$  Portrait,  $24 \times 36$  Portrait,  $24 \times 36$  Landscape,  $22 \times 34$  Portrait,  $22 \times 34$  Landscape,  $18 \times 24$  Portrait,  $18 \times 24$  Landscape,  $17 \times 22$  Portrait,  $17 \times 22$  Landscape,  $17 \times 18$  Portrait,  $18 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Portrait,  $11 \times 17$  Landscape,  $11 \times 17$  Portrait,  $11 \times 17$  Po



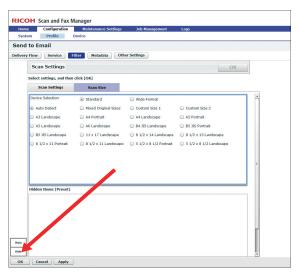
- When [Auto Detect] is enabled, the originals is scanned in the size of the first page that is detected, i.e., automatic size detection is performed for the first page only, and the detected size is used for all of originals to follow.
- When [Mixed Original Sizes] is enabled, automatic size detection is performed for each page of the original.
- If the paper size specified in the project is not supported by the MFP, [Auto Detect] will be selected by default. However, with certain MFPs [A4 Landscape] will be selected instead.
- 4. If you wish to hide the all Scan Size settings, so the users cannot make a selection, please continue. If not, click [Apply], or [OK], to return to the Group/Project screen.

#### **Hiding All Scan Size Settings**

- 1. Set a Scan Size value, for example [Auto Detect]. A preset value must be selected.
- 2. Click on any setting within the [Scan Size] screen.

3. Drag and drop the screen to [Hide] via the Screen Component Transfer Zone.





The [Hidden Items (Preset)] screen is now blank. Scroll down to view all Scan Size settings in the [Hidden Items (Preset)] screen. If all settings are placed in the [Hidden Items (Preset)] screen, a tab will not be available to the user. Instead, these default values are applied to all scanned documents. To return the Scan Size settings back to the Main Screen, drag and drop the screen to [Main] in the Screen Component Transfer Zone.

4. If you wish to select individual Scan Size settings to display on the MFP display panel, please continue. If not, click [Apply], or [OK], to return to the Group/Project screen.

### Selecting Individual Scan Size Settings

You can make a Scan Size setting visible or read-only, as needed. For example, you may wish to display only the [Auto Detect] setting and a few paper sizes supported by the MFP. To do so, proceed as follows:

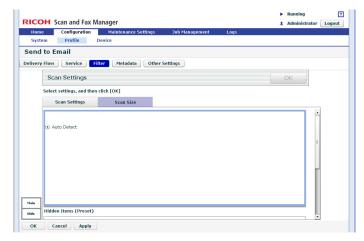
1. Double-click on any Scan Size setting. The Scan Size Properties screen displays.

Fig.: Scan Size Properties Screen



- 2. On the Scan Size Properties screen, clear the check boxes for scan sizes that you want to hide
- 3. Click [OK].

Fig.: Scan Size Main Screen





- To modify the Scan Size Properties again, double-click on a Scan Size to open the Properties screen.
- 4. When finished, click [Apply], or [OK], to save settings, to return to the Group/ Project screen.

### **OCR Scanned PDF**

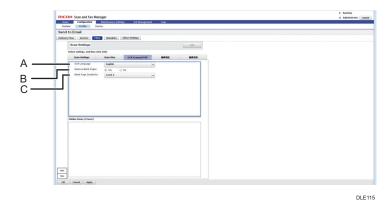
The [OCR Scanned PDF] tab is available through [Filter]. This setting enables you to create the OCR scanned PDF.

This function is available with MFP which supports the OCR function (OCR Unit).



 If this function is used in a Project (Server), PDF files are created when scanning is executed on an MFP. Therefore, the filter functions that do not support PDF file as the input format cannot be used.

### Fig.: OCR Scanned PDF Screen



**Table: OCR Scanned PDF** 

	ltem	Description
Α	[OCR Language]	You can select the language for OCR.
		The followings are selectable:
		• [English]
		• [German]
		• [French]
		• [Italian]

	ltem	Description
		<ul> <li>[Spanish]</li> <li>[Dutch]</li> <li>[Portuguese]</li> <li>[Norwegian]</li> <li>[Danish]</li> <li>[Polish]</li> <li>[Swedish]</li> <li>[Finnish]</li> <li>[Hungarian]</li> <li>[Japanese]</li> </ul>
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] (Only pure white is blank)  • [Level 2]  • [Level 3]  • [Level 4]  • [Level 5] (Dirty paper is blank)  • [Link to Device Setting] (Standard Operation Panel only)

#### 4

# **About Other Settings**

The Other Settings tab allows you to configure settings regarding the Document Name, Scan Settings (Standard Operation Panel only), and preview function.

Fig.: MFP Display Panel (Standard Operation Panel)

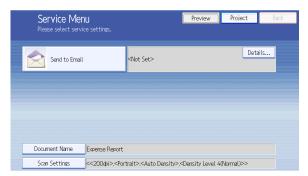


Fig.: MFP Display Panel (Smart Operation Panel)

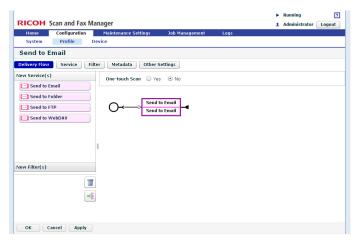


To preset a Document Name and Scan Settings screen preferences, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- 3. If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.

4. Double-click the Project button. The Delivery Flow screen displays.

Fig.: Delivery Flow



5. Click [Other Settings].

Fig.: Other Settings Screen (Standard Operation Panel)

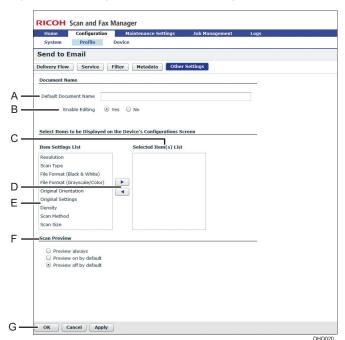
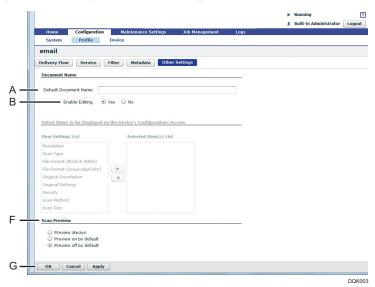


Fig.: Other Settings Screen (Smart Operation Panel)



6. Specify the Other Settings, as outlined in the table below.

## Table: Other Settings

lable:	le: Other Settings		
	ltem	Description	
A	[Default Document Name]	Specify the default Document Name. The name you specify here is set to the "Document Name" property of each scanned document and used for the name of the created attached file (email distribution) and the created file (folder distribution). This entry will appear in the Document Name field on the MFP display panel.	
		The Document Name is set as follows:	
		<ul> <li>If the scanned time information is enabled, the Document Name is:</li> </ul>	
		DocumentName_yyyymmddhhmmss	
		<ul> <li>If a Document Name is not specified, the scan date is used as the Document Name, as follows:</li> </ul>	
		yyyymmddhhmmss	
		<b>■</b> Reference	
		See page 42 "Step 2: Add a Profile".	
		<ul> <li>Depending on the Service/Filter, it is possible to give a unique Document Name in the various setting screens, for</li> </ul>	

	ltem	Description
		example, within the [Document Name Extraction] property in the OCR Filter title export function and the Send to Folder Service.
		(1) Limitation
		The maximum length of a Document Name is 128 characters.
В	[Enable Editing]	Specify whether to allow the user to edit the document name.  • [Yes]
		When performing a scan, this field is active, thus the user can specify the Document Name via the MFP display panel.
		• [No]
		The default Document Name set via the AdminTool is used.
		As such, the Document Name field is grayed out on the Standard Operation Panel or not displayed on the Smart Operation Panel, thus the user cannot make changes.
С	[Selected Item(s) List]	Items that have been moved from the [Item Settings List] field to this field appear on the MFP display panel in the box to the right of [Scan Settings]. See [E] for a list of settings.
D	[▶] (Standard Operation Panel only)	Moves selected items from [Item Settings List] to [Selected Item(s) List].
	[◀] (Standard Operation Panel only)	Moves selected items from [Selected Item(s) List] to [Item Settings List].
E	[Item Settings List] (Standard Operation	Displays items available for display in the Scan Settings field on the MFP display panel, as follows:
	Panel only)	• [Resolution]
		• [Scan Type]
		• [File Format(Black & White)]
		[File Format(Grayscale/Color)]      [Original Originatorian]
		[Original Orientation]     [Original Settings]
		[Original Settings]

	ltem	Description
		• [Density]
		[Scan Method]     [Scan Size]
		V [Scan Size]
F	[Scan Preview]	Specify whether or not to display a preview of the scanned documents.
		For profiles set for a machine with a 4.3 inch screen, SFM does not support this function.
		[Preview always]
		If [Preview always] is selected, a preview of the scanned documents will be displayed every time before the actual output.
		If [Preview always] is selected, the preview setting cannot be changed on the MFP display panel.
		[Preview on by default]
		If [Preview on by default] is selected, a preview of the scanned documents will be displayed every time before the actual output unless a user sets the [Preview] button to off.
		[Preview off by default]
		If [Preview off by default] is selected, scanning will be performed without displaying a preview of the scanned documents unless a user sets the [Preview] button to on.
G	[OK]	Saves settings, and return to the Group/Project screen.
	[Cancel]	Exits, without saving the settings.
	[Apply]	Saves only.

The figure below shows entered/selected items for both the Default Document Name and Selected Item(s) List (Standard Operation Panel only). The MFP's Service Menu will display these values.

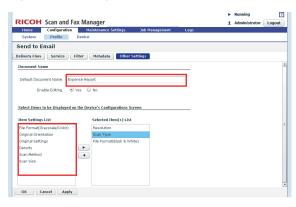
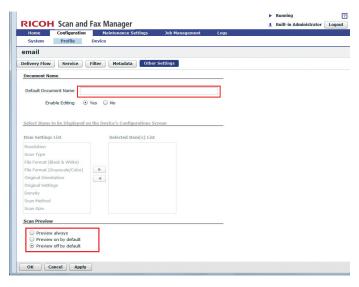


Fig.: Other Settings Screen - AdminTool (Smart Operation Panel)



- - Be careful to select the items in order of priority. This will ensure that the most important settings are visible on the MFP display panel. For example, if you select all settings, those that appear at the end may not be displayed.
- 7. When finished, click [Apply] to save the settings.
- 8. Click [OK] to return to the Group/Project screen.

## **About Metadata**

Scan and Fax Manager uses Metadata to classify documents for indexing and subsequent searching/retrieval tasks. As a document management tool, Metadata is used within Services/Filters to capture user-relevant information (in XML format).

Scan and Fax Manager supports two kinds of Metadata, also called document information, basic and custom.

### Basic Metadata

Standard document information is automatically captured by Scan and Fax Manager during the scanning process. This process occurs in the background, i.e., user input is not generally required.

#### Custom Metadata

The document information is designed/added to a Project by the Administrator, using various input field types, such as text boxes and/or drop-down lists. The user, from the MFP display panel, can enter certain values prior to scanning the document.

## Reference

• See page 468 "Metadata Specifications".

The Administrator can create custom Metadata Input Components, such as text boxes and/or drop-down lists, for any Project.

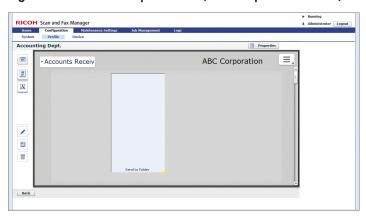
To add Metadata Input Components to a Project, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- If necessary, click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.

In the example below, the Project is called "Send to Folder".



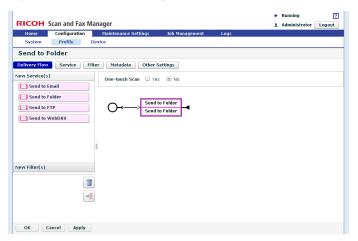
Fig.: Send to Folder Project Button (Smart Operation Panel)



### 4. Double-click [Send to Folder].

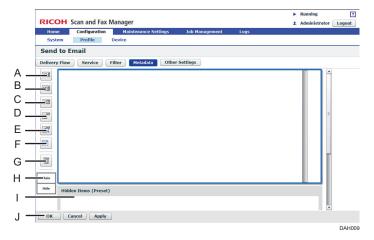
In this example, the Deliver Flow screen displays.

Fig.: Send to Folder Delivery Flow



5. Click [Metadata]. The Metadata Input Component screen displays.

Fig.: Metadata Input Component Screen



6. Specify the Input Components, as outlined in the table below.

The possible configuration settings for Metadata Input Components are as follows:

#### Display position

Where to display the Input Component(s) on the computer screen. The order in which you click (select) the Input Components is how they will display on the MFP display panel. For instance, if you want to add a check box field, text field, and then Dropdown ListBox, click button E, A, and D, in that order.

### • Display/hide

Whether to display the Input Component(s) on the MFP display panel. If placed in the [Hidden Items (Preset)] section (see [H]), the user will not see the setting on the MFP display panel.

• Default value/preset value

If you wish to preset the value so that the user cannot change the field, drag and drop the Input Component, with preset value, in the [Hidden Items (Preset)] section (see [H]).



- To open a Metadata Properties dialog box, double-click the field label.
- For each Metadata, the [Tag Name on Metadata XML] field is required. Other Metadata rules are as follows:
  - Do not enter characters that are prohibited in XML, for example &%\$.
  - Do not use a Tag Name twice.
  - Do not use Metadata Tag Names, for example "name", "userName", etc., as these are utilized internally by Scan and Fax Manager.

## Reference

• See page 468 "Metadata Specifications".

### Table: Metadata Input Components

Iable	ble: Metadata Input Components		
	Metadata Field	Description	
A	InputText	Use this component to add document information of string type. To this component, you can specify the following attributes:  • Enable [Yes], [No]	
		Required Entry Item [Yes], [No]	
		Display Name (Maximum: 128 characters)	
		Tag Name on Metadata XML (Maximum: 128 characters)	
		Max. Characters (Default: 128)	
		Min. Characters (Default: 0)	
		Password [Yes], [No]	
		<ul> <li>Regex for Validation (if the user inputs a string that does not match this regular expression, an error will occur. See page 474 "About Regular Expressions".)</li> </ul>	
		<b>♣</b> Note	
		If the [Required Entry Item] setting is [Yes], you cannot set Min. Characters and Max. Characters to zero.	
		<ul> <li>To ensure users enter a value, select [Yes] for [Required Entry Item].</li> </ul>	

	Metadata Field	Description
В	NumberStepper	Use this component to add document information of numeric type (an integer). To this component, you can specify the following attributes:
		Enable [Yes], [No]
		Display Name (Maximum: 128 characters)
		Tag Name on Metadata XML (Maximum: 128 characters)
		Max. Value
		Min. Value
		<b>U</b> Note
		If the field is left blank and if the range between the Min. Value and Max. Value includes zero, a zero will be specified as the value. If the range between the Min. Value and Max. Value does not include zero, the Min. Value or Max. Value, whichever is closer to zero, will be specified as the value.
С	DateField	Use this component to add document information of date type.
		If you enter a date in this field, it will be used as the default date on the display panel.
		To this component, you can specify the following attributes:
		• Enable [Yes], [No]
		Display Name (Maximum: 128 characters)
		<ul> <li>Tag Name on Metadata XML (Maximum: 128 characters)</li> </ul>
		Start Date
		• End Date
		Use date of operation as default value [Yes], [No]
		<b>◆</b> Note
		<ul> <li>You can set the default date to display on the display panel as follows:</li> </ul>
		<ul> <li>To display a date that you specify as the default value:</li> </ul>

	Metadata Field	Description
		Select [No] in [Use date of operation as default value], and enter the date on the Metadata Input Component screen.
		<ul> <li>To display the date of operation of the MFP as the default value:</li> </ul>
		Select [Yes] in [Use date of operation as default value].
D	Dropdown ListBox	Use this component to add document information by using a drop-down list. To this component, you can specify the following attributes:
		Enable [Yes], [No]
		Display Name (Maximum: 128 characters)
		Tag Name on Metadata XML (Maximum: 128 characters)
		Options (add up to 50 option items to appear in the drop-down on the MFP display panel)
Е	Dropdown Listbox (File)	Use this component to add a drop-down list for selecting a value from a csv file.
		Example uses: Document type, Subject, Company
		<ul> <li>Dropdown ListBox (search) retrieves its selections from a CSV file.</li> </ul>
		Users search the selected file to find a selection.
		The CSV file is specified using the "Refer to" field.
		<ul> <li>SFM does not display or access the content of the CSV file until the "Search" button has been pressed.</li> </ul>
		<b>U</b> Note
		<ul> <li>[Dropdown List Box (File)] is unavailable in the document information editor screen of a Project (Serverless) and cannot be used.</li> </ul>
		<ul> <li>The path and file name combined ("Refer to" field) cannot exceed 128 characters.</li> </ul>
		Only the .csv and .CSV extensions are supported.
		The file path must be local. If a failover or load
		balance server is used, each server must have the same CSV file in the same location.

	Metadata Field	Description
		The "Test" button only checks for the existence of the file, not its validity.
		The Search function can not be tested from the AdminTool.
		CSV Specification
		<ul> <li>All the entries in a file will be available as a searchable selection.</li> </ul>
		Character code: UTF-8 only.
		Delimiter: Comma (,) only.
		Line Feed: <cr><lf> only.</lf></cr>
		Enclosure: With or without double quotations.
		To include a comma in an entry, enclose it with double quotations.
		<ul> <li>To use double quotations in an enclosure, use an escape with double quotations.</li> </ul>
		Comment line: Lines starting with "#" are handled as comments.
		<b>♦</b> Note
		In an unenclosed string, an solitary double quotation is displayed as-is.
		In an enclosed string, a solitary double quotation is parsed as a delimiter.
		For example, "A"AA" results in 2 entries, A and AA
F	Check Box	Use this component to add document information by using a check box (On/Off). To this component, you can specify the following attributes:
		Enable [Yes], [No]
		Display Name (Maximum: 128 characters)
		Tag Name on Metadata XML (Maximum: 128 characters)
G	Waste Basket	To remove an Input Component, drag and drop the component to the Waste Basket button.
		Reference
		See page 345 "Deleting an Input Component".

	Metadata Field	Description
Н	Screen Component Transfer Zone	The Screen Component Transfer Zone allows the user to move screen components between the Main Screen and [Hidden Items (Preset)] screen. This zone remains visible at all times, regardless of scrolling action.
I	Hidden Items (Preset)	To hide an Input Component from the users' view, drag and drop the item either to the Preset button in the Screen Component Transfer Zone or to the Hidden Items (Preset) section of the screen.    Reference
		See page 345 "Hiding an Input Component".
J	[OK]	Saves settings, and return to the Group/Project screen.
	[Cancel]	Exits, without saving settings.
	[Apply]	Saves only.



- The ID (an XML tag) of each Input Component must be unique, i.e., you cannot specify a
  value that is already used by another Input Component. (See page 468 "Metadata
  Specifications" in the Appendix.)
- The MFP display panel can display a maximum of 7 Input Components, on one screen. On the AdminTool screen, separator lines are automatically added as necessary.
- The Metadata screen can have a maximum of 50 Input Components. However, only 21 Input Components (for 3 screens, as a single screen can display a maximum of 7 input components) can be placed on the Main Screen.

Fig. "Metadata Input Components - AdminTool" shows entered Metadata Input Components created via the AdminTool. Fig. "Metadata Input Components - MFP Display Panel" shows how the MFP display panel will display those components.

Fig.: Metadata Input Components - AdminTool

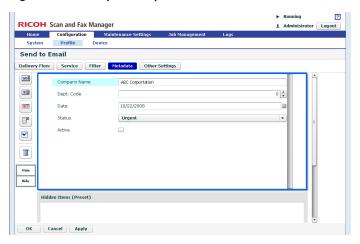


Fig.: Metadata Input Components - MFP Display Panel (Standard Operation Panel)



Fig.: Metadata Input Components - MFP Display Panel (Smart Operation Panel)



7. When finished, click [Apply], or [OK], to save the settings.

## **Changing Input Component Display Order**

To change the order in which the Input Components display on the MFP display panel, proceed as follows:

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- Click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Double-click the Project button.
- 5. If necessary, click the [Metadata] tab.
- 6. Point to the Display Name of the Input Component, and then drag and drop into the position you want. See Fig. "Metadata Components AdminTool (Correct Position)".



You can insert the Input Component at any location marked by a blue line, i.e., if a red "x" appears, the operation will fail. See Fig. "Metadata Components - AdminTool (Incorrect Position)".

Fig.: Metadata Input Components - AdminTool (Correct Position)

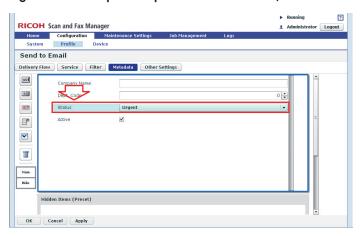
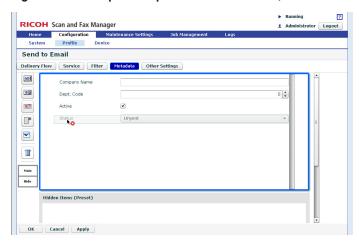


Fig.: Metadata Input Components - AdminTool (Incorrect Position)



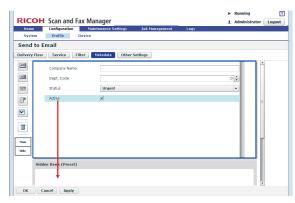
7. When finished, click [Apply], or [OK], to save the settings.

### **Hiding an Input Component**

It is possible to hide an Input Component from the users' view, with the value of the Input Component preset. For instance, you may wish to apply a department code to all scan jobs, and not let the user modify the value.

- 1. If necessary, click [Home], and then the [Profile] shortcut.
- 2. Double-click the Profile Name.
- Click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 4. Double-click the Project button.
- 5. If necessary, click the [Metadata] tab.
- 6. Drag and drop the Input Component to the Hidden Items (Preset) section of the screen.

Fig.: Metadata Input Component Screen



**U**Note

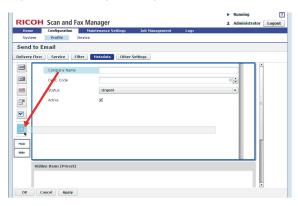
 Placing Metadata fields on the [Hidden Items (Preset)] screen, via direct drag and drop or Transfer Zone is supported. Fields placed on the [Hidden Items (Preset)] screen are not visible to the user at the MFP display panel.

## **Deleting an Input Component**

- 1. If necessary, click [Home], and then the [Profile] shortcut. Double-click the Profile Name.
- Click the Group tab. When Smart Operation Panel is used, click the group name in the Group list.
- 3. Double-click the Project button.

- 4. If necessary, click the [Metadata] tab.
- 5. Drag and drop the Input Component to the Waste Basket button.

## Fig.: Metadata Input Component Screen



#### 4

# **About Device Properties**

The [Device] button on the [Home] page can be used to confirm the device configuration only.

On the Device List screen, click [Properties] to open the device's properties screen.



 In the RICOH Streamline NX system, the device configurations are managed by Administration Manager.

## **About Inbound FAX Transfer**

Scan and Fax Manager supports Inbound FAX Transfer. In order to enable this feature, the MFP's Reception Settings function for facsimile must be set to "Store". For details, refer to the MFP model's Operating Instructions.

If "Store" is specified at the device's FAX transfer settings, the following will occur:

- 1. All inbound faxes from all ports will be stored in the MFP's document server and then delivered.
- 2. If the delivery is successful, the document will be automatically deleted from the MFP's document server.



- If an error occurs after the document has been transferred to the server PC, the job will be placed in the Error Queue. If the document could not be transferred to the server PC, the document will remain in the MFP's document server.
- If the transfer of a received fax document has failed, check the MFP's Document Server. If you
  cannot find it in the Document Server, try restarting the device, and then check the Document
  Server again.
- Documents that were not successfully transferred to the server PC are stored in the MFP's document server. Depending on the MFP's settings, documents stored in the MFP's document server may be deleted after a certain length of time, so make sure to check the document server periodically.
- If too many jobs accumulate in the Error Queue, the MFP's hard disk can fill up, causing the
  received documents to be printed out.



• The MFP can be configured to print faxes when they arrive, even if the MFP's fax transfer setting is "Store". For details, refer to the MFP model's Operating Instructions.

Additionally, to perform Inbound FAX Transfer, the Scan and Fax Manager AdminTool must be configured with a Project configured for the purpose. To create such a Project, proceed as follows:

 Within the Scan and Fax Manager AdminTool, create a Profile, Group, and Project for Inbound FAX Transfer.

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



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



## Reference

- See page 42 "Step 2: Add a Profile".
- See page 45 "Step 3: Add a Group".
- See page 50 "Step 4: Add a Project".

## **Important**

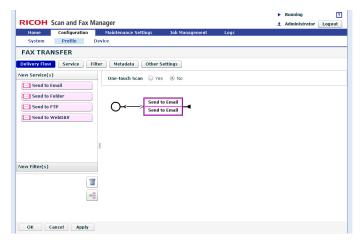
- The Inbound FAX Transfer function is only available to Projects without authentication.
- 2. Double-click on the Project button to open the Delivery Flow screen.

**■** Reference

• See page 61 "Step 6: Configure the Service".

### Fig.: Delivery Flow Screen

3. Select and configure the Service/Filter.



- 4. Specify the target email destination(s), i.e., the "To" field as follows:
  - 1. Click [Service].
  - 2. Double-click [Manual Entry].
  - 3. Enter the email address.
  - 4. Click [OK].
  - 5. Repeat 2 4 to enter another address, if necessary.



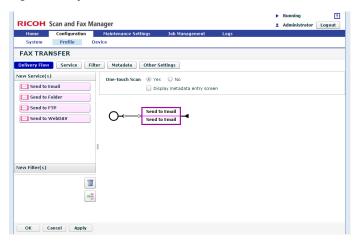
 If LDAP configuration settings are established, you have the ability to search your corporate address book for target destinations.

## Reference

- See page 148 "Send to Email Service".
- See page 280 "About Distribution Parameters".
- 5. Click [Delivery Flow].

6. Now, identify the Project as a One-touch Scan by selecting [Yes].

### Fig.: Delivery Flow Screen





- A message appears warning you that cancelling (reversing) this setting might not be possible.
   Click [OK] to make the setting, or [Cancel] to cancel it.
- After this Project has been selected for processing inbound FAX documents, the One-touch scan setting cannot be cancelled.
- 7. Click [Apply], or [OK], to save the settings.



 If any required settings are missing, for example the [To] destination was not entered/ selected, or the SMTP Server Name or Default Sender Address was not specified, an alert message displays.

## Reference

- See page 148 "Send to Email Service".
- See page 280 "About Distribution Parameters".
- In Administration Manager, create a template for Scan and Fax Manager in which [Use Fax] is enabled, and then apply the policy to the device.



- Only One-touch Scan projects are supported.
- The MFP can be equipped with multiple ports, one or more of which can serve as a fax port.
   Unavailable ports will be disabled (grayed out).
- The [Use Internet port] and [Use IP port] check boxes never be grayed out because SFM
  cannot acquire MFP's support function information.

- Following is a list of available ports. Note that some MFPs have multiple fax ports and unavailable ports will be grayed out.
  - G3-1
  - G3-2
  - G3-3
  - InternetFAX
  - Ipfax
- For details, see "Server Configuration Template Settings", RICOH Streamline NX Administrator's Guide.

#### Λ

# Localizing the AdminTool

This section describes how to localize Profile, Group, and Project Display Names. Doing so will enable you to customize the MFP user interface to address language differences. For instance, if your organization has offices in Florida and Puerto Rico, you can create Profiles that address the language preferences of both user groups.

The Scan and Fax Manager settings that can be localized include the following:

- Document Name
- Profile Display Name
- Group Display Name
- Project Display Name
- Service/Filter Display Name
- Group/Project Screen Text Box
- Send to Email's Subject and Body Text
- Metadata Field Display Name
- Metadata Field Value for InputText



- The example to follow is just one implementation of localization. This same concept can be applied
  to any of the above listed settings. While this example uses Spanish as the localization target, Scan
  and Fax Manager also supports Italian, French, Dutch German, Simplified Chinese, and Japanese.
- 1. Open the AdminTool Login screen.

## Reference

- See page 40 "Step 1: AdminTool Login".
- 2. Select English from the Language drop-down list.
- 3. Create a Profile, for example, "Urgent Documents".

## Reference

- See page 42 "Step 2: Add a Profile".
- 4. Next, create a Group, for example, "Legal Dept".

## Reference

- See page 45 "Step 3: Add a Group".
- 5. Create a Project, for example, "Contract".

## Reference

• See page 50 "Step 4: Add a Project".

- Log out of the AdminTool, and then log back in, selecting Spanish from the Language drop-down list.
- 7. Open the Profile Properties screen. You see that the Profile Name, "Urgent Documents", is in English. Retype the name in Spanish, "Ugente Documentos".
- 8. Double-click the Group tab to open the Group Properties screen. When the Smart Operation Panel is used, double-click the group name in the Group list to open the Group Properties screen. You see the Group Name, "Legal Dept", is in English. Retype the name in Spanish, "Dept. Juridico".
- 9. Open the "Contract" Project Properties screen (drag and drop to the Edit icon). Retype the Project Name in Spanish, "Contrato".
- 10. Create a second Project in Spanish, for example, "Informes", meaning "Reports".
- 11. Log out, and then log back in, selecting English from the Language drop-down list. You will see the Profile, Group and Project called "Contracts" in English, and the Project called "Informes" in Spanish. On the other hand, if you log out and log back in and select Spanish from the Language drop-down list, you will see all settings in Spanish. Whatever displays on the AdminTool Group/Project screen is what the user will see on the MFP display panel.

## 5. MANAGING LOGS

This chapter explains how to, for example, view, search, export, and delete System and Job Logs.

## **System Log**

It is possible to view, search, delete and export the target MFP's System Log. To do so, proceed as follows:



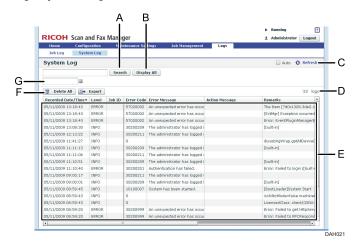
- All system logs are displayed in a single page.
- 1. Click [Logs].
- 2. Click [System Log].

### Fig.: System Log Navigation



The System Log screen displays.

Fig.: System Log Screen



3. Navigate and manage the System Log, as outlined in the table below.

### **Table: System Log**

	Item	Description
Α	[Search]	Performs a text search by keyword.

Refined search is supported. This means after the initial search is complete, [Search] reads [Narrow Search]. Enter the new keyword and click [Narrow Search].  As the keyword, you can use the specific entry in Log Data.  B [Display All] After performing a search, press this button to go back to the System Log.  C [Refresh] Refreshes the screen; the screen will be updated. If you select the [Auto] check box, the latest information appears automatically when you display this screen.  D x logs Indicates the number of System Log entries.  E Log Data The following columns display the associated log data:  • [Recorded Date/Time]  • [Level] (INFO, WARN, ERROR)  • [Job ID] (unique alphanumeric string)  • [Error Code] (numeric reference)  • [Error Message] (detail of the error)  • [Action Message] (next step to take)  • [Remarks] (details for service analysis)  • [Position (Function Name, etc.)] (details for service analysis)  • Note  • To view additional column headings, use the scroll bar located at the bottom of the screen.  • To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  • To sort the list, click the column heading of the item you wish to sort by.		Item	Description
After performing a search, press this button to go back to the System Log.  Refreshes the screen; the screen will be updated. If you select the [Auto] check box, the latest information appears automatically when you display this screen.  Dx logs Indicates the number of System Log entries.  E Log Data The following columns display the associated log data:  • [Recorded Date/Time]  • [Level] (INFO, WARN, ERROR)  • [Job ID] (unique alphanumeric string)  • [Error Code] (numeric reference)  • [Error Message] (detail of the error)  • [Action Message] (next step to take)  • [Remarks] (details for service analysis)  • [Source] (details for service analysis)  • [Position (Function Name, etc.)] (details for service analysis)  • Note  • To view additional column headings, use the scroll bar located at the bottom of the screen.  • To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  • To sort the list, click the column heading of the item you wish to sort by.			search is complete, [Search] reads [Narrow Search]. Enter
System Log.  C [Refresh] Refreshes the screen; the screen will be updated. If you select the [Auto] check box, the latest information appears automatically when you display this screen.  D x logs Indicates the number of System Log entries.  E Log Data The following columns display the associated log data:  • [Recorded Date/Time]  • [Level] (INFO, WARN, ERROR)  • [Job ID] (unique alphanumeric string)  • [Error Code] (numeric reference)  • [Error Message] (detail of the error)  • [Action Message] (next step to take)  • [Remarks] (details for service analysis)  • [Source] (details for service analysis)  • [Position (Function Name, etc.)] (details for service analysis)  • Note  • To view additional column headings, use the scroll bar located at the bottom of the screen.  • To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  • To sort the list, click the column heading of the item you wish to sort by.			As the keyword, you can use the specific entry in Log Data.
If you select the [Auto] check box, the latest information appears automatically when you display this screen.  D x logs Indicates the number of System Log entries.  E Log Data The following columns display the associated log data:  • [Recorded Date/Time]  • [Level] (INFO, WARN, ERROR)  • [Job ID] (unique alphanumeric string)  • [Error Code] (numeric reference)  • [Error Message] (detail of the error)  • [Action Message] (next step to take)  • [Remarks] (details for service analysis)  • [Source] (details for service analysis)  • [Position (Function Name, etc.)] (details for service analysis)  • To view additional column headings, use the scroll bar located at the bottom of the screen.  • To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  • To sort the list, click the column heading of the item you wish to sort by.	В	[Display All]	
appears automatically when you display this screen.  D x logs Indicates the number of System Log entries.  E Log Data The following columns display the associated log data:  • [Recorded Date/Time]  • [Level] (INFO, WARN, ERROR)  • [Job ID] (unique alphanumeric string)  • [Error Code] (numeric reference)  • [Error Message] (detail of the error)  • [Action Message] (next step to take)  • [Remarks] (details for service analysis)  • [Source] (details for service analysis)  • [Position (Function Name, etc.)] (details for service analysis)  • Note  • To view additional column headings, use the scroll bar located at the bottom of the screen.  • To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  • To sort the list, click the column heading of the item you wish to sort by.	С	[Refresh]	Refreshes the screen; the screen will be updated.
The following columns display the associated log data:  • [Recorded Date/Time]  • [Level] (INFO, WARN, ERROR)  • [Job ID] (unique alphanumeric string)  • [Error Code] (numeric reference)  • [Error Message] (detail of the error)  • [Action Message] (next step to take)  • [Remarks] (details for service analysis)  • [Source] (details for service analysis)  • [Position (Function Name, etc.)] (details for service analysis)  • To view additional column headings, use the scroll bar located at the bottom of the screen.  • To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  • To sort the list, click the column heading of the item you wish to sort by.			,
<ul> <li>[Recorded Date/Time]</li> <li>[Level] (INFO, WARN, ERROR)</li> <li>[Job ID] (unique alphanumeric string)</li> <li>[Error Code] (numeric reference)</li> <li>[Error Message] (detail of the error)</li> <li>[Action Message] (next step to take)</li> <li>[Remarks] (details for service analysis)</li> <li>[Source] (details for service analysis)</li> <li>[Position (Function Name, etc.)] (details for service analysis)</li> <li>Note</li> <li>To view additional column headings, use the scroll bar located at the bottom of the screen.</li> <li>To change the display order of the log columns, click on the column heading, and then drag and drop left or right.</li> <li>To sort the list, click the column heading of the item you wish to sort by.</li> </ul>	D	x logs	Indicates the number of System Log entries.
· ·	E	Log Data	<ul> <li>[Recorded Date/Time]</li> <li>[Level] (INFO, WARN, ERROR)</li> <li>[Job ID] (unique alphanumeric string)</li> <li>[Error Code] (numeric reference)</li> <li>[Error Message] (detail of the error)</li> <li>[Action Message] (next step to take)</li> <li>[Remarks] (details for service analysis)</li> <li>[Source] (details for service analysis)</li> <li>[Position (Function Name, etc.)] (details for service analysis)</li> <li>Note</li> <li>To view additional column headings, use the scroll bar located at the bottom of the screen.</li> <li>To change the display order of the log columns, click on the column heading, and then drag and drop left or right.</li> <li>To sort the list, click the column heading of the item you</li> </ul>
I I DOUGE AIL DEIEES HE OVIEIL FOU.	F	[Delete All]	Deletes the System Log.

	ltem	Description
		<b>U</b> Note
		To prevent tampering with System logs, it is not possible to delete separate System logs, i.e., you can only delete all logs at once.
	[Export]	Exports all the logs in CSV format. The CSV format file is useful if, for example, you want to import the log data into a spreadsheet or similar application.
		Select the character encoding methods under the [Select Character Encoding] screen.
		The following character encoding methods are supported:
		• UTF-8
		• Latin-1
		<b>⊘</b> Important
		<ul> <li>Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.</li> </ul>
		<ul> <li>If you want to change the file name, download the file with the default name, and then rename it. Changing the file name beforehand may cause problems using the downloaded file.</li> </ul>
G	Date Selection	Display the list of logs for a specific date. Click [ ] and/or [ ] on the calendar to go backward/forward by month.  Click the date, and that selection will appear in the adjacent field.
		On the calendar, the dates that have logs will be highlighted.

# **System Log Settings**

To specify the maximum amount of Job Log data to retain, prior to automatic deletion, proceed as follows:

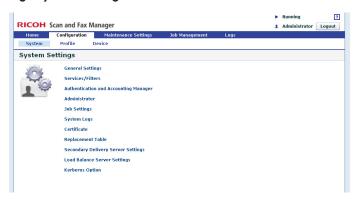
1. Click [Home], and then the [System] shortcut.

Fig.: AdminTool Home Page



2. Click [System Log].

Fig.: System Settings Screen



The System Log Settings screen displays.

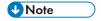
Fig.: System Log Settings Screen



- 3. Specify [Auto Delete Stored Log(s)] [On] or [Off]. If enabling this function, continue with the next step. Otherwise, go to 5.
- 4. Specify the Log Storage Setting (file size). Default storage size is 5120KB. System Logs are deleted automatically when the file size reaches the specified setting.



- The specified setting must be a multiple of 64KB. Thus, the specified value will be
  automatically adjusted when [Apply] is clicked, though you can specify the value freely within
  the possible range, for example 2000KB > 2048KB.
- 5. Click [Apply] to save the settings.



· Click [Back] to exit, without saving the setting.

### Reference

• See page 355 "System Log".

# **Job Log**

To display the Job Log screen, proceed as follows:

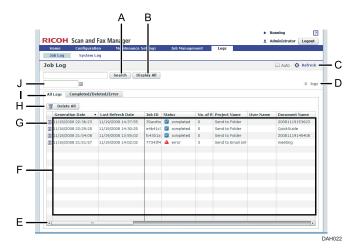
1. Click [Logs].

Fig.: Job Log Navigation



The Job Log screen displays. Select an MFP from the list for which you want to display a summary list of Job Logs. Note that you enter this screen in the [All Logs] view, which displays all Job Logs. The [Completed/Deleted/Error] view displays those logs where the status is either completed, deleted, or an error occurred.

Fig.: Job Log Screen



2. Navigate and manage the Job Log, as outlined in the table below.

Table: Job Log

	ltem	Description
А	[Search]	Enter the search string in the space provided, and then click this button to perform a text search by keyword.
		Refined search is supported, which means after the initial search is complete, [Search] reads [Narrow Search]. Enter the new keyword and click [Narrow Search].
		As the keyword, you can use the specific entry in Log Data.

	ltem	Description
В	[Display All]	After performing a search, press this button to go back to the Job Log list.
С	[Refresh]	Refreshes the screen; the screen will be updated.  If you select the [Auto] check box, the latest information appears automatically when you display this screen.  • Note  • The [Auto] check box does not appear in user mode.
D	X Logs	Indicates the number of Job Log entries.
Е	Scroll Bar	Use this scroll bar to view column data.
F	Log Data	The following columns display the associated log data:  For a list of the columns that appear in the table, see "Log Data Column List" below.  Note  To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  To sort the list, click the column heading of the item you wish to sort by. (Please note that some items may not be sorted in ascending or descending order.)
G	Details III	Checks the details of the log you have specified. The Details view of the log will open as a tab screen. See figures "Detail Screen - Status: Succeeded" and "Detail Screen - Status: Failed". To exit the Details screen, click [Close].  Limitation  A maximum of five (5) tab screens can open at one time. If you click the Details button when five (5) tab screens are already open, the sixth tab screen will open after the first one closes.
Н	[Delete All]	Deletes the Job Log.  To delete Job logs whose status is [Error], you first need to delete the target jobs in the Error Queue screen.

	ltem	Description
		Error job logs cannot be deleted unless their status is changed to [Deleted].  •• Note
		To prevent tampering with Job logs, it is not possible to delete separate Job logs, i.e., you can only delete all logs at once.
		<ul> <li>Job logs whose state is Current, Wait, or Error cannot be deleted.</li> </ul>
I	[All Logs]	Displays the entire Job Log.
	[Completed/Deleted/ Error]	Displays the Job Logs whose status is Completed/ Deleted/Error.  Important  Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.
		If you want to change the file name, download the file with the default name, and then rename it.  Changing the file name beforehand may cause problems using the downloaded file.
J	Date Selection	Displays the list of logs for a specific date. Click [◀] and/or [▶] on the calendar to go backward/forward by month. Click the date, and that selection will appear in the adjacent field.
		<ul> <li>• On the calendar, the dates that have logs will be highlighted.</li> <li>• Text search within the list is supported.</li> </ul>



- On the Job Log screen, click the [Completed/Deleted/Error] tab, and then click [Export] to save the data as a CSV format file.
- The Export function will save all Job Logs regardless of the search results displayed in the list.
- On the [Select Output Object and Character Encoding] screen that appears when you click [Export], you can select the type of information to output and the character encoding method.
  - Output Object: Log per job, Detailed log

- Available encoding methods: UTF-8, Latin-1
- The upper entries in the exported CSV file contain the information displayed in Summary view, and the lower entries contain the information displayed in Detail view.

#### Log Data Column List

- [Generation Date]
- [Last Refresh Date]
- [Job ID]
- [Status] (see table "Status Icons" below)
- [No. of Retries]
- [Project Name]
- [User Name]
- [Document Name]
- [No. of Pages]
- [Document Size]
- [Job Type]
- [First Page Size]
- [First Page Resolution]
- [Device Name] (Device ID is also displayed)
- [Registration Date]
- [Generation Job ID]
- [No. of Scanned Page(s)]
- [MAC Address]
- [IP Address]
- [Added Device Name]

#### Table: Status Icons

Status	Description
	Indicates that the job is waiting in the queue, for example a new job or retry job.  Note
[Waiting]	<ul> <li>A failed job is first held in the waiting queue, and then automatically retried for the specified number of times. If retry is unsuccessful, job is passed from waiting queue to error queue.</li> </ul>

Status	Description
[Processing]	Indicates that the job is being processed.
[Completed]	Indicates that the job is completed.
[Error]	Indicates that the job has failed after retries.
[Deleted]	Indicates that the job has been deleted that was in Waiting, Retry, or Error condition.
[Fatal error]	Indicates that an unrecoverable error occurred. For example, a Project was deleted.  If this status displays, check the System Log for details.

Fig.: Detail Screen - Status: Succeeded

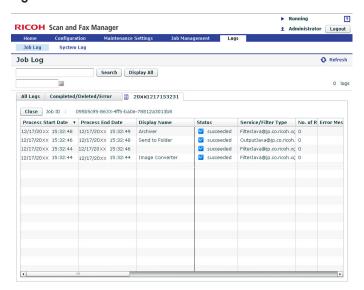


Fig.: Detail Screen - Status: Failed

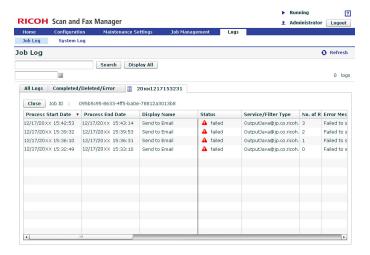


Table: Job Log Screen - Details

ltem	Description
[Process Start Date]	The date and time processing started.
[Process End Date]	The date and time processing finished.
[Display Name]	The display name for the Service/Filter in the delivery flow.
[Status]	The result of data processing
[Service/Filter Type]	The plug-in type
[No. of Retries]	The number of retries
[Error Message]	Error messages
[Action Message]	Action messages
[Destination Address]	The email addresses the data was sent to.
[No. of Destination Address(es)]	The number of addresses the data was sent to.
[Total No. of Deliveries]	The total number of items sent. For example, when using the divide email function, this will be the number of emails the data was divided into.
[Processed Size]	The size of the data processed by the plug-in. This is not the size of the data passed to the plug-in, but the size of the data processed

ltem	Description
	and output by the plug-in. For instance, if an email was sent with no attached data, this number will be zero.
[Processed Pages]	The number of pages processed by the plug-in. This is not the number of pages passed to the plug-in, but the number of pages processed and output by the plug-in. For instance, if an email was sent with no attached data, this number will be zero.

3. When finished, navigate to another screen or close your Web browser.

# 6. MANAGING JOBS

This chapter explains how to manage jobs that are in the Job or Error Queue, as well as establish settings that will control job retry interval, scheduled distributions, etc.

## Job Queue

The status of jobs in the Job Queue is either [Waiting] or [Processing]. To view the Job Queue, proceed as follows:

1. If necessary, click [Home], and then click [Job Queue] shortcut.

Fig.: AdminTool Home Page



**U** Note

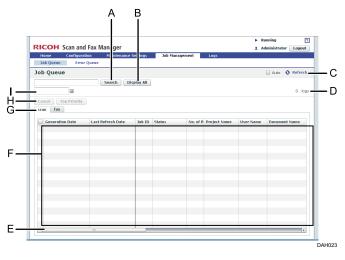
• You can also click the [Job Management] tab, and then [Job Queue].

Fig.: Job Queue Navigation



The Job Queue screen opens.

Fig.: Job Queue Screen



- UNote
  - The Job Logs are displayed in chronological order. That is, they are displayed in the order in which they were accepted. The job that was last accepted will appear at the end of the list.
- 2. Navigate and manage the Job Queue, as outlined in the table below.

Table: Job Queue

	ltem	Description
A	[Search]	Enter the search string in the space provided, and then click this button to perform a text search by keyword.
		Refined search is supported. This means after the initial search is complete, [Search] reads [Narrow Search]. Enter the new keyword and click [Narrow Search].
		As the keyword, you can use the specific entry in Log Data.
В	[Display All]	After performing a search, press this button to go back to the job list.
С	[Refresh]	Refreshes the screen; the screen will be updated.
		If you select the [Auto] check box, the latest information appears automatically when you display this screen.
D	Job Count	Displays the number of jobs listed.
Е	Scroll Bar	Use this scroll bar to view column data.

	ltem	Description
F	Log Data	The following columns display the associated log data:  • [Generation Date]  • [Last Refresh Date]  • [Job ID]  • [Status]  • [No. of Retries]  • [Project Name]  • [User Name]  • [Document Name]  • [No. of Pages]  • [Document Size]  • [Job Type]  • [First Page Resolution]  • [Device Name]  • [Registration Date]  • [Generation Job ID]   Note  • To change the display order of the log columns, click on the column heading, and then drag and drop left or right.  • Column order is maintained, even if you click the [Refresh] button.  • Sorting by clicking on a column heading is not supported.
G	[Scan]	Selects Scan job queue.
	[Fax]	Selects Fax job queue.
Н	[Cancel]	After selecting the job(s) to interrupt, click this button. The job(s) are cancelled and transferred to the Job Log.
	[Top Priority]	Moves a selected job to the top of the Job Queue.

3. When finished, navigate to another screen or close your Web browser.

#### 6

## **Error Queue**

To view the Error Queue, proceed as follows:



- Jobs listed in the Error Queue are stored on the Scan and Fax Manager server and also on the MFPs. If too many jobs accumulate in the Error Queue, the server and/or MFPs' hard disks can fill up. To prevent this, periodically retry or download and then delete jobs from the Error Queue.
- 1. If necessary, click [Home], and then click [Error Queue] shortcut.

Fig.: AdminTool Home Page



**U** Note

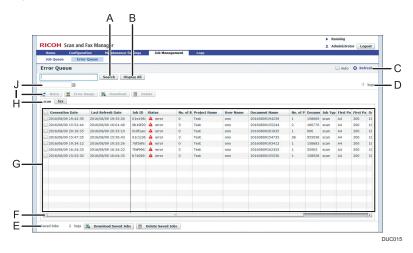
 You can also click the [Job Management] tab, and then [Error Queue] to open the Error Queue screen.

#### Fig.: Error Queue Navigation



The Job Logs held in the Error Queue are displayed.

Fig.: Error Queue Screen



2. Navigate and manage the Error Queue, as outlined in the table below.

Table: Error Queue

	Button	Description
A	[Search]	Enter the search string in the space provided, and then click this button to perform a text search by keyword.
		Refined search is supported. This means after the initial search is complete, [Search] reads [Narrow Search]. Enter the new keyword and click [Narrow Search].
		As the keyword, you can use the specific entry in Log Data.
В	[Display All]	After performing a search, press this button to go back to the job list.
С	[Refresh]	Refreshes the screen; the screen will be updated.
		If you select the [Auto] check box, the latest information appears automatically when you display this screen.
D	Job Count	Displays the number of jobs listed.
Е	Number of Saved Jobs	If an unexpected error occurs, it is recorded in the system log. The job is saved in the appropriate MFP folder but not displayed in the error job list.
		Displays the number of saved jobs, if any.

	Button	Description
		If the failover feature is enabled, the total number of error jobs accumulated on the Primary and Secondary Delivery
		Servers and all of the Load Balance Servers is displayed.  • If saved jobs are accumulated in the save folder, the message "An unspecified error has occurred. Check the saved jobs from the error queue screen on the AdminTool's job management screen" will be sent to the e-mail address specified in the error notification settings on the Administrator Settings screen.
	[Download Saved Jobs]	This button is displayed if there is a saved job. You can obtain information about the saved job by downloading it in ZIP format.
		<ul> <li>• If the failover feature is enabled, saved jobs accumulated on the Primary and Secondary Delivery Servers and all of the Load Balance Servers are downloaded.</li> </ul>
	[Delete Saved Jobs]	This button is displayed if there is a saved job.  You can delete saved jobs.  Note  If the failover feature is enabled, saved jobs accumulated on the Primary and Secondary Delivery Servers and all of the Load Balance Servers are deleted.
F	Scroll Bar	Use this scroll bar to view column data.
G	Log Data	The following columns display the associated log data:  • [Generation Date]  • [Last Refresh Date]  • [Job ID]  • [Status]  • [No. of Retries]  • [Project Name]  • [User Name]  • [Document Name]

	Button	Description	
		<ul> <li>[No. of Pages]</li> <li>[Document Size]</li> <li>[Job Type]</li> <li>[First Page Size]</li> <li>[First Page Resolution]</li> <li>[Device Name]</li> <li>[Registration Date]</li> <li>[Generation Job ID]</li> <li>Note</li> <li>To change the display order of the log columns, click on the column heading, and then drag and drop left or right.</li> </ul>	
		Column order is maintained, even if you click the [Refresh] button.	
Н	[Scan]	Opens the Scan error queue.	
	[Fax]	Opens the Fax error queue.	
I	[Retry]	After specifying the Error jobs, click to retry.  The job(s) will be deleted from this view and transferred to the Job Queue, with a status of [Waiting].  • Reference  • See page 367 "Job Queue".	
	[Error Image]	Displays the first-page image of the Error job.  Important  Your browser requires a Plug-in to display TIFF files.	
	[Download]	Multiple error jobs can be downloaded at once.  When downloading, you can choose to download a log file (in CSV format) in addition to the image data.  Important  Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.  If you want to change the file name, download the file with the default name, and then rename it. Changing the file	

	Button	Description
		name beforehand may cause problems using the downloaded file.  ••• Note
		<ul> <li>Before downloading, you can select which character encoding method to use for the log file.</li> </ul>
	[Delete]	After specifying the Error jobs, click to delete. They will be deleted from this view and their status will be changed to [Delete]. (In the Job Log list, they will appear as Delete logs.)
on the calendar to go backward/		Displays the error queue for a specific date. Click [◀] and/or [▶] on the calendar to go backward/forward by month. Click the date, and that selection will appear in the adjacent field.
		<b>↓</b> Note
		On the calendar, the dates that have logs will be highlighted.
		Text search within the list is supported.

3. When finished, navigate to another screen or close your Web browser.

# **Job Settings**

To set Number of Retries, Retry Interval, Scheduled Delivery, and Auto Delete preferences, proceed as follows:

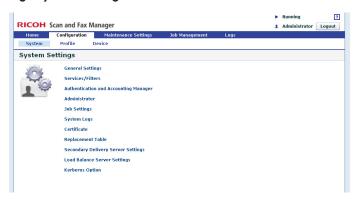
1. Click [Home], and then the [System] shortcut.

Fig.: AdminTool Home Page



2. Click [Job Settings].

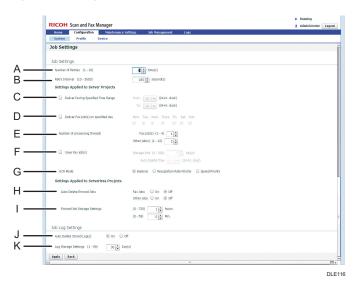
Fig.: System Settings Screen



The Job Settings screen displays.

B

Fig.: Job Settings Screen



3. Specify the Job settings, as outlined in the table below.

Table: Job Settings

	ltem	Description
A	[Number of Retries]	Specify the number of retries performed for a failed job, in the range of 1-10. (Default: 3)
В	[Retry Interval] (10-3600)	Specify the retry interval for a failed job, in the range of 10-3600 seconds. (Default: 180 seconds)  Note  A failed job will be retried at the specified interval, i.e., a failed job will be added to the end of the queue after the time specified here has elapsed. So, if there are many jobs waiting in the queue, the actual retry intervals will be longer.
С	[Deliver During Specified Time Range]	Specify whether or not to enable Scheduled Delivery. If enabled, incoming document distribution jobs will be stored on the Server PC and performed on the specified time.  The user can set the Start and Stop time using the 24-hour clock. For example, if you set the Start time at "23" and the Stop time at "3", delivery will start at 11:00 p.m. and end at 3:00 a.m. If you set the same value (hour) to the Start time and Stop time, Scheduled Delivery will not start correctly.

	ltem	Description
D	[Deliver Fax job(s) on specified day]	Select this check box to specify on which days of the week fax jobs are processed. After you select this check box, select the days of the week on which to process fax jobs. (Default: not selected; fax jobs will be processed on every day of the week.)  • If both [Deliver During Specified Time Range] and [Deliver Fax job(s) on specified day] are enabled, fax jobs will be sent only during the specified time period on the specified days of the week. Jobs other than fax jobs will be sent during the specified time period on every day of the week.
E	[Number of processing threads]	Specify the maximum number of fax jobs and other job that can be processed simultaneously.
F	[Save Fax job(s)]	If you want to save received fax jobs, select this check box, and then specify [Storage limit] and [Auto Delete Time].  • [Storage limit]: Specify the number of days that fax jobs are saved for. Enter a value from 0 to 999 days. (Default: 0 days.)  When the specified save period passes, the fax job data will be deleted automatically.  • [Auto Delete Time]: Specify the time of day at which fax jobs that have reached the storage period limit are deleted. (Default: 1:00 AM.)
G	[OCR Mode]	Determines the OCR engine's operation mode.  • [Balance]  • [Recognition Rate Priority]  • [Speed Priority]  • If you select [Speed Priority], the recognition rate decreases and the processing speed increases. If you select [Recognition Rate Priority], the processing speed decreases and recognition rate increases.
Н	[Auto Delete Errored Jobs]	Select [On] for the jobs ([Fax Jobs] or [Other Jobs]) to which you want to apply the Auto Delete function.

	ltem	Description	
I	[Errored Job Storage Settings]	Specify the duration to store the errored jobs (Errored Job Storage Time) by entering [Hours] and [Minutes] (0 to 720:59).	
J	[Auto Delete Stored Log(s)]	Specify whether or not to enable automatic deletion of the Job Logs.  • Job Logs whose status is [Error] cannot be deleted, i.e., they are excluded from the targets of this deletion.	
K	[Log Storage Settings]	Specify the number of days the Job Logs should be retained, from 1 day to 90 days. (Default: 30 days) After the specified number of days, the Job Log data is deleted.	

4. When finished, click [Apply] to save the settings.



- If a message appears indicating that you must restart Scan and Fax Manager, restart the server that is running the Scan and Fax Manager service.
- Click [Back] to exit, without saving the setting.
- In Administration Manager, click [Policy] under Scan and Fax Manager to apply the settings to the device after configuring the Auto Delete Errored Jobs function. For details, see "Policy Settings", RICOH Streamline NX Administrator's Guide.

### Reference

• See page 360 "Job Log".

# 7. MAINTENANCE SETTING

This chapter explains how to manage the Scan and Fax Manager Server for maximum workflow efficiency.

# **System Control Settings**

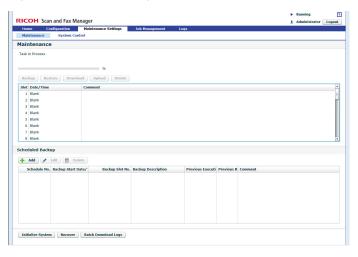
### **Stop/Start Service**

You can start/stop the Scan and Fax Manager Server from processing distribution jobs. The system itself is not stopped, processing of distribution jobs is just temporarily stopped. Incoming jobs are held in the Waiting queue. They will not be processed until you restart job processing.

To start/stop service, proceed as follows:

1. Click [Maintenance Settings], and then [System Control].

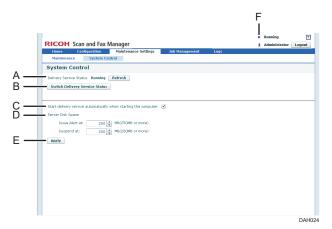
Fig.: Maintenance Settings



**U**Note

• You can also click [Running], in upper right corner, to enter the System Control screen.

Fig.: System Control



2. Specify the operational setting(s), as outlined in the table below.

**Table: System Control Settings** 

	ltem	Description	
A	[Delivery Service Status]	This is a read-only entry that indicates server status. Note that the header entry [F] changes to correspond to this setting.	
	[Refresh]	Refreshes server status.  Note  This command will be executed immediately.	
В	[Switch Delivery Service Status]	Toggles Scan and Fax Manager Server status from [Running] to [Suspended].  • This command will be executed immediately.	
С	[Start delivery service automatically when starting the computer.]	Specify the startup mode of distribution jobs.	

/

	ltem	Description	
D	[Server Disk Space]	Reference	
		See page 383 "Setting Server Disk Space".	
Е	[Apply]	Click to save settings.	
F	Server Status	This is a read-only entry that indicates Scan and Fax Manager Server status, [Running] or [Suspended].	

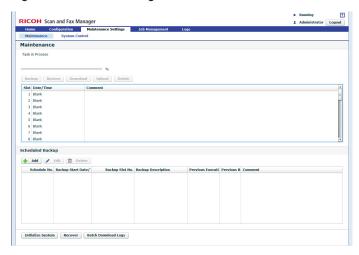
3. When finished, click [Apply] to save setting(s).

### Setting Server Disk Space

To set disk capacity alert/suspend settings, proceed as follows:

1. Click [Maintenance Settings], and then [System Control].

### Fig.: Maintenance Settings



The System Control screen displays.

Fig.: System Control Screen



2. Specify Server Disk Space settings, as outlined in the table below.

Table: Server Disk Space Settings

	Item	Description	
A	[Server Disk Space]	The disk space of the Scan and Fax Manager Server is monitored. As such, if the free disk capacity becomes smaller than the specified size, an alert is logged to the System Log and the Scan and Fax Manager Server will be stopped automatically.	
		<b>↓</b> Note	
		<ul> <li>When the Administrator's email address has been specified, and the notification setting has been enabled, notification will be sent to the Administrator. This requires that the Administrator's email address be specified, and the Notify setting has been enabled.</li> </ul>	
		The user can specify the following settings:	
		• [Issue Alert at:]	
		Specify the alert size, in 50MB increments. The default/minimum size is 250MB.	
		When the free disk capacity drops to the specified size, a notification email will be sent to the Administrator alerting that the service could be stopped, again, provided that the address has been set properly.	
		• [Suspend at:]	
		Specify the suspend size, in 50MB increments. When the free disk capacity drops to this size, the service will be stopped. The default/minimum size is 200MB.	

/

ltem	Description
	■ Reference
	See page 415 "Administrator Settings".

3. When finished, click [Apply] to save setting(s).

# **Maintenance Settings**

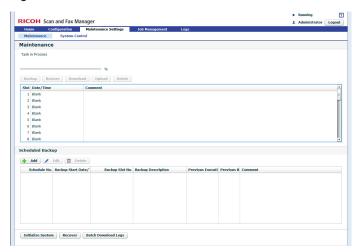
During maintenance, no distribution jobs can be performed on the MFP; the MFP display panel will be locked. Also, during maintenance, any other user cannot login to the AdminTool.

Note that Maintenance will proceed in the background even if the AdminTool is terminated in the middle of Maintenance.

To enter Maintenance Mode, proceed as follows:

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

Fig.: Maintenance Mode



2. Review the table below, the Maintenance Screen. Please do not execute any procedures until you have reviewed this information.

Fig.: Maintenance Mode

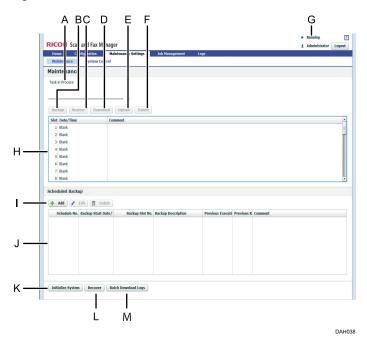


Table: Maintenance Mode

	ltem	Description	
А	[Task in Process]	Gauges process of the requested task.	
В	[Backup]	Performs a backup of Scan and Fax Manager settings.  All the configuration data of the Scan and Fax Manager Server, excluding jobs, Job Logs, and System Logs, are backed up.  Breference  See page 389 "Performing a Manual Backup".	
С	[Restore]	Restores Scan and Fax Manager settings.  Important  You must reboot the Scan and Fax Manager PC/Server after a restore operation.  Reference  See page 399 "Restoring a Backup".	

	ltem	Description	
D	[Download]	Downloads a backup file from Scan and Fax Manager to your computer.  Important  Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.  Reference	
		See page 396 "Downloading a Backup File".	
Е	[Upload]	Uploads a backup file from your computer to Scan and Fax Manager.  • Reference	
		See page 398 "Uploading a Backup File".	
F	[Delete]	Deletes a backup file.  Reference  See page 402 "Deleting a Backup File".	
G	Server Status	Indicates the status of the Scan and Fax Manager Server.	
Н	Backup Data List	Lists each backup that was performed, including date/time and comments.  Q Limitation  A maximum of 30 backups files can be retained.	
ı	[Add]	Adds a backup schedule.	
	[Edit]	Allows you to change the selected backup schedule.	
	[Delete]	Deletes the selected backup schedules.	
J	Schedule list	Displays a list of registered backup schedules.	
K	[Initialize System]	Restores default settings.  Important  This will delete Scan and Fax Manager PC/Server settings, for example Jobs, Logs, etc. Note that the MFP's internal	
		Scan and Fax Manager settings are not cleared.	

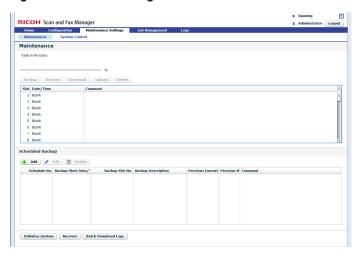
	ltem	Description	
		You must reboot the Scan and Fax Manager PC/Server after initialization.    Reference   Reference	
		See page 403 "Initializing the System".	
L	[Recover]	Performs a recovery.  Important  You must reboot the Scan and Fax Manager PC/Server after initialization.  Reference  See page 401 "Performing a Recovery".	
М	[Batch Download Logs]	Collects logs from the SFM PC application and the selected device(s).  Note  It is intended to collect all SFM-related logs in a single operation. Since it is for log files, a backup file is not included and must be gathered separately.	

## Performing a Manual Backup

It is recommended that the Administrator backup Scan and Fax Manager data on a daily basis. Note that there are 30 available lines, enabling backup of data daily, for up to one month.

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

Fig.: Maintenance Settings

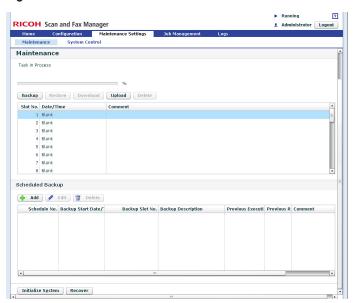


2. Select (highlight) a blank line.

Once you have reached 30 backup files, you can select which backup data to overwrite.

3. Click [Backup].

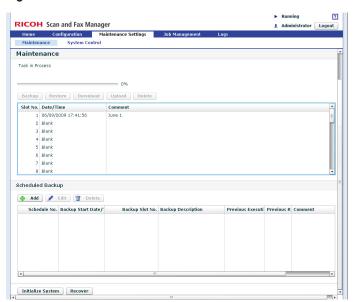
Fig.: Maintenance Mode



4. A message displays confirming the backup, and providing a [Comment] field. Enter a comment (up to 50 characters), and then click [OK]. A message displays indicating that the Backup operation was successful.

5. Click [OK]. The newly-created backup file is added to the list.

Fig.: Maintenance Mode



All of the configuration data of the target MFP, excluding the jobs, Job Logs, and System Logs, are backed up. Note that the data is identified by the date/time of backup, and any comment that may have been entered.



- Backups are retained in a specific folder on the Scan and Fax Manager server running the application and AdminTool; the folder is fixed and thus not changeable.
- · Interruption is not supported, i.e., once a backup has been executed, the task cannot be stopped.
- It is possible to restore a backup onto another MFP. Depending on the capabilities of the MFP, some settings may or may not be supported, for example color scan settings, resolution, etc.

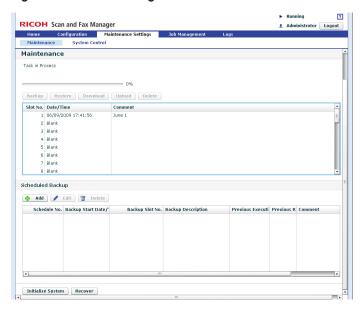
### **Configuring Automatic Backups**

If you configure a backup schedule, backups will be automatically made on the specified date at the specified time.



You can register up to 10 backup schedules.

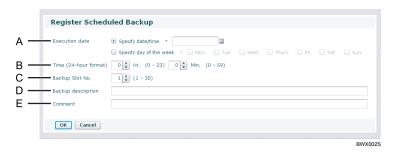
Fig.: Maintenance Settings



2. Click [Add] under Scheduled Backup.

The Register Scheduled Backup screen appears.

#### Fig.: Register Scheduled Backup screen



3. Specify the settings, as outlined in the table below.

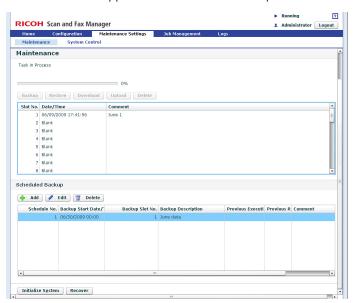
Table: Register Scheduled Backup screen

	ltem	Description
A	[Execution date]	Specify the day(s) on which the backup is to be performed.
		<ul> <li>[Specify date/time]: select the date using the calendar.</li> </ul>

	ltem	Description
		[Specify day of the week]: select the check boxes of the days on which you want the backup to be performed.
В	[Time (24-hour format)]	Specify the time the backup is to be performed.
С	[Backup Slot No.]	Specify a number for the backup slot. The number you specify will appear as the [Slot No.] on the backup list. The number you specify determines the "slot" that backup data is written to.
		For example, if you specify 3 for a backup in the backup list, that backup data will overwrite the data in the third slot when the backup is performed.
		You can specify up to 30 slots by entering a number from 1 to 30.
D	[Backup description]	Enter an explanation of the scheduled backup. You can enter up to 128 characters.
Е	[Comment]	Enter the information that will appear in [Comment] on the backup data list.
		You can enter up to 50 characters.

### 4. Click [OK].

The new schedule appears in the scheduled backup list.



- If Scan and Fax Manager Server is not running at the specified backup time, the backup will be not performed.
- Backups are not performed under the following conditions:
  - If you are logged in to AdminTool as an Administrator. (Backups are still performed if a general user is logged in.)
  - If any of the following maintenance processes is running: backup, restore, download, upload, initialize, or recovery.
- If a scheduled backup is not performed, a failure is recorded in the system and error logs, and the Administrator will receive an error notification email. However, error notification emails are not sent during the initialization or recovery processes.



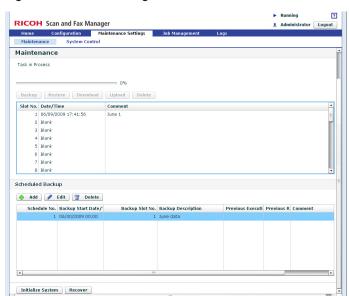
• If multiple backups are scheduled to be performed at the same time, the backup that is higher on the list receives priority.

### Changing the Settings of a Scheduled Backup

Use the following procedure to change the settings of a scheduled backup.

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

#### Fig.: Maintenance Settings



On the scheduled backup list, select the backup whose settings you want to change, and then click [Edit].

Fig.: Register Scheduled Backup screen



- 3. Change the settings as necessary.
- 4. Click [OK].

The modified scheduled backup will appear in the scheduled backup list.



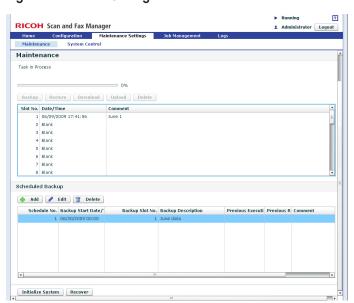
To return to the Maintenance screen without saving the changes, click [Cancel].

### Deleting a Scheduled Backup

Use the following procedure to delete a scheduled backup.

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

Fig.: Maintenance Settings



On the scheduled backup list, select the backup you want to delete, and then click [Delete].

A confirmation message will appear.

3. To delete the scheduled backup, click [OK].



• To return to the Maintenance screen without deleting the scheduled backup, click [Cancel].

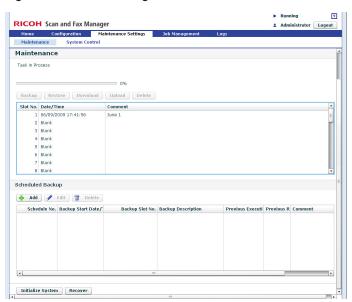
## Downloading a Backup File

You can download a backup file, for example, when copying the backup data to another PC, proceed as follows:



- Before downloading, make sure that the disk capacity is large enough. A capacity shortage may cause problems opening the downloaded file.
- 1. Click [Maintenance Settings], and then [Maintenance], if necessary.

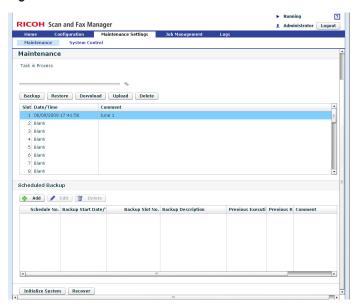
### Fig.: Maintenance Settings



/

### 2. Select the line of backup data you want to download.

### Fig. Maintenance Mode



### 3. Click [Download].

You can set a password for the backup file. If entered, this password will be required when the backup file is uploaded.

### 4. Enter the password.

# **○** Limitation

- The maximum length is 128 characters.
- Enter only alphanumeric characters for the download password.

Re-enter the password to confirm.

### Fig.: Maintenance Mode

Download		
Confirm		
Do you want to dow	vnload?	
Password		
Confirm Password		
OK Cancel		

- 5. Click [OK] to save the password.
- 6. Save the backup file to the desired location.

A message displays indicating that the download operation was successful.

### 7. Click [OK].

# Uploading a Backup File

It is possible to upload a backup file to restore Scan and Fax Manager settings.

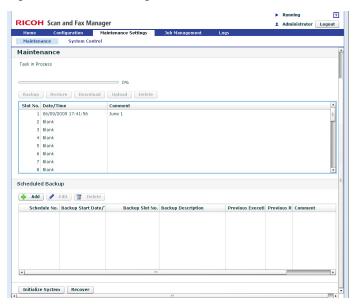


 You can import backup files created by a Scan and Fax Manager system that has different options installed on it.

## Reference

- See page 389 "Performing a Manual Backup".
- 1. Click [Maintenance Settings], and then [Maintenance], if necessary.

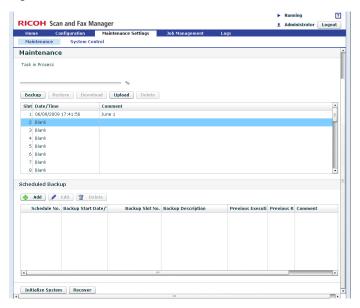
Fig.: Maintenance Settings



2. Select a blank line on the list.

### 3. Click [Upload].

### Fig.: Maintenance Mode



- 1. Browse to the backup (.bk) file.
- 2. Click [Open].
- If the backup file was password-protected, enter the password used to download the file, and then [OK]. A message displays indicating that the upload operation was successful.
- Reference
  - See page 396 "Downloading a Backup File".
- 4. Click [OK].

## Restoring a Backup

You can restore the settings of the target MFP(s), by using a restored a backup file. To do so, proceed as follows:



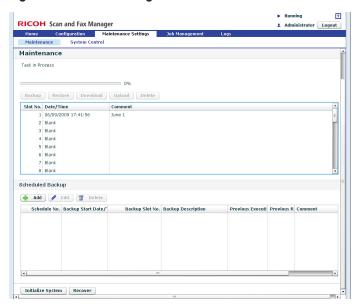
 You cannot restore data which does not have a screen size item to a machine with a 4.3-inch screen.

# Limitation

 If you are uploading a backup file that was created using a different version or edition of Scan and Fax Manager, the available space on the server's hard disk must be at least 12 times larger than the size of the backup file. This is because the backup file must be decompressed in order to convert it to the current version or edition.

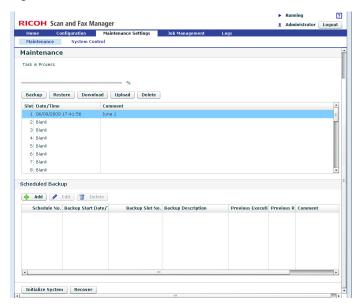
1. Click [Maintenance Settings], and then [Maintenance], if necessary.

Fig.: Maintenance Settings



2. Select the line of backup data to restore.

Fig. Maintenance Mode



3. Click [Restore]. A confirmation message displays.

- 4. Click [OK] to confirm. A message displays indicating that the Restore operation was successful.
- 5. Click [OK]. A message displays indicating that the system must be rebooted.
- 6. Click [OK]. You are automatically logged out of the AdminTool.
- 7. Reboot the Scan and Fax Manager Server.



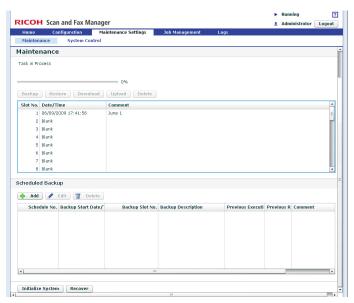
- Interruption is not supported, i.e., once a Restore operation has been executed, the task cannot be stopped.
- It is possible to upload a backup that is available outside the MFP to restore the settings.
- It is possible to Restore a Backup onto another MFP. Depending on the capabilities of the MFP, some settings may or may not be supported, for example color scan settings, resolution, etc.

### Performing a Recovery

The target data will be recovered, if possible, when a problem has occurred on the System. The target data here includes the content of the Job Queue and the distribution settings of the Profiles, Projects, etc. Interruption is not supported.

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

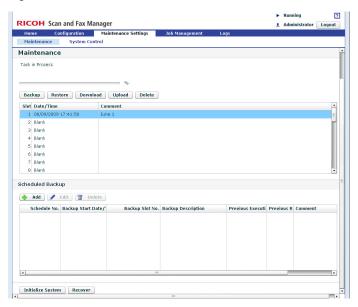
Fig.: Maintenance Settings



2. Select (highlight) the backup file that you want to recover.

### 3. Click [Recover].

### Fig.: Maintenance Mode



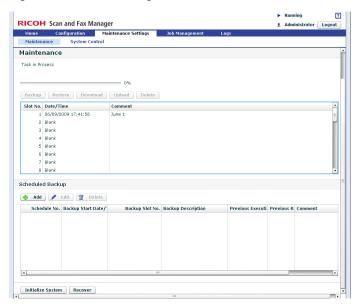
- 4. A confirmation message displays.
- 5. Click [OK] to confirm. A message displays indicating that the Recovery operation was successful.
- 6. Click [OK]. A message displays indicating that the system must be rebooted.
- 7. Click [OK]. You are automatically logged out of the AdminTool.
- 8. Reboot the Scan and Fax Manager Server.

# Deleting a Backup File

Backup files can be deleted. To do so, proceed as follows:

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

### Fig.: Maintenance Settings



- 2. Select (highlight) the backup file you want to delete.
- 3. Click [Delete].
- 4. Click [OK] to confirm deletion.



• Click [Cancel] to exit, without deleting the backup file.

# **Initializing the System**

Initializing the system will delete all Scan and Fax Manager settings of the target MFP, for example jobs, logs, etc., and restore some default settings. The following settings, however, are retained:

- Activation settings (license-related settings)
- Backups held by the system
- System Logs
- Built-in Password for the current Administrator



• Once initialization has been executed, the task cannot be interrupted.

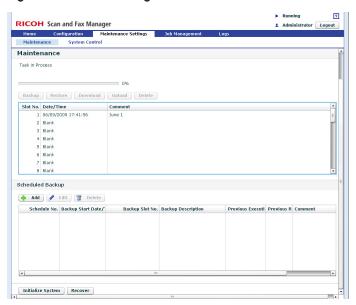


• You must reboot the system after an initialization.

To initialize the system, proceed as follows:

1. Click [Maintenance Settings], and then [Maintenance], if necessary.

Fig.: Maintenance Settings



2. Click [Initialize System].

The warning message displays.

- 3. Click [OK] to begin initializing system.
- 4. Click [OK].
- 5. Reboot the Scan and Fax Manager server.



- Click [Cancel] to exit, without initializing system.
- In Administration Manager, apply the target policy for Scan and Fax Manager to the device.

For details, see "Policy Settings", RICOH Streamline NX Administrator's Guide.

### **Batch Execution of Maintenance**

Scan and Fax Manager provides a mechanism for performing maintenance from an MS-DOS command prompt. This mechanism is provided so that Scan and Fax Manager can cooperate with external backup tools.

There are many backup tools offered by third-party vendors. Such backup tools usually offer the scheduled backup feature that performs a system backup at the specified interval, with the specified preprocessing and post-processing.

In pre-processing, the relevant distribution service and Web server should be stopped because entry of new jobs, or setting changes, should not happen to the target system while performing a system backup. In post-processing, the stopped distribution service and Web server should be restarted.

The stop commands, service\_stop and server\_stop, will stop the relevant distribution service and Web server, respectively, after the job has been completed, if the target system is currently processing a job.

### Supported Commands

The following commands (functions) are intended to be used in the pre-processing and post-processing settings for system backup.

- service start
  - Starts Scan and Fax Manager's distribution service ([Suspended] to [Running]). Even if this command is executed when Scan and Fax Manager's distribution service is already running, Scan and Fax Manager's distribution service will not change, and no error message will display.
- service\_stop
  - Stops Scan and Fax Manager's distribution service ([Running] to [Suspended]). Even if this command is executed when Scan and Fax Manager's distribution service is already stopped, the status of the Scan and Fax Manager's distribution service will not change, and no error message will display.
- service resume

Resumes Scan and Fax Manager's distribution service. Unlike the start command (service\_start), this command restarts Scan and Fax Manager's distribution service, with the status Scan and Fax Manager's distribution service was in before the maintenance. See tables "Order of command calls: service\_stop to service\_resume" below.

### Table: Order of Command Calls: service stop to service start

Before Maintenance	First Command	Second Command	After Maintenance
Suspended	Stop	Start	Running
Running	Stop	Start	Running

### Table: Order of Command Calls: service\_stop to service\_resume

Before Maintenance	First Command	Second Command	After Maintenance
Suspended	Stop	Resume	Suspended

Before Maintenance	First Command	Second Command	After Maintenance
Running	Stop	Resume	Running

This command can be used to prevent the status of Scan and Fax Manager's distribution process from being changed after the maintenance. When no other command was executed before this command, the status of the Scan and Fax Manager's distribution service remains the same.

server\_start

Starts the Web server that Scan and Fax Manager uses. Even if this command is executed when the relevant Web server is already running, the status of the relevant Web server will not change, and no error message will display.

server\_stop

Stops the Web server Scan and Fax Manager uses. Even if this command is executed when the relevant Web server is already stopped, status of the relevant Web server will not change, and no error message will display.

### Recommended Order of Command Calls

The recommended order of command calls are listed in the table below.

### Table: Recommended Order of Command Calls

Before Performing a Backup	After Performing a Backup
service_stop	server_start
server_stop	service_resume

These commands are processed sequentially. Therefore, if another command is executed on another command prompt, while a command is processed, they will be processed one-by-one, in the order of execution.

### How to Execute the Command Calls

The command calls can be executed from the command line or a batch file.

### **Executing Commands from the Command Line**

Manually type the command name to the command line, as follows:

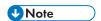
java -jar batch-execution.jar -cmd [-out\_result]



• The command line "cmd" values are listed in the table below.

Table: Command Line "cmd" Values

"cmd" Value	Description
service_start	Starts Scan and Fax Manager's distribution service.
service_stop	Stops Scan and Fax Manager's distribution service.
service_resume	Resumes Scan and Fax Manager's distribution service.
server_start	Starts the Web server the Scan and Fax Manager uses.
server_stop	Stops the Web server Scan and Fax Manager uses.



• Use out\_result to output the result of the command execution. When this is omitted, the result will not be output.

## Executing the Commands from a Batch File

The batch files for the command calls are listed in the table below.

**Table: Command Call Batch Files** 

Batch File	Description
service_start.bat	Starts Scan and Fax Manager's distribution service.
service_stop.bat	Stops Scan and Fax Manager's distribution service
service_resume.bat	Resumes Scan and Fax Manager's distribution service.
server_start.bat	Starts the Web server Scan and Fax Manager uses.
server_stop.bat	Stops the Web server Scan and Fax Manager uses.

# 8. SYSTEM CONFIGURATION

# **General Settings**

General Settings allow you to set a date format to apply to System Logs, Job Logs, etc.

- 1. Click [Home], and then the [System] shortcut.
- 2. Click [General Settings].

Fig.: System Settings Screen



The General Settings screen displays.

Fig.: General Settings Screen



- 3. Specify one of the following date formats for the display:
  - MM/DD/YYYY
  - DD/MM/YYYY
  - YYYY/MM/DD



- The specified date format will be applied to all dates (except for those added to Document Names). For example, the date for the following items is displayed in the specified format:
  - Job Logs

- System Logs
- Backup Data Files
- Metadata
- 4. In [Project without Access Rights], specify whether to disable or hide buttons on the display panel of the MFP for the functions that the user is not authorized to use.
- 5. Click [Apply] to save the settings.



• Click [Back] to exit, without saving the settings.

# Service Settings (Output Service/Filter Service)

It is suggested you first configure settings on the System level. At the System Level, the Profile settings are copied. At the Profile Level, the Project settings are copied. In short, you have the flexibility to set all parameters at once on the System Level or drill down to the Profile or Project Level to further modify settings. All Scan and Fax Manager Services/Filters can be configured on the System, Profile or Project Level.

# **Authentication and Accounting Manager**

## Specifying the Authentication and Accounting Manager

Perform the following procedures to specify the Authentication and Accounting Manager server to be used for:

- User authentication
- Distribution using Kerberos authentication
- Group search for ACL settings

### Failover feature

If the connection with the primary server fails, a connection with a secondary server will be attempted automatically. This is called failover.

To use the failover feature, enter the information for the secondary server as found in Step 4 below.

- The connection with the secondary server is attempted starting from the first secondary servers you
  registered. The first successful connection from among the secondary servers will be used from that
  time point onwards.
- While the secondary server is being used, the connection with the primary server will be attempted at regular intervals (5 minutes).
- While the lower priority secondary server (the one registered last) is being used, connection with
  the primary server will be attempted, but connections with the higher priority secondary servers will
  not be attempted.
- After you restart Scan and Fax Manager or update the server setting from the Admin tool, a
  connection is attempted with the primary server first.
- The failover function is enabled in the following cases:

On the Admin tool

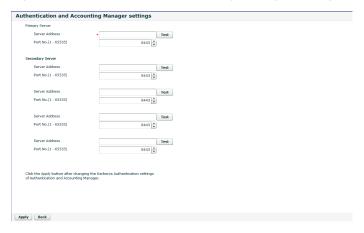
- When the user logs in
- · When a group search for ACL settings is performed

### On MFP

- when you log in to a project (with ACL settings enabled)
- When you send a document (with login authentication enabled at each plug-in)
- 1. Click [Home], and then click the [System] shortcut.
- 2. Click [Authentication and Accounting Manager].

The Authentication and Accounting Manager Settings screen appears.

Fig.: The Authentication and Accounting Manager Settings Screen

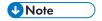


3. Enter the following information for each setting item under [Primary Server].

ltem	Description
Server Address	Enter the IP address or host name of the Authentication and Accounting Manager server, using up to 128 characters.
	Enter the HTTPS port number of the Authentication and Accounting Manager server.
Port No.(1-65535)	<ul> <li>Note</li> <li>The numbers from 1 to 65535 can be entered. The default port number is 8443.</li> </ul>

- 4. To use the Failover feature, enter the information under [Secondary Server], as in Step 3 above.
- 5. Click [Test] to test the connection with the specified servers.

The connection result is displayed.



- If the connection with the specified server fails, return to Step 3 or 4 and specify the correct server address or port number.
- When you click [Apply], only a connection with the primary server is attempted.
- 6. Click [Back] to close the result screen.
- 7. Click [Apply].

The specified settings are saved.



• Click [Back] to cancel saving the specified setting and return to the System Settings screen.

 If the Kerberos authentication setting is changed in the Authentication and Accounting Manager server, click Apply on the Authentication and Accounting Manager Settings screen to obtain a ticket from the server.

### 8

# **Administrator Settings**

### **Error Notification Email Address**

In order for Scan and Fax Manager to notify Administrators and users of a job processing error, you must set the Administrator's email address. You need to set the Administrator's email address even if you are sending notification email to only the user.

Error notification email will be sent in the following cases:

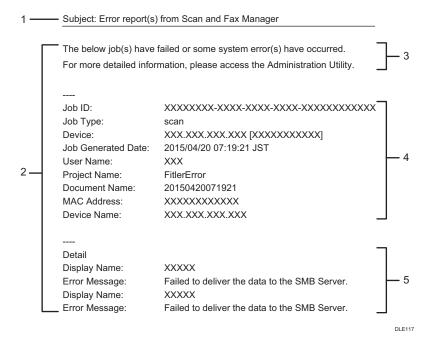
### To administrators

- When a job could not be processed.
- When available disk space has dropped to the specified alert size.

### To user

• When a job could not be processed (one notification email per failed job).

### **Email contents**



- 1. Subject
- 2. Body
- 3. Static message

It describes there was error during job procession.

### 4. Job Log

It describes job properties which caused an error. (Job ID, Job Type, Device, Job Generated Date, User Name, Project Name, Document Name, MAC Address, Device Name)

### 5. Detail

Display Name, Error Message, Specific Service (Only when the information is available)

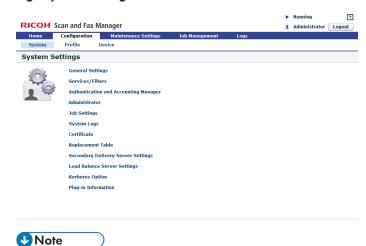
1. Click [Home], and then [System] shortcut.

### Fig.: AdminTool Home Page



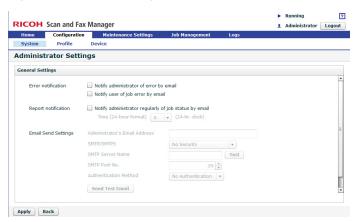
2. Click [Administrator].

### Fig.: System Settings Screen



 You can also click [Administrator], in the upper right corner of the display, to enter the screen directly.

### Fig.: Administrator Settings Screen



- 3. Select who you want to send the error notification email to:
  - [Notify administrator of error by email]: Send error notifications to administrators.
  - [Notify user of job error by email]: Send error notifications to the user.



• Users' email addresses are obtained from the authentication server.



- User's e-mail addresses are obtained from the Active Directory or LDAP server via the Authentication and Accounting Manager Server.
- 4. Select [Notify administrator regularly of job status by email], as necessary.

This report informs the administrator about the current system status, number of jobs in the queue and error job queue. A report notification email is sent once a day.

- Report emails are only sent at the specified time, once a day. The time the email is sent can be specified by the hour.
- The report email is not sent if the SFM service is stopped.
- If load balancing or failover servers are used, a notification report is sent by every server.

### **Email contents**

### Subject

• The subject includes the server's IP address and current job queue status.

### Body

- SFM version
- Data/Time the report was generated
- IP address of the SFM server
- Delivery service status

- Number of jobs in the job queue
- Number of jobs in the error job queue
- 5. In [Administrator's Email Address], enter the Administrator's email address.

The address you enter will also be used as the sender in notification email.



- If you want to send notification to multiple Administrators, enter their email addresses separated by commas.
- 6. If you selected either of the check boxes, you must configure the SMTP server settings. If you do not configure these settings, notification email cannot be sent.



- In order to send notification using SMTP-AUTH or POP before SMTP, be sure to enter the
  authentication account under proxy user information input column. Otherwise, no notification
  can be sent to the Administrator, even if the Login user account is specified as the login
  account.
- Click [Test] to test the connection to the SMTP server you have specified.

# Reference

- See page 148 "Send to Email Service".
- 7. Click [Apply] to save the settings.



- Click [Send Test Email] to send a confirmation email to the address you have specified. If the
  confirmation email arrives, the server settings are correct.
- Click [Back] to exit, without saving the settings.

### About User Mode

General users, those without administrative privileges, can log in to the AdminTool in User Mode. However, users can only access/move between his/her own logs. Other capabilities of the AdminTool are not available.

If you have logged in to the Administrator Tool in the User mode, job logs will be displayed as follows:

	Document name	User name
Job logs of a Project with authentication	You can check your own job logs only. Other job logs are masked with asterisks.	You can check your own job logs only. Other job logs are masked with asterisks.

	Document name	User name
Job logs of a Project without authentication	You can check all job logs.	You can check your own job logs only. Other job logs are masked with asterisks. (In this case, the user name is actually blank, as the Project does not require authentication.)

# Reference

- See page 40 "Step 1: AdminTool Login".
- See page 412 "Authentication and Accounting Manager".
- See page 360 "Job Log".

# Managing the Server Certificate

In order to use HTTPS to secure communication between the PC/Server, with the Scan and Fax Manager AdminTool, and a connected MFP, it is necessary to install a server certificate. HTTPS is a communication protocol that includes SSL (Secure Sockets Layer) data encryption. When a Web browser communicates with PC/Server installed with the AdminTool, a secure handshake authenticates the session using a public and private key, provided by the certificate. The public key is used to encrypt information and the private key is used to decipher it.

By obtaining and installing a certificate, from a trusted Certificate Authority (CA), it is possible to protect Scan and Fax Manager data.



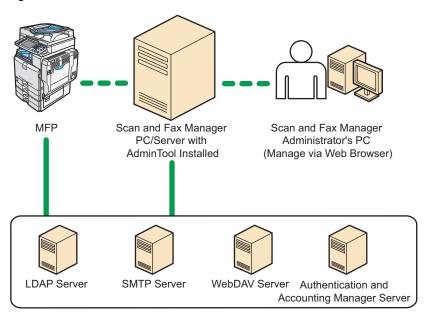
- When using SSL, it is not necessary to install certificates on registered MFPs, as the VM card contains a self-certified web server.
- A maximum of two server certificates can be managed per PC.
- If IIS is specified as the Web server for SFM, only the On/Off feature is provided. See page 428
  "IIS SSL On/Off".
- If you will be using the failover or load balancing functions and want to protect the data, you must install server certificates on the servers you will use for these functions.



 When SSL is used, the URL of the AdminTool must be specified as follows: https://IPAddress:PortNo/DirectoryName/
 The URL can vary according to the settings selected during software installation.

8

Fig.: Server Certificate



CWT010

- Communication using Server Certificate
- Communication using Site Certificate

# Obtaining and Installing a Server Certificate

If the Built-in Web Server (Default) is selected during Scan and Fax Manager software installation, the Web Server is automatically installed on the PC, along with a shortcut to the Server Certificate Setting Tool. Use this tool to obtain and install a server certificate.



- The Server Certificate Setting Tool is not available to remote PCs, i.e., it can only start from the Web browser on the PC running Scan and Fax Manager software.
- Click [Start] > [All Programs] > [Scan and Fax Manager] > [Scan and Fax Manager SSL Setting Tool].

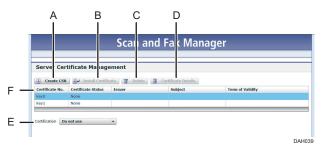
You can also double - click the [Scan and Fax Manager SSL Setting Tool] shortcut icon on the desktop.

The Server Certificate Management screen displays.



• Unlike the AdminTool, the Server Certification Setting Tool does not require login. Therefore, the Server Certificate Management screen displays immediately after start up.

 The display language you chose during Scan and Fax Manager software installation is applied to the Server Certification Setting Tool. You cannot change the Tool's display language.



2. Review the table, and then continue with step 3. Please do not execute any functions until step 3.

Table: Server Certificate Management Screen

	ltem	Description
Α	[Create CSR]	Creates the CSR.
		When you click this button, the Create CSR screen shown below displays; provide the necessary information.
В	[Install Certificate]	Installs the server certificate.
С	[Delete]	Deletes (uninstall) the server certificate.
		Choose the certificate (line) you wish to delete, click this button, and the certificate and the private key are deleted. Note that the certificate that is currently in use cannot be deleted. See [Certification], below.
D	[Certificate Details]	Displays the details of the certificate.  Choose the target certificate, and then click this button. A screen that shows certificate details displays.
Е	[Certification] Drop-down List	Select the certificate to use from the available certificates listed in the drop-down.  Choose [Do not use] if a certificate is not used.
F	Column Headings	Certificate No.  Certificate number for exemple level level.
		Certificate number, for example, key0, key1.  • Certificate Status
		Certificate Status, for example, None, Requesting or Installed.

ltem	Description
	• Issuer
	CA that issued the certificate.
	• Subject
	Certificate target; same as CN in following table.
	Term of Validity
	Certificate expiration date.

- 3. Create a CSR (Certificate Signing Request):
- 4. Select a line in which you wish to create/register a Certificate.



When you are carrying out this operation on a line whose "Certificate Status" is not "None",
you create a CSR using the existing private key. For example, in a situation where you want to
extend the use of a certificate that has expired, select the appropriate line and follow this
procedure to create a CSR again.

### 5. Click [Create CSR].

The Create CSR screen displays.

Fig.: Create CSR Screen



- **U**Note
  - Required fields are indicated by an asterisk (\*).
- 6. Specify the information outlined in the table.

**Table: CSR Input Form** 

ltem	Description	Supported Characters * 1	No. of Characte
Common Name [CN]	The URL using FQDN.	Alphanumeric characters and the following characters:  Space []	1 - 64

ltem	Description	Supported Characters * 1	No. of Characte rs
	It looks like "www.gsnxcorp.com" or " gsnxcorp.com".  Note  You must use the FQDN (Fully- qualified Domain Name).	Hyphen [-] Dot [.] Underscore [_]	
Organization Unit [OU]	The name of the department or organization unit making the request.	Alphanumeric characters and the following characters:  Space [ ]  Hyphen [-]  Dot [.]  Underscore [_]  Comma [,]  Plus [+]  Slash [/]  Parenthesis [ ( ], [ ) ]	1 - 64
Organization [O]	The legal name of the organization under which your organization is registered  • Do not abbreviate.	Same as Department Name	1 - 64
City/Locality [L]	The name of city in which the organization is located  Note  Do not abbreviate.	Same as Department Name	1 - 128

ltem	Description	Supported Characters *1	No. of Characte
State/Province [ST]	The state or province name spelled out completely  Note  Do not abbreviate.	Alphanumeric characters and the following characters:  Space [ ]  Hyphen [-]  Dot [.]  Comma [,]  Plus [+]  Slash [/]  Parenthesis [ ( ], [ ) ]	1 - 128
Country Code [C]	The 2-character ISO format country code	Alphabets , for example,  • United States of America: us  • Germany: de  • United Kingdom: uk  Regarding other countries, please search for the word "ccTLD" through the Internet search engine.	2
Key Length	1024 or 2048 can be specified as the key length.  The key encryption method for 1024 and 2048 is RSA.		

<sup>\* 1</sup> Supported Characters lists the characters that are generally supported. However, as the supported characters can vary between Certificate Authorities, you might want to check them beforehand.

# 7. Click [OK].

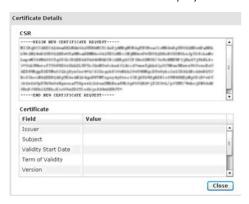
The Create CSR screen closes.

The "Certificate Status" changes to "Requesting".

Certificate No	Certificate Status	Issuer	Subject
key0	Requesting		
key1	None		

- 8. Submit the newly-created CSR to a Certificate Authority to obtain a certificate.
  - 1. Select the line where you created the CSR.
  - 2. Click [Certificate Details].

The Certificate Details screen displays.



Copy and paste the CSR content from the Certificate Details screen and submit it to a Certificate Authority.



- The text from "-----BEGIN NEW CERTIFICATE REQUEST-----" to "-----END NEW CERTIFICATE REQUEST-----" is the CSR content (information) the Certificate Authority needs to create a certificate.
- Some Certificate Authorities require the CSR content via email, others require it via a
  Web site. For details, see the instructions provided by the CA.
- The Certificate Authority may charge a fee to issue a certificate.
- 9. If you obtain a certificate from a Certificate Authority, install the certificate as follows:
  - 1. Select the line where you wish to install the certificate.

If you wish to import intermediate CA certificates, proceed to Step 2. If not, go to Step 6.



- Be sure to choose the line where you created the CSR content. If you choose the other one, operation will not be guaranteed, even if the installation is successful.
- 2. Click [Install Certificate].

The Install Certificate screen displays.



- 3. Select the [Intermediate CA Certificates] check box.
- 4. Copy the content of the intermediate CA certificate to import, and paste it to the text area in the screen.



- Some Certificate Authorities send the certificate via email, others display the certificate in the Web browser. For details, see the instructions provided by the CA.
- See the sample certificate obtained from a Certificate Authority by email. The text from"-----BEGIN CERTIFICATE-----" to"-----END CERTIFICATE -----" is the certificate content (information) you must copy and paste to the text area.

### 5. Click [OK].

The Create CSR screen closes. The "Certificate Status" changes to "Installed".

If you want to install multiple intermediate CA certificates, repeat Steps 2 through 5 for each certificate.

If you want to delete intermediate CA certificates, select the intermediate CA certificate and click [Delete] on the Certificate Details screen.

6. Click [Install Certificate].

The Install Certificate screen displays.

7. Confirm that the [Intermediate CA Certificates] check box is not selected.

8. Copy the content of the certificate issued using the CSR, and paste it to the text area in the screen.



- Some Certificate Authorities send the certificate via email, others display the certificate in the Web browser. For details, see the instructions provided by the CA.
- See the sample certificate obtained from a Certificate Authority by email. The text from"-----BEGIN CERTIFICATE-----" to"-----END CERTIFICATE -----" is the certificate content (information) you must copy and paste to the text area.



9. Click [OK].

The Create CSR screen closes. The "Certificate Status" changes to "Installed".

10. Select the certificate you wish to use from the Certification drop-down list.



- You can select not to use a certificate. In that case, choose [Do not use].
- 11. When finished, close the Web browser.



 When you have changed the certificate, you are prompted to restart the PC/server. Please do so.

## IIS - SSL On/Off

If the IIS Web Server was specified during Scan and Fax Manager software installation, the screen below displays when launching the Server Certificate Setting Tool. On this screen, SSL On/Off control is supported.



In order to enable SSL communication, it is necessary to configure IIS as well as Scan and Fax Manager. The configuration can be done through the IIS Management Tool (Internet Services Manager).

The following procedure gives a simple explanation of how to enable SSL using IIS.

- 1. Double-click the [Scan and Fax Manager SSL Setting Tool] shortcut on the desktop.
- 2. Select the [Use SSL] check box.

Fig.: Scan and Fax Manager SSL Setting Tool for IIS



- 3. Restart the Scan and Fax Manager service.
- 4. In the IIS management tool, open the Scan and Fax Manager properties, select the Directory Security tab, and then request a certificate.

Contact a certificate authority (CA) to have a certificate issued.

- 5. After you have obtained a certificate, register it in IIS.
- 6. Enter the port number to use for SSL connections (the default is 8443).
- 7. Download the intermediate CA certificates and import them into Scan and Fax Manager via the Site Certificate settings in AdminTool.

8. In Administration Manager, apply the target policy for Scan and Fax Manager to the device.

For details, see "Policy Settings", RICOH Streamline NX Administrator's Guide.

### 

- The SSL setting in Scan and Fax Manager must first be configured before configuring the SSL setting in IIS.
- In case you first configured the SSL setting in IIS, access the following URL to set the SSL setting in Scan and Fax Manager to On.

https://127.0.0.1:8443/sfm/ssl\_xx.html

or

https://localhosts:8443/sfm/ssl\_xx.html

Replace "xx" with your desired language code as specified below:

• English: en

• French: fr

• German: de

Italian: it

Dutch: nl

• Spanish: es

 After configuring the SSL setting in Scan and Fax Manager, you must reboot the PC to enable the new setting.



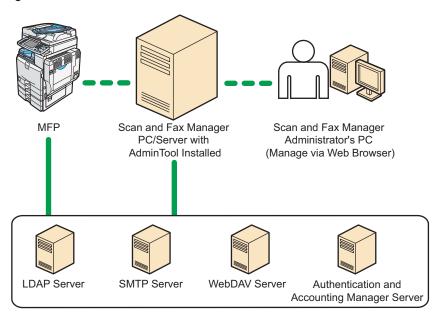
• For instructions on IIS-related procedures, refer to the IIS manuals.

# Managing the Site Certificate

A Site Certificate is required in order to utilize SSL/TLS to encrypt data communication, thus secure the path between the Scan and Fax Manager PC/server and destination servers, for example, SMTP, LDAP, WebDAV, or Authentication and Accounting Manager servers.

For the LDAP server, the Site Certificate enables you to secure User Authentication and Address Book search operations.

Fig.: Site Certificate



DAH042

- Communication using Server Certificate
- : Communication using Site Certificate

**U**Note

- If you will be using the failover or load balancing functions, you must also import a Site Certificate for the servers you will use for these functions. Import the certificate before registering the servers.
- If you would like to use Private Keys for secure Send to FTP Service, see page 433 "Managing the Private Keys".
- Not an external server certificate but both root CA certificate and intermediate CA certificate are imported on SFM.

Supported Certificate file formats include the following:

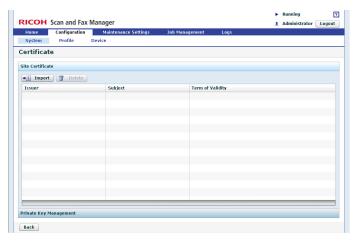
- DER encoded binary X.509
- Base 64 encoded X.509

• Cryptographic Message Syntax Standard - PKCS #7

To import a site certificate, proceed as follows:

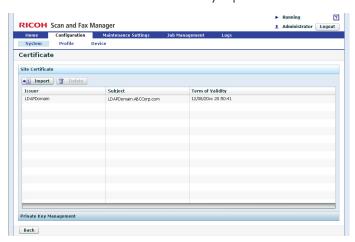
- 1. Log in to the Scan and Fax Manager AdminTool.
- 2. From the Home Page, select the [System] shortcut.
- 3. Click [Certificate].
- Click the [Site Certificate] accordion button to open the Site Certificate screen, if necessary.
- 5. Click [Import].

Fig.: Site Certificate Screen



6. Specify the path to the file, i.e., browse and select, for example "sample.cer".

The Site Certificate has been successfully imported.





Private Keys other than RSA and DSA keys generated with the OpenSSL tool are not supported.

- To delete a Site Certificate select (highlight) the Certificate, and then click [Delete]. Click [OK] to confirm deletion.
- Selection of multiple Certificates is supported as follows: click multiple items while pressing the SHIFT key or CTRL key.

# **Important**

Deletion of a Certificate is performed regardless of whether the Certificate is currently used or not.

### Managing the Private Keys

When using SFTP, or Secure FTP (SSH Protocol), in the Send to FTP Service, it is necessary to import a Private Key.

### Reference

- See page 138 "About Services".
- See page 204 "About Filters".

To import a Private Key, proceed as follows:

- 1. Log in to the Scan and Fax Manager AdminTool.
- 2. From the Home page, select the [System] shortcut.
- 3. Click [Certificate].
- 4. Click [Private Key Management] accordion button on the bottom of screen to open the Private Key Management screen.
- 5. Click [Import].
- 6. Specify the path to the file and open.

The Private Key has been successfully imported.



- To delete a Private Key, select (highlight) the Key, and then click [Delete]. Click [OK] to confirm deletion.
- Selection of multiple Keys is supported as follows: click multiple items while pressing the SHIFT key or CTRL key.

# 

• Deletion of a Key is performed regardless of whether the Key is currently used or not.

# Replacement Table Settings

This section explains what Replacement Tables are and what they are used for, and describes how to create, edit, export/import, and delete Replacement Tables.

A Replacement Table is a table consisting of entries made up of comparison strings and output data. Input data is compared with the comparison strings, and if the input matches the comparison string, the output data is output. The comparison string can be a literal string, such as "Johnson" or "555-5432", or it can be a regular expression for more powerful matching. Input is usually from Metadata.

# Reference

- See page 474 "About Regular Expressions".
- See page 335 "About Metadata".

Replacement Tables are used in the Flow Redirect and Metadata Converter Filters.

#### Use in the Flow Redirect Filter

A Replacement Table is used to specify the target Project for Flow Redirection. The output data is the Project to redirect a Flow to when the input matches a comparison string.

For example, if the input data is the "User Name" Metadata item, the Replacement Table might look like the following:

### Table: Flow Redirect Replacement Table

Comparison String	Output (Target Project)
Johnson	Johnson Project
Mendoza	Save to Marketing Server
Tanaka	To PDF and Email

When a user with the user name "Mendoza" scans a document, the Flow will be redirected to the "Save to Marketing Server" Project, as specified in the table.

# Reference

- See page 257 "Flow Redirect Filter" for details on the Flow Redirect Filter.
- See page 482 "Redirecting a Flow" for an example using the Flow Redirect Filter.

#### Use in the Metadata Converter Filter

A Replacement Table is used with the Metadata Converter Filter to replace the values of Metadata items. If the input Metadata item's value matches an entry in the table, the Metadata item's value is replaced with the output value.

For example, to replace a department code with the department's name, the Replacement Table might look like the following:

Table: Metadata Converter Replacement Table

Comparison String	Output
435	Legal Department
535	Engineering Department
635	Marketing Department

When the Department Code "435" is given as input to the table, "Legal Department" is output from the table.



• See page 260 "Metadata Converter Filter" for details on the Metadata Converter Filter.

# Adding a Replacement Table

To create a new Replacement Table, proceed as follows:

- 1. Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration] tab.
- 2. Click [Replacement Table].

Fig.: System Settings Screen



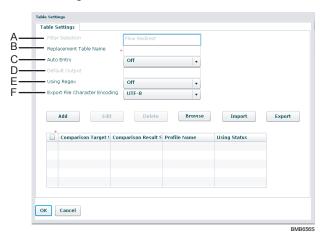
The Replacement Table Settings screen displays.



- 3. Select the type of Filter this table will be used with from the [Filter Selection] drop-down list.
  - [Flow Redirect]
     Select this option to use the table with the Flow Redirect Filter.
  - [Metadata Converter]
     Select this option to use the table with the Metadata Converter Filter.
- 4. Click [Add Entry].

The Table Settings screen displays.

#### **Table Settings Screen**



5. Set values for [Replacement Table Name], [Auto Entry], [Default Output], and [Using Regex]. The table below describes the settings.

Table: Table Settings Screen

	Item	Description
A	[Filter Selection] (reference only)	Displays the type of Replacement Table selected for this table.
В	[Replacement Table Name]	Enter the display name for the Replacement Table.  Limitation  The maximum length is 128 characters.
С	[Auto Entry]	Select whether or not to add a new entry to the Replacement Table if the input value does not match an entry.  • [On]  If there is no match in the Replacement Table, a new entry for the input value is added to the table. The new entry uses the input value for the comparison string and a blank string for the output.  • [Off]  No new entry is added if there is no match in the Replacement Table.
D	[Default Output]	Enter the default output value. This value is used when the input does not match an entry in the table.  Limitation  This setting is only available when [Metadata Converter] is selected as the table type.
Е	[Using Regex]	Select whether to use regular expressions in the comparison strings.  • [On]  Use regular expressions in the comparison strings.  • [Off]  Do not use regular expressions in the comparison strings.  • Reference  • See page 474 "About Regular Expressions".

6. Add entries to the table.



- See page 439 "Managing Replacement Table Entries".
- 7. Click [OK].

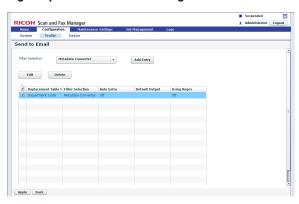
The Replacement Table Settings screen displays the new table.

### **Editing a Replacement Table**

To edit a Replacement Table, proceed as follows:

- 1. Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration]
- 2. Click [Replacement Table].
- 3. Select the check box of the Replacement Table you want to edit.

#### Fig.: Replacement Table Settings Screen





- You can only select one table for editing. If you select two or more, [Edit] will be grayed out.
- 4. Click [Edit]

- Change the values for the table settings as desired. See table "Table Settings Screen" for details on the settings.
- 6. Add, edit and or delete table entries as desired.
  - Reference
    - See page 439 "Managing Replacement Table Entries".
- 7. Click [OK].

The Replacement Table Settings screen displays table with the updated settings.

# **Managing Replacement Table Entries**

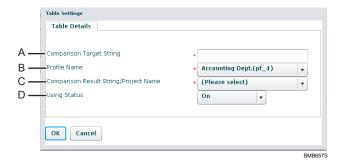
This section describes how to add, edit, and delete Replacement Table entries.

#### To add a Replacement Table entry, proceed as follows:

1. From the Table Settings screen, click [Add].

The Table Details screen appears.

#### Fig.: Table Details Screen



2. Fill in the fields for the table entry.

The table below describes the table entry fields.

Table: Table Details Screen

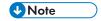
Tuble.	Tuble. Tuble Deluiis Screen	
	ltem	Description
A	[Comparison Target String]	Enter the string to compare with input.  ! Limitation
		Two entries cannot have the same comparison string.

	ltem	Description
В	[Profile Name] (Flow Redirect only)	Select the Profile that contains the Project to redirect a Flow when the input value matches the value in [Comparison Target String].
С	[Comparison Result String/Project Name]	For Flow Redirect tables  Select the Project to redirect a Flow to when the input value matches the value in [Comparison Target String].
		For Metadata Converter tables  Enter the string to output when the input value matches the value in [Comparison Target String].
D	[Using Status]	Select whether or not to use this entry.  In [On] Use this entry when matching input.  In [Off]  Do not use this entry when matching input. If this option is selected, even if an input string matches the comparison string, no value is output.

3. Click [OK] to save the entry and return to the Table Settings screen.

#### To edit a Replacement Table entry, proceed as follows:

1. From the Table Settings screen, select the check box of the entry you want to edit.



- You can only select one entry at a time for editing. If you select two or more, [Edit] will be grayed out.
- 2. Click [Edit].
- 3. Change the settings for the entry as desired.

See table "Table Details Screen" above for details on the settings.

4. Click [OK] to save the entry and return to the Table Settings screen.

#### To delete a Replacement Table entry, proceed as follows:

1. From the Table Settings screen, select the check boxes of the entries you want to delete.



• Select the check box in the column headings to select all entries.

#### 2. Click [Delete].

A deletion confirmation displays. Click [OK] to confirm the deletion, or click [Cancel] to cancel the deletion.

### **Deleting a Replacement Table**

To delete a Replacement Table, proceed as follows:

- 1. Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration] tab.
- 2. Click [Replacement Table].
- 3. Select the check boxes of the Replacement Tables you want to delete.



- Select the check box in the column headings to select all Replacement Tables.
- 4. Click [Delete].

A deletion confirmation displays. Click [OK] to confirm the deletion, or click [Cancel] to cancel the deletion.

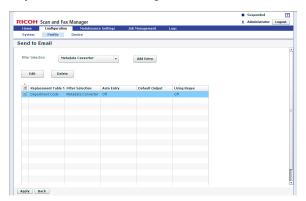
# Exporting/Importing a Replacement Table

The table entries in a Replacement Table can be exported and imported in CSV (comma separated value) format. The data can then be opened and edited in a text editor supporting either UTF-8 or Latin-1, or in a spreadsheet application such as Microsoft Excel. This enables you to maintain a record of all Replacement Tables.

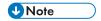
#### To export a Replacement Table, proceed as follows:

- Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration] tab.
- 2. Click [Replacement Table].

#### Replacement Table Settings Screen

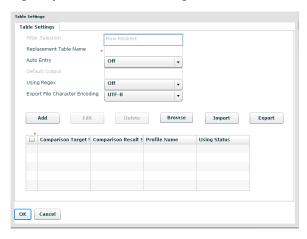


4. Click [Edit].



 You can only select one table for exporting. If you select two or more, [Edit] will be grayed out.

#### Fig.: Replacement Table Settings Screen



- 5. Select the character encoding methods for exporting from the drop-down list.
- 6. Click [Export].

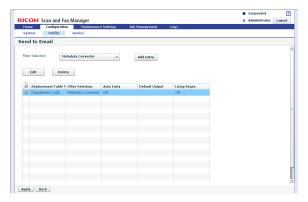
Select a folder to save the file, enter a file name for the exported data, and click [Save]. The Replacement Table will be exported and saved under the file name you specified in 5.

#### To import Replacement Table entries, proceed as follows:

 Click [Home] and then click the [System] shortcut. Alternately, click the [Configuration] tab.

- 2. Click [Replacement Table].
- 3. Select the check box of the Replacement Table you want to import entries into.

#### Replacement Table Settings Screen

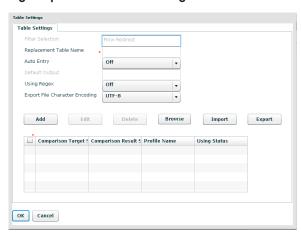


4. Click [Edit].



 You can only select one table for importing. If you select two or more, [Edit] will be grayed out.

Fig.: Replacement Table Settings Screen



5. Click [Browse].

The [Open File] window displays. Select the CSV file you want to import, and click [Open].

6. Click [Import].

The file selected in 5 is imported, and the data are added to the Replacement Table.



• The amount of data that can be imported to a replacement table is limited as follows:

- One replacement table can have a maximum of 700 entries.
- The total number of entries for all replacement tables must not exceed 5000.

# Reference

 See page 444 "Replacement Table CSV Specifications" for details about the format for Replacement Table CSV files.

### **Replacement Table CSV Specifications**

This section describes the format for CSV files for Replacement Tables.

The CSV file for a Replacement Table is a text file where each line is one table entry, and the values for the entry are separated by commas. The figures below show an example row for a Flow Redirect table and a Metadata Converter table.

Fig.: Entry for Flow Redirect Table in CSV File

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Fig. Entry for Metadata Converter Table in CSV File

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The table below describes the fields in the CSV file.



CSV files exported from Scan and Fax Manager contain several lines of headers above the entries.
 Header rows begin with the character "#". Do not change these lines.

Table: Replacement Table CSV File Fields

Field	Data	Corresponding Table Detail Field
1	The comparison string. This can be any user-defined value.	[Comparison Target String]
2	The comparison result (output).	[Comparison Result String]
	For Flow Redirect Tables:	

Field	Data	Corresponding Table Detail Field
	This value is the Control ID of the target Project. The Control ID is used internally in Scan and Fax Manager to identify a Project. It can be obtained by viewing the Project properties under [Control ID].	
	For Metadata Converter Tables:  The output string. This can be any user-defined value.	
3	O or 1. A zero (0) indicates that the entry will not be used for comparisons. A one (1) indicates that the entry will be used for comparisons.	[Use]
4	The Control ID of the Profile that contains the target Project.  This entry is used only for Flow Redirect Tables. The Control ID is used internally in Scan and Fax Manager to identify a Profile. It can be obtained by viewing the Profile properties under [Control ID].  For Metadata Converter Tables, this column will be blank.	[Profile Name]

#### Import Conditions for a Replacement Table CSV File

- If the comparison string (column 1) for an entry is blank, the entry will not be used for comparisons. ([Use] will be set to "0" in the Replacement Table).
- If the [Use] column (column 3) for an entry is a value other than 0 or 1, that entry will not be imported.
- If the comparison string (column 1) for an entry already exists in the table, that entry's information in the table will be updated with the data in the CSV file.
- If the comparison string (column 1) for an entry does not exist in the table, a new entry is added to the table with the data in the CSV file.

- If you are editing a CSV file that was exported by Scan and Fax Manager, do not change the header lines. Header lines begin with the character "#".
- If you edit the CSV file with a spreadsheet program, make sure to save it in CSV format; proprietary formats, such as the Excel format, cannot be read by Scan and Fax Manager.

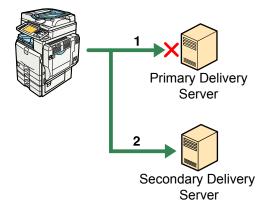
# Failover - Secondary Delivery Server

The failover feature provides processing redundancy when you register a Secondary Delivery Server to the Primary Delivery Server (the main processing server). If the Primary Delivery Server experiences connectivity or other communication problems, the Secondary Delivery Server will automatically assume the Primary Delivery Server's document jobs.

This feature is useful in large organizations where there are heavy workloads. In such environments, server down time can result in expensive delays.

The following figure illustrates the role of the Secondary Delivery Server.

Fig.: Secondary Delivery Server Overview



BMB950S

- 1. The MFP attempts to send a job to the Primary Delivery Server, but fails due to a network error.
- 2. The MFP automatically reroutes the job to the Secondary Delivery Server.

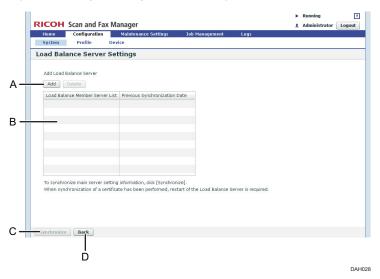


- The jobs that remain on the Primary Delivery Server will not be processed until the Primary Delivery Server is restored. Make sure to restore the Primary Delivery Server as soon as possible.
- The message "The secondary server is being used because connecting to the primary server failed.
   Check the status of the primary server." will be sent to the e-mail address specified in the error notification settings on the Administrator Settings Screen.

# Secondary Delivery Server Settings

This section explains the settings that are available on the Secondary Delivery Server Settings screen. The following figure shows the Secondary Delivery Server Settings screen.

Fig.: Secondary Delivery Server Settings Screen



**Table: Secondary Delivery Server Settings** 

	ltem	Description
A	[Use Secondary Delivery Server]	Select this option to enable the failover function.
В	[Secondary Delivery Server]	Click [Browse] to select the Secondary Delivery Server from a list, or enter the Secondary Delivery Server's URL in the text box.
С	[Synchronize]	Synchronizes all the settings on the Primary Delivery Server with the Secondary Delivery Server.
D	[Apply]	Saves the current settings and returns you to the System menu.
	[Back]	Returns you to the System menu without saving the settings.

# Registering a Secondary Delivery Server

To register a Secondary Delivery Server, proceed as follows.



- Install and activate the Scan and Fax Manager software on the PC that you want to use as the Secondary Delivery Server.
- If you are using SSL, import Server Certificates and Site Certificates into the Secondary Delivery Server.

- Only one Secondary Delivery Server can be registered to the Primary Delivery Server at a time.
- 1. If necessary, click [Home] and then the [System] shortcut.
- 2. Click [Secondary Delivery Server Settings].

The Secondary Delivery Server Settings screen displays. See Fig. "Secondary Delivery Settings Screen" above.

- 3. Select the [Use Secondary Delivery Server] check box.
- 4. Click [Browse] to select the server that you want to use as the Secondary Delivery Server from a list of connected servers, or enter the server's URL in [Secondary Delivery Server].

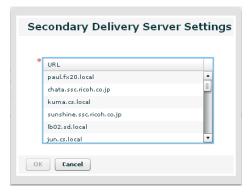
If you click [Browse], a window containing a list of server names displays. Select a server, and then click [OK]. The URL of the server displays in text box.

If you enter the URL of the server, the format must be as follows:

http(s)://IP Address:Port No/Virtual Directory Name/

Default: http(s)://IP Address:8080(8443)/sfm/

Fig.: Select Server Window



5. Click [Synchronize] to copy all of the Profiles, system settings, etc., from the Primary Delivery Server to the Secondary Delivery Server.

AdminTool will check the specified server to make sure it can be registered as a Secondary Delivery Server. See "Secondary Delivery Server Conditions" below for the list of conditions.

If the specified server can be registered, a confirmation message displays.

6. Click [Yes] to synchronize the servers. Or, click [No] to cancel the operation.



You can click [Apply] to save the settings without synchronizing the servers.

#### **Secondary Delivery Server Conditions**

- If the server you are registering as the Secondary Delivery Server meets any of the conditions listed below, an error message will display when you click [Synchronize].
  - The server is not a Scan and Fax Manager server.

- The server is not running the same server edition of Scan and Fax Manager as the Primary Delivery Server.
- The version of the software that is installed on the server is different from the version that is installed on the Primary Delivery Server.
- The server is the Primary Delivery Server (i.e. you are trying to register the Primary Delivery Server as its own Secondary Delivery Server).
- The server is already registered as the Secondary Delivery Server to another Primary Delivery Server.
- The server is already registered as the Primary Delivery Server with another Scan and Fax Manager system.
- If one or more MFPs are registered to the specified Secondary Delivery Server, an error message will display.

Remove all registered MFPs from the specified server, and then click [Synchronize] again.



• For details on removing MFPs, see page 347 "About Device Properties".

#### When Using Secondary Delivery Server

Make sure to keep the following in mind:



- If you change any settings on the Primary Delivery Server, you must synchronize the Secondary Deliver Server again.
- If you do not synchronize the servers, the Secondary Delivery Server will not operate correctly.
- After you register a Secondary Delivery Server, you can use AdminTool on the Secondary Delivery
  Server to perform the same operations that are available on the Primary Delivery Server, such as
  adding Profiles and changing system settings. However, changing system settings through the
  Secondary Delivery Server can result in malfunctions. For this reason, do not use AdminTool on the
  Secondary Delivery Server to change system settings.
- After you register a Secondary Delivery Server, you must synchronize the Primary Delivery Server
  with all connected MFPs so that the MFPs can recognize the Secondary Delivery Server. In
  Administration Manager, apply the target policy for Scan and Fax Manager to the device. For
  details, see "Policy Settings", RICOH Streamline NX Administrator's Guide.
- For synchronization to succeed, the two following settings must be the same on the Primary Delivery Server and the Secondary Delivery Server.
  - DNS Server IP address
  - Date/time setting
- If you are using Replacement Tables in your delivery flows, keep the following in mind:

- Before enabling the failover function, you must configure the Replacement Tables and then synchronize both the Primary and Secondary Delivery Server.
- After you have enabled failover, you must not use the auto-entry function for the Replacement Tables.
- Configure a DNS that can identify the host name or FQDN name of the Secondary Delivery Server
  or Load Balance Server on the MFP in order to specify the Secondary Delivery Server or Load
  Balance Server by its FQDN name.



- Job information and log details are not synchronized between delivery servers. This means that job
  information and log details are stored only on the server that processed the job. Therefore, if you
  want to view the status and error information of a job that was processed by the Secondary
  Delivery Server, you must access the Secondary Delivery Server to do so.
- To change the Secondary Delivery Server, you must first remove the currently registered server. See page 450 "Removing a Secondary Delivery Server".

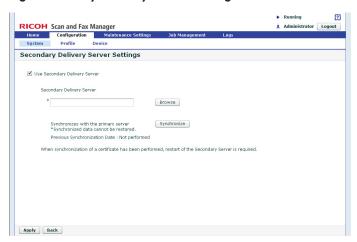
# Removing a Secondary Delivery Server

To remove the Secondary Delivery Server setting from the Primary Delivery Server, proceed as follows:

- 1. If necessary, click [Home], and then click the [System] shortcut.
- 2. Click [Secondary Delivery Server Settings].

The Secondary Delivery Server Settings screen displays.

Fig.: Secondary Delivery Server Settings Screen



- 3. Clear the [Use Secondary Delivery Server] check box.
- 4. Click [Apply].

A confirmation message displays.

5. Click [OK] to confirm the settings.

### Making a Secondary Delivery the Primary Delivery Server

If the Primary Delivery Server becomes unusable, or if you no longer want to use it as the Primary Delivery Server, you can easily change the registered Secondary Delivery Server to be the Primary Delivery Server.



- Make sure that you synchronize the Primary and Secondary Delivery Servers whenever you
  change settings such as Profiles on the Primary Delivery Server. If you do not, the Secondary
  Delivery Server will not have the most recent settings, and this might complicate the transition to
  Primary Delivery Server.
- 1. Log in to the AdminTool on the Secondary Delivery Server.
- 2. Click the [System] shortcut, and then click [Remove Secondary Delivery Server Settings].

Fig.: System Settings Menu



A confirmation screen displays.

3. Click [Yes] to confirm removal of the Secondary Delivery Server setting and change the server status to Primary Delivery Server. Or, Click [No] to cancel the operation.



• If you want to restore the original Primary Delivery Server, you must re-register the Secondary Delivery Server. See page 447 "Registering a Secondary Delivery Server".

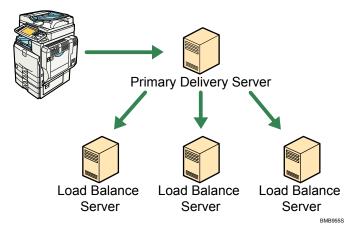
# **Load Balancing**

The load balancing function enables the Primary Delivery Server (main processing server) to delegate jobs to one or more registered Load Balance Servers in order to increase processing efficiency. Multiple jobs are processed at the same time, resulting in faster throughput.

This feature is useful in large organizations where several hundred jobs might be processed simultaneously.

The following figure illustrates how load balancing works.

Fig.: Load Balancing Overview



#### **Load Balancing Conditions**

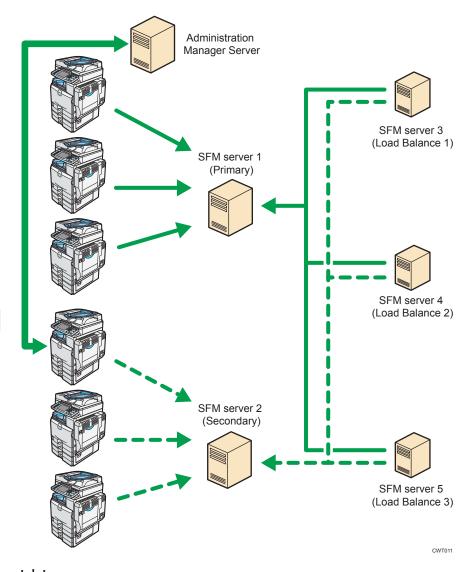
- The Job Log and Job Queue are stored only on the Primary Delivery Server; the Load Balance Servers send the job information to the Primary Delivery Server. You can view the status of all jobs on the Primary Delivery Server.
- If you apply the [Top Priority] setting to a job in the Job Queue, that job is moved to the front of the queue on the server that is processing it.
- Error jobs are controlled from the Primary Delivery Server, even if the job has been delegated
  to a Load Balance Server. However, the job data itself is stored on the Load Balance Server. If
  the Load Balance Server storing the job goes offline, error job handling will be abandoned.
- The Primary Delivery Server delegates jobs between the Load Balance Servers and itself.
- Jobs are delegated primary to the Load Balance Servers in order to reduce the load on the Primary Delivery Server.

# Reference

- See page 360 "Job Log".
- See page 367 "Job Queue".
- See page 371 "Error Queue".

In the RICOH Streamline NX system, load balance servers can be shared with primary and secondary delivery servers. If a communication with a primary delivery server fails, MFP sends jobs to a secondary delivery server to which the shared load balance servers are connected and vice versa.

Fig.: Overview of Shared Load Balance Servers



#### Job Logs

- Only job logs stored in the SFM server to which the MFP is connected can be checked on a display panel of the MFP.
- Logs of job processed by other primary or secondary delivery server while a failover occurs cannot be checked.

- Job logs processed in each load balance server are transferred to a primary or secondary delivery server to which MFP accessed to check the job destination when it sends jobs.
- Job logs cannot be transferred to a primary delivery server from a secondary delivery server.

#### **System Logs**

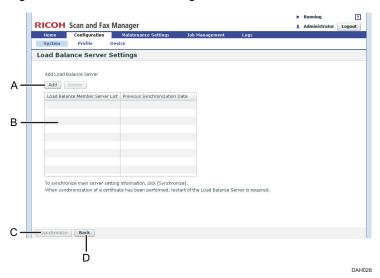
System logs processed in a secondary delivery server or processed in a load balance server to which a secondary delivery server assigned can be viewed from a secondary delivery server.

# **Load Balance Server Settings**

This section explains the settings that are available on the Load Balance Server Settings screen.

The following figure shows the Load Balance Server Settings screen.

Fig.: Load Balance Server Settings Screen



**Table: Load Balance Server Settings** 

	Item	Description
A	[Add]	Displays the Add Load Balance Server screen, where you can add a new Load Balance Server.
	[Delete]	Removes the selected Load Balance Server from the list.
В	[Load Balance Member Server List]	Displays a list of all currently registered Load Balance Servers.
С	[Synchronize]	Synchronizes all the settings on the Primary Delivery Server with the Load Balance Servers.

	ltem	Description
D	[Back]	Returns you to the System settings screen without synchronizing the servers' settings.

# **Registering Load Balance Servers**

To register Load Balance Servers, proceed as follows:



- Install and activate the Scan and Fax Manager software on the PCs that you want to use as Load Balance Servers.
- If you are using SSL, import Server Certificates and Site Certificates into the Load Balance Servers.
- 1. If necessary, click [Home] and then the [System] shortcut.
- 2. Click [Load Balance Server Settings].

The Load Balance Settings screen displays. See Fig. "Load Balance Server Settings Screen" above.

3. Click [Add].

The Add Load Balance Server screen displays.

Fig.: Add Load Balance Server Screen

Add Load Balance Server		
URL *	Browse	
OK Cancel		

4. Click [Browse] to select the server that you want to add from a list of connected servers, or enter the server's URL in [URL].

If you click [Browse], a window containing a list of server names displays. Select a server, and then click [OK]. The URL of the server displays in text box.

If you enter the URL of the server, the format must be as follows:

http(s)://IP Address:Port No/Virtual Directory Name/

Default: http(s)://IP Address:8080(8443)/sfm/

Fig.: Load Balance Server Settings Screen



#### 5. Click [OK].

AdminTool will check the specified server to make sure it can be registered as a Load Balance Server. See "Load Balance Server Conditions" below for the list of conditions.

- 6. To add more Load Balance Servers, repeat steps 3 to 5 for each additional server.
- 7. Click [Synchronize] to copy all the Profiles, system settings, etc., from the Primary Delivery Server to the Load Balance Servers.

AdminTool will check the specified servers to make sure they can be registered as Load Balance Servers. See "Load Balance Server Conditions" below for the list of conditions.

If the servers you have specified can be registered, a confirmation message displays.

8. Click [Yes] to synchronize the servers. Or click [No] to cancel the operation.



- You cannot use AdminTool with a registered Load Balance Server. If you try to connect to a
  registered Load Balance Server with AdminTool, a message will be displayed telling you that you
  cannot log in.
- The delivery status (suspended/running) of the Primary Delivery Server is automatically synchronized with the Load Balance Servers when the status of the Primary Delivery Server is changed.

#### **Load Balance Server Conditions**

- If a server you are registering as a Load Balance Server meets any of the conditions listed below, an error message will display when you click [Synchronize].
  - The server is not a Scan and Fax Manager server.
  - The server is not running Scan and Fax Manager.
  - The version of the software that is installed on the server is different from the version that is installed on the Primary Delivery Server.
  - The server is the Primary Delivery Server (i.e., you are trying to register the Primary Delivery Server as its own Load Balance Server).

- The server is already registered as a Load Balance Server.
- The server is registered as the Primary or Secondary Delivery Server with another Scan and Fax Manager system.
- The server has jobs in its Job Queue. (This condition is not checked during synchronization.)

Reference

- See page 446 "Failover Secondary Delivery Server".
- If one or more MFPs are registered to any of the specified Load Balance Servers, an error message will display.

Remove all registered devices from the server, and then click [Synchronize] again.

#### When Using Load Balance Servers

Make sure to keep the following in mind:



- Before you change any settings (including the start/stop service setting), make sure that all the Load Balance Servers are running.
- If you change any settings on the Primary Delivery Server, you must synchronize the Load Balance Servers again. If you do not synchronize the servers, the Load Balance Servers will not operate correctly.
- For synchronization to succeed, the two following settings must be the same on the Primary Delivery Server and all Load Balance Servers.
  - DNS Server IP address
  - Date/time setting
- If you are using Replacement Tables in your delivery flows, keep the following in mind:
  - Before enabling the load balance function, you must configure the Replacement Tables and then synchronize the Load Balance Servers.
  - After you have enabled failover, you must not use the auto-entry function for the Replacement Tables.
- Configure a DNS that can identify the host name or FQDN name of the Secondary Delivery Server
  or Load Balance Server on the MFP in order to specify the Secondary Delivery Server or Load
  Balance Server by its FQDN name.

# Removing Load Balance Servers

To remove Load Balance Servers, proceed as follows:

- 1. If necessary, click [Home] and then the [System] shortcut.
- 2. Click [Load Balance Server Settings].

The Load Balance Settings screen displays.

Fig.: Load Balance Server Settings Screen



In [Load Balance Member Server List], select the Load Balance Servers that you want to remove.



- You can select multiple servers by holding down SHIFT or CTRL while selecting them.
- 4. Click [Delete].

A confirmation message displays.

5. Click [Yes] to confirm the removal. Or, click [No] to cancel the operation.

The selected Load Balance Servers are removed from the list.



- When you remove a Load Balance Server, it is only removed from the list; the server's settings are
  not deleted. After the Load Balance Server is removed, you can access AdminTool on it as you
  would on a current server.
- When you remove a Load Balance Server, any jobs in the Job Queue of that server will still be processed. However, the log information is stored only on the server that processed the job and is not forwarded to the Primary Delivery Server.

# **Kerberos Option**

If you are using the Kerberos ticket for authentication with Send to Folder and Send to WebDAV Services, you can select whether to use only the Kerberos ticket for authentication, or to use other authentication credentials in the event that authentication with the Kerberos ticket fails. This function is available only when the Project uses Active Directory Authentication.

When you use the Kerberos ticket as the preferred authentication credential:

Scan and Fax Manager first tries to authenticate with the destination server (for example a WebDAV server) using the Kerberos ticket. If authentication fails, Scan and Fax Manager then attempts to authenticate using different authentication credentials, such as the user's user name and password.

• When you use only the Kerberos ticket:

Scan and Fax Manager tries to authenticate with the destination server using the Kerberos ticket. If authentication fails, user access is not granted.

- When Kerberos Option is enabled and the destination is running a client OS (Windows Vista), an error may occur during the following due to too many sessions:
  - Accessing folders from the operation panel
  - Delivering documents to folders

To select the Kerberos Option, proceed as follows:

1. If necessary, click [Home], and then click the [System] shortcut.

#### System Settings Menu



#### 2. Click [Kerberos Option].

#### Fig.: Kerberos Option



- 3. Select the Service you want to configure from the drop-down list.
- 4. Select the method for authentication using the Kerberos ticket for each Service.
  - [Use the ticket received on Kerberos authentication as the priority]
     Scan and Fax Manager will first attempt to authenticate with the destination server using the Kerberos ticket. If authentication fails, Scan and Fax Manager attempts authentication using different authentication credentials.
  - [Use only the ticket received on Kerberos authentication]
     Scan and Fax Manager will attempt to authenticate with the destination server using the Kerberos ticket only. If authentication fails, user access is not granted.
- 5. Click [Apply] to save the settings. Or, click [Back] to return to the System Settings screen.



 If you use an IP address for a destination server, Kerberos authentication will fail when a name resolution cannot be performed using forward and reverse DNS or a hosts file.

# Plug-in Information Menu

On the Plug-in Information screen, you can view the name, version, and details of each plug-in that is installed.

Use the following procedure to view the plug-in information.

- 1. If necessary, click [Home], and then click the [System] shortcut.
- 2. Click [Plug-in Information].

Fig.: System Settings Screen



The names and versions of the installed plug-ins appear. Plug-ins are grouped into tabs by categories.

Fig.: Plug-in Information Screen



3. Click a plug-in name to open its properties screen.

The properties screen contains a description and other details of the plug-in.

4. Click [OK] to close the properties screen.

# 9. APPENDIX

This section provides additional resources to supplement the guide, including details on File Formats, Metadata Specifications, AdminTool Localization, Glossary of Terms, and more.

# **Active Directory Authentication**

Active Directory Authentication is supported, with the following conditions:

- Time/Date Setting
  - The date/time setting of all the systems, i.e., the Active Directory server, Scan and Fax Manager server and target MFP(s), must be the same. If not, Authentication will fail.
- Lockout
  - Care must be taken for the lockout policy of the relevant Key Distribution Center (KDC), in order to prevent an account from being locked out.

If the user (including the administrator) enters the password incorrectly for a number of times (the possible number of attempts is specified by the lockout policy), the user will be locked out. The lockout policy can vary between Key Distribution Centers.

# **File Formats**

Scan and Fax Manager supports a wide variety of file formats. Those that display on the MFP display panel is controlled by settings selected via the AdminTool, so users at the MFP display panel may see all or limited choices on the Scan Setting screen.

# Reference

• See page 308 "About Scan Settings".

#### Table x: Black & White File Formats

Visible (by Default)	Invisible (by Default)
TIFF (MMR,multi-page)	TIFF (MMR, single-page)
PDF (multi-page)	PDF (single-page)
PDF/A (multi-page)	PDF/A (single-page)
BMP (Uncompressed) *	TIFF (Uncompressed, single-page) *
PNG *	TIFF (MH, single-page) *
GIF *	TIFF (MR, single-page) *
PDF (OCR scanned, multi-page)	TIFF (Uncompressed, multi-page) *
	TIFF (MH, multi-page) *
	TIFF (MR, multi-page) *
	TIFF-F (MH, single-page) *
	TIFF-F (MR, single-page) *
	TIFF-F (MMR, single-page) *
	TIFF-F (MH, multi-page) *
	TIFF-F (MR, multi-page) *
	TIFF-F (MMR, multi-page) *
	DCX (single-page) *
	DCX (multi-page) *

<sup>\*</sup> Project (Serverless) is not supported.

### Table x: Grayscale/Color File Formats

Table X: Grayscale/ Color File Formals	
Visible (by Default)	Invisible (by Default)
JPEG	PDF (single-page)
PDF (multi-page)	PDF/A (single-page)
PDF/A (multi-page)	High Compression PDF (single-page) *

Visible (by Default)	Invisible (by Default)
High Compression PDF (multi-page) *	TIFF (Uncompressed, single-page) *
BMP (Uncompressed) *	TIFF (Uncompressed, multi-page) *
PNG *	
GIF *	
PDF/A(OCR scanned, multi-page)	
H.CompPDF(OCRscan., multi-pg)	

<sup>\*</sup> Project (Serverless) is not supported.

# Input/Output Formats for the Image Converter Filter

By using the Image Converter Filter, you can convert input data into another format with the same color depth. The tables below show the supported input formats and convertible output formats.

# Limitation

- If JPEG format is selected as the output data, the data is output in 24-bit color, regardless of the input color depth.
- Input with a color depth of 24 bits in grayscale or full color is converted to 8-bit color when converted to the GIF format.

# Reference

• For the Image Converter Filter settings, see page 229 "Image Converter Filter".

#### Black & White (1bit)

You can convert each supported format into any one of the convertible formats.

Supported Formats (Input data)	Convertible Formats (Output data)
TIFF (MH, single-page)	TIFF (MH, single-page)
TIFF (MR, single-page)	TIFF (MR, single-page)
TIFF (MMR, single-page)	TIFF (MMR, single-page)
TIFF (Uncompressed, single-page)	TIFF (Uncompressed, single-page)
TIFF (MH, multi-page)	TIFF (MH, multi-page)
TIFF (MR, multi-page)	TIFF (MR, multi-page)
TIFF (MMR, multi-page)	TIFF (MMR, multi-page)
TIFF (Uncompressed, multi-page)	TIFF (Uncompressed, multi-page)
TIFF-F (MH, single-page)	TIFF-F (MH, single-page)
TIFF-F (MR, single-page)	TIFF-F (MR, single-page)
TIFF-F (MMR, single-page)	TIFF-F (MMR, single-page)
TIFF-F (MH, multi-page)	TIFF-F (MH, multi-page)
TIFF-F (MR, multi-page)	TIFF-F (MR, multi-page)
TIFF-F (MMR, multi-page)	TIFF-F (MMR, multi-page)
DCX (single-page)	DCX (single-page)
DCX (multi-page)	DCX (multi-page)
BMP (Uncompressed)	BMP (Uncompressed)
PNG	JPEG

C

Supported Formats (Input data)	Convertible Formats (Output data)
GIF	PNG
GIF	GIF

# Gray Scale/Full Color (4bit, 8bit, 24bit)

You can convert each supported format into any one of the convertible formats.

Supported Formats (Input)	Convertible Formats (Output)
TIFF (Uncompressed, single-page)	TIFF (Uncompressed, single-page)
TIFF (Uncompressed, multi-page)	TIFF (Uncompressed, multi-page)
BMP (Uncompressed)	BMP (Uncompressed)
JPEG	JPEG
PNG	PNG
GIF	GIF

# **Metadata Specifications**

Document Metadata contains various document properties, such as the document name, the user who created the document, and the date the file was created. Metadata is stored in XML format, and consists of 2 kinds of items: basic Metadata items and custom Metadata items.

Basic Metadata items are defined by the system and are automatically added to a document. Custom Metadata items are added by the Administrator, and the Administrator defines the items' names (IDs). The item names are used to specify Metadata items when configuring Filters and other features that use Metadata.

For Filters and other features where you can use Metadata, some basic Metadata items will be displayed in a drop-down list, which you can select and use directly. To use items that are not displayed and custom Metadata items, you can enter the tag name directly into the list box according to the rules.



 To output the Metadata in its native XML format, use the XML Transformer Filter without specifying an XSL file.

# Reference

- See page 335 "About Metadata".
- See page 254 "XML Transformer Filter".

#### C

## Fig.: Metadata XML

```
<?xml version="1.0" encoding="UTF-8" ?>
<document>
 cproperties>
   <basic>
    - cproperty id="hostName">
       <value> 192.168.1.1 </value>
     </property>
     cproperty id="generationDate">
       <value>20070928T060811Z
     </property>
     cproperty id="name">
       <value>20070928150811
     </property>
     cproperty id="width">
       <value>1176</value>
          arue >6bf13dde-6066-45
      </property>
    </basic>
   <resultURL>
    - cproperty id="ScanToFolder">
       <value>http://123/20071206220708.tif</value>
      </property>
      property id="ScanToWebDAV">
                                  com/projectA/</value>
           nue>https://disk.comp.
                                          مراح المانية ا
      </property>
     cproperty id="ScanToFolder">
       <value>\\LANMachine\common\scanner\fullDoc.pdf</value>
      </property>
    </resultURL>
  </properties>
</document>
```

#### 1. The "document" Element

The document element is the root element of the Metadata.

#### 2. The "properties" Element

The properties element contains all of the property elements and the resultURL element.

#### 3. The "basic" Element

Basic Metadata items and custom Metadata items are listed between the <br/> <br/>basic> and </br>

#### 4. The "resultURL" Element

Document URLs are listed between the  $\$ resultURL> and  $\$ /resultURL> tags.

#### 5. Metadata Property

The "id" attribute of the contains tag contains the name of the Metadata item for both basic and custom Metadata.

#### 6. Metadata Item Value

The text between the <value> and </value> tags is the value associated with the enclosing Metadata item.



- The "resultURL" element is included in the XML when the following Services precede the XML Transformer Filter in a Flow:
  - When [Create URL Using Base URL] is specified in the Send to Folder Service.
  - When the Send to FTP or Send to WebDAV Service is used.

# Reference

Item Name (ID)

- See page 165 "Send to Folder Service".
- See page 179 "Send to FTP Service".
- See page 189 "Send to WebDAV Service".
- The order of Metadata displayed in XML and the actual order displayed above may differ.

Description

The basic Metadata items and their corresponding tag names are displayed in the table below.

Table: Metadata Items (displayed in drop-down lists)

Display Name

nem radne (ID)	Display Name	Description
name	Document Name	The name of the scanned document.
userName	User Name	The user name used to log in to the Project and send the document. If the Project did not require authentication, this contains the user name used to log in to the MFP. In the following cases, the value will be empty:  • Neither the Project nor MFP requires authentication.  • The document was received via the fax function.
pageCount	Document Page(s)	The number of originals. A two-sided original is counted as 2 originals.
generationDate	Document Creation Date (UTC)	The time of acceptance of the Scan/FAX document.  • UTC (Coordinated Universal Time) is used.  • The format is "yyyymmddThhmmssTZD".  (TZD is the time zone and "Z" indicates "UTC".) For example, if the document was accepted on July 13, 2007 at 03:00:00 PM (Eastern Standard Time -5 UTC), the value will be as follows:  "20070713T200000Z".
contentSize	Document Size	The total data size (Bytes).

Item Name (ID)	Display Name	Description
pageSize	First Page Size	The size of the first page. For this, Page Size values are used. See the "Page Size Values" tables below.  ! Limitation
		Any Page Size values not on the lists are indicated as "Unknown".
outMode	2-Sided/1-Sided	duplex/single
port	Port No.	The FAX reception port:  • G3-1  • G3-2  • G3-3  • InternetFAX  • IPFax
tsi	TSI	TSI (RTI/CSI)
application	Application	The type of application that supplied the input data:  scan fax
hostAddress	Host Address	The IP address of the device.
hostName	Host Name	The host name of the device.
dayOfWeek	Day of the Week	The day of week on which the job was created.
generationDateLocal	Document Creation Date (Local Time)	The time the Scan/FAX document was accepted.  • Local time is used.  • The format is "yyyymmddThhmmss".  This value is generated using generationEpoch and sourceTimeZone.

# Table: Metadata Items (not displayed in drop-down lists)

Item Name (ID)	Description	
jobld	The job ID. This ID is unique across the system.	
registrationDate	The date and time the job was created.	
	UTC (Coordinated Universal Time) is used.	

Item Name (ID)	Description
	The format is "yyyymmddThhmmssTZD".
	(TZD is the time zone and "Z" indicates "UTC".) For example, if the job was created on July 13, 2007 at 03:00:00 PM (Eastern Standard Time -5 UTC), the value will be as follows:
	"20070713T200000Z".
adminMailAddress	The Administrator's email address.
dammytan/taaress	The email address is specified by via the AdminTool.
profileId	The ID of the Profile.
projectId	The ID of the Project.
machineld	The ID of the device.
mfpApplicationVer	The version of Scan and Fax Manager.
transferKind	The transfer type (purpose), for example, "delivery".
xResolution	The horizontal resolution (dpi).
yResolution	The vertical resolution (dpi).
width	The image width (pixel).
length	The image length (pixel).
	The rotation angle:
rotation	• 0
	• 90
language	The language set via the MFP display panel.
faxJobId	The ID of the reception FAX document (the SAF management ID).
direction	The FAX direction:
	• in
mailFaxSubject	The subject of the received FAX mail.
macAddress	The MAC address of the device registered to AdminTool.
scanMethod	The method used for scanning.
	• ADF
	• PLATEN

Item Name (ID)	Description
	• MIX
groupld	The ID of the Group.
generationEpoch	The date and time that the file was created, expressed as the number of milliseconds that have elapsed since January 1, 1970, 0:00.
	This value is calculated based on Universal Coordinated Time (UTC).
registrationEpoch	The date and time that the file was registered, expressed as the number of milliseconds that have elapsed since January 1, 1970, 0:00.
	<b>♥</b> Note
	This value is calculated based on Universal Coordinated Time (UTC).
contentType	The MIME type of the first page. This value conforms to RFC standards.
sourceTimeZone	The local time zone that was used as the basis for the values of generationEpoch and registrationEpoch.
hostDomain	The domain to which the device belongs. If the domain name cannot be determined, this item is blank.
registrationDateLocal	The date and time the job was created.
	Local time is used.
	The format is "yyyymmddThhmmss".
	This value is calculated based on generationEpoch and sourceTimeZone.

# **■** Reference

- For details about formatting numeric Metadata items for output in file/folder names, see page 199
   "Specifying Folder and File Names Using Metadata".
- For details about formatting Metadata items that represent dates for output in file/folder names, see page 201 "Formatting dates in Metadata".

## Table: A-series Page Size Values

Page Size value	Inches × Inches	mm × mm
A3	11.7 × 16.5	297 × 420
A4	8.3 × 11.7	210 × 297
A5	5.8 × 8.3	148 × 210

## Table: B-series Page Size Values

Page Size value	Inches × Inches	mm × mm
B4	9.8 × 13.9	250 × 353
B5	6.9 × 9.8	176 × 250

## **Table: Inch Size Values**

Page Size value	Inches × Inches	mm × mm
5 1/2 × 8 1/2	5 1/2 × 8 1/2	140 × 216
8 1/2 × 11	8 1/2 × 11	216 × 279
81/2 × 13	8 1/2 × 13	216 × 330
81/2 × 13 2/5 Landscape	81/2 × 13 2/5	216 × 340
8 1/2 × 14	8 1/2 × 14	216 × 356
11 × 17	11 × 17	279 × 432

# **About Regular Expressions**

## **Meta Characters**

The following characters are called "meta characters" and have a special meaning:

Other characters are called "normal characters" and have no special meaning.

To use a meta character as a normal character, put "\" in front of the meta character.

Character	Meaning
. (period)	Match any character (except Newline).
[]	Match any single character within the brackets.
[^]	Match any single character not within the brackets.
^	Match the beginning of the line.
\$	Match the end of the line (or before Newline at the end).
\A	Match only at beginning of string.

Character	Meaning
\Z	Match only at end of string (or before Newline at the end).
\G	Match only at position () (for example at the end-of-match position of prior m//g).
\b	Match a word boundary.
\B	Match a non-word boundary.
\w	Match any "word" character (alphanumeric plus "_").
\W	Match any non-"word" character.
\s	Match any whitespace character.
\\$	Match any non-whitespace character.
/d	Match any digit character (0-9).
\D	Match any non-digit character.
\1, \2,	Used to refer to previous group.
\x	Escape sequence.  Match extended Unicode "combining character sequence".  Equivalent to (?:\PM\pM*).
*	Match 0 or more times.
* \$	Match 0 or more times (shortest match).
+	Match 1 or more times.
+ŝ	Match 1 or more times (shortest match).
ś	Match 1 or 0 times.
ŝŝ	Match 0 or 1 time.
{n,m}	Match at least n but not more than m times.
{n,m}?	Match at least n but not more than m times (shortest match).
()	Grouping.
	Alternation.

Character	Meaning
(?:regexp)	A group that cannot be referred to by \1, \2,
(?=regexp)	Match following expression to "regexp".
(?!=regexp)	Match following expression to anything but "regexp".

# **Escape Sequences**

The following escape sequences can be used.

Character	Meaning
\0	Null character.
\xhh	Hex character.
\n	Newline.
\t	Таь.
\b	Match a word boundary.
\000	Octal character.
\cC	Control character.
\r	Return.
\f	Form feed.
\a	Alarm (bell).

The following escape sequences can also be used in replacement strings:

Character	Meaning
\u	Make the next character uppercase.
\I	Make the next character lowercase.
\U	Make all following characters uppercase until the next \E.
\L	Make all following characters lowercase until the next \E.
\E	End case modification, i.e., \U and \L.

Q

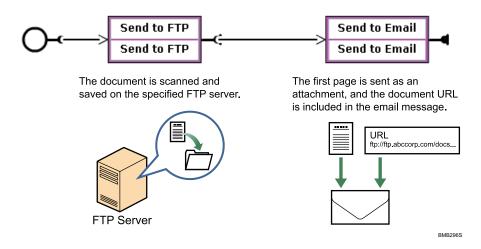
# Flow Examples

This section gives several examples of Flows. These examples highlight useful features for various Services and Filters that can help you create efficient Flows.

## Include Document URLs in an Email

This example uses the Send to Email Service with the Send to FTP Service to include the URL(s) of a scanned document in an email message. In addition, the Flow will be configured to attach only the first page of the scanned document.

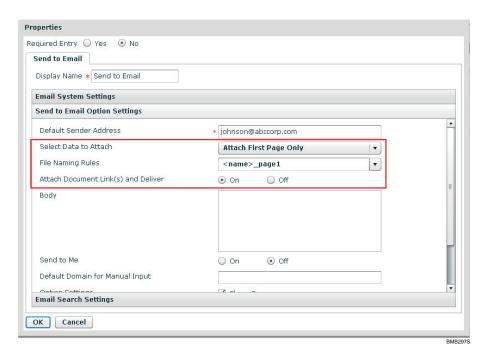
## **Example Flow**



**Key Settings** 

Send to Email Service

 $\mathsf{c}$ 



Setting	Value
[Select Data to Attach]	[Attach First Page Only]
[File Naming Rules]	<any value=""></any>
[Attach Document Link(s) and Deliver]	[On]

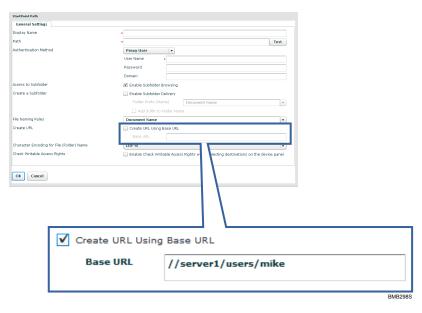
9 Results

When the email is sent, the URL of the document on the FTP server is included in the body of the message, and the first page of the document is sent as an attachment to the email.



 When using the Send to Folder Service, you must select the [Create URL Using Base URL] check box in Add StartPoint Path settings. Enter a base URL in [Base URL] if necessary.





# Reference

- See page 148 "Send to Email Service".
- See page 165 "Send to Folder Service".
- See page 179 "Send to FTP Service".
- See page 189 "Send to WebDAV Service".

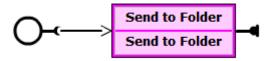
# Creating Subfolders when Saving Scanned Files

This example uses the subfolder creation feature in the Send to Folder Service to save scanned documents in subfolders with the users' names.



• This example uses to the Send to Folder Service, but the same results can be achieved by using the Send to FTP and Send to WebDAV Services as well.

## **Example Flow**



## **Key Settings**

Send to Folder Service

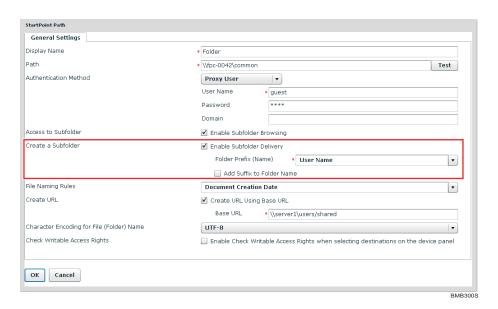


Table: Send to Folder settings for creating subfolders

Setting	Value
[Enable Subfolder Delivery]	Selected
[Folder Prefix (Name)]	User Name
[Add Suffix to Folder Name]	Selected/Not Selected

#### **Results**

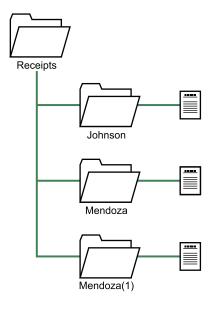
9

## When [Add Suffix to Folder Name] is selected

If a user with the user name "Johnson" scans a document, and another user with the user name "Mendoza" scans 2 documents, the resulting folder hierarchy will look like the figure below.

9

Fig.: Folder hierarchy when [Add Suffix to Folder Name] is selected

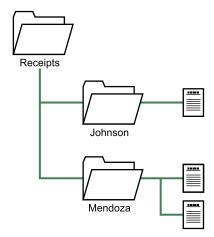


Every time "Mendoza" scans a document, a new subfolder is created and a suffix "(1), (2), ..." is appended to the subfolder's name.

## When [Add Suffix to Folder Name] is not selected

If a user with the user name "Johnson" scans a document, and a user with the user name "Mendoza" scans 2 documents, the resulting folder hierarchy will look like the figure below.

Fig.: Folder hierarchy when [Add Suffix to Folder Name] is not selected



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Every time "Mendoza" scans a document, the files are saved in the existing subfolder.

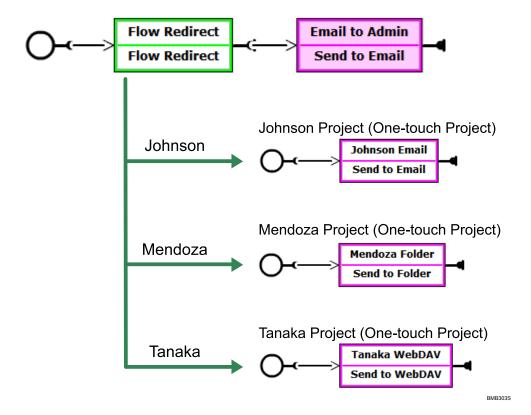
# Reference

- See page 165 "Send to Folder Service".
- See page 179 "Send to FTP Service".
- See page 189 "Send to WebDAV Service".

# Redirecting a Flow

This example uses the Flow Redirect Filter to redirect the Flow based on the user's name. After creating One-touch Projects for individual users and configuring a Replacement Table that maps user names to their Projects, scanned documents are distributed to the user by his or her preferred method.

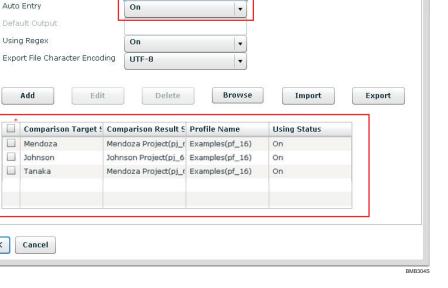
#### **Example Flow**



When a user who is not registered in the Replacement Table scans a document, the data is processed with the "Email to Admin" Send to Email Service.

## **Key Settings**

Replacement Table



■ User Redirect

Setting	Value
[Auto Entry]	[On]
Replacement Entries	Users' names and the Project names to redirect to.

## Flow Redirect

Table Settings Table Settings Filter Selection Replacement Table Name

Auto Entry

Default Output Using Regex

Add

Johnson

Tanaka

Cancel

ОК

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Setting	Value
[Metadata]	User Name
[Select Replacement Table]	<a replacement="" table=""></a>

## Send to Email Settings

On the "Send to Email" tab in [Service], the Administrator's email address is added to the recipient list.

If the project is using Active Directory or LDAP authentication, you can enable the Send to Me function to send an email to the user, notifying him/her that the scanned document was not saved.

#### Results

If "Johnson", "Mendoza" or "Tanaka" scans a document, the scanned document will be redirected to the specified Project and processed accordingly. If the user is not registered in the Replacement Table, an email is sent to the administrator, who can update the Replacement Table as necessary.

# Reference

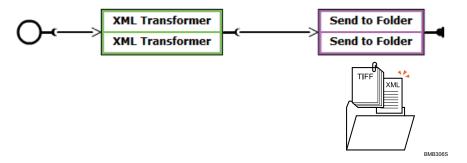
- See page 257 "Flow Redirect Filter".
- See page 434 "Replacement Table Settings".
- See page 148 "Send to Email Service".

# 9

# Extracting and Saving Metadata as XML

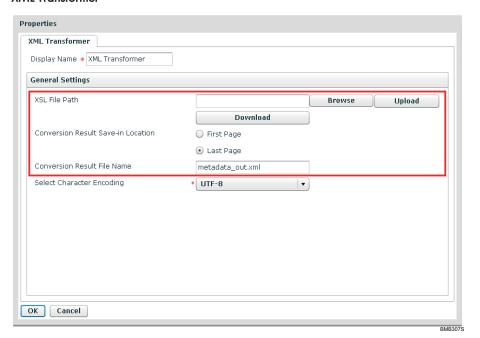
This example uses the XML Transformer Filter to extract the Metadata from a scanned document as an XML file, and then stores the document and the XML file in a shared folder.

## **Example Flow**



## **Key Settings**

#### **XML Transformer**



Setting	Value
[XSL File Path]	<blank></blank>
[Conversion Result Save-in Location]	[Last Page]

Setting	Value
[Conversion Result File Name]	<any value=""></any>

#### **Results**

Because no XSL file has been uploaded, the Metadata will be extracted in its native XML format. [Last Page] is selected in [Conversion Result Save-in Location], so the extracted XML file will be added to the end of the scanned data. The XML file's name will be whatever is entered in [Conversion Result File Name] ("metadata\_out.xml" in this instance).



• If the folder in which you are storing the data is monitored by an external document management system (DMS) server, make sure to select [Last Page] in [Conversion Result Save-in Location], as in this example.

# ■ Reference

- See page 254 "XML Transformer Filter".
- See page 468 "Metadata Specifications".

# Sending Metadata in an Email as HTML

This example uses the XML Transformer Filter to convert the document Metadata from XML to HTML, and then sends it as an email. The SMTP server can then send the email in HTML format, with the Metadata as the body text.

#### Flow

XML Transformer
XML Transformer

XML Transformer

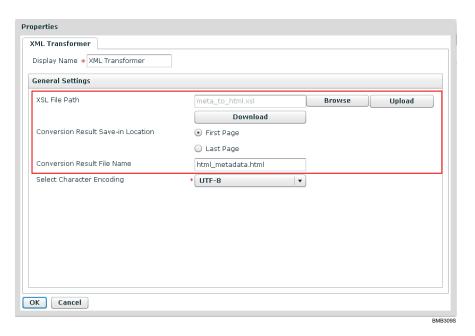
XML Transformer

Send to Email

Send to Email

#### **Key Settings**

**XML Transformer** 



Setting	Value
[XSL File Path]	XSL file for converting the Metadata to HTML
[Conversion Result Save-in Location]	[First Page]
[Conversion Result File Name]	<any value=""></any>

#### **Results**

The XSL Transformer Filter uses the XSL file to convert the Metadata XML into HTML. The resulting HTML file is added to the front of the scanned data and sent as the email body text.

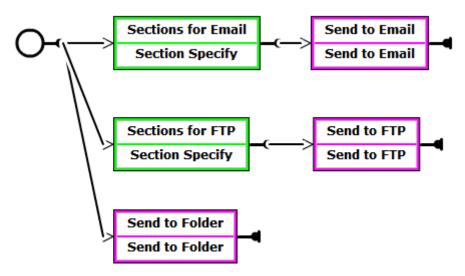
# Reference

- See page 254 "XML Transformer Filter".
- See page 468 "Metadata Specifications".

# **Extracting Document Sections**

This example uses the Section Specify Filter to extract Sections of a scanned document. The example Flow contains 2 instances of the Section Specify Filter, and each instance extracts different Sections and processes them separately.

## **Example Flow**



## **Key Settings**

Documents with many Sections might be too large to send by email, so you can predefine Sections beforehand. In the "Sections for Email" tab in the [Filter] screen, enter the Sections to extract, then move the component to the [Hidden Items (Preset)] screen so the user cannot modify it on the MFP display panel.

9

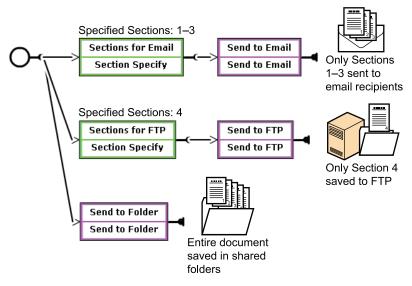
Fig.: Section Specify Settings



## Results

If you did not preset the Sections, the MFP user can specify the Sections to extract for each instance of the Section Specify Filter. If the user specifies Sections 1 to 3 for "Sections for Email", and Section 4 for "Sections for FTP", then the documents will be processed as in the figure below.

Fig.: Section Specify Filter Example



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# Reference

- See page 248 "Section Specify Filter".
- See page 280 "About Distribution Parameters".

# Using the Image Converter Filter

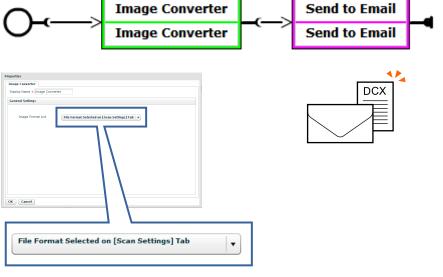
This example explains how the Image Converter Filter works. When the user specifies a file format on the MFP display panel, the output might be in a format different from the one selected on the display panel, depending on whether or not the Image Converter Filter is in the Flow.

## Case 1: Let the MFP user specify the output format

To allow the MFP user to select the output format, select [File Format Selected on [Scan Settings] Tab] in [Image Converter List] on the Image Converter Filter's Properties screen, as shown in the figure below. For this flow, if the user selects DCX as the format, the scanned data will be in DCX format.

BMB313S

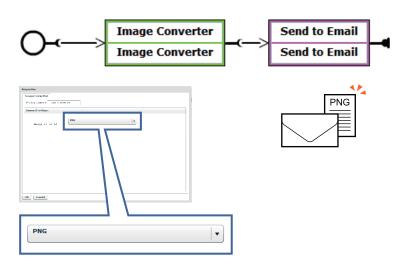
Fig.: Letting the user select the output format



Case 2: Preset the output format

To set the output format, select a format from [Image Converter List] on the Image Converter Filter's Properties screen. When you have selected a format, the output from the Image Converter Filter will always be in the selected format, regardless of what the user selects on the MFP display panel. The figure below shows an example where "PNG" is selected as the output format.

Fig.: Presetting the output format



9

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# 

When you preset the output format, the format selection that the MFP user makes on the MFP
display panel is ignored. Therefore, it is recommended to hide the [File Format] component on
the [Scan Settings] tab by moving it to the [Hidden Items (Preset)] screen to not confuse the
user.

# Reference

- See page 229 "Image Converter Filter".
- See page 280 "About Distribution Parameters".

# List of TCP/UDP Ports

Scan and Fax Manager uses the TCP/UDP ports listed in the following tables. Refer to these tables when configuring Scan and Fax Manager.

# 

- Configure the ports so that they do not conflict with other connections and services running on the computer.
- Configure the necessary ports as exception ports on the firewall.

# When Not Using SSL

## Ports Necessary for AdminTool

Function	Port Number	Protocol
Using the AdminTool Log/job operations Transferring logs	The port number specified when installing Scan and Fax Manager * 1	НТТР
Registering MFPs	8080 (MFP)	НТТР

<sup>\*1</sup> The default value is 8080.

## Ports Necessary for Authentication

Authentication Method	Function	Port Number	Protocol
Active Directory Authentication	Executing authentication	88	KRB5
		389	LDAP
	Creating an authentication profile	137	NBNS
		389	LDAP
		445	SMB
	Obtaining the user list on the Administrator settings screen	88	KRB5
		389	LDAP
LDAP Authentication	Executing authentication	The port number specified when setting	LDAP

c

## Ports Necessary for Delivery

Delivery Method	Port Number	Protocol
Send to Email	25 *1	SMTP
	389 *2	LDAP
Send to Folder	445	SMB
Send to FTP	21 *3	FTP
	20 *4	FTP
Send to WebDAV	80 *5	НТТР

- \* 1 Set the port number to the same one used by the SMTP server. If a port is not specified, the default port number 25 is used.
- \*2 Set the port number to the same one used by the LDAP server. If a port is not specified, the default port number 389 is used.
- \*3 Set the port number to the same one used by the FTP server. If a port is not specified, the default port number 21 is used.
- \*4 This port number cannot be changed because it is automatically set to one less than the port number above.
- \*5 Set the port number to the same one used by the WebDAV server. If a port is not specified, the default port number 80 is used.

<sup>\* 1</sup> The default value is 389.

#### 9

# When Using SSL

# Ports Necessary for AdminTool

Function	Port Number	Protocol
Using AdminTool Log/job operations Transferring logs	The port number specified when installing Scan and Fax Manager * 1	HTTPS
Registering MFPs	51443 (MFP)	HTTPS

<sup>\*1</sup> The default value is 8443.

# Ports Necessary for Authentication

Authentication Method	Function	Port Number	Protocol
	Executing authentication	88	KRB5
		636	LDAPS
	Confirming the presence of a sever	389	LDAP
A skin sa Dima aka mi	Active Directory Authentication  Creating an authentication profile  Obtaining the user list	137	NBNS
·		389	LDAP
		445	SMB
		636	LDAPS
		88	KRB5
on the Administrator settings screen	636	LDAPS	
Executing authentication	The port number specified when setting the authentication profile * 1	LDAPS	
LDAP Authentication  Creating an authentication profile		The port number specified when setting the authentication profile * 1	LDAPS

Authentication Method	Function	Port Number	Protocol
	Obtaining the user list on the Administrator settings screen	The port number specified when setting the authentication profile * 1	LDAPS

<sup>\* 1</sup> The default value is 636.

## Ports Necessary for Delivery

Delivery Method	Port Number	Protocol
Send to Email	465 * 1	SMTPS
	636 *2	LDAPS
Send to Folder	445	SMB
Send to FTP	22 *3	SFTP
Send to WebDAV	443 *4	HTTPS

- \*1 Set the port number to the same one used by the SMTP server. If a port is not specified, the default port number 25 is used.
- \*2 Set the port number to the same one used by the LDAP server. If a port is not specified, the default port number 389 is used.
- \*3 Set the port number to the same one used by the FTP server. If a port is not specified, the default port number 22 is used.
- \*4 Set the port number to the same one used by the WebDAV server. If a port is not specified, the default port number 443 is used.

## Ports for RMI

#### Ports for RMI

Function	Port Number	Protocol
Batch execution	41108	RMI
	41109	RMI

#### 9

# Ports for SNMP

## Ports for SNMP

Function	Port Number	Protocol
Searching MFPs	161	SNMP

# **Troubleshooting**

This section describes the procedures for resolving issues that may arise during operation of Scan and Fax Manager software. Perform the suggested solution in order to address the issue. If you are unable to resolve the problem, contact your sales or service representative.

Issue	Cause/Solution
The MFP screen displays a message indicating that Profile configuration information cannot be found.	No Profile has been delivered to the MFP via the Device settings, or no Group has been created for the selected Profile.
No Group or Project is displayed on the MFP screen.	All Groups for the Profile are set to hidden.
Cannot perform Inbound FAX Transfer.	Make sure that the MFP's Reception Settings function for facsimile is set to "Store". For details, refer to the MFP model's Operating Instructions.
Cannot use SFM from MFPs using Basic Authentication.	Make sure that the users are given Full Control privileges. SFM is not available to MFPs using Basic Authentication, unless users are given Full Control privileges.
Authentication fails.	Make sure that the date/time settings of DNS matches those of the MFPs and the PC installed with the SFM application and AdminTool.

## 9

# **Glossary of Terms**

#### AdminTool

The AdminTool is a software utility that enables the Scan and Fax Manager Administrator to establish all network and MFP configuration and management settings. An easy to navigate, Webbased application, the AdminTool enables creation of Profiles, Groups/Projects, and Flows, as well as the selection of Services/Filters. Once configured, Scan and Fax Manager-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.

#### **Failover**

Failover is a function where job processing switches from the Primary Delivery Server (the main processing server) to a Secondary Delivery Server if the Primary Delivery Server fails due to a connection error or other cause.

#### **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.

#### Scan and Fax Manager

Scan and Fax Manager supports the configuration and management of up to 2000 connected devices. Scan and Fax Manager requires that the Scan and Fax Manager application and AdminTool software be installed on a PC. Scan and Fax Manager offers the most advanced feature-set for document capture and distribution, including image enhancements and plug-ins. Scan and Fax Manager 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.

#### 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.

## **Load Balancing**

Load balancing is a method to increase job processing efficiency by distributing jobs to several servers. Several jobs can then be processed simultaneously, increasing the rate at which jobs are completed.

#### 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.

## Secondary Delivery Server

When you enable the failover function, the Secondary Delivery Server processes jobs in the event that the main server is down. If the main server fails, for example it loses its network connection, processing is automatically switched to the Secondary Delivery Server.

#### 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 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.

# Scan and Fax Manager Feature

The tables below show major features of Scan and Fax Manager.

For details about each feature, see the linked pages.

• Security

Feature
Secure Login/Communication
Authentication: Active Directory, LDAP, NT
SSL Encryption: LDAPS and LDAP with StartTLS

• Document Distribution Services/Filters

Feature
1. Services
Send to Email/Send to Me
Send to Folder (SMB)/Send to Home Directory
Send to FTP
Send to Printer
Send to WebDAV
One-touch Scan
2. Filters
Archiver
Flow Redirect
Image Converter
Image Correction
OCR
PDF Converter
Metadata Replacement

a

• AdminTool Features

Feature
1. Configure General System Settings
2. Create/Edit/Delete Profiles
3. Create/Edit/Delete Groups
4. Create/Edit/Copy/Delete Projects
5. Devices
Add/Delete MFP(s)
Assign Profile to MFP
Confirm MFP Status
6. Maintenance
Initialize System
Backup and Restore Data
Integration with Third-party Maintenance Software
7. Job Management
Queue (View Waiting/Processing and Error Jobs)
Search/Delete/Interrupt/Confirm Job Status
8. Logs
Job Log (View Completed/Deleted/Errored Jobs)
Search/Delete Job Logs
System Log

Feature
Search/Delete System Logs
Auto Delete Stored System Logs

## • Other Standard Features

Feature
Touch Panel Screen Customization
Email Notification
Fax Routing (Inbound)
File Format Conversion
Manual [?] Button
Metadata Input
User Mode Login
Start/Stop Service
Feature extensibility via the SDK (for example DMS integration)
Failover
Document delivery using Kerberos security
Load Balancing

## **Template**

A sample profile can be imported during installation.

Edit the sample profile before using it.

However, the sample profile can only be imported the first time the software is installed.

9

## **INDEX**

A	Deleting a Backup File	402
	Deleting a Scheduled Backup	395
Access to Subfolder	Downloading a Backup File	390
Send to Folder	Performing a Manual Backup	389
Send to FTP	Performing a Recovery	
Send to WebDAV	Restoring a Backup	
ACL Configuration13	Uploading a Backup File	398
ACL Settings107	Basic Metadata	28, 36
ACL Settings Screen	Batch Execution of Maintenance	404
Active Directory Authentication63, 151, 412, 463	How to Execute the Command Calls	
Add a Service/Create a Flow 57	Recommended Order of Command Calls	
Add Scanned Time to Document Name75	Supported Commands	403
Address Search Settings157	Blank Page Sensitivity	328
Administrator	Body Text	153
Administrator Settings	Border Color	
Error Notification Email Address	PDF Stamper Filter (Font Tab for Bates Stamp)	275
AdminTool	Border Width	
Home Page	PDF Stamper Filter (Font Tab for Bates Stamp)	275
Localizing353	C	
Login		
URL420	Cc/Bcc/ReplyTo Addresses63	
Alignment Button60	Certificate Attribute	157
Allow User Modification	Certificate Authority (CA)	13, 420
PDF Stamper Filter (Position Tab)276	Compression	222
Application Bar76, 86, 96, 122	Compression Rate	222
Archiver Filter	Configure the MFPs	66
Convertible Formats (Output Data)242	Control ID	74, 106
Supported Formats (Input Data)242	Copy Project Button	
Archiver Filter Properties242	Counter End	,
Attach Document Link(s) and Deliver152	PDF Stamper Filter (Stamp Tab for Bates Stamp	)27
Authentication and Accounting Manager412	Counter Start	
Authentication Method176	PDF Stamper Filter (Stamp Tab for Bates Stamp	)27
Authentication Methods150, 412	Create a Subfolder	173
Active Directory Authentication	Example	
LDAP Authentication	Send to Folder	169
Authentication Server63, 151, 173, 412	Send to FTP	182
Authentication Setting Name	Send to WebDAV	192
Auto-adjust image orientation247	Create URL	170, 174
7.010 dajosi ililage oficilialion247	CSV File, Replacement Tables	444
В	Current Counter	
Back Button21, 31, 87, 96	PDF Stamper Filter (Stamp Tab for Bates Stamp	)27
Background Color	Custom Metadata	28, 36
PDF Stamper Filter (Font Tab for Bates Stamp)275		•
Backup	D	
Changing the Settings of a Scheduled Backup	Date Format	409
Configuring Automatic Backups 391	Date Format Settinas	77

Default Document Name	331	Opening/Navigating Distribution Parame	eter Screens 283
Default Domain for Manual Input	154	Setting Email Distribution Parameters	293
Default Filter Service Settings		Setting Folder Distribution Parameters	301
Default Output Service Settings		Transferring a Distribution Parameter to A	
Default Sender Address			
Delete Screen Page Button	•	Divide Email	
Delivery Flow27, 3		Do Not Divide	
Density		Page Divide	
•		Size Divide	
Deskew	223	DN	
Details	270	Document Name	,
PDF Stamper Filter (General Tab)		Document Name Button	•
Stamper Settings Properties		Document Name Extraction	245
Details Button		E	
Device List		E la D	22.07
Device Properties		Edit Button	
OK		Email Addresses, To/Cc/Bcc/Reply	/lo65, 159, 286
Priority Server		Email Attachment Format	
Profile Name			•
Screen After Login Use Fax		Email Division Size (KB)	162, 288
Use Scanner		Email Login Information	
		Login User	
Device Shortcut		Proxy User	
Display All Button		Email System Settings Screen	
Display Job Log on Device Display Par	nel76	Email/Folder Search	
Display Name		Enable Address Search	
Archiver Filter		Enable Address Validation	154
Flow Redirect Filter		Enable Editing	332
Image Converter Filter		Enable Manual Address Entry	64, 154
Image Correction Filter Metadata		Enable S/MIME	157
Metadata: Validate/Replace (Specified)		Encryption Algorithm	
Metadata: Validate/Replace Filter		Error Notification	
OCR Filter		Error Queue	
PDF Converter Filter		Date Selection	
Section Specify Filter	,	Delete	
Section Splitter Filter		Display All	
Send to Email		Error Image	
Send to Folder		Job Count	
Send to FTP	180, 187	Log Data	
Send to WebDAV		Refresh	
XML Transformer Filter		Search/Narrow Search	372
Distribution Parameters13, 25, 26,	27 34 35	Error Queue Screen	372
	6, 280, 305	Error Queue Shortcut	
Changing Display Position of a Distribution		F	
Distribution Parameter Screen Overview	280	Enilaria	15 410 444
Hiding a Distribution Parameter	292	Failover	. 13, 412, 446

FAX		Example	482
Inbound FAX Transfer	348	Replacement Table Setting Example	483
File Format	311	Flow Redirect Filter Properties	257
File Formats14, 25, 34, 3	308, 464	Flow Settings	
Archiver Filter		Adding a Service/Filter to the Flow	133
Image Converter	229	Alignment Button	
Image Converter Filter230, 462, 4	466, 504	Changing a Service/Filter's Display Name	137
Image Correction	236	Changing Display Position of a Service/Filter	135
Image Correction Filter	237	New Filter Services	130
OCR Filter	244	New Output Services	130
PDF Converter Filter	220, 268	Removing a Service/Filter	136
PDF Stamper Filter	268	Waste Basket Button	130
File Naming Rules 152, 170, 174,	183, 193	Working with Services/Filters in the Flow	132
Filter Properties	211, 244	Flows27, 3	36, 129
Archiver Filter		Examples	477
Enhanced PDF Converter Filter	220	Redirecting Example	482
Flow Redirect Filter	257	Font Color	
Image Converter Filter	229	PDF Stamper Filter (Font Tab for Bates Stamp	and Tex
Image Correction Filter	236	Watermark)	274
Metadata Converter Filter		Font Family	
Metadata Replacement Filter	263	PDF Stamper Filter (Font Tab for Bates Stamp	and Tex
OCR Filter	244	Watermark)	274
PDF Converter Filter	213	Font Size	
PDF Stamper Filter	267	PDF Stamper Filter (Font Tab for Bates Stamp	and Tex
Section Specify Filter	248	Watermark)	274
Section Splitter Filter	252	Font Style	
XML Transformer Filter	254	PDF Stamper Filter (Font Tab for Bates Stamp	
Filter Summary		Watermark)	
Archiver Filter	205	Format Conversion	245
Barcode Separator/Index Filter	205	FTP Login Information	
Enhanced PDF Converter Filter	205	Anonymous	
Flow Redirect Filter	205	Login User	
Image Converter Filter	205	Proxy User	
Image Correction Filter	205	Use Certificate	182
Metadata: Metadata Converter Filter	205	G	
Metadata: Metadata Replacement Filter	205		
OCR Filter	205	General Settings, System	409
PDF Converter Filter	205	Group	24, 33
PDF Stamper Filter	206	Group List - MFP Display Panel	94
Section Specify Filter	205	Group Settings	
Section Splitter Filter	205	Add a Group45,	
XML Transformer Filter	205	Adding a New Screen Page	
Filters 15, 22, 32, 204, 2	205, 207	Changing a Group Name	
Accessing Property Settings Screens	206, 207	Changing Group Display Order	
Filter Summary	205	Deleting a Group	
Flow Editor Screen	129	Deleting a Screen Page	
Start Position	130	Hiding a Group	
Flow Redirect Filter	. 13, 132	Group Tab - MFP Display Panel	

Group/Project Screen	283	Date Selection	362
Group/Project Screen Overview85	, 94	Delete All	36
Guides for This Solution		Details	36
		Display All	36
H		Log Data	36
Hidden Items (Preset)	342	Refresh	36
Hidden Items (Preset) Screen		Search/Narrow Search	360
Horizontal	202	Status Icons	363
PDF Stamper Filter (Position Tab)	276	with Load Balance Servers	45
•		X Logs	36
How to Read This Guide		Job Log Screen	360
HTTP/HTTPS189, -	420	Job Log Security Mode	70
I		Job Queue	367
l		Date Selection	370
lcon Profile	76	Display All	368
Project		Job Count	368
·		Log Data	369
IIS - SSL On/Off		Refresh	368
IIS Web Server	420	Search/Narrow Search	368
Image Converter Filter		Top Priority	369
Convertible Formats (Output Data)		Job Queue Screen	368
Example		Job Queue Shortcut	367
Input/Output Formats		Job Settings	370
Supported Formats (Input Data)		Auto Delete Errored Jobs	
Image Converter Filter Properties	231	Auto Delete Stored Log(s)	
Image Correction Filter		Deliver During Specified Time Range	
Auto Orientation	240	Deliver Fax job(s) on specified day	
Change Resolution		Errored Job Storage Settings	379
Convertible Formats (Output Data)		Log Storage Settings	379
Deskew		Number of processing threads	378
Noise Reduction (Black & White image only)		Number of Retries	377
Remove Blank Pages		OCR mode	378
Remove Punch Holes (Black & White image only)		Retry Interval	377
Supported Formats (Input Data)		Save Fax job(s)	378
Image Correction Filter Properties		Scheduled Delivery	377
Image Correction Properties	239	Job Settings Screen	377
Image Scale Percentage		K	
PDF Stamper Filter (Stamp Tab for Image Stamp)	272	N .	
PDF Stamper Filter (Stamp Tab for Image Watermark)		Kerberos Option	460
Inbound FAX Transfer		L	
Issue alert at	384	Language	
Item Settings List	332	OCR Filter	240
J		LDAP Authentication	
111	0.45	LDAP Base DN	150
Job Log40, 358,		LDAP Login Information	
Completed/Deleted/Error	30Z	Proxy User	150

LDAP Server14, 65,	148, 155, 431	Custom Metadata	28, 36, 335
LDAP(S) Port No	156	Deleting an Input Component	345
LDAP(S) Server	156	Extracting	
LDAPS (LDAP over SSL)		Hiding an Input Component	
LDAPS (StartTLS)		Metadata Input Component Screen	
Left/Right Margin		Metadata Input Components - Admir	
PDF Stamper Filter (Position Tab)	277	Metadata Input Components - MFP [	
Letter Keys on the Display Panel		Metadata Input Components - MFP Operation Panel)	
Load Balance		Specifications	
Conditions		Tag Name on Metadata XML33	
Load Balance Servers		Metadata Button	
Conditions		Metadata Converter Filter Proper	
Registering		·	
Removing		Metadata Replacement Filter Pro	Jenies 203
Settings	455	N	
Synchronizing	455	New Group Button	87 97
Load Balancing	453	New Project Button	
Localizing the AdminTool		•	
Login Status		New Screen Page Button	
Logout Button		New Text Button	
		Notification	163, 289
M		0	
Maintenance	386	OCR Filter	
Maintenance Mode	386	Convertible Formats (Output Data)	244
Automatic Backups	391	Supported Formats (Input Data)	244
Backup		OCR Language	327
Batch Download Logs		OCR Scanned PDF	
Batch Execution of Maintenance		OCR Scanned PDF Screen	
Deleting a Backup File		One-touch Scan 14, 26, 3	
Download			
Downloading a Backup File		Options Button	
Initialize System		Options Screen	
Initializing the System		Original Orientation	
Performing a Manual Backup		Original Setting	313
Performing a Recovery		Other Settings	329
Recover		P	
Restore			
Restoring a Backup		Pad Zero	
Upload		PDF Stamper Filter (Stamp Tab for Ba	tes Stamp) 272
Uploading a Backup File		Page Numbers	
Manual Entry		PDF Stamper Filter (Position Tab)	276
Max. No. of Groups		Page Orientation	
Metadata		PDF Stamper Filter (Preview Tab)	277
Adding Metadata Input Components to		Page Range	
Basic Metadata		PDF Stamper Filter (Position Tab)	276
Changing Input Component Display Ord		Page Size	
Converting to HTML Example	486	-	

PDF Stamper Filter (Preview Tab)277	Profile Properties Screen	74
Password Entry141	Profile Settings	72
PDF Conversion Mode222	Add a Profile	
PDF Converter Filter	Deleting a Profile	80
Convertible Formats (Output Data) 213, 220, 268	Editing Profile Properties	
Supported Formats (Input Data)213, 220	Exporting a Profile	
PDF Converter Filter Properties214, 221	Importing a Profile	
PDF Format214, 222	Importing/Exporting Profiles	
PDF Stamper Filter	Profile Shortcut	7
Supported Formats (Input Data)268	Project	. 25, 34
PDF Stamper Filter Properties278	Project Button	
PDF Stamper Settings (Font Tab for Bates Stamp	AdminTool	4
and Text Watermark)274	Project Configuration Screen 129, 28	
PDF Stamper Settings (General Tab)269	Project Icons	122
PDF Stamper Settings (Position Tab)275	Project Menu - MFP Display Panel	.25, 34
PDF Stamper Settings (Preview Tab)277	Project Name	10
PDF Stamper Settings (Stamp Tab for Bates	Project Properties	
Stamp)270	Editing Project Properties	103
PDF Stamper Settings (Stamp Tab for Image	Project Settings	102
Stamp)272	Add a Project	
PDF Stamper Settings (Stamp Tab for Image	Adding Text to a Group Screen	113
Watermark)	Changing Project Button Display Order	118
PDF Stamper Settings (Stamp Tab for Text	Deleting a Project	
Watermark)	Importing Profile/Project Icons	
POP before SMTP	Moving a Project Button	
Prefix	Moving a Project to Another Group	
PDF Stamper Filter (Stamp Tab for Bates Stamp)270	Moving a Project to Another Screen Page	
Preset	Resizing a Project Button	
Document Name	Project without Access Rights	
Email Destinations	Project/Group Screen	
Folder Destinations	Properties Button	67
Preview	R	
	Dafmada Duwan	40.0
Primary Server	Refresh Button	
Priority Level	Regular Expression Usage Examples	
Priority Levels	Regular Expressions	
Private Keys	Escape Sequences	
Delete		
	Remove Blank Pages	
Product names	Replacement Table Entries Adding	
Profile	Comparison Result String/Project Name	
Profile > Project > Service Workflow24, 33	Comparison Target String	
Profile Icons	Deleting	
Profile List73	Editing	
Profile Name74	Use	
Profile Properties Button73, 86, 96		

Replacement Tables	434	Scheduled backup	391
Adding a Replacement Table	435	Delete	395
Auto Entry	437	Edit	394
CSV File Specifications	444	Screen Component Transfer Zone 286, 315	, 342
Default Output	437	Screen Title21, 43, 76, 86, 96	
Deleting a Replacement Table	441	Search	,
Editing a Replacement Table	438	Email Destinations	. 286
Entries	439	Error Queue	
Exporting	441	Folder Destinations	
Import Conditions	445	FTP Destinations	
Importing	441	Job Log	
Using Regex		Job Queue	
with Flow Redirect Filter4		System Log	
with Metadata: Validate/Replace Filter	434	WebDAV Destinations	
Resolution3		Search Button	
Root Button177, 1	85, 198	Secondary Delivery Server	446
Rotation(Degree)		Changing from Secondary to Primary	
PDF Stamper Filter (Position Tab)	276	Conditions	
S		Registration	447
		Removing	450
S/MIME	290	Settings	446
Saved Job	372	Synchronizing	447
Delete Saved Jobs	373	Secondary Server	412
Download Saved Jobs	373	Section2	8. 37
Scan and Fax Manager Feature	501	Section Range	•
Scan and Fax Manager Feature Highlights	s13	Examples	
Scan and Fax Manager System Overview	19	Section Specify Filter	
Scan and Fax Manager Workflow		Example	487
Scan Method3	314, 315	Section Specify Filter Properties	
ADF/Exposure Glass3		Section Splitter Filter Properties	
Batch Scan3	314, 315	Select Data to Attach	
Mixed Batch Scan	314	Selected Destinations	132
SADF3	314, 315	Send to Email Destinations	204
Scan Settings	308	Send to Folder Selected Destinations	
Changing a Scan Setting's Display Position		Send to FTP Selected Destinations	
Hiding a Scan Setting	316	Send to WebDAV Selected Destinations	
Making a Scan Setting Uneditable	317	Selected Destinations Button	
Scan Settings Button	21	Selected Item(s) List	
Scan Settings Screen	309	Send to Email	
Scan Size	318	Send to Email Destination Selection Screen -	
Auto Detect3	18, 327	Display Panel	
Mixed Sizes3	318, 327	Send to Email Destination Selection Screen -	
Scan Size Settings		Display Panel (Standard Operation Panel)	
Hiding All Scan Size Settings		Send to Email General Screen - AdminTool	281
Selecting Individual Scan Size Settings		Send to Email Hidden Items (Preset) Screen	283
Scan Type		Send to Email Option Settings Screen	
Scanned Time Information	75 221		

Send to Email Options Screen - AdminTool282	Send to Email Service139
Send to Email Options Screen - MFP Display	Send to Folder Service
Panel (Smart Operation Panel)282	Send to FTP Service
Send to Email Options Screen - MFP Display	Send to Printer Service
Panel (Standard Operation Panel)282	Send to RightFax140
Send to Email Properties Screen62	Send to SharePoint
Send to Email Service Settings	Send to SharePoint (Enhanced)140
Email Search Settings	Send to WebDAV140
Email System Settings149	Services17, 20, 30, 138, 147, 199
Send to Email Option Settings	Shared Network Folder Login Information
Send to Folder14	Login User169
Send to Folder Service Settings	Proxy User
Send to Home Folder Settings	Shared Network Folders139, 165
StartPoint Path Settings	Allowable Types165
Send to FTP 14	Show Preview
Send to FTP Service Settings179	PDF Stamper Filter (Preview Tab)277
StartPoint Path Settings	Single Page Settings
Send to Home Folder14, 172, 173	PDF Stamper Filter (Position Tab)276
	Site Certificate
Send to Me14, 153	Certificate File Formats
Send to Printer Service Settings186	Delete
Send to WebDAV14	Import432
Send to WebDAV Service Settings189	Managing Private Keys433
HTTP Proxy Server196	SMTP over SSL
Metadata Elements	
StartPoint Path Settings	SMTP Port No
Server Certificate13, 420	SMTP Server Name63, 150
Certificate Authority420	SMTP-AUTH150
Create CSR (Certificate Signing Request)422	SMTP/SMTPS Settings62, 149
Obtaining and Installing a Server Certificate421	SMTPS (SMTP over SSL)149
Server Management15	SMTPS (StartTLS)149, 150
Server Status41, 382, 388	SSL Encryption
Running41	Stamp Image
Suspended	PDF Stamper Filter (Stamp Tab for Image Stamp) 272
Service Buttons22, 31	PDF Stamper Filter (Stamp Tab for Image Watermark)
Service Menu21, 31	273
Layout21, 31	Stamp Name
Overview21, 31	Stamper Settings Properties278
Service Menu - MFP Display Panel26, 35	StartPoint Paths
Service Menu for One-touch Scan - MFP Display	Subject Text
Panel	•
Service Properties147	Supported Languages
Accessing Property Settings Screens	Suspend at
Send to Email Service	System Control Screen384
Service Settings	System Control Settings
-	Delivery Service Status
Service Summary	Refresh
Send to DocumentMall140	Select Delivery Service Startup Status

Server Disk Space	
Server Status	
Setting Server Disk Space	
Stop/Start Service	
Switch Delivery Service Status	
System Log	
Date Selection	357
Delete All	356
Display All	
Export	
Lines	356
Log Data	356
Refresh	
Search/Narrow Search	355
System Log Screen	355
System Log Settings	358
Auto Delete Stored Log(s)	359
Log Storage Setting	359
System Shortcut	358
Т	
Target Screen Size	75
Terms	
MFP Configuration Terms	•
System Setting Terms	
,	
Timeout Settings	
Tooltips	86, 96
Top/Bottom Margin	
PDF Stamper Filter (Position Tab)	276
Trademarks	3
Troubleshooting	498
Туре	51, 107
U	
URL	
AdminTool	420
Document URLs	477
Send to WebDAV	191
with Send to Email	477
User Authentication	<i>1</i> 31
User Mode	
V	
Vertical PDF Stamper Filter (Position Tab)	275
View Folder(s) Button	
VIEW COIDERS DUTTON	1// 180 198

## W

Waiting Queue41, 363, 381	, 382
Waste Basket	341
Waste Basket Button	88, 97
Watermark Text	
PDF Stamper Filter (Stamp Tab for Watermark Text)	273
WebDAV Login Information	
Anonymous	192
Login User	192
Proxy User	191
x	
XML Transformer Filter	
Convertible Formats (Output Data)	254
Example	i, 486
XSL File	254
XML Transformer Filter Properties	255
XSL File	487
XSL File Path	255

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