

**RICOH**



# Scan and Fax Manager

Operating Instructions

Serverless Scan and S/MIME Operation Guide





# TABLE OF CONTENTS

## 1. Serverless Scan and S/MIME Operation Guide

- Introduction.....3
  - Important.....3
  - How to Read This Guide.....3
- Features Overview.....6
- AdminTool Configuration.....7
  - Adding a Project (Serverless).....7
  - Configuring Auto Delete Errored Jobs.....9
  - Using S/MIME.....10
- Distributing Scanned Documents.....13
  - Executing a Project (Serverless).....13



# 1. Serverless Scan and S/MIME Operation Guide

Scan and Fax Manager is a software tool that utilizes the connected multifunctional devices (MFPs) to scan and distribute documents. The following two features of Scan and Fax Manager provide enhanced security when you distribute documents by e-mail.

- Creating a Project (Serverless) and distributing documents by e-mail without going through a server
- Using S/MIME when distributing documents by e-mail

This manual explains how to create and execute a project without going through a server and how to configure S/MIME.

## Introduction

### 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.

### 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.

**★ Important**

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

## Symbols

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

**★ Important**

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

**↓ Note**

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

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

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

## Key Terms

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This section explains the terms used in Scan and Fax Manager.

### Service

A Service represents a distribution method used during document processing. If a user is sending a scanned image to an e-mail address, he/she selects the Project button containing the Send to Email Service.

**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.

**Project**

A Project refers to a document distribution task and is configured by the Administrator to address specific application needs.

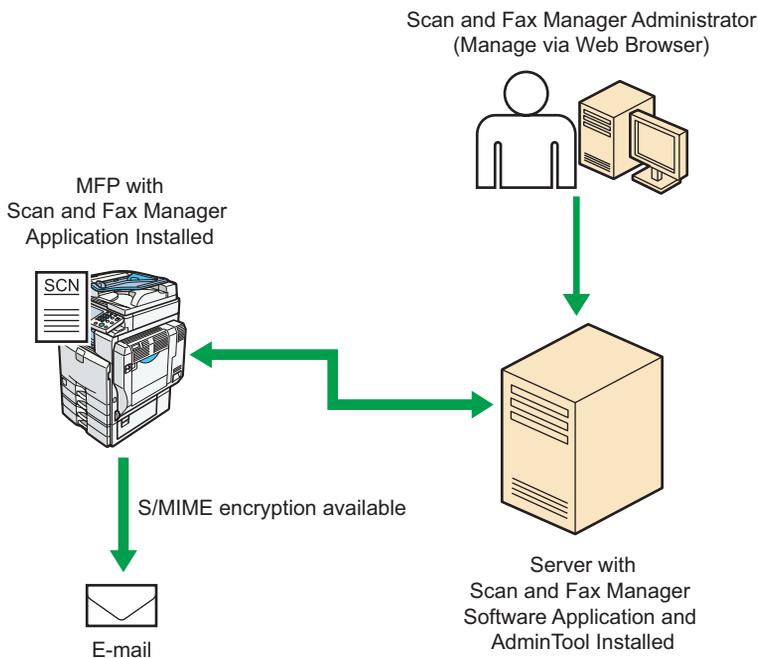
The user can distribute documents by selecting the corresponding Project button on the display panel of the MFP.

# Features Overview

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It is possible to scan documents on the MFP and directly distribute the scanned data easily and securely by using the Send to Email service of Scan and Fax Manager's Project (Serverless). Also, using S/MIME for e-mail distribution can further enhance the security.

**Figure: Scan and Fax Manager (a project that does not go through a server) Workflow**



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# AdminTool Configuration

The following section explains the procedures for creating a Project (Serverless) and configuring the Auto Delete Errored Jobs feature to be applied to the Project, and the procedures for configuring S/MIME.

For details about other items and settings, see "Scan and Fax Manager Administrator's Guide".

## ★ Important

- If the settings related to a Project (Serverless) and S/MIME are not displayed, contact your service representative.

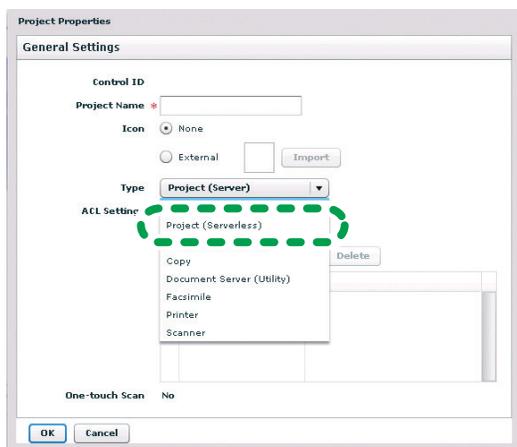
## Adding a Project (Serverless)

To add a Project (Serverless), use the following procedure to configure a new project.

1. Select [Home], and then select [Profile].
2. On the Profile list, double-click the name of the profile to be added to a project.
3. Select the tab of the group for which you want to create a Project (Serverless).
4. Click the New Project button, and then drag and drop it to the Group/Project screen.

The project properties screen appears.

5. Select [Project (Serverless)] in [Type].



DLE102

## ↓ Note

- If [Project (Serverless)] is selected in [Type], [ACL Settings] is not available.
- If an older version Project has been imported, [Type] is set to [Project (Server)].

## 6. Press [OK].

The button of the Project (Serverless) is displayed. A Project (Serverless) has been successfully created.

Add services and filters to the project, and create a Flow.

## 7. Double-click the button of the Project (Serverless) you have created.

The Project Configuration screen appears.

## 8. Drag and drop [Send to Email] to the Flow Editor screen.

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

The Send to Email service is added to the Flow Editor screen. Double-click the lower half of the Send to Email service you have added to display the Send to Email properties screen, and configure the settings as necessary.

### ↓ Note

- [Select Data to Attach] under [Send to Email Option Settings] is unavailable for a Project (Serverless). The setting is set to [Attach All].
- S/MIME encryption can be used to further enhance the security of e-mail distribution. For details about configuring the S/MIME settings, see page 10 "Using S/MIME".

## 9. Select [New Filter] from the accordion menu, and drag and drop the filters you want to add to the Flow Editor screen as necessary.

Only the [PDF Converter (Serverless)] and [Image Converter (Serverless)] filters can be added to a Project (Serverless).

The selected filters are added to the Flow Editor screen. Double-click the lower half of the filter you have added to display the filter properties screen, and configure the settings as necessary.

### ↓ Note

- 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)
- [PDF Converter (Serverless)] supports password-protected PDF file as its output format.
- 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
- The following file formats are supported as input data by [PDF Converter (Serverless)].
  - TIFF (MMR, single-page), JPEG
- The following file formats are supported as input data by [Image Converter (Serverless)].
  - TIFF (MMR, single-page)

## 10. Press [OK] to save the settings.

### ↓ Note

- 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.
- [Dropdown List Box (File)] is unavailable in the document information editor screen of a Project (Serverless) and cannot be used.
- Only the following file types are supported for a Project (Serverless):

#### Black & White File Formats

Displayed (Default)	Not Displayed (Default)
<ul style="list-style-type: none"> <li>• TIFF (MMR, Multi-Page)</li> <li>• PDF (Multi-Page)</li> <li>• PDF/A (Multi-Page)</li> </ul>	<ul style="list-style-type: none"> <li>• TIFF (MMR, Single-Page)</li> <li>• PDF (Single-Page)</li> <li>• PDF/A (Single-Page)</li> </ul>

#### Grayscale/Color File Format

Displayed (Default)	Not Displayed (Default)
<ul style="list-style-type: none"> <li>• JPEG</li> <li>• PDF (Multi-Page)</li> <li>• PDF/A (Multi-Page)</li> </ul>	<ul style="list-style-type: none"> <li>• PDF (Single-Page)</li> <li>• PDF/A (Single-Page)</li> </ul>

- The file types to be displayed on the display panel of the MFP change according to the settings that are specified in the AdminTool. Depending on the settings, all or some of the supported file types will be displayed. For details about the Scan Settings, see "Scan and Fax Manager Administrator's Guide".
- An OCR Scanned PDF is not supported in a Project (Serverless).

## Configuring Auto Delete Errored Jobs

You can automatically delete only the image data in errored jobs of a Project (Serverless) at a regular interval. Use the following procedure to configure [Auto Delete Errored Jobs] under [Settings Applied to Serverless Projects] and enable the function.

1. Click [Home], and then the [System] shortcut.
2. Click [Job Settings] to display the Job Settings screen.

3. Select [On] for the jobs ([Fax Jobs] or [Other Jobs]) to which you want to apply the Auto Delete function.
4. Specify the duration to store the errored jobs (Errored Job Storage Time) by entering [Hours] and [Minutes] (0 to 720:59).
5. Press [Apply] to save the settings.

**Note**

- 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.

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## Using S/MIME

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You can use S/MIME encryption to enhance the security of e-mail distribution.

S/MIME can also be used for a Project (Server), but it can be used more effectively in a Project (Serverless) to enhance the security of the project.

**★ Important**

- To use S/MIME for a Project (Serverless), Scan and Fax Manager – Embedded (sfm\_serverless\_smime\_option-2.x.x.x.zip) for S/MIME must be installed 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.
- When S/MIME for a Project (Serverless) 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.

In order to use S/MIME, follow the procedure below:

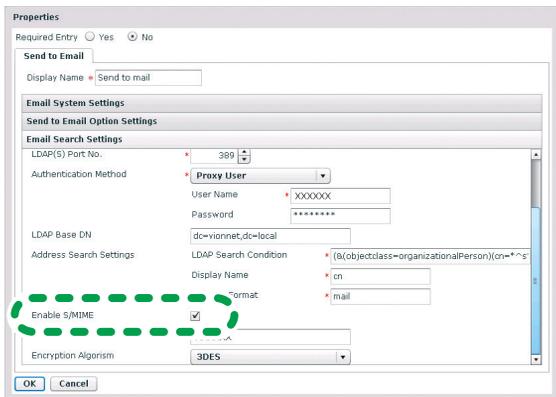
1. Double-click the lower half of the Send to Email service in the Flow Editor screen.

The Email System Settings screen in the Send to Email properties screen appears.

2. Expand the accordion menu, and select [Email Search Settings].

The Email Search Settings screen appears.

### 3. Select the [Enable S/MIME] check box.



The screenshot shows the 'Properties' dialog box with the 'Email Search Settings' tab selected. The 'Enable S/MIME' checkbox is checked and highlighted with a green dashed circle. Other settings include:
 

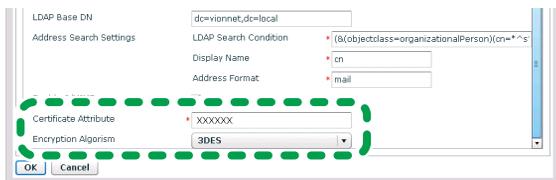
- Required Entry: No
- Send to Email: Display Name: Send to mail
- Email System Settings: Send to Email Option Settings
- Email Search Settings:
  - LDAP(S) Port No.: 389
  - Authentication Method: Proxy User
  - User Name: XXXXXX
  - Password: \*\*\*\*\*
  - LDAP Base DN: dc=viornet,dc=local
  - Address Search Settings:
    - LDAP Search Condition: [(objectclass=organizationalPerson)(cn=\*^\*)]
    - Display Name: cn
    - Address Format: mail
  - Enable S/MIME:
  - Encryption Algorithm: 3DES

DLE103

#### Note

- 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. For details about the LDAP server settings, see "Scan and Fax Manager Administrator's Guide".

### 4. Enter the certificate attribute in [Certificate Attribute], and select [Encryption Algorithm].



The screenshot shows the 'Properties' dialog box with the 'Email Search Settings' tab selected. The 'Certificate Attribute' field is filled with 'XXXXXX' and the 'Encryption Algorithm' is set to '3DES'. Both are highlighted with a green dashed circle. Other settings include:
 

- LDAP Base DN: dc=viornet,dc=local
- Address Search Settings:
  - LDAP Search Condition: [(objectclass=organizationalPerson)(cn=\*^\*)]
  - Display Name: cn
  - Address Format: mail
- Certificate Attribute: XXXXXX
- Encryption Algorithm: 3DES

DLE104

#### Note

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

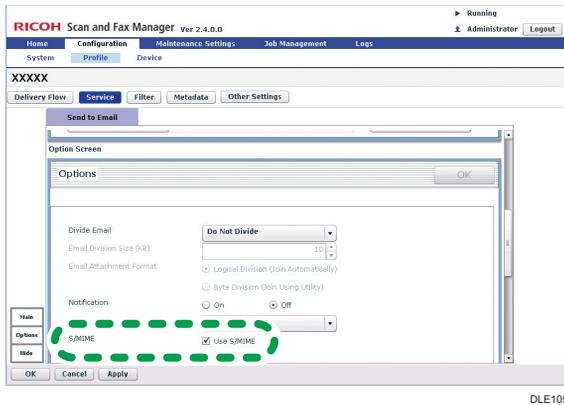
### 5. Click [OK].

### 6. Click (select) the [Service] tab.

The Send to Email Distribution Parameter Screen appears.

### 7. Scroll down to display the Option Screen.

## 8. Select the [Use S/MIME] check box.



### Note

- In order to receive an encrypted e-mail, you need to use a mail client software that supports the encryption algorithm (3DES or AES128).
- When S/MIME is being used, the Email Division feature cannot be used.
- To be notified of a distribution error, use the Error Notification setting under the Administrator settings. Use the following steps to configure the setting:
  1. Click [Home], and then the [System] shortcut.
  2. Click [Administrator] to display the Administrator Settings screen.
  3. Select the [Notify user of job error by email] check box under [Error notification].
- For details about the Error notification setting, see "Scan and Fax Manager Administrator's Guide".

# Distributing Scanned Documents

The following section explains how to execute the Project (Serverless) that has been created and distribute the documents that have been scanned using the MFP.

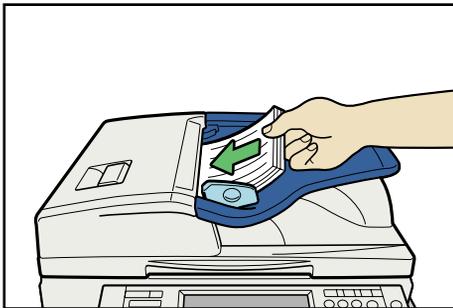
## Executing a Project (Serverless)

### Step 1: Set an Original

#### 1. Set the original on the automatic document feed (ADF) or exposure glass.

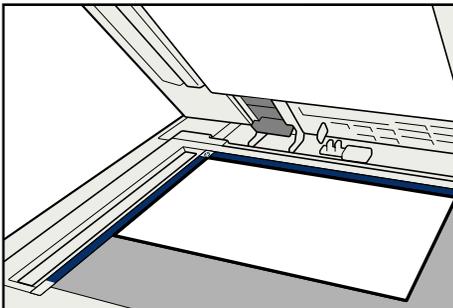
On the ADF, set the original with its front side facing up. On the exposure glass, set the original facing down.

#### ADF



BPF006S

#### Exposure Glass



BPF007S

#### Note

- Up to 100 pages can be added to a job.

## Step 2: Login

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### 1. Log in to the MFP.

The Group/Project screen appears.



### Note

- When a project that includes one or more Projects (Serverless) is synchronized, the Group/Project screen of the projects that have been already synchronized appears. The Project (Server) is displayed even if the connection with the server cannot be established. In this case a connection error occurs when the project button is pressed. The [Home] screen appears if no Project (Serverless) is available.

## Step 3: Select a Group/Project

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1. Press the tab of the target group.
2. Press the target project.

## Step 4: Add Document Information

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If the document information needs to be specified, the Metadata screen appears. Proceed to page 14 "Step 5: Configure Services and Filters" if the document information does not need to be specified.

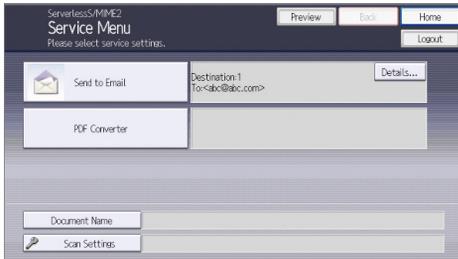
1. Select the item you want to specify by selecting it from the pull-down list or pressing the button.
2. Enter the document information.
3. Repeat Steps 1 and 2 as necessary.
4. Press [Next].

## Step 5: Configure Services and Filters

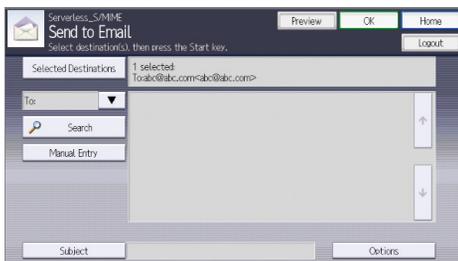
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The Service Menu appears when the settings of the Service and Filter can be configured. When the Service and Filter settings do not need to be configured, the Service Menu is not displayed and the basic screen of Send to Email is displayed. Proceed to Step 3.

For details about how to configure the Service and Filter settings, see "Scan and Fax Manager Administrator's Guide".



1. If necessary, press the Filter button to modify the settings, and then press [OK].
2. Press [Send to Email].
3. To add or edit an e-mail address, enter the e-mail address manually, or search in the address book and select the address to edit.



4. Press [Subject].
5. Enter the subject and press [OK].
6. If necessary, press [Options] to display the option screen, modify the settings, and then press [OK].

#### ↓ Note

- When S/MIME is being used, the Email Division feature cannot be used.

7. Press [OK].

The Service Menu screen appears.

## Step 6: Configure the Scan Parameters

### Document Name

You can assign a document name to the file to be attached to an outgoing e-mail.

On the Service Menu screen, perform the following procedure:

1. Press [Document Name].

**2. Enter the document name and press [OK].**

The entered document name automatically appears in the Document Name box.

**Scan Settings / Scan Size**

On the Service Menu screen, perform the following procedures:

- 1. Press [Scan Settings].**
- 2. Select the [Scan Settings] or [Scan Size] tab.**
- 3. Select the setting you want to use, and then press [OK].**

**Note**

- When [Auto Color Select] is selected in [Scan Type], color images are rotated 90 degrees when distributed.
- Depending on the administrator settings, other parameters may need to be configured.

**Step 7: Start Scanning**

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- 1. Confirm that the correct destination is selected. If necessary, press [Details...] in the Service Menu screen and confirm the destination.**
- 2. Press [Summary] to return to the previous screen.**
- 3. Press the [Start] key.**

Scanning starts and the scanned document is distributed.

If scanning does not start, make sure that all the required distribution parameters are specified and the original is set on the Automatic Document Feeder (ADF) or Exposure Glass.

**Step 8: Close a Project**

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If you want to continue executing a project, press [Home] to display the Group/Project screen.

When scanning of all the required documents is completed, press [Logout] to end the project.

**Step 9: View Jog Log**

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Press [Job Log] in the Group/Project screen to display the job log.

You can use the job log to check details of the scanned document, such as its scan date and time, project name, document name, user name, or distribution status and result.

The information recorded in the job log differs depending on the administrator settings.

The administrator settings determine whether to show job logs of all projects or only a specific project.



