

# Scan and Fax Manager MS SharePoint Server/ MS SharePoint Server (Enhanced) Plug-in Administrator's Guide

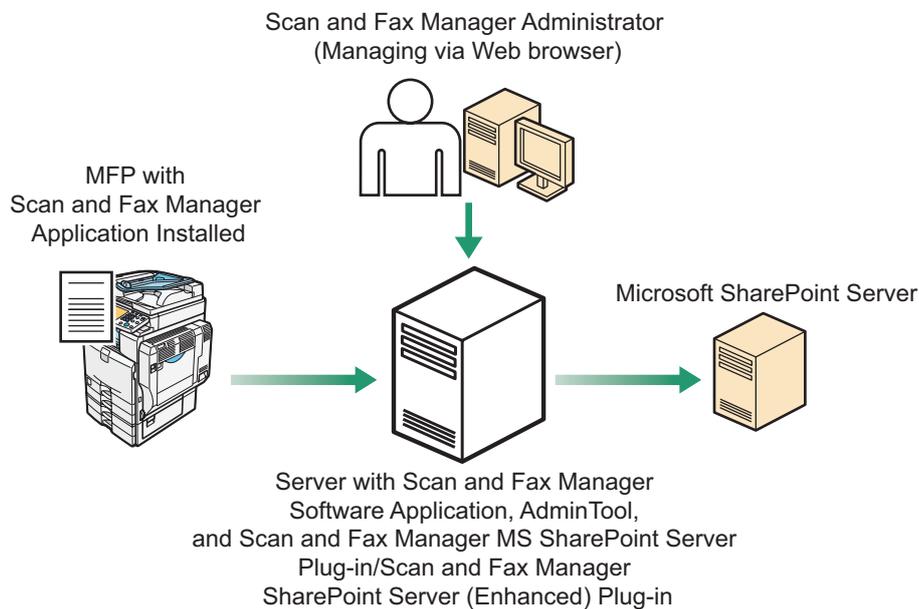
The Scan and Fax Manager MS SharePoint Server Plug-in (MS SharePoint Server Plug-in) /Scan and Fax Manager MS SharePoint Server (Enhanced) Plug-in (MS SharePoint Server (Enhanced) Plug-in) is a Scan and Fax Manager (SFM) plug-in service that distributes documents scanned using a multifunctional device (MFP) to Microsoft SharePoint Server (\*1).

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

If you use Scan and Fax Manager MS SharePoint Server Plug-in, you can specify URL, sites, and libraries using SFM Admin-Tool.

If you use Scan and Fax Manager MS SharePoint Server (Enhanced) Plug-in, you can specify URL, sites, and libraries using SFM AdminTool as Scan and Fax Manager MS SharePoint Server Plug-in and you can also specify sites and libraries using MFP's control panel depending on settings.

\*1 For details about the editions and versions which this plug-in supports, see Readme.



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**Fig. 1:** Scan and Fax Manager MS SharePoint Server Plug-in /Scan and Fax Manager MS SharePoint Server (Enhanced) Plug-in (MS SharePoint Server (Enhanced) Plug-in) Workflow

## Note

- This plug-in is displayed as "Send to SharePoint" or "Send to SharePoint (Enhanced)" on the SFM server, in AdminTool, and on the MFP control panel.
- This manual explains the configuration procedures for the MS SharePoint Server Plug-in/MS SharePoint Server (Enhanced) Plug-in. For details about Administrator Settings and Service/Filter Settings, see *Scan and Fax Manager Administrator's Guide*.
- For details about Microsoft SharePoint Server settings and operations, see the Microsoft SharePoint Server manuals.

## Introduction

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

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## Before You Begin

### Abbreviations

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

Product / Name	Abbreviation
Scan and Fax Manager	SFM
Multifunctional Device	MFP, Device
Scan and Fax Manager MS SharePoint Server Plug-in	MS SharePoint Server Plug-in
Scan and Fax Manager MS SharePoint Server (Enhanced) Plug-in	MS SharePoint Server (Enhanced) Plug-in

### About Libraries

The MS SharePoint Server Plug-in/MS SharePoint Server (Enhanced) Plug-in can specify the following libraries as distribution destinations:

- Document Library
- Image Library
- Wiki Library
- Form Library
- Translation Management Library
- Media Library

### About Authentication

NTLMv2 authentication, and Kerberos authentication can be used when accessing Microsoft SharePoint Server from the MS SharePoint Server Plug-in/the MS SharePoint Server (Enhanced) Plug-in.

# Adding the MS SharePoint Server Plug-in/ MS SharePoint Server (Enhanced) Plug-in

## Step 1: Login to AdminTool

For details, see "3. Login and Logout" and "5. Server Management", *RICOH Streamline NX Administrator's Guide*.

## Step 2: Add a Profile

1. Click [**Profile**].



**Fig. 5:** AdminTool Home Page

The image above is version 1.2.0.0.

2. Click [**Create**].

The Profile Properties screen appears.

If you are adding the MS SharePoint Server Plug-in to an existing profile, proceed to P.4 "Step 3: Add a Group".

3. Enter the profile name and screen title.

### Note

- The profile name can contain up to 128 characters.
- The screen title can contain up to 50 characters.
- For details about profile settings, see *Scan and Fax Manager Administrator's Guide*.

4. Click [**OK**].

## Step 3: Add a Group

1. In the Profile List, double-click the profile name you want to add the MS SharePoint Server Plug-in to.

The Group/Project screen appears.



**Fig. 6:** Group/Project screen

The image above is version 1.2.0.0.

### Note

- If you are adding the MS SharePoint Server Plug-in to an existing group, click the group you require, and then proceed to P.4 "Step 4: Add a Project".

2. Click  (top left).

The Group Properties screen appears.

3. Enter the group name.

### Note

- The group name can contain up to 128 characters.

4. Make sure the status of "Display" is [**On**].

5. Click [**OK**] to save the settings.

The group appears as a tab on the Group/Project screen.

### Note

- For details about group settings, see *Scan and Fax Manager Administrator's Guide*.

## Step 4: Add a Project

1. Drag the  button (below the  button) to the Group/Project screen.

The Project Properties screen appears.

### Note

- If you are adding the MS SharePoint Server Plug-in to an existing project, click the desired project, and then proceed to P.5 "Step 5: Add a Service and Filter/Create a Delivery Flow".

2. Enter the project name.

### Note

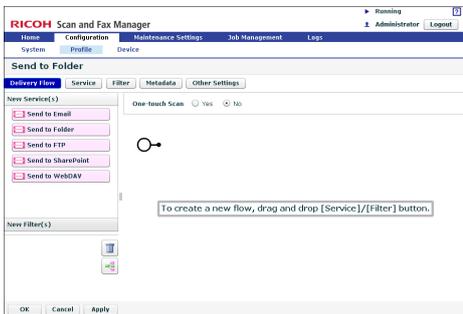
- For details about project settings, see *Scan and Fax Manager Administrator's Guide*.

3. Click [**OK**].

A new project button appears.

## Step 5: Add a Service and Filter/Create a Delivery Flow

1. Double-click the project button.  
The Project Configuration screen appears.
2. Under "New Service(s)", drag "Send to SharePoint" or "Send to SharePoint (Enhanced)" to the Delivery Flow Editor screen.



**Fig. 7:** Delivery Flow Editor screen

The image above is version 1.2.0.0.

### Note

- To automatically align Service(s) and Filter(s), click the  button (below the  button).
- For details about creating a delivery flow, see *Scan and Fax Manager Administrator's Guide*.

3. Under "New Filter(s)", drag the service you require to the Delivery Flow Editor screen.
4. Double-click the lower half of the Service/Filter icon added to the Delivery Flow.  
The Properties screen appears.

### Note

- There are three levels at which you can configure the properties for services: the System Level, Profile Level, and Project Level. This example procedure explains how to configure the properties at the Project Level. For details about how to specify the properties in other levels, see *Scan and Fax Manager Administrator's Guide*.
- The contents of each setting vary depending on the Service/Filters. For details, see *Scan and Fax Manager Administrator's Guide*. If you are using the optional Service/Filter plug-in, see the Administrator's Guide of each plug-in.
- For details about properties of the MS SharePoint Server Plug-in, see P.6 "Configuring the MS SharePoint Server Plug-in".
- For details about properties of the MS SharePoint Server (Enhanced) Plug-in, see P.13 "Configuring the MS SharePoint Server (Enhanced) Plug-in".

5. Change the settings as necessary.
6. Click **[Apply]**, and then **[OK]** to return to the Group/Project screen.

## Step 6: Configure the MFP (s)

For details, see "6. Configuration", *RICOH Streamline NX Administrator's Guide*.

# Configuring the MS SharePoint Server Plug-in

## Step 1: Configuring the StartPoint Path

Use this procedure to configure the settings of the MS SharePoint Server Plug-in for connection to Microsoft SharePoint Server.

### Properties Screen Overview

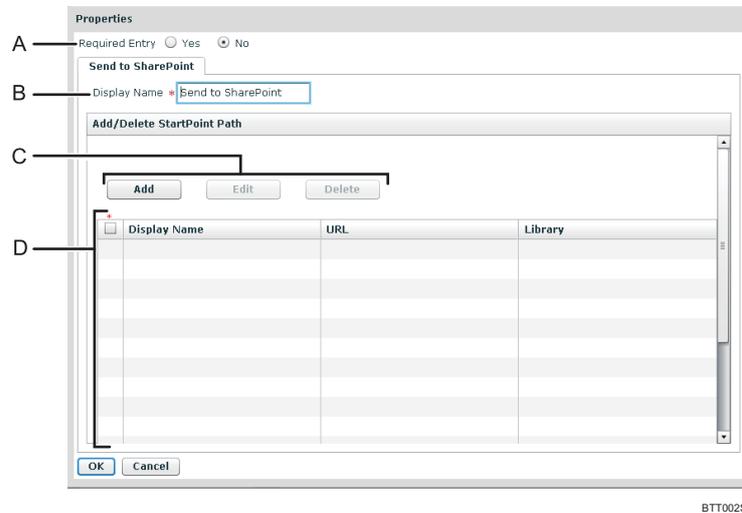


Fig. 9: Properties Screen

#### Note

- Settings on the screen that are marked with an asterisk (\*) must be specified.

#### A. Required Entry (Project settings only)

Select whether to require that this service be used.

- **Yes**  
When scanning, at least one StartPoint path must be specified in the destinations list.
- **No**  
Allows the Delivery Flow to continue even if no StartPoint path is specified in the destinations list.

#### B. Display Name (Project settings only)

Enter the display name for this service.

#### Note

- The display name can contain up to 30 characters.

#### C. Add / Edit / Delete

- **Add**  
Add a new StartPoint path.
- **Edit**  
Modify the settings of the selected StartPoint path.
- **Delete**  
Delete the selected StartPoint path.

#### D. StartPoint Path Table

Display a list of registered StartPoint paths.

Use the check boxes to select a StartPoint path for editing or deleting root folders. Select the check box on the first row or column to select an entire StartPoint path.

## Procedure

1. Click [**Home**].
2. Click [**Profile**].
3. Select the desired profile you require.
4. Select the desired project you require.
5. Double-click the lower half of the MS SharePoint Server Plug-in (MS SharePoint) icon in the Delivery Flow. The Properties screen appears.
6. In "Display Name", enter the display name that you require.
7. Click [**Add**].
8. Proceed to P.7 "Step 2: Adding a StartPoint Path".

## Step 2: Adding a StartPoint Path

Use this procedure to connect to Microsoft SharePoint Server at the distribution destination, specify the library to be distributed, and configure the naming rules for subfolders and files.

### Add StartPoint Path Screen General Settings Tab Overview

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Fig. 10: Add StartPoint Path Screen General Settings Tab

#### Note

- Settings on the screen that are marked with an asterisk (\*) must be specified.

#### A. Display Name

Enter a display name for the StartPoint path.

#### Note

- The display name can contain up to 128 characters.

#### B. URL

Enter the entire path to the Microsoft SharePoint Server site. The URL must be specified as follows:

- **http://IP address (or DNS name): Port number/site name**

If SSL is set, the URL must be specified as follows:

- **https://IP address (or DNS name): Port number/site name**

#### Note

- A site certificate must be imported in advance if SSL is set for Microsoft SharePoint Server. For details about how to import the site certificate, see *Scan and Fax Manager Administrator's Guide*.

### C. Authentication Method

Select the authentication method in use. The information specified here will be applied when accessing the destination Microsoft SharePoint Server to save scanned documents.

- Proxy User  
Apply the information specified in [User Name] and [Password] for authentication.
- Login User  
Apply the login information for the project for authentication.

#### ↓ Note

- Even if you select [Login User], you must also enter a [User Name] and [Password] to browse folders, view Library Information, and view MOSS Field information via the AdminTool.
- If you are using passwordless authentication, we recommend that you not use [Login User] as the authentication type. If you do, authentication with the server might not be possible because the user's password cannot be obtained from the login information.

### D. User Name

Enter the user name of the account that is used for logging in to Microsoft SharePoint Server.

If the server requires domain information, enter the user name in the format of "domain\username".

### E. Password

Enter the password of the account used for logging in to Microsoft SharePoint Server.

#### ↓ Note

- You can change [Password] without clicking [Disconnect].

### F. Connect (Disconnect)

Connection to Microsoft SharePoint Server is possible through the entered [URL], [User Name], and [Password].

This connection information is determined when connection succeeds. The [URL] and [User Name] cannot be entered at this point. Library information can be acquired from Microsoft SharePoint Server and displayed in a Library list.

When [Use only the ticket received on Kerberos authentication] is set as the Kerberos option, connection is only possible if the authentication profile has been selected.

- **Disconnect**  
When connection is successfully established, the button name changes from [Connect] to [Disconnect]. To re-specify the connection destination, click [Disconnect]. This will delete the contents of the specified library and Assigned Metadata Elements. You can now change the [URL] and [User Name] if necessary.

### G. Library

Specify the library at the distribution destination.

When connection is successfully established, you can press [Connect] to display a list of browsing-authorized libraries.

#### ↓ Note

- Write-unauthorized libraries are also displayed in a list.
- For details about libraries that can be specified at the distribution destination, see P.3 "Before You Begin".

### H. Access to Subfolder

Select the [Enable Subfolder Browsing] checkbox to allow MFP users to browse subfolders and select them as destinations.

### I. Create a Subfolder

Select the [Enable Subfolder Delivery] checkbox to create a subfolder under the destination folders.

- When Selected  
A folder is automatically created in the destination folder. Scanned documents are stored there.
- When not Selected  
No subfolder is created. Scanned documents are sent directly to the specified destination folder(s) and stored there.



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## J. Folder Prefix (Name)

Select one of the two following methods of naming created subfolders.

- **Select from Existing Metadata**

Select a metadata item from the drop-down list; the value of that metadata item will then be used as the file name. Only major metadata items can be selected from the drop-down list.

- **Manual Entry**

Enter a name for the subfolder directly.

You can create nested subfolders by including a path separator. For instance, if you enter "abc\xyz", the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this instance, scanned documents will be saved in "xyz".

To enter a custom metadata item that is not available in the drop-down list of basic metadata items, enclose the metadata item name (ID) in curly brackets ("{" , "}").

To 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)".

**Note**

- Folder names can contain up to 255 characters.
- The following characters cannot be used in folder names and will be automatically replaced by underscores "\_" if included:

~ " # % & \* : < > ? / ¥ { | }

Note however that "/" is not replaced by an underscore "\_", but is recognized as a path delimiter.

- If the first or last character of a folder name is a hair space (half space) or single full point (period "."), that character will be automatically replaced by an underscore "\_".
- If the folder name contains continuous full points (multiple periods without spaces "..."), these will be automatically replaced by a single full point.

You can also enable or disable the following function:

- **Add Suffix to Folder Name**

Select this to add a suffix to the subfolder name if a subfolder with the same name already exists. The suffix will be a number between 1 and 99. The suffix number is increased until it reaches a value that generates a unique folder name. If the suffix number exceeds 99, an error will occur.

If you do not enable this option and a subfolder already exists with the same name, no new subfolder will be created and the scanned documents will be saved in the existing folder.

## K. File Naming Rules

Use one of the following two methods to specify the name of files to be saved in a distribution destination folder:

- **Select from Existing Metadata**

Select a metadata item from the drop-down list; the value of that metadata item will then be used as the file name. Only major metadata items can be selected from the drop-down list.

- **Manual Entry**

Directly enter the desired file name.

To enter a custom metadata item that is not available in the drop-down list of basic metadata items, enclose the metadata item name (ID) in curly brackets ("{" , "}").

To 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)".

**Note**

- The following characters cannot be used in folder names and will be automatically replaced by underscores "\_" if included:

~ " # % & \* : < > ? / ¥ { | }

- If the first or last character of a file name is a hair space (half space) or single full point (period "."), that character will be automatically replaced by an underscore "\_".
- If a file with the same name already exists, a suffix will be added to the file name. The suffix will be a number between 1 and 99. The suffix number is increased until it reaches a value that generates a unique folder name. If the suffix number exceeds 99, an error will occur.

## Procedure

1. Specify [Display Name], [URL], [Authentication Method], [User Name], and [Password].
2. Click [Connect].
3. Specify [Library].
4. Select [Access to Subfolder] and [Create a Subfolder] as necessary.
5. If you selected the [Create a Subfolder] check box in step 4, specify a [Folder Prefix (Name)].
6. Proceed to P.10 "Step 3: Configuring the Field Settings".

### Step 3: Configuring the Field Settings

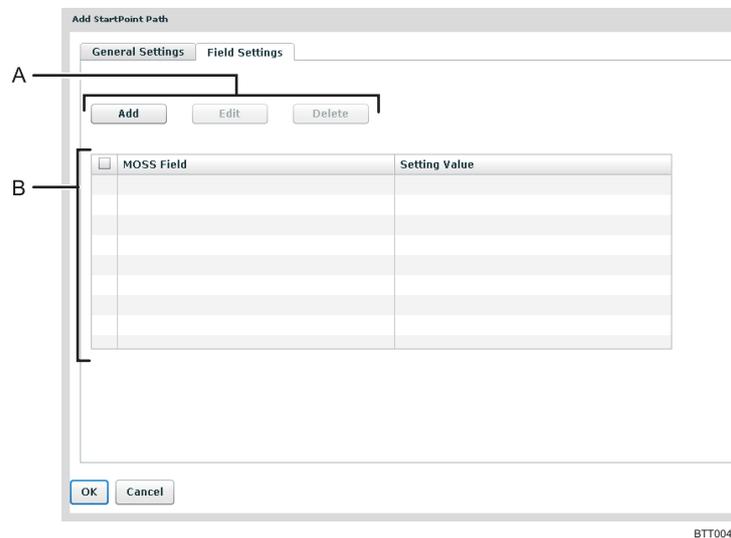
You can specify the values of the specified library's settings at the distribution destination.

Items specified as metadata for scanned documents can be added and associated as MOSS fields. This enables the metadata to be shared more easily and improve document management efficiency.

#### ↓ Note

- We recommend you do not specify values of over 1000.

### Add StartPoint Path Screen Field Settings Tab Overview



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Fig. 11: Add StartPoint Path Screen Field Settings Tab

#### A. Add / Edit / Delete

- **Add**  
Add a newly assigned metadata element.
- **Edit**  
Modify the settings of a selected metadata element.
- **Delete**  
Delete all selected metadata elements.

#### B. Table of Assigned Metadata Elements

Displays the MOSS field and setting value of each metadata element.

MOSS fields are displayed in following format:

- "*display name of Microsoft SharePoint Server* [Field Type] "

## Add Field Settings Screen Overview

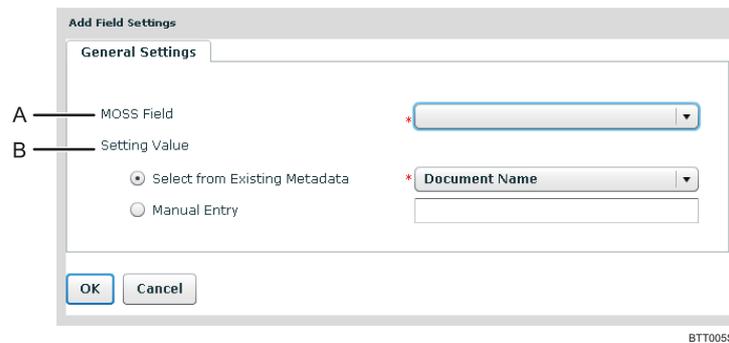


Fig. 12: Add Field Settings Screen

### Note

- Settings on the screen that are marked with an asterisk (\*) must be specified.

#### A. MOSS Field

The field list of the Microsoft SharePoint Server library specified in "**Library**" on the StartPoint Path screen is displayed in the following format:

##### **Field name [field type]**

### Note

- Only the items of a library field that can be changed are displayed in field lists.
- When scanning is performed, the scan file's creation date and the date and check boxes specified in the job's metadata are automatically converted into a Microsoft SharePoint Server library field and distributed.
- The field types that can be set are as follows:
  - One line text, Reference  
Specify a character string.
  - Numeric value  
Specify a character string indicating a numeric value.
  - YES/NO (check box)  
Specify a character string of "TRUE", "FALSE", "1", or "0".
  - Currency  
Specify a character string indicating the numeric value of a currency.
  - Multiline text  
Specify a multiple-line character string.
  - Choice (radio button, drop-down menu)  
Specify a radio button or drop-down menu character string.
  - Date and time  
Specify a date and time character string in the format of "MM/DD/YYYY hh:mm am/pm".  
(Note that "hh:mm" and "am/pm" can be omitted.)
  - Hyperlink or image  
Specify a URL-format character string or an image.

#### B. Setting Value

Specify items of SFM metadata that you want to add to and associate with a library field.

To select an item of SFM metadata, specify the item in "Select from Existing Metadata".

If you want to specify an item of SFM metadata using "Manual Entry", specify the tag defined for the item of metadata or enter the item directly as a character string.

Multiple items of metadata can be combined or an arbitrary character string can be entered.

## Procedure

- Click the [Field Settings] tab.
- Click [Add].
- Specify the library field from [MOSS Field]
- Specify [Setting Value].
- Click [OK].

6. Click [OK].
7. Proceed to P.12 "Step 4: Configuring the MFP Service Screen".

## Step 4: Configuring the MFP Service Screen

Use this screen to specify preset items and specify whether an item is hidden or displayed. The preset options are displayed on the MFP's control panel. For details about which items can be preset or specified as hidden or displayed, see the explanation for each item.

### Note

- Items other than "Selected Folders" can be specified as hidden or displayed. They cannot however be individually set for each item.

## MFP Service Screen Overview

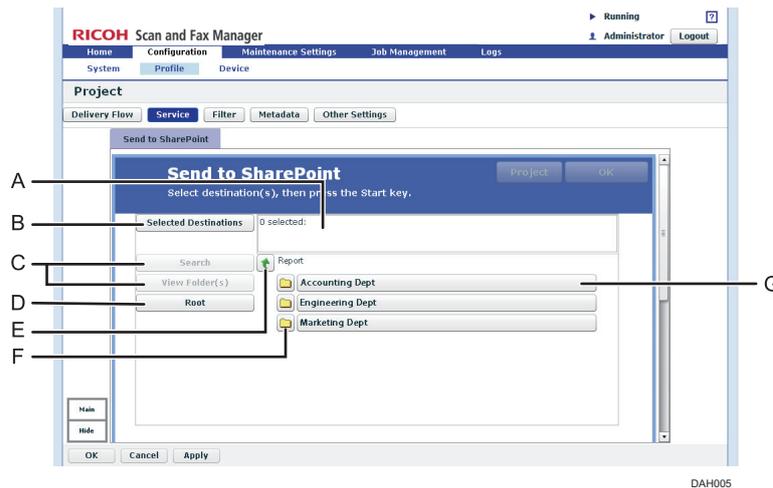


Fig. 13: MFP Service Screen

### A. Selected Folder(s)

The number of selected destinations and the selected folder name are displayed in the following format:

**[Display Name] folder**

This setting cannot be specified as hidden.

### B. Selected Destinations

Display a list of the destination folders currently selected. You can click folders in this list to remove them.

### C. Search, View Folder(s)

Not available in MS SharePoint Server Plug-in.

### D. Root

Return to the screen displaying the root folders.

### E.

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

### F.

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

This item is only available if the [Access to Subfolder] check box in the StartPoint Path screen is selected.

### G. Folder Name

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

## Procedure

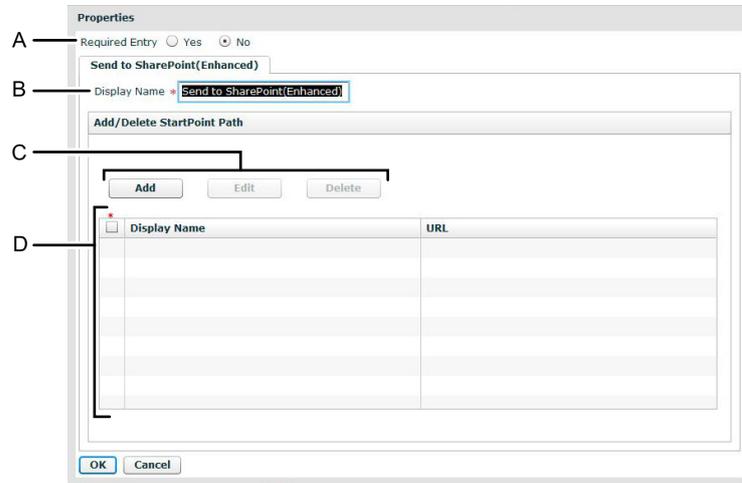
1. Click [Service].
2. Change the settings on the Service screen as necessary.
3. Click [OK].

# Configuring the MS SharePoint Server (Enhanced) Plug-in

## Step 1: Configuring the StartPoint Path

Use this procedure to configure the settings of the MS SharePoint Server (Enhanced) Plug-in for connection to Microsoft SharePoint Server.

### Properties Screen Overview



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Fig. 14: Properties Screen

#### Note

- Settings on the screen that are marked with an asterisk (\*) must be specified.

#### A. Required Entry (Project settings only)

Select whether to require that this service be used.

- **Yes**  
When scanning, at least one StartPoint path must be specified in the destinations list.
- **No**  
Allows the Delivery Flow to continue even if no StartPoint path is specified in the destinations list.

#### B. Display Name (Project settings only)

Enter the display name for this service.

#### Note

- The display name can contain up to 30 characters.

#### C. Add / Edit / Delete

- **Add**  
Add a new StartPoint path.
- **Edit**  
Modify the settings of the selected StartPoint path.
- **Delete**  
Delete the selected StartPoint path.

#### D. StartPoint Path Table

Display a list of registered StartPoint paths.

Use the check boxes to select a StartPoint path for editing or deleting root folders. Select the check box on the first row or column to select an entire StartPoint path.

## Procedure

1. Click [**Home**].
2. Click [**Profile**].
3. Select the desired profile you require.
4. Select the desired project you require.
5. Double-click the lower half of the [**Send to SharePoint (Enhanced)**] icon in the Delivery Flow. The Properties screen appears.
6. In "Display Name", enter the display name that you require.
7. Click [**Add**].
8. Proceed to P.14 "Step 2: Adding a StartPoint Path".

## Step 2: Adding a StartPoint Path

Use this procedure to connect to Microsoft SharePoint Server at the distribution destination, specify the library to be distributed, and configure the naming rules for subfolders and files.

### Add StartPoint Path Screen General Settings Tab Overview

A — Display Name  
B — URL  
C — Enable SPS Site Selection  
D — Enable Subfolder Delivery  
E — Authentication Method  
F — User Name  
G — Password  
H — Create a Subfolder  
I — Folder Prefix (Name)  
J — File Naming Rules  
K — Document Name

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**Fig. 15:** Add StartPoint Path Screen General Settings Tab

#### ↓ Note

- Settings on the screen that are marked with an asterisk (\*) must be specified.

#### A. Display Name

Enter a display name for the StartPoint path.

#### ↓ Note

- The display name can contain up to 128 characters.

## B. URL

Enter the entire path to the Microsoft SharePoint Server site. The URL must be specified as follows:

- **Website Address**

Enter the path of the SharePoint site.

Entry Example

***http://hostname/test/site/***

***http://hostname:80/test/site***

If SSL is set, the URL must be specified as follows:

***https://IP address (or FQDN name): Port number/site name***

- **Library and Folder Path**

Enter the library of the SharePoint Server site.

Entry Example:

library

library/folder1

**Note**

- A site certificate must be imported in advance if SSL is set for Microsoft SharePoint Server. For details about how to import the site certificate, see *Scan and Fax Manager Administrator's Guide*.

## C. Enable SPS Site Selection

Select this if you want to select a destination from a site using the operation panel. If selected, you must select a site or library on the operation panel.

**Note**

- If this check box is selected, [Library and Folder Path] is not available.

## D. Deliver to Login User's My Site

Specify whether or not to deliver to a private site.

If you want to use a fixed user site as a delivery destination, deselect this check box and enter the URL in "Website Address".

- If this check box is selected:
  - A private site is used as a delivery destination.
  - Only [**Login User**] can be set for "Authentication Method".
  - The following items are not available:

- Library and Folder Path
- Enable SPS Site Selection

Enter a private site path with only "server name" for "Website Address".

Entry Example:

***http://servername***

***https://servername***

**Note**

- If "Deliver to Login User's My Site" is selected, only the root folders of private sites are displayed on the MFP operation panel when browsing a destination.
  - If this check box is not selected:
    - A private site is not used as a delivery destination.
    - The following items are available:
- Library and Folder Path
  - Enable SPS Site Selection

## E. Authentication Method

Select the authentication method in use. The information specified here will be applied when accessing the destination Microsoft SharePoint Server to save scanned documents.

- Proxy User
  - Apply the information specified in [**User Name**] and [**Password**] for authentication.
- Login User
  - Apply the login information for the project for authentication.

**Note**

- If you are using passwordless authentication, we recommend that you not use [**Login User**] as the authentication type. If you do, authentication with the server might not be possible because the user's password cannot be obtained from the login information.

## F. User Name

Enter the user name of the account that is used for logging in to Microsoft SharePoint Server.

If the server requires domain information, enter the user name in the format of "domain\username".

## G. Password

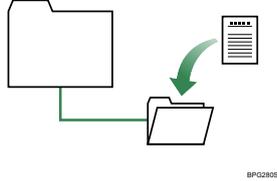
Enter the password of the account used for logging in to Microsoft SharePoint Server.

## H. Create a Subfolder

Select the [Enable Subfolder Delivery] checkbox to create a subfolder under the destination folders.

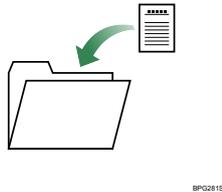
- When Selected

A folder is automatically created in the destination folder. Scanned documents are stored there.



- When not Selected

No subfolder is created. Scanned documents are sent directly to the specified destination folder(s) and stored there.



## I. Folder Prefix (Name)

Select one of the two following methods of naming created subfolders.

- **Select from Existing Metadata**

Select a metadata item from the drop-down list; the value of that metadata item will then be used as the file name. Only major metadata items can be selected from the drop-down list.

- **Manual Entry**

Enter a name for the subfolder directly.

You can create nested subfolders by including a path separator. For instance, if you enter "abc\xyz", the folder "abc" will be created under the root folder, and the folder "xyz" will be created under the folder "abc". In this instance, scanned documents will be saved in "xyz".

To enter a custom metadata item that is not available in the drop-down list of basic metadata items, enclose the metadata item name (ID) in curly brackets ("{"", "}").

To 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)".

### ↓ Note

- Folder names can contain up to 255 characters.
- The following characters cannot be used in folder names and will be automatically replaced by underscores "\_" if included:  
~ " # % & \* : < > ? / \ / ¥ { | }

Note however that "/" is not replaced by an underscore "\_", but is recognized as a path delimiter.

- If the first or last character of a folder name is a hair space (half space) or single full point (period "."), that character will be automatically replaced by an underscore "\_".
- If the folder name contains continuous full points (multiple periods without spaces "..."), these will be automatically replaced by a single full point.

You can also enable or disable the following function:

- **Add Suffix to Folder Name**

Select this to add a suffix to the subfolder name if a subfolder with the same name already exists. The suffix will be a number between 1 and 99. The suffix number is increased until it reaches a value that generates a unique folder name. If the suffix number exceeds 99, an error will occur.

If you do not enable this option and a subfolder already exists with the same name, no new subfolder will be created and the scanned documents will be saved in the existing folder.

## J File Naming Rules

Use one of the following two methods to specify the name of files to be saved in a distribution destination folder:

- **Select from Existing Metadata**

Select a metadata item from the drop-down list; the value of that metadata item will then be used as the file name. Only major metadata items can be selected from the drop-down list.

- **Manual Entry**

Directly enter the desired file name.

To enter a custom metadata item that is not available in the drop-down list of basic metadata items, enclose the metadata item name (ID) in curly brackets ("{" , "}").

To 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)".

 **Note**

- The following characters cannot be used in folder names and will be automatically replaced by underscores "\_" if included:  
~ " # % & \* : < > ? / ¥ { | }
- If the first or last character of a file name is a hair space (half space) or single full point (period "."), that character will be automatically replaced by an underscore "\_".
- If a file with the same name already exists, a suffix will be added to the file name. The suffix will be a number between 1 and 99. The suffix number is increased until it reaches a value that generates a unique folder name. If the suffix number exceeds 99, an error will occur.

## K. Test

When this button is pushed, the plug-in checks whether or not the specified server exists or the specified account has Read privileges. The connection test result is displayed with the [OK] dialog box.

The following is the detailed sequence:

1) If [Enable SPS Site selection] is checked.

Tests login to the SharePoint server with the website URL and entered authentication information and checks the Read privileges.

[OK]: The specified SharePoint server exists

[NG]: An error message is displayed.

2) If [Enable SPS Site selection] is not checked.

Tests login to the SharePoint server with the website URL, library and folder path, and entered authentication information and checks the Read privileges.

[OK]: Successfully connected to the specified SharePoint server with the entered authentication information.

[NG]: An error message is displayed.

## Procedure

1. Specify [Display Name], [URL], [Authentication Method], [User Name], and [Password].  
If "Authentication Method" is set to "Login User", [User Name] and [Password] are not required.
2. Select [Enable SPS Site Selection] if you want to select a destination from a site using the operation panel.
3. Click [Test].
4. Select [Create a Subfolder] as necessary.
5. If you selected the [Create a Subfolder] check box in step 4, specify a [Folder Prefix (Name)].