

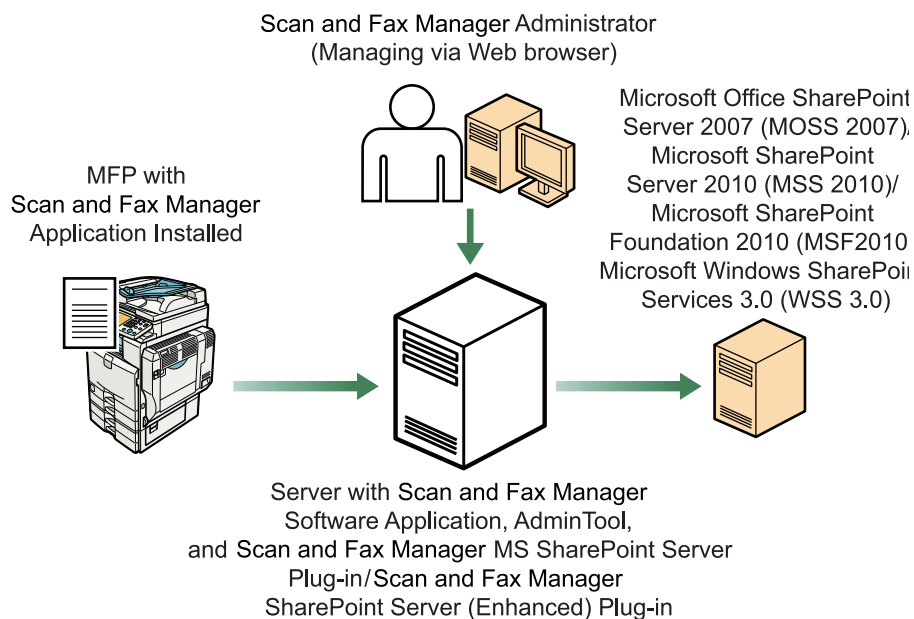
Scan and Fax Manager MS SharePoint Server/ MS SharePoint Server (Enhanced) Plug-in User's Guide

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 Office SharePoint Server.

This plug-in service enables distribution of documents to MOSS 2007 / MSS 2010 / MSF2010 / WSS 3.0, automatic generation of a distribution folder, and association of document information with MOSS 2007/MSS 2010/MSF 2010/WSS 3.0.

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

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.



CSE0

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 product is displayed as "Send to SharePoint" or "Send to SharePoint (Enhanced)" on the MFP control panel.
- This manual explains the operation procedures for the MS SharePoint Server Plug-in/MS SharePoint Server (Enhanced) Plug-in. For details about the operation procedures for other Services/Filters, see *Scan and Fax Manager User's Guide*.

Introduction

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

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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
Microsoft Office SharePoint Server 2007	MOSS 2007
Microsoft SharePoint Server 2010	MSS 2010
Microsoft SharePoint Foundation 2010	MSF 2010
Microsoft Windows SharePoint Services 3.0	WSS 3.0
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

MS SharePoint Server Plug-in

<When using the Standard Operation Panel>

Step 1: Placing the Original

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

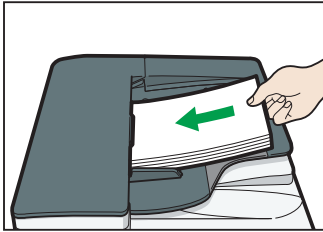


Fig. 2: ADF

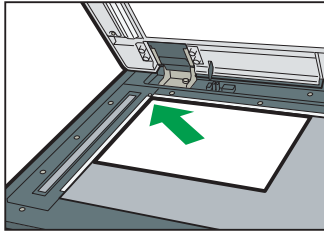


Fig. 3: Exposure Glass

Step 2: Logging in to a Device

1. Log in to a device.

Note

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

2. Select the group tab you require.
3. Select the project button you require.

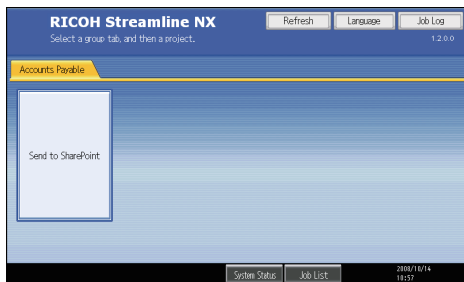


Fig. 4: Group/Project Screen

Step 3: Selecting/Entering Metadata

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

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

Step 4: Selecting a Service

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

1. Press [Send to SharePoint].

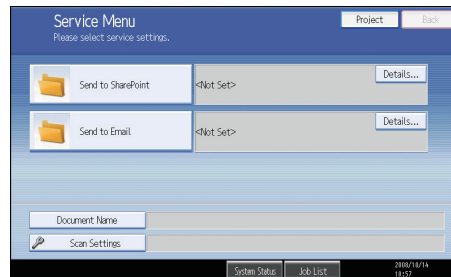


Fig. 5: Service Menu

Note

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

Step 5: Specifying a Destination

Send to SharePoint Screen Overview

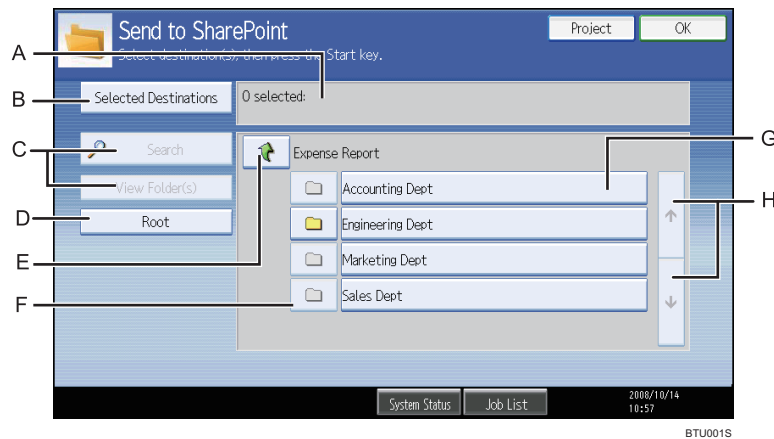


Fig. 6: Send to SharePoint Screen

A. Selected Folder(s)

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

[Display Name] folder

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

F.

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

G. Folder Name

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

H. Scroll key

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

Procedure

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

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

Step 6: Setting the Scan Parameters

Note

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

Document Name

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

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

Note

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

Scan Settings/Scan Size

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

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

Note

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

Filters

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

Step 7: Start the Scan

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

Step 8: Exit the Project

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

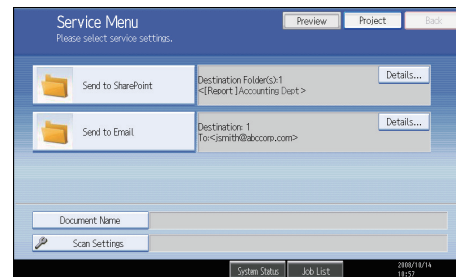


Fig. 7: Service Menu

Step 9: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.

The content of the Job Log is determined by the administrator. Depending on the administrator's settings, you will be able to view the job log of every project or a specific project only.

To view the Job Log, proceed as follows:

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

MS SharePoint Server (Enhanced) Plug-in

Step 1: Placing the Original

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

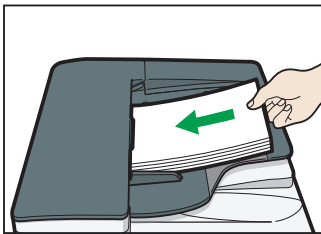


Fig. 8: ADF

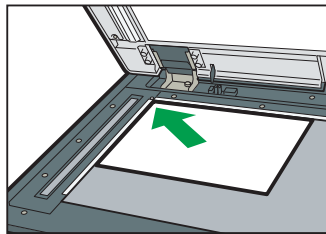


Fig. 9: Exposure Glass

Step 2: Logging in to a device

1. Log in to a device.

Note

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

2. Select the group tab you require.
3. Select the project button you require.

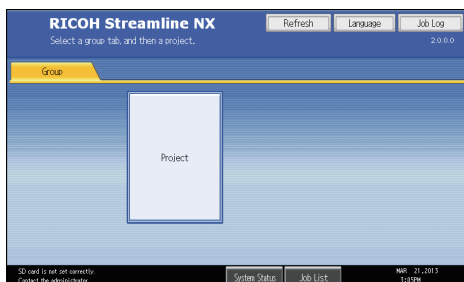


Fig. 10: Group/Project Screen

Step 3: Selecting/Entering Metadata

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

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

Step 4: Selecting a Service

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

1. Press [Send to SharePoint (Enhanced)].

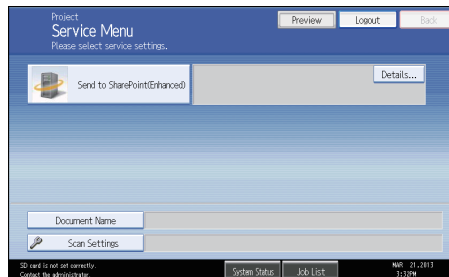


Fig. 11: Service Menu

Note

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

Step 5: Specifying a Destination (Selected Destination Screen)

Send to SharePoint (Enhanced) Screen Overview

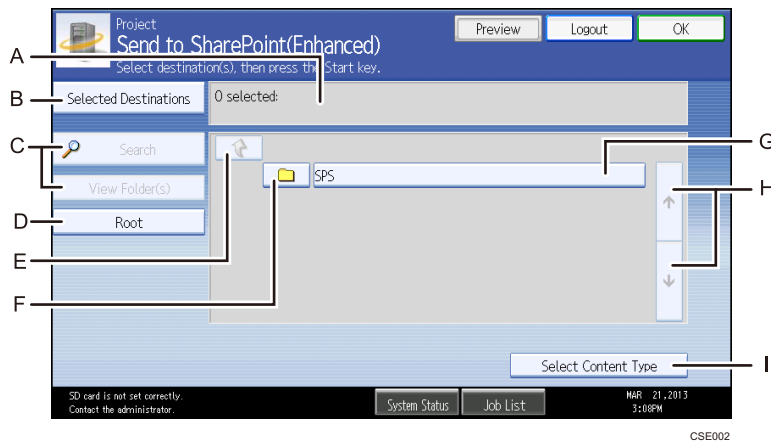


Fig. 12: Send to SharePoint (Enhanced) Screen

A. Selected Folder

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

[Display Name] folder

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 (Enhanced) Plug-in.

D. Root

Return to the screen displaying the root folders.

E.

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

F.

The list of accessible sites, libraries, and/or folders is displayed.

G. Folder Name

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

Only one destination can be selected for "Folder Name".

Note

- The settings in "Select Content Type" must be configured before sending.
- If only the destination is selected, you cannot start scanning.

H. Scroll key

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

I. Select Content Type

Open the Select Content Type screen.

If the destination is not selected, an error message is displayed.

Procedure

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

1. Select a destination folder.
2. Press [Select Content Type].
The [Selected Content Type] screen is displayed.

Step 6: Specifying a Destination (Select Content Type Screen)

Send to SharePoint (Enhanced) Screen Overview

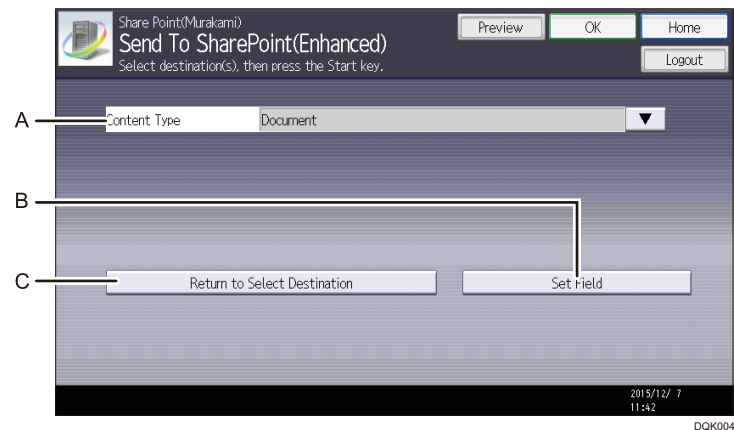


Fig. 13: Send to SharePoint (Enhanced) Screen

A. Content Type

Select the content type.

B. Set Field

Move to the [Setting Value of Field] screen.

C. Return to Select Destination

Return to the [Select Destination] screen.

Procedure

From Send to SharePoint (Enhanced) screen (Fig. 13), proceed as follows:

1. Select a content type from "Content Type".
2. Press [Set Field].
The [Setting Value of Field] screen is displayed.

Note

- If the content type is changed, all input field values will be cleared.
- All required fields must be set before scanning.
If there are some empty required fields, you cannot start the scan.

Step 7: Specifying a Destination (Setting Value of Field Screen)

Send to SharePoint (Enhanced) Screen Overview

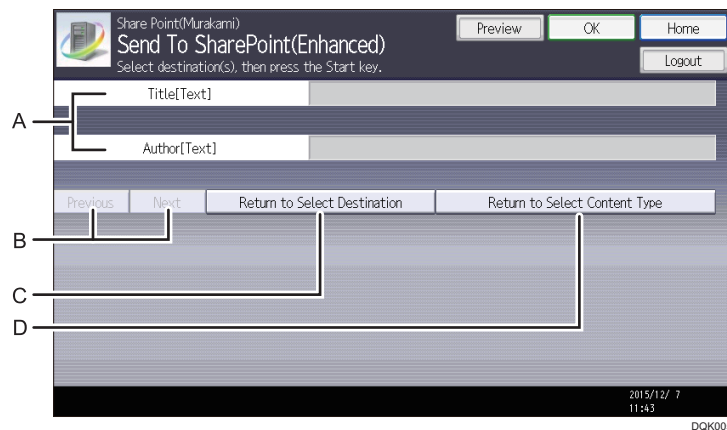


Fig. 14: Send to SharePoint (Enhanced) Screen

A. Fields

- Single line of text

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Users cannot use linefeed.

- Multiple lines of text

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Users cannot use linefeed.

- Choice

Users can set multiple lines of text in the following categories.

- Drop down list
- Radio button
- Check box
- Makes new answer
- Number

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Operation panel cannot view "%".

Users can input a number that is more than the maximum number or less than the minimum number. Float value is unavailable.

- Currency

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Operation panel cannot view currency symbols.

Users can input a number that is more than the maximum number or less than the minimum number. Float value is unavailable.

- DateTime

Hours, minutes, and seconds information is unavailable.

User can input only values between 1/1/1900 and 12/31/8900.

Users have to input values in Gregorian calendar format.

- URL

The smaller value of either 255 characters or the value specified in SharePoint Server can be input.

Users cannot browse access.

Users cannot use relative path.

B. Previous/Next Button

Go to/return to next/previous field screen.

C. Return to Select Destination

Return to the [Select Destination] screen.

D. Return to Select Content Type

Return to the [Select Content Type] screen.

Procedure

1. Specify the settings of each field.
2. Press **[OK]**.

Step 8: Setting the Scan Parameters

Note

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

Document Name

This name identifies the e-mail attachment or file.
From the Service Menu (Fig. 11), proceed as follows:

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

Note

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

Scan Settings/Scan Size

From the Service Menu (Fig. 11), proceed as follows:

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

Note

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

Filters

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

Step 9: Start the Scan

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

Step 10: Exit the Project

When scanning finishes, press the [**Logout**] button (see Fig. 15). The Group/Project screen (Fig. 10) will appear.

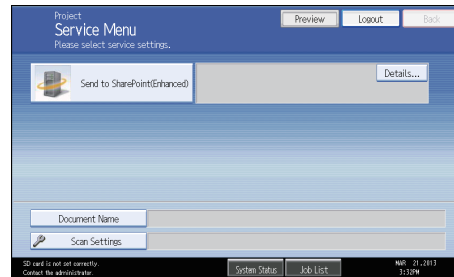


Fig. 15: Service Menu

Step 11: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.

The content of the Job Log is determined by the administrator. Depending on the administrator's settings, you will be able to view the job log of every project or a specific project only.

To view the Job Log, proceed as follows:

1. Press [**Job Log**].
2. Check the job log.
3. When finished, press [**OK**].

<When using the Smart Operation Panel>

Step 1: Placing the Original

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

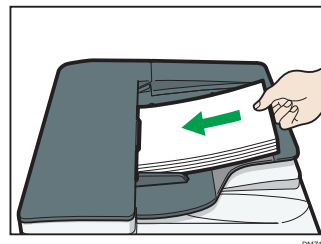


Fig. 16: ADF

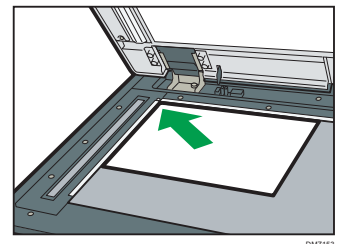


Fig. 17: Exposure Glass

Step 2: Logging in to a Device

1. Log in to a device.

Note

- For details, see “3. Login/Logout”, *RICOH Streamline NX User’s Guide*.

2. Press the Group Selection button and select a Group.
3. Select the project button you require.

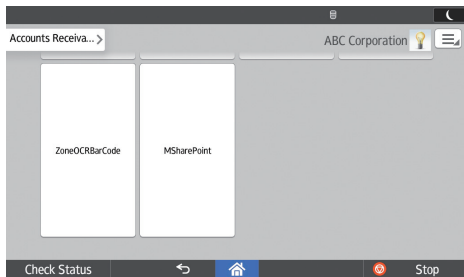


Fig. 18: Group/Project Screen

Step 3: Selecting/Entering Metadata

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

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

Step 4: Selecting a Service

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

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

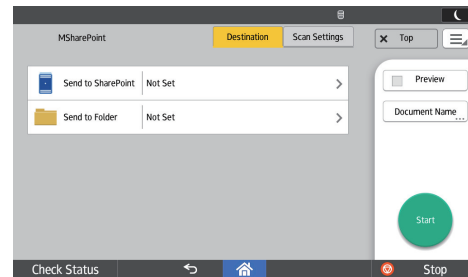


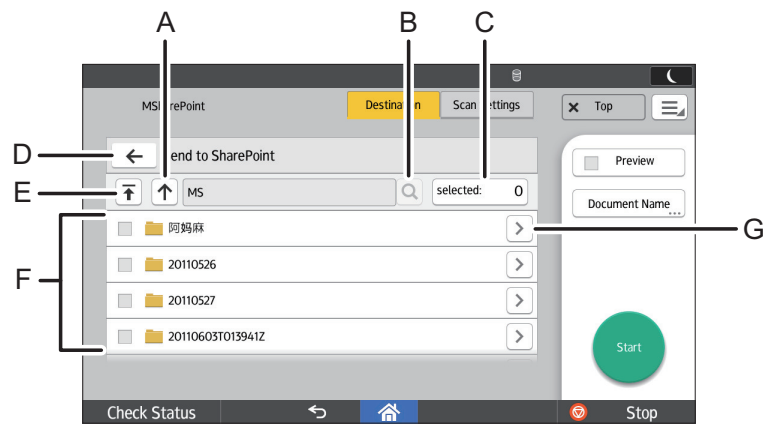
Fig. 19: Service Menu

Note

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






Step 5: Specifying a Destination

Send to SharePoint Screen Overview



DMZ083

Fig. 20: Send to SharePoint Screen

- A.  Display the folders on the upper level folders. This button is disabled in root folder view.
- B.  Not available in MS SharePoint Server Plug-in.
- C. **Selected Folder(s)**
The number of selected folders is displayed. Pressing this button displays a list of selected folders.
- D.  Returns to the Service Menu screen.
- E.  Return to the screen displaying the root folders.
- F. **Folder List**
A list of the folders that can be specified as a destination displays here.
- G.  Press this button to view the subfolders.

Procedure

From Send to SharePoint screen (Fig. 20), proceed as follows:

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

Note

If necessary, press [] to display subfolders.

Step 6: Setting the Scan Parameters

Note

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

Document Name

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

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

Note

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

Scan Settings

Proceed as follows:

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

Note

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

Filters

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

Step 7: Start the Scan

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

Note

- To see more details, press the Number of selected folders button.

2. Press [**Start**].

Note

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

Step 8: Exit the Project

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

Step 9: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.

The content of the Job Log is determined by the administrator. To view the Job Log, proceed as follows:

1. Press [≡] at the top right of the screen, and then select [**Job Log**].
2. When finished, press [**Exit**] to close the Job Log.

MS SharePoint Server (Enhanced) Plug-in

Step 1: Placing the Original

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

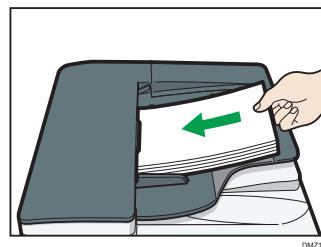


Fig. 21: ADF

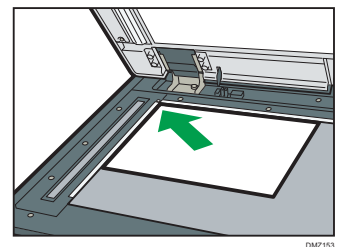


Fig. 22: Exposure Glass

Step 2: Logging in to a device

1. Log in to a device.

Note

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

2. Press the Group Selection button and select a Group.
3. Select the project button you require.

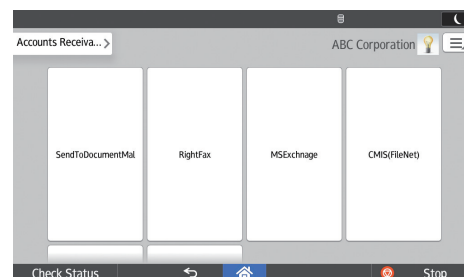


Fig. 23: Group/Project Screen

Step 3: Selecting/Entering Metadata

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

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

Step 4: Selecting a Service

The Service Menu for the project selected in “Step 2: Opening the Group/Project Screen” appears.

1. Press [**Send to SharePoint (Enhanced)**].

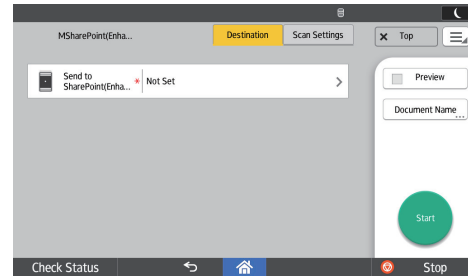


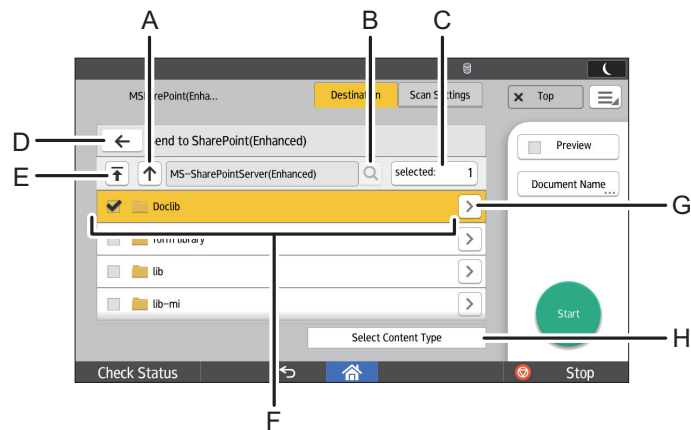
Fig. 24: Service Menu

Note

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

Step 5: Specifying a Destination (Selected Destination Screen)

Send to SharePoint (Enhanced) Screen Overview



DMZ204

Fig. 25: Send to SharePoint (Enhanced) Screen

- A. Display the folders on the upper level folders. This button is disabled in root folder view.
- B. Not available in MS SharePoint Server (Enhanced) Plug-in.
- C. **Selected Folder**
The number of selected folders is displayed. Pressing this button displays a list of selected folders.
- D. Returns to the Service Menu screen.
- E. Return to the screen displaying the root folders.
- F. **Folder List**
A list of the folders that can be specified as a destination displays here. Only one destination can be selected.
- Note**
- The settings in “Select Content Type” must be configured before sending.
 - If only the destination is selected, you cannot start scanning.
- G. The list of accessible sites, libraries, and/or folders is displayed.
- H. **Select Content Type**
Open the Select Content Type screen.
If the destination is not selected, an error message is displayed.

Procedure

From Send to SharePoint (Enhanced) screen (Fig.25), proceed as follows:

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

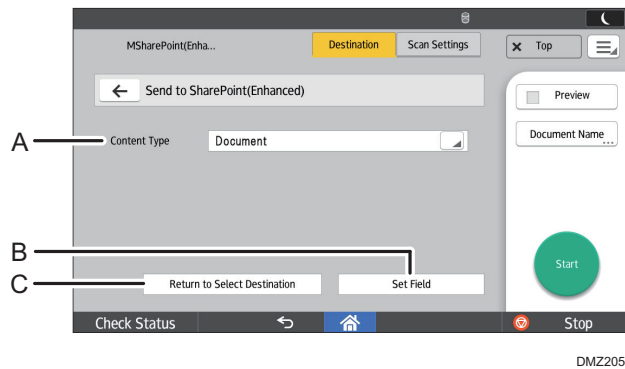
Note

If necessary, press [] to display subfolders.

2. Press [Select Content Type].
The [Selected Content Type] screen is displayed.

Step 6: Specifying a Destination (Select Content Type Screen)

Send to SharePoint (Enhanced) Screen Overview



DMZ205

Fig. 26: Send to SharePoint (Enhanced) Screen

A. Content Type

Select the content type.

B. Set Field

Move to the [Setting Value of Field] screen.

C. Return to Select Destination

Return to the [Select Destination] screen.

Procedure

From Send to SharePoint (Enhanced) screen (Fig. 26), proceed as follows:

1. Select a content type from “Content Type”.
2. Press [Set Field].
The [Setting Value of Field] screen is displayed.

↓ Note

- If the content type is changed, all input field values will be cleared.
- All required fields must be set before scanning.
If there are some empty required fields, you cannot start the scan.

Step 7: Specifying a Destination (Setting Value of Field Screen)

Send to SharePoint (Enhanced) Screen Overview

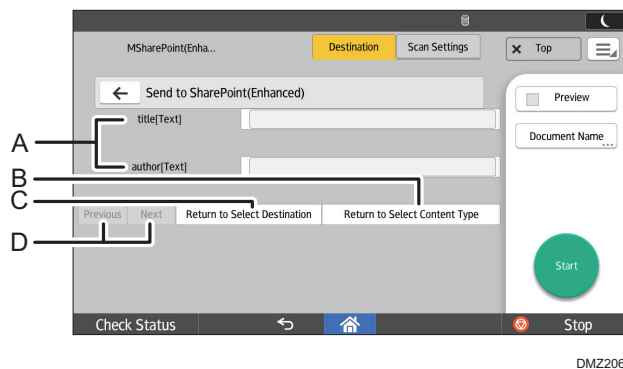


Fig. 27: Send to SharePoint (Enhanced) Screen

A. Fields

- Single line of text

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Users cannot use linefeed.

- Multiple lines of text

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Users cannot use linefeed.

- Choice

Users can set multiple lines of text in the following categories.

- Drop down list
- Radio button
- Check box
- Makes new answer
- Number

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Operation panel cannot view “%”.

Users can input a number that is more than the maximum number or less than the minimum number. Float value is unavailable.

- Currency

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Operation panel cannot view currency symbols.

Users can input a number that is more than the maximum number or less than the minimum number. Float value is unavailable.

- DateTime

Hours, minutes, and seconds information is unavailable.

User can input only values between 1/1/1900 and 12/31/8900.

Users have to input values in Gregorian calendar format.

- URL

The smaller value of either 255 characters or the value specified in SharePoint Server can be input. Users cannot browse access.

Users cannot use relative path.

B. Return to Select Content Type

Return to the [Select Content Type] screen.

C. Return to Select Destination

Return to the [Select Destination] screen.

D. Previous/Next Button

Go to/return to next/previous field screen.

Procedure

1. Specify the settings of each field.
2. Press **[OK]**.

Step 8: Setting the Scan Parameters

Note

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

Document Name

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

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

Note

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

Scan Settings

Proceed as follows:

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

Note

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

Filters

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

Step 9: Start the Scan

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

Note

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


Step 10: Exit the Project

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

Step 11: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.

The content of the Job Log is determined by the administrator. To view the Job Log, proceed as follows:

1. Press [] at the top right of the screen, and then select [**Job Log**].
2. Check the job log.
3. When finished, press [**Exit**].