



ScanRouter EX Enterprise

Version 2

ScanRouter EX Professional

Version 3



Operating Instructions Capture Function

-
- 1 Overview of Capture Function
 - 2 Preparing Capture
 - 3 Using Capture Function
 - 4 Appendix

Read this manual carefully before you use this product and keep it handy for future reference.

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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ScanRouter EX Manuals

ScanRouter EX has several manuals. Read the manual that is relevant to your usage or query.

Note

- ❑ To display PDF format instructions, Adobe Acrobat or Adobe Reader must be installed on your computer.

❖ **Setup Guide**

Explains system environment requirements and how to set up a ScanRouter EX delivery server. This guide also describes the first operation after establishing a delivery server and how to set up SSL communication.

❖ **Introduction Guide**

Explains basic ScanRouter EX document delivery operations, using several examples. This guide also describes how to add destination data collectively.

❖ **Management Guide**

Explains delivery procedure and daily administrator operations for ScanRouter EX. This guide also describes operations that are available by accessing a delivery server and Authentication Management Service using SR Manager and Authentication Manager.

❖ **Operating Instructions Capture Function**

Explains general procedures such as settings to make for using the capture function and ScanRouter EX network device operations.

❖ **Operating Instructions Device Browser Delivery Function**

Explains general procedures such as settings to make for using Device Browser delivery and ScanRouter EX network device operations.

Reference

After installing ScanRouter EX, you can display the manuals above in a PDF format according to the procedure below.

- On the **[Start]** menu, point to **[Programs]** > **[ScanRouter System]** > **[ScanRouter EX Professional]** or **[ScanRouter EX Enterprise]**.

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How to Read This Manual

Symbols

In this manual, the following symbols are used:

Important

This symbol indicates a situation that may result in property damage or malfunction if instructions are not followed. Be sure to read the instructions.

Preparation

This symbol indicates information or preparations required prior to operating.

Note

This symbol indicates precautions for operation, or actions to take after abnormal operation.

Limitation

This symbol indicates numerical limits, functions that cannot be used together, or conditions in which a particular function cannot be used.

Reference

This symbol indicates a reference.

[]

Elements on the machine's display panel or the computer's display, such as keys, buttons, and menus.

[]

Keys built into the machine's control panel.

1. Overview of Capture Function

Capture Function

The capture function of ScanRouter EX can digitize copied documents, documents sent from a facsimile or LAN Fax, and printed documents to save them into ScanRouter DocumentServer (hereafter called a document management server).

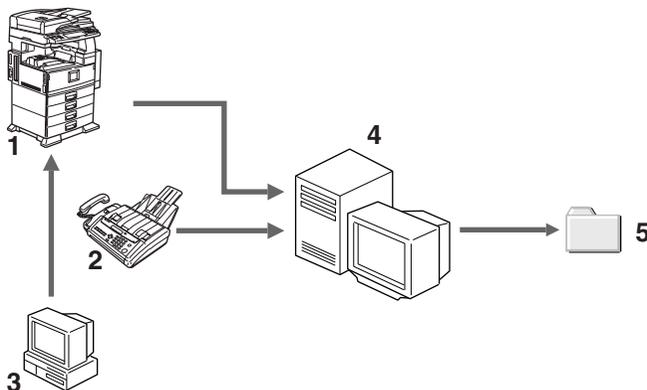
Saved documents can be utilized for later viewing, searching, or other operations.

Adding documents to document management server folder is called "Capture".

Capture Function Layout

1 Capture Function Overview

The ScanRouter EX capture function distributes documents created in various operations, and adds them to specified document management server folders.

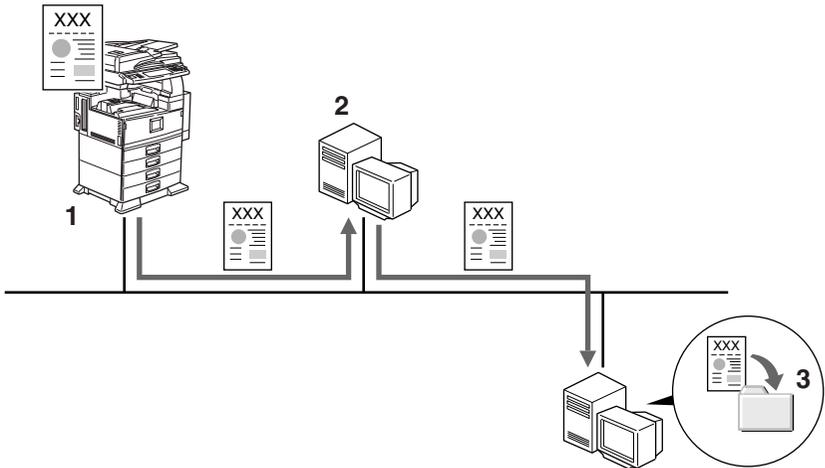


AEF001S

1. Scanner, Copier
2. Fax
3. Printing, LAN Fax
4. Delivery Server
5. Folders in Document Management Server

Capture Function System Layout

The following layout describes ScanRouter EX's capture function system.



AEF002S

1. Network device

Scanned, copied, faxed, printed, and LAN Fax documents are sent to the delivery server.

2. Delivery server

Documents delivered from devices are received using network-connected devices and the capture function, and added to specified folders in the document management server.

3. Folders in the Document Management Server

When **[Forward]** is selected under **[Forward Settings]** in Capture Table of SR Manager, documents are added to the folder specified as the saving location.

For added documents, the default document type (set for the folder/adding location) is set as the document type in the document management server. If the default document type is not specified or not available, a document type determined according to the capture method is set.

Types of Documents That Can Be Added

The following documents can be added using the capture function:

- Scanned documents
- Copied documents
- Documents sent from a fax or LAN Fax
- Printed documents
- Documents stored in a Document Server

⚠ Limitation

- ❑ Some documents may not be captured depending on network devices.

Documents Distribution

1

A delivery server receives documents using the capture function, and then distributes and adds them to the document management server.

The adding location depends on the adding location information set for each user in Capture Table.

However, if the specified folder is not found on the document management server, or when a setting is not made not to add documents using Capture Table, the documents are handled as unforwarded data.

Reference

p.9 "Managing Capture Table"

p.7 "Managing Unforwarded Data"

2. Preparing Capture

Setting SR Manager

Reference

For details about SR Manager, see SR Manager Help.

Setting I/O Devices

Add network devices used for the capture function. Make network device settings in **[Add...]** on the **[Operations]** menu.

Network devices can be installed by:

- Setting their IP addresses
- Setting their host names

❖ Basic Settings

Specify a name.

❖ Capture Settings

Make the following capture settings:

- Whether to use the capture function or not
- Default user settings
- Capture settings for individual objects

Important

- ❑ When changing capture settings, do not use network device copy, fax, or scanner functions. Network device operations may be reset, or the settings may not be reflected to the network devices immediately.

Note

- ❑ Added network devices are listed in **[I/O Device List:]**.
- ❑ Multiple network devices can be added.
- ❑ Select a network device in **[I/O Device List:]**, and then click **[Properties...]** on the **[Operations]** menu to check and change settings.

Managing Unforwarded Data

Specify a method for handling unforwarded data.

Make unforwarded data settings on the **[Unforwarded Data]** tab in **[Capture Settings]** on the **[Server]** menu.

The following methods are available:

- Delete documents immediately without adding
- Add documents to specified document management server folder.

Additional Handling

Make additional handling processes for received documents.

Auto-adjust image orientation and extract text as document name are available.

Setting Capture Table

The following operations are available in Capture Table:

- Add new user
- Edit user
- Delete user
- Import Capture Table
- Export Capture Table

Note

The following information appears in Capture Table:

- User
- Created by
- Forwarded to

Reference

p.9 “Managing Capture Table”

Administrator Operations

Reference

For details about SR Manager, see SR Manager Help.

Managing Waiting Delivery

Use the delivery server to check lists of capture documents that are being delivered or waiting to be delivered.

Limitation

- You must have ScanRouter EX Administrator rights to check capture documents.

Managing Capture Table

Make the necessary capture settings in Capture Table.

Adding New User to Capture Table

When adding a user to Capture Table, set the following items in **[Create New Capture Entry]** on the **[Operations]** menu:

- User
- Created by
- Forward Settings

Limitation

- If capture is performed by a user who does not exist in the table, that user is added as a new user. These documents are not saved in a document management server and handled as unforwarded data.

Editing User in Capture Table

Added user details in Capture Table can be edited. Select the user whose details you want to edit, and then edit the necessary items in **[Edit Capture Entry]** on the **[Operations]** menu.

Deleting User in Capture Table

Users can be deleted from Capture Table. Click a user to be deleted, and then click **[Delete Capture Entry]** on the **[Operations]** menu.

Importing Capture Table

Capture Table can be updated by importing saved CSV files or files exported using Capture Table's export function to the delivery system. Click **[Import Capture Table]** on the **[Operations]** menu, and then specify the file to import.

Exporting Capture Table

All Capture Table information can be exported as backup data. Click **[Export Capture Table]** on the **[Operations]** menu, and then specify the save location.

Managing Logs

The following logs are saved in the delivery server:

- Copy
- Fax
- Printer
- Scanner

Manage logs using log lists displayed when you select **[Copy]**, **[Fax]**, **[Printer]**, or **[Scanner]**.

The following operations are available in each log list:

- Deleting capture log entries
- Exporting capture log entries
- Setting a maximum number of days for saving the capture log

Limitation

- To manage logs, ScanRouter EX Administrator rights are required.

Note

- The following information appears in each capture log list:
 - Logged
 - Device
 - Captured Date
 - User Name
 - Forward to
 - Item Name
 - Data Size(KB)
 - Pages
 - Remarks

Deleting Capture Log Entries

Multiple capture log entries can be deleted at the same time.

Click **[Delete All Logs]** on the **[Operations]** menu.

Limitation

- You cannot specify and delete logs individually.

Exporting Capture Log Entries

Capture log entries can be exported into a file and saved.

Click **[Export Capture Log]** on the **[Operations]** menu, and then specify the save location of the file.

Setting Maximum Days for Saving for Capture Log

To set a maximum number of days to save capture logs, use **[Max. Log Entries]** on the **[Operations]** menu.

Limitation

- Specify a maximum number of days from 1 to 60.

Managing undelivered data tray

The undelivered data tray can be managed. Undelivered data is saved in the undelivered data tray. Select **[Undelivered Data In-Tray]** under **[Delivery Table]** to display the saved data list. Use the error logs to determine the cause of non-delivery, and then perform the appropriate remedial action.

The following operations are available for the undelivered data tray:

- Delete undelivered data
- Deliver undelivered data
- View undelivered data

 **Note**

- The following information appears in **[Undelivered Data List]**:
 - Item Name
 - Creator
 - Added
 - Expires
 - Number of Sections
 - Owner
 - Extension Information
 - Delivery Device Name
 - Forwarded
- Using the capture function, documents not saved in the adding location set by the user are also displayed in the undelivered data tray. To distinguish delivery documents from unsaved documents, display the document properties from DeskTopBinder Professional and check "capture" appears as "Keyword 1". If it is, the document is a captured document.
- Only users who are set as **[Current owner:]** in Default ACL on SR Manager can view documents added in the undelivered data in-tray.

Deleting Undelivered Data

Documents in the undelivered data tray can be deleted. You can specify an individual document to delete. Deleting multiple documents in the undelivered data tray at the same time is also possible.

- To specify a document to delete, select it in **[Undelivered Data List]**, and then click **[Delete Selected Undelivered Data]** on the **[Operations]** menu.
- When deleting multiple documents in the undelivered data tray at the same time, click **[Delete All Undelivered Data]** on the **[Operations]** menu.

 **Note**

- The save period can be set so documents in the undelivered data tray whose expiration dates have already passed are deleted automatically.

Forwarding Undelivered Data

To forward a document from the undelivered data tray, select it in **[Undelivered Data List]**, and then specify the destination in **[Forward Undelivered Data]** on the **[Operations]** menu.

Viewing Undelivered Data

To view a document in the undelivered data tray, select it in **[Undelivered Data List]**, and then click **[View Undelivered Data]** on the **[Operations]** menu. The application associated with the data on the first page starts, and the document appears.

3. Using Capture Function

Capture Function Operation

Using the capture function, add documents to the document management server. Make capture settings in **[Add...]** on the **[Operations]** menu.

The following methods are available for capture:

- Manual capture
- Automatic capture
- Always capture (user selectable)
- Capture all data (user not selectable)

📍 Limitation

- Before using the capture function, make the settings for SR Manager.

📝 Note

- Access rights for captured documents are inherited from adding location in the document management server.

🔍 Reference

p.7 “Setting SR Manager”

For details about normal network devices procedures, see the manuals for the network devices.

Manual Capture

Capture documents when the default is set to not capture documents.

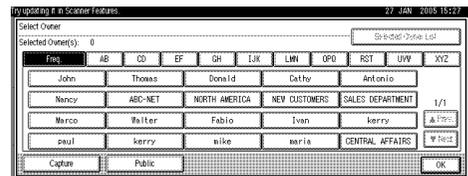
Capture can be set to be available during the operation.

For Documents Copied, Faxed, Scanned, and Stored in Document Server

Follow the procedure below to capture each document manually.

- 1** Press **[Copy]**, **[Fax]**, **[Scanner]**, or **[Document Server]**.

The **[Select Owner]** screen appears.



📝 Note

- To capture documents, press **[Capture]**.

- 2** Select a user name, and then press **[OK]**.

- 3** Perform each operation as normal.

Automatic Capture

Capture documents automatically when the default is set to capture documents.

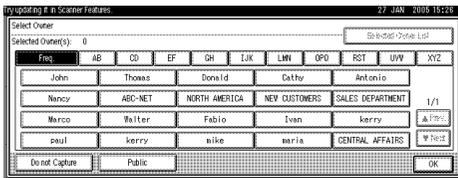
Capture can be set to be unavailable during the operation.

For Documents Copied, Faxed, Scanned, and Stored in Document Server

Follow the procedure below to capture each document automatically.

- 1 Press **[Copy]**, **[Fax]**, **[Scanner]**, or **[Document Server]**.

The **[Select Owner]** screen appears.



Note

- To not capture documents, press **[Do not Capture]**.

- 2 Select a user name, and then press **[OK]**.

- 3 Perform each operation as normal.

Always Capture (user selectable)

Settings for saving documents to the document management server are not selectable. Documents are always captured.

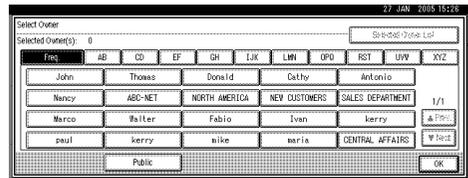
When documents are processed, they are always captured to the specified user.

Operating Copy, Fax, Scanner, and Documents in Document Server

Follow the procedure below to always capture each document.

- 1 Press **[Copy]**, **[Fax]**, **[Scanner]**, or **[Document Server]**.

The **[Select Owner]** screen appears.



- 2 Select a user name, and then press **[OK]**.

- 3 Perform each operation as normal.

Capture All Data (user not selectable)

Documents are always captured. The setting for not saving documents to the document management server cannot be selected.

When documents are processed, they are always captured to the default user.

Note

- The default user is set in "Setting Default User" in **[Add...]** on the **[Operations]** menu. However, if user limitations on network device usage are set, an authenticated user may become the default.

Operating Copy, Fax, Scanner, and Documents in Document Server

Follow the procedure below to capture each document.

- 1 Press **[Copy]**, **[Fax]**, **[Scanner]**, or **[Document Server]**.
- 2 Perform each operation as normal.

Capturing LAN Fax and Printed Documents

LAN Fax and printed documents are captured by normal LAN Fax and printing operations from a client computer.

When documents are directly captured by a client computer operation only without operations on network device displays such as LAN Fax and printed documents, all documents are compulsorily captured.

Note

- User information settings during LAN Fax and printing operations vary depending on network devices.
- Capturing LAN Fax documents is available only when using memory transmission.

User Limitations and Selecting Users

If user limitations on network device usage are set, timing in which the User Limitations screen and Select User screen appear depends on settings of the network device.

❖ **Color-supported Devices**

The Select User screen appears first, and then the User Limitations screen appears.

❖ **Monochrome-supported Devices**

The User Limitations screen appears first, and then the Select User screen appears.

Note

- Even if user limitations are set, users can be changed in the Select User screen.

Operating Environment

The capture function of ScanRouter EX manager requires the following:

! **Limitation**

- When the capture function is used with high-resolution documents (created under network device read conditions using "Grayscale" or "Color" of 600 dpi resolution or higher, or by reading large images), or many documents together, processing may take a longer time. If you use these types of images frequently, we recommend you increase the computer's CPU, memory, and hard disk capacity.

❖ **Available delivery servers for capture**

- ScanRouter EX Professional
- ScanRouter EX Enterprise

❖ **Available document management servers as a saving location for captured documents**

- ScanRouter DocumentServer

! **Limitation**

- Available additional handling functions depend on the document management server at the saving location.

❖ **Network Devices**

Contact your local dealer.

CSV File for Importing User

User information in a CSV file of the following format can be imported to add a user to Capture Table.

In Capture Table, specify **[Import Capture Table]** on the **[Operations]** menu.

CSV File Format

Items to be specified in a CSV files are as follows:

❖ **User name**

Enter a user name using up to 20 characters.

❖ **Creator**

Enter a creator name using up to 80 characters.

Making Entries in a CSV File

Divide each item with a comma "," and enclose the user name and creator with quotations "".

Enter one destination per line.

❖ **Entry Method**

"User name", "Created by"

❖ **Entry sample**

"Smith", "Marketing"

"Williams", "Marketing"

"Johnson", "Marketing"

Troubleshooting

Problem	Causes and solutions
When the document name extraction process is set, the "Item Name" in the log differs from the "Item Name" added to the document management server.	The document name extraction process is performed when the document is added to the document management server. Therefore, the "Item Name" in the log is the name before extraction. The name after extraction is applied when the document is added to the document management server.
Some items cannot be set in "Additional Handling".	Available "Additional Handling" items depend on the version of the document management server used as the document adding location. The Auto-adjust image orientation and title extraction require ScanRouter DocumentServer.

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Parts of illustrations or explanations in this manual may differ from your product due to improvements or changes in the product.

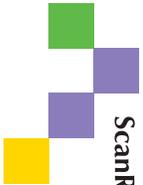


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- It is possible that any document or data stored in the PC will be damaged or lost by user error during operation or software error. Be sure to back up of all important data beforehand. Important documents and data should always be copied or backed up. Documents and data can be lost because of malfunction or human error. Furthermore, the customer is responsible for protection measures against computer viruses, worms, and other harmful software.
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ScanRouter EX Enterprise Version 2 ScanRouter EX Professional Version 3

Operating Instructions Capture