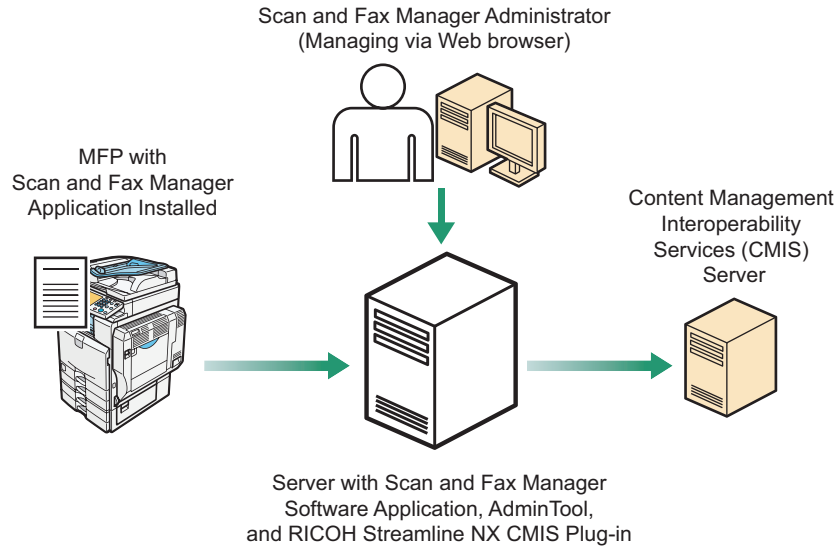


## RICOH Streamline NX CMIS Plug-in

### Administrator's Guide

The RICOH Streamline NX CMIS Plug-in (CMIS Plug-in) is a Scan and Fax Manager (SFM) plug-in service that distributes documents scanned using a multifunctional device (MFP) to IBM File Content Manager P8.



DHQ006

**Fig. 1:** RICOH Streamline NX CMIS Plug-in Workflow

#### Note

- This plug-in is displayed as "Send to CMIS" on the SFM server, in AdminTool, and on the MFP control panel.
- This manual explains the configuration procedures for the CMIS Plug-in. For details about Administrator Settings and Service/Filter Settings, see *Scan and Fax Manager Administrator'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
RICOH Streamline NX CMIS Plug-in	CMIS Plug-in
Content Management Interoperability Services	CMIS
Enterprise Content Management	ECM

## Adding the CMIS 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**].

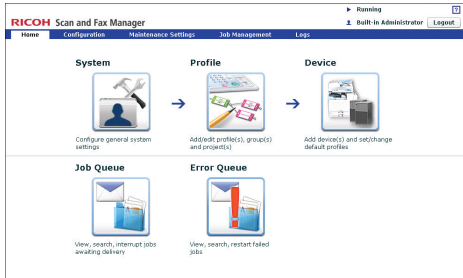


Fig. 5: AdminTool Home Page

2. Click [**Create**].

The Profile Properties screen appears.

If you are adding the CMIS Plug-in to an existing profile, proceed to P.3 "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 CMIS Plug-in to.

The Group/Project screen appears.

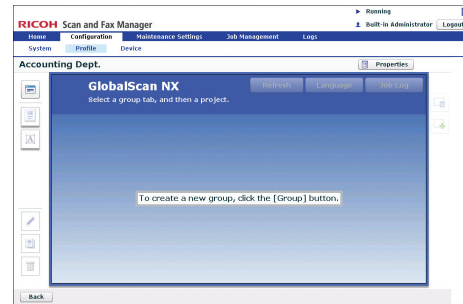


Fig. 6: Group/Project screen

#### Note

- If you are adding the CMIS Plug-in to an existing group, click the group you require, and then proceed to P.3 "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 CMIS Plug-in to an existing project, click the desired project, and then proceed to P.4 "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 CMIS" to the Delivery Flow Editor screen.

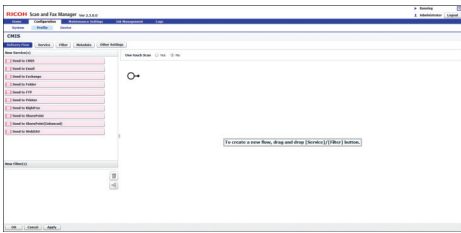




Fig. 7: Delivery Flow Editor screen

### 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 CMIS Plug-in, see P.5 "Configuring the CMIS 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)

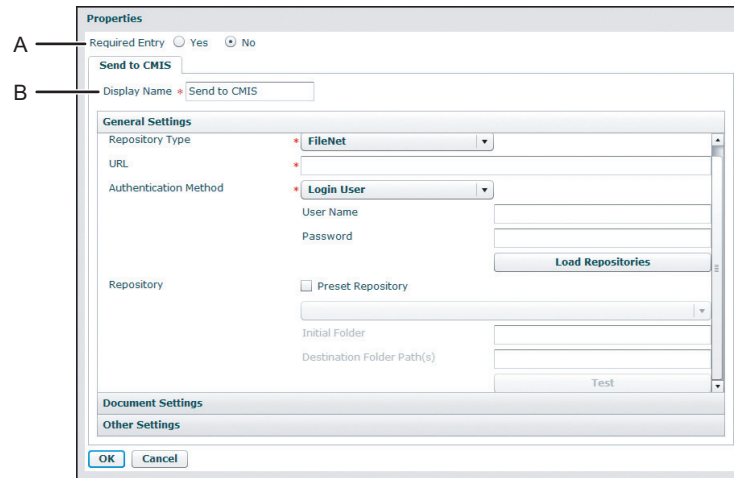
For details, see "6. Configuration", *RICOH Streamline NX Administrator's Guide*.

# Configuring the CMIS Plug-in

## Step 1: Configuring the Send to CMIS

Use this procedure to configure the settings of the CMIS Plug-in for delivering documents to ECM systems.

### Properties Screen Overview



DHQ003

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 destination folder path must be specified in the destinations list.
- No**  
Allows the Delivery Flow to continue even if no CMIS Server 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.

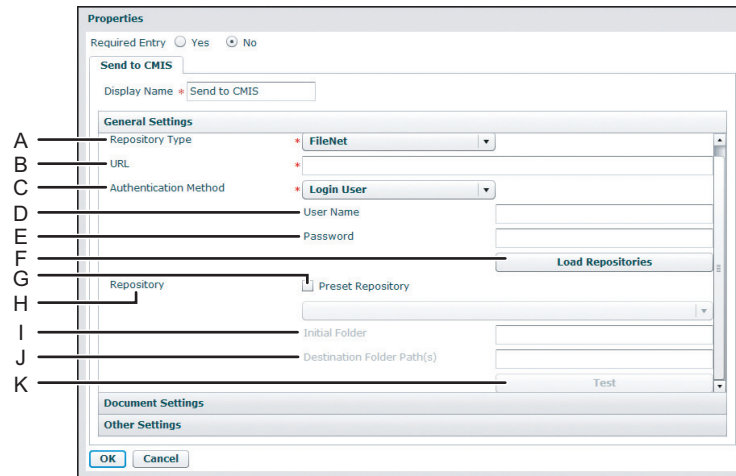
### Procedure

- Click [**Home**].
- Click [**Profile**].
- Select the desired profile you require.
- Select the desired project you require.
- Double-click the lower half of the Send to CMIS icon in the Delivery Flow.  
The Properties screen appears.
- In "Display Name", enter the display name that you require.
- Proceed to P.6 "Step 2: Adding a CMIS Server Path".

## Step 2: Adding a CMIS Server Path

Use this procedure to connect to CMIS Server at the distribution destination and you can specify the repository or folder to be distributed.

### Properties Screen General Settings Tab Overview



DHQ004

Fig. 10: Properties Screen General Settings Tab

#### ↓ Note

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

#### A. Repository Type

Select a repository type from the following:

- Documentum
- FileNet
- Opentext

#### ↓ Note

- If the selected repository type differs from the one specified for [URL], a message will appear when [OK] is clicked.

#### B. URL

Enter the entire path to the CMIS Server site.

#### C. Authentication Method

Select the authentication method in use. The information specified here will be applied when accessing the CMIS 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.

#### D. User Name

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

For details about entering the user name of the account, see "Notes" of "Readme.txt".

#### E. Password

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

#### F. Load Repositories

Retrieve repositories from CMIS and update the contents of the repository combo box on the screen. [URL], [User Name], and [Password] must be specified in advance. If the SFM fails to retrieve the information, an error message will appear.

### **G. Preset Repository**

Specify whether or not to use the preset repository.

If this is selected, the fixed repository will be used as the scanned document destination.

### **H. Repository**

Specify the preset repository.

This must be specified if "Preset Repository" is enabled.

### **I. Initial Folder**

Specify the initial folder path.

If this is specified, the folder path will be used as the root folder for the Destination Folder Selection screen on the MFP operation panel.

Example: test or test/subfolder\_test

### **J. Destination Folder Path(s)**

Specify the destination folder path(s).

If this is specified, the folder path(s) will be pre-selected on the Destination Folder Selection screen on the MFP operation panel.

It is possible to specify multiple folder paths by separating with a comma.

Example: test or test/subfolder\_test or test/subfolder\_test, test/abc,etc

### **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]**.

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

**[NG]**: An error message is displayed.

## **Procedure**

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1. Specify **[URL]**, **[Authentication Method]**, **[User Name]**, and **[Password]**.
2. Click **[Load Repositories]** as necessary.
3. If you select the **[Preset Repository]** check box, specify a preset repository.
4. Specify **[Initial Folder]** and **[Destination Folder Path(s)]** as necessary.
5. Click **[Test]**.
6. Proceed to P.8 "Step 3: Configuring the Document Settings".

### Step 3: Configuring the Document Settings

You can specify the document type and properties at the distribution destination.

#### Properties Screen Document Settings Tab Overview

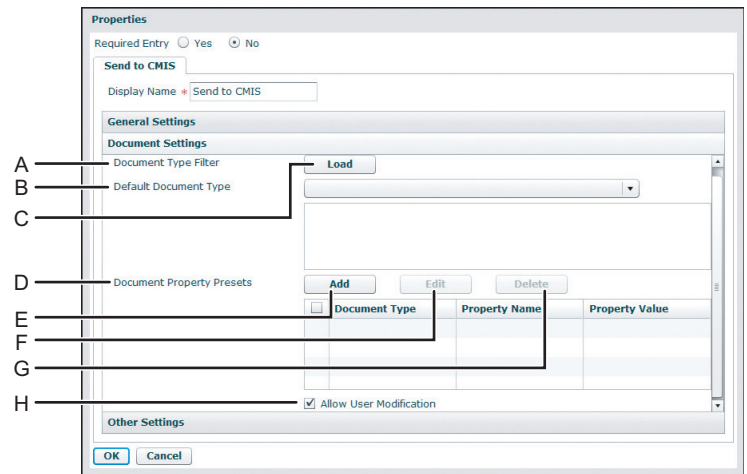


Fig. 11: Properties Screen Document Settings Tab

#### A. Document Type Filter

Specify the document type(s) to be displayed on the Document Information Input screen on the MFP operation panel. Up to 14 properties can be displayed on the MFP operation panel. If there are 15 properties or more, the delivery will fail.

#### B. Default Document Type

Select the default document type(s) to be displayed on the MFP operation panel. You can select multiple document types from the dropdown list box by holding down the [Ctrl] key while clicking them.

#### C. Load

Retrieve all document types from CMIS and update the contents of the document type filter list box on the screen. If the SFM fails to retrieve information, an error message will appear.

#### D. Document Property Presets

Display the document property presets.

#### E. Add

Add an item to the document property presets. The Add Property Settings screen will appear.

#### F. Edit

Edit the selected item in the document property presets. The Edit Property Settings screen will appear.

#### G. Delete

Delete the selected item(s) from the document property presets.

#### H. Allow User Modification

- If this check box is selected:  
Allow users to change "Document Property Presets" displayed on the MFP operation panel.
- If this check box is not selected:  
Prevent users from changing "Document Property Presets" displayed on the MFP operation panel.



## Add/Edit Property Settings Screen Overview

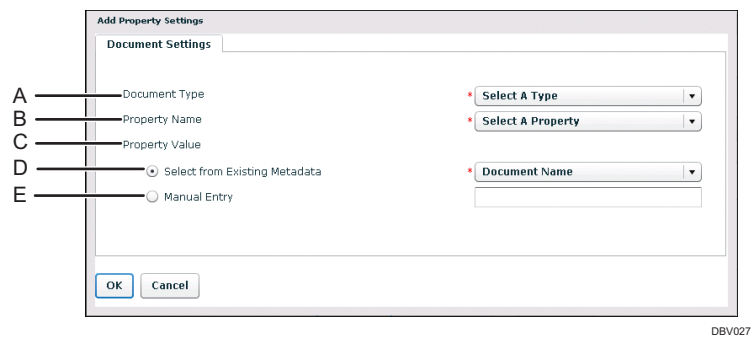


Fig. 12: Add Property Settings Screen

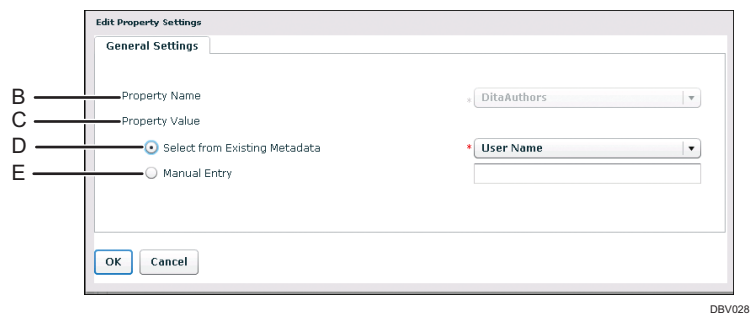


Fig. 13: Edit Property Settings Screen

### Note

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

#### A. Document Type

Retrieve all document types from CMIS and populate the combo box. If the SFM fails to retrieve information, an error message will appear.

#### B. Property Name

Retrieve all document type properties depending on the selected document type above from CMIS and populate the combo box. If the SFM fails to retrieve information, an error message will appear.

It is not possible to change this setting if the user is editing the existing item.

#### C. Property Value

Specify the property value.

#### D. Select from Existing Metadata

If "Select from Existing Metadata" is selected, the value will be generated from the SFM basic document metadata.

### Note

- If the data type does not match the metadata, the delivery will fail.

#### E. Manual Entry

If "Manual Entry" is selected, the administrator can define a free text to specify values.

It is possible to specify multiple values by separating them by a comma, depending on the property name.

### Note

- If a multi-choice type property is selected for "Property Name", the text box will be replaced by a combo box and the list available for the CMIS server will be displayed.

## Procedure

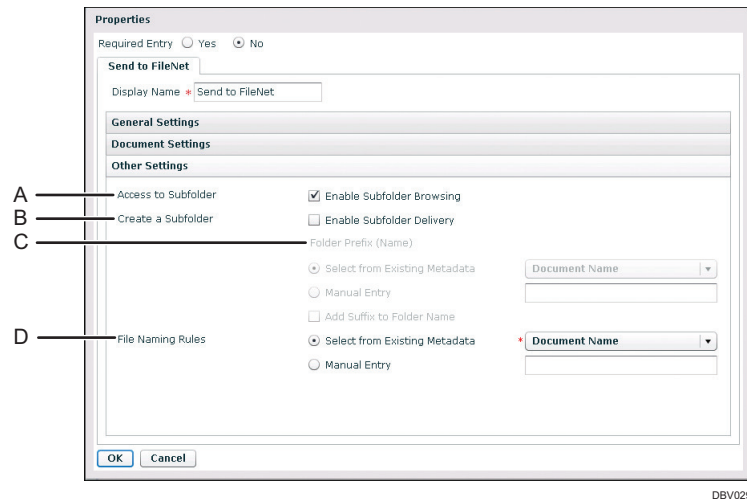
- Click the [Document Settings] tab.
- Click [Load] as necessary.
- Specify a [Document Type Filter] as necessary.
- Click [Add] as necessary, and then specify [Document Type], [Property Name], and [Property Value] on the Add Property Settings screen.

5. Click **[Edit]** as necessary, and then edit **[Property Name]** and **[Property Value]** on the Edit Property Settings screen.
6. Click **[OK]**.
7. If you want to delete a document type, select the document type, and then click **[Delete]** as necessary.
8. Click **[OK]**.
9. Proceed to P.10 "Step 4: Configuring the Other Settings".

## Step 4: Configuring the Other Settings

You can specify the other settings at the distribution destination and configure the naming rules for subfolders and files.

### Properties Screen Other Settings Tab Overview



**Fig. 14:** Properties Screen Other Settings Tab

#### Note

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

#### A. Access to Subfolder

Specify the subfolder access.

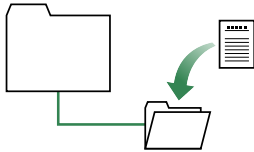
If this is disabled, users cannot browse subfolders in Destination Folder Selection Screen on the MFP operation panel.

#### B. Create a Subfolder

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

- When Selected

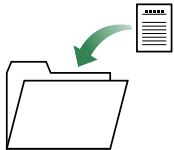
A folder is automatically created in the destination folder. Scanned documents are stored there.



BPG2805

- When not Selected

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



BPG2815

### C. 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**

- Only "cmis:folder" is supported as a subfolder folder type when you create the subfolder.
- 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.

### D. 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 "\_".

## Procedure

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1. Enable or Disable [**Enable Subfolder Browsing**] as necessary.
2. Select [**Create a Subfolder**] as necessary.
3. If you select the [**Enable Subfolder Delivery**] check box in step 2, specify a [**Folder Prefix (Name)**].
4. Specify the method for the name of files from [**Select from Existing Metadata**] or [**Manual Entry**].
5. If you select the [**Manual Entry**] check box in step 4, enter the desired file name.