RICOH Streamline NX CMIS Plug-in

User'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.

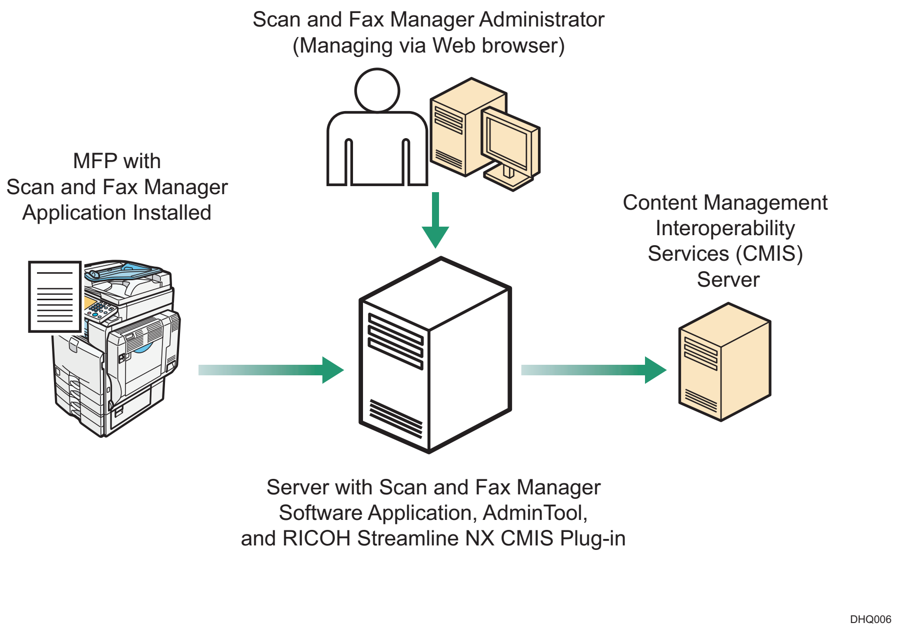

Fig. 1: RICOH Streamline NX CMIS Plug-in Workflow

Note

- This product is displayed as "Send to CMIS" on the MFP control panel.
- This manual explains the operation procedures for the CMIS 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.

Important

- Some illustrations or explanations in this guide may differ from your product due to improvement or change in the product.
- The contents of this document are subject to change without notice.
- No part of this document may be duplicated, replicated, reproduced in any form, modified or quoted without prior consent of the supplier.
- It is possible that any document or data stored in the computer 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.
- Do not remove or insert any disk while operating this software.

Trademarks

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

CMIS 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.

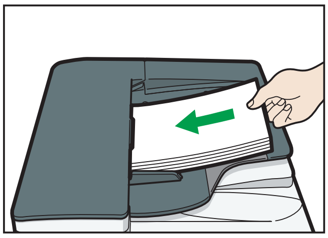

Fig. 2: ADF

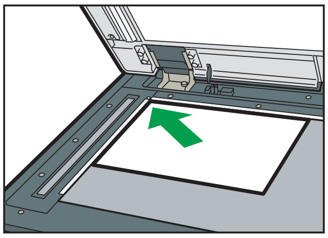

Fig. 3: Exposure Glass

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.

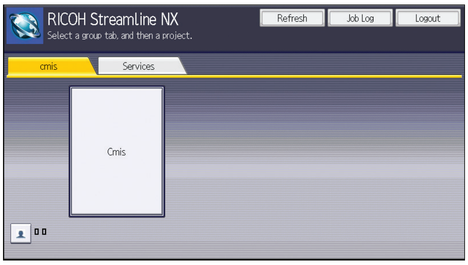

Fig. 4: Group/Project Screen

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 [**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 CMIS**].

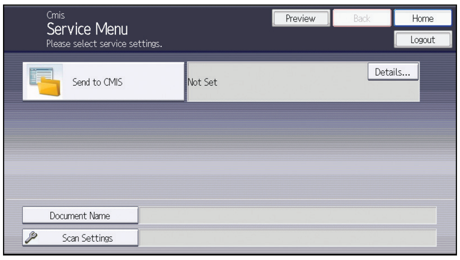

Fig. 5: Service Menu

Note

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

Step 5: Specifying a Destination (Repository Selection Screen)

Send to CMIS Screen Overview

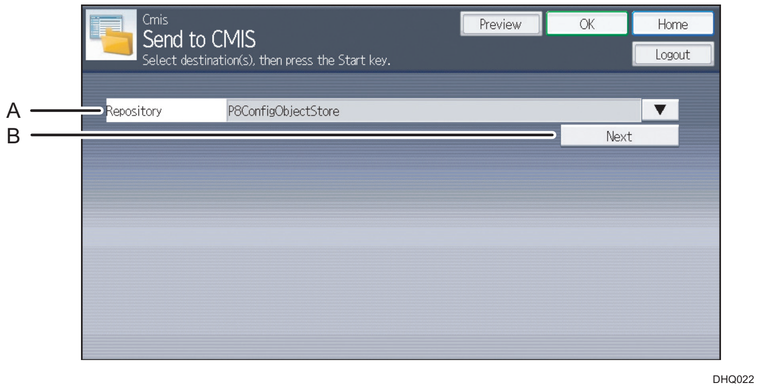

Fig. 6: Send to CMIS Screen

This screen does not appear depending on the settings specified by the administrator.

A. Repository
Specify the repository to connect. The repository list is listed in alphabetical order.
This input is not visible until the user performs a successful login.

B. Next
Load "Destination Folder Selection Screen".
This input is not visible until the user performs a successful login.

Procedure

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

1. Specify a repository.
2. Press [**Next**].
   The Destination Folder Selection screen is displayed.

Step 6: Specifying a Destination (Destination Folder Selection Screen)

Send to CMIS Screen Overview

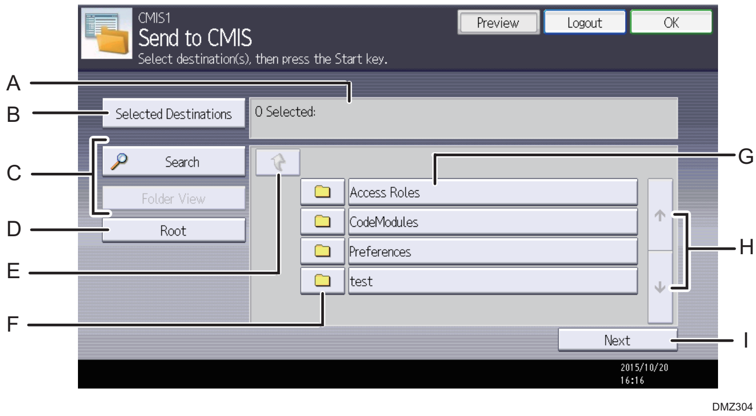

Fig. 7: Send to CMIS Screen

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 press folders in this list to remove them.

C. Search, Folder View

Perform the keyword search in the current folder and its sub-tree folder(s).

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**].

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. Next

If one or more destination folder(s) is specified, move to the Document Information Input screen.
If not, an error dialog will appear.

Procedure

From Send to CMIS screen (Fig. 7), proceed as follows:

1. Select a destination folder.
2. Press [**Next**].
   The Document Information Input screen is displayed.

Step 7: Specifying a Destination (Document Information Input Screen)

Send to CMIS Screen Overview

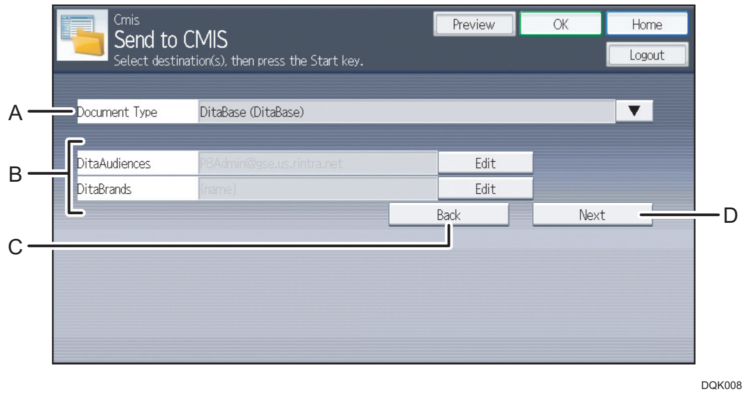

Fig. 8: Send to CMIS Screen

A. Document Type

Specify the document type. The Document type list is sorted in alphabetical order using its display name attribute.

B. Document Properties

Specify document properties. The Document properties list is sorted in alphabetical order using its display name attribute.

The UI control type varies depending on the document property type. (String / Integer / Date-time). Parameter settings on the screen that are marked with an asterisk (*) must be specified.

The parameter settings displayed in addition to those marked with an asterisk (*) are those that have been preset in the Scan and Fax Manager AdminTool.

Up to 14 properties can be set.

C. Back

Move to the Destination Folder Selection screen.

D. Next

Move to the Scanning screen.

Procedure

From Send to CMIS screen (Fig. 8), proceed as follows:

1. Select a document type from the drop-down list".
2. Specify document properties.
3. Press [**Next**].
   The Scanning screen is displayed, and then Press [**OK**].

Note

- All required fields must be set before scanning.
  If there are some empty required fields, you cannot start the scan.

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. 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 *RICOH Streamline NX User's Guide*.

Filters

For details about how to specify other filters, see *RICOH Streamline NX 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. 9). The Group/Project screen (Fig. 4) will appear.

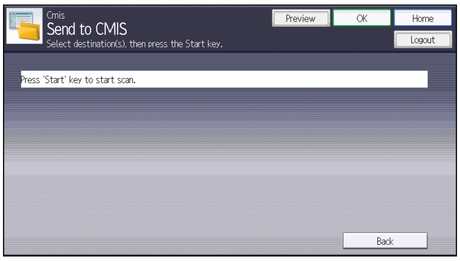

Fig. 9: Scanning Screen

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.

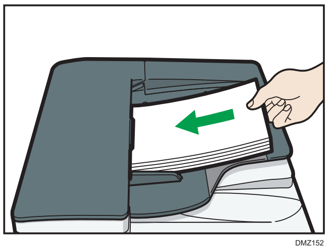

Fig. 10: ADF

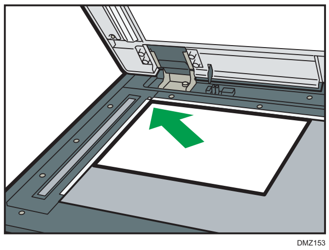

Fig. 11: Exposure Glass

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.

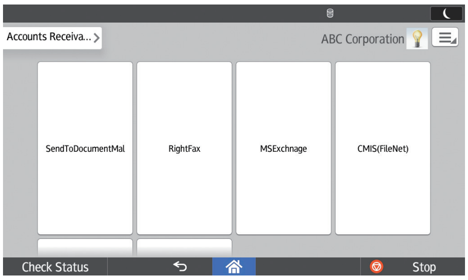

Fig. 12: Group/Project Screen

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 CMIS**].

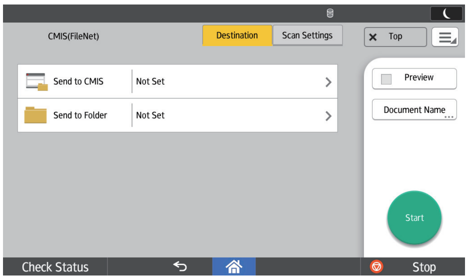

Fig. 13: Service Menu

Note

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

Step 5: Specifying a Destination (Repository Selection Screen)

Send to CMIS Screen Overview

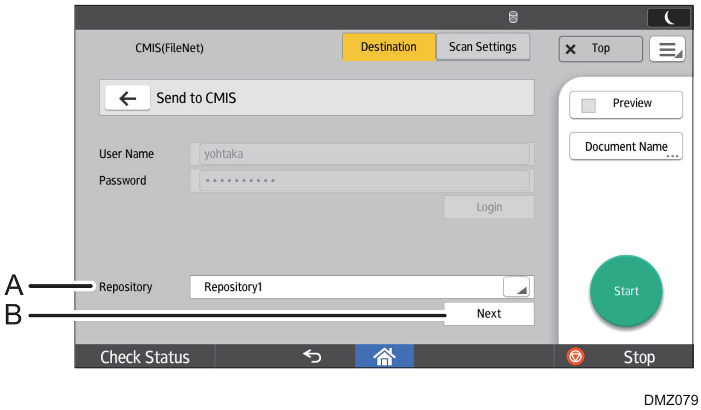

Fig. 14: Send to CMIS Screen

This screen does not appear depending on the settings specified by the administrator.
“User Name”, “Password”, and “Login” do not appear when the authentication profile has been set to the project.

A. Repository

Specify the repository to connect. The repository list is listed in alphabetical order.

This input is not visible until the user performs a successful login.

B. Next

Load “Destination Folder Selection Screen”.

This input is not visible until the user performs a successful login.

Procedure

From Send to CMIS screen (Fig. 14), proceed as follows:

1. Specify a repository.
2. Press [**Next**].
   The Destination Folder Selection screen is displayed.

Step 6: Specifying a Destination (Destination Folder Selection Screen)

Send to CMIS Screen Overview

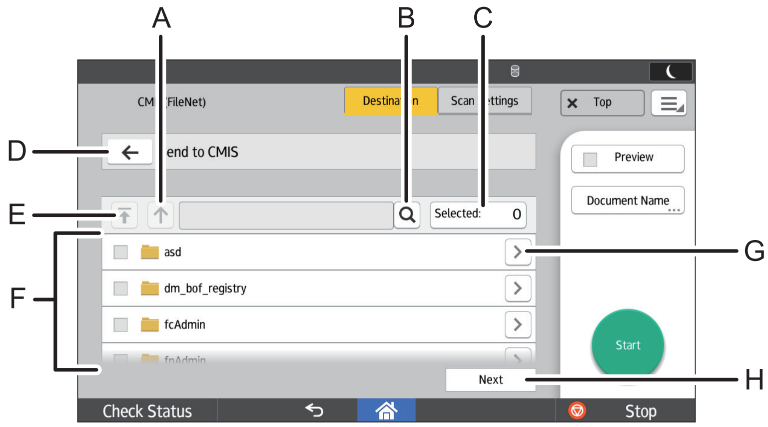

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Fig. 15: Send to CMIS Screen

A. ↑

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

B.

Perform the keyword search in the current folder and its sub-tree folder(s).

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.

G. >

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

H. Next

If one or more destination folder(s) is specified, move to the Document Information Input screen.
If not, an error dialog will appear.

Procedure

From Send to CMIS screen (Fig. 15), proceed as follows:

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

   Note

   If necessary. press [>] to display subfolders.

2. Press [**Next**].
   The Document Information Input screen is displayed.

Step 7: Specifying a Destination (Document Information Input Screen)

Send to CMIS Screen Overview

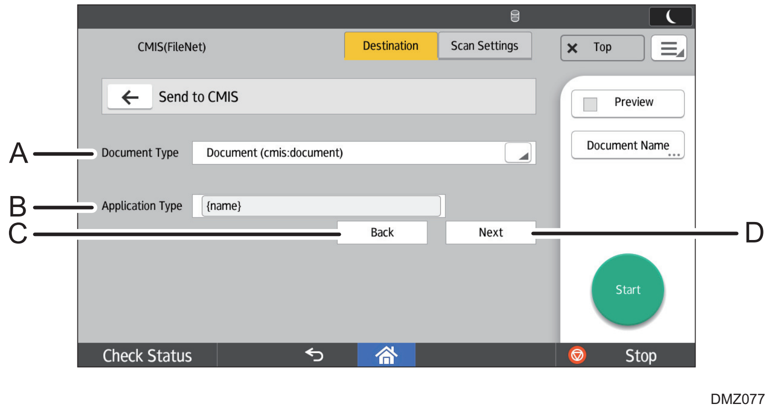

Fig. 16: Send to CMIS Screen

A. Document Type

Specify the document type. The Document type list is sorted in alphabetical order using its display name attribute.

B. Document Properties

Specify document properties. The Document properties list is sorted in alphabetical order using its display name attribute.

The UI control type varies depending on the document property type. (String / Integer / Date-time). Parameter settings on the screen that are marked with an asterisk (*) must be specified.

The parameter settings displayed in addition to those marked with an asterisk (*) are those that have been preset in the Scan and Fax Manager AdminTool.

Up to 14 properties can be set.

C. Back

Move to the Destination Folder Selection screen.

D. Next

Move to the Scanning screen.

Procedure

From Send to CMIS screen (Fig. 16), proceed as follows:

1. Select a document type.
2. Specify document properties.
3. Press [**Next**].

Note

- All required fields must be set before scanning.
  If there are some empty required fields, you cannot start the scan.

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 *RICOH Streamline NX User's Guide.*

Filters

For details about how to specify other filters, see *RICOH Streamline NX 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 [›].

   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 10: Exit the Project

When scanning finishes, press [**Top**] (see Fig. 17). The Group/Project screen will appear.

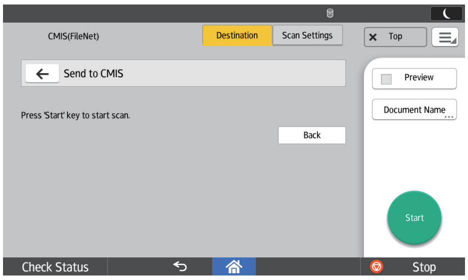

Fig. 17: Scanning Screen

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**].