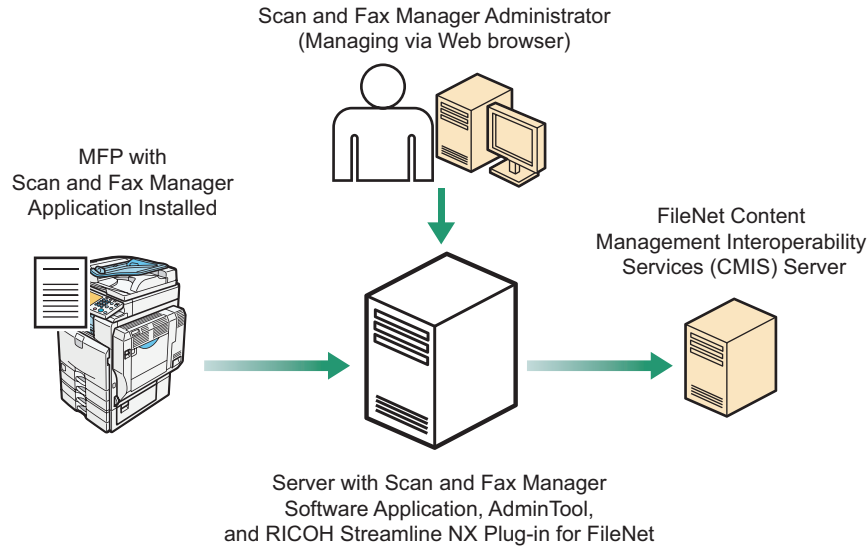


RICOH Streamline NX Plug-in for FileNet Administrator's Guide

The RICOH Streamline NX Plug-in for FileNet (FileNet 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.



DDK046

Fig. 1: RICOH Streamline NX Plug-in for FileNet Workflow

Note

- This plug-in is displayed as "Send to FileNet" on the SFM server, in AdminTool, and on the MFP control panel.
- This manual explains the configuration procedures for the FileNet 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.

Important

- TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW:
 - THE SUPPLIER SHALL NOT BE LIABLE FOR THE RESULT OF OPERATION OF THIS SOFTWARE OR THE USE OF THIS DOCUMENT.
 - THE SUPPLIER SHALL NOT BE LIABLE TO YOU FOR DAMAGES OR LOSS OF ANY DOCUMENT OR DATA PRODUCED BY USING THIS SOFTWARE.
 - THE SUPPLIER SHALL NOT BE LIABLE TO YOU FOR ANY CONSEQUENTIAL, INCIDENTAL OR INDIRECT DAMAGES (INCLUDING, BUT NOT LIMITED TO, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF BUSINESS INFORMATION, AND THE LIKE) CAUSED BY FAILURE OF THIS SOFTWARE OR LOSS OF DOCUMENTS OR DATA, NOR FOR ANY OTHER DAMAGES ARISING OUT OF THE USE OF THIS SOFTWARE, IF THE SUPPLIER HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.
- 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

IBM, the IBM logo and ibm.com are trademarks of International Business Machines Corp., registered in many jurisdictions worldwide.

Other product names used herein are for identification purposes only and might be trademarks of their respective companies. We disclaim any and all rights to those marks.

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 Plug-in for FileNet	FileNet Plug-in
Content Management Interoperability Services	CMIS
Enterprise Content Management	ECM

Adding the FileNet 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].

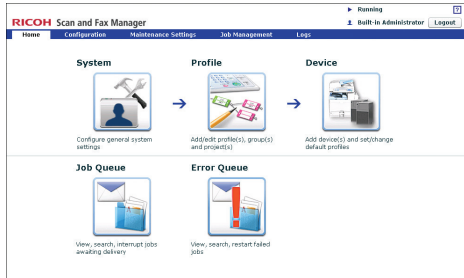


Fig. 5: AdminTool Home Page

2. Click [Create].

The Profile Properties screen appears.

If you are adding the FileNet 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 FileNet Plug-in to.

The Group/Project screen appears.



Fig. 6: Group/Project screen

Note

- If you are adding the FileNet 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 FileNet 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 FileNet" to the Delivery Flow Editor screen.

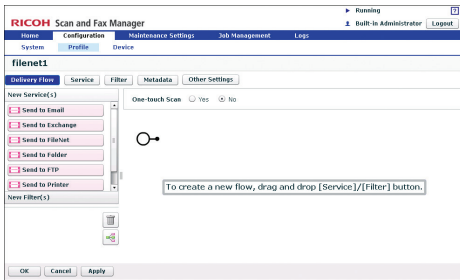




Fig. 7: Delivery Flow Editor screen

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

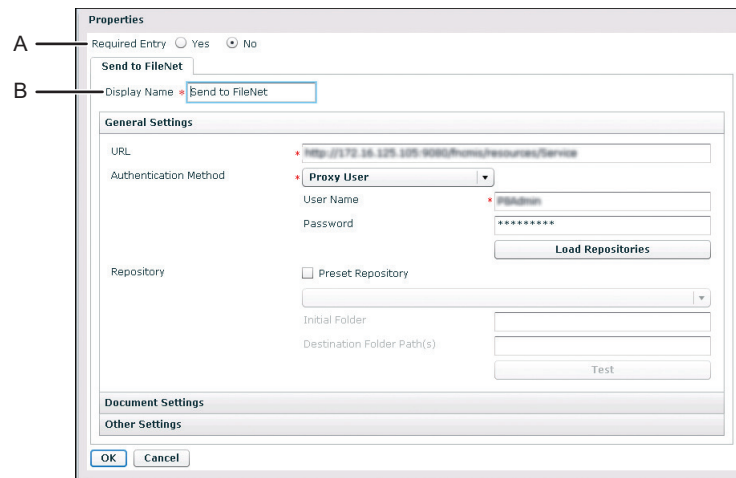
For details, see "6. Configuration", *RICOH Streamline NX Administrator's Guide*.

Configuring the FileNet Plug-in

Step 1: Configuring the Send to FileNet

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

Properties Screen Overview



DBV024

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 FileNet 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.

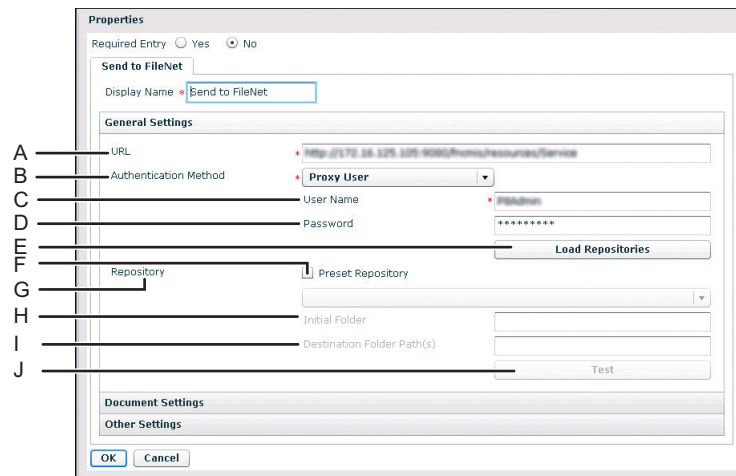
Procedure

- 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 FileNet 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 FileNet CMIS Server Path".

Step 2: Adding a FileNet CMIS Server Path

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

Properties Screen General Settings Tab Overview



DBV025

Fig. 10: Properties Screen General Settings Tab

Note

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

A. URL

Enter the entire path to the FileNet CMIS Server site.

B. Authentication Method

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

C. User Name

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

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

D. Password

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

E. Load Repositories

Retrieve repositories from FileNet 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.

F. 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.

G. Repository

Specify the preset repository.

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

H. 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

I. 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

J. 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.

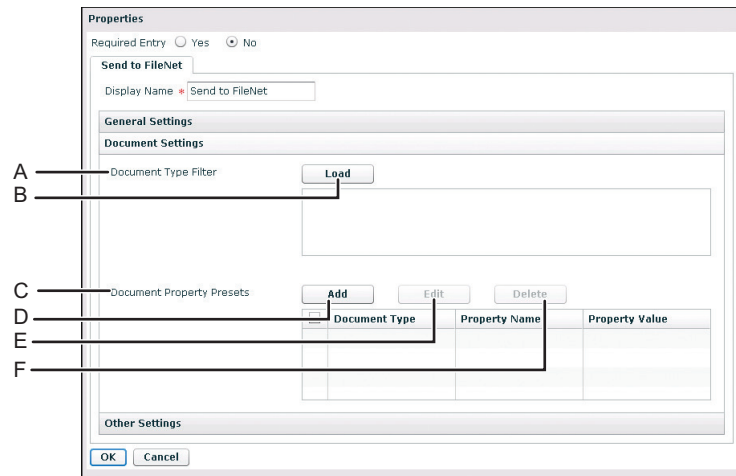
Procedure

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



DBV026

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. Load

Retrieve all document types from FileNet and update the contents of the document type filter listbox on the screen.

If the SFM fails to retrieve information, an error message will appear.

C. Document Property Presets

Display the document property presets.

D. Add

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

E. Edit

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

F. Delete

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

Add/Edit Property Settings Screen Overview

DBV027

Fig. 12: Add Property Settings Screen

DBV028

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.

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.

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.
- Click **[Edit]** as necessary, and then edit **[Property Name]** and **[Property Value]** on the Edit Property Settings screen.
- Click **[OK]**.
- 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

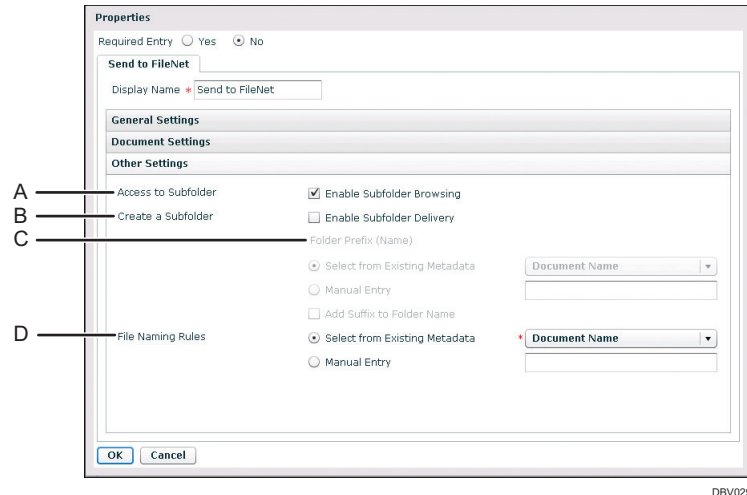


Fig. 14: Properties Screen Other Settings Tab

Note

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

A. Access to Subfolder

Specify the subfolder access.

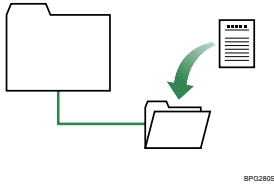
If this is disabled, users cannot browse subfolders in Destination Folder Selection Screen on the MFP operation panel.

B. Create a Subfolder

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

- When Selected

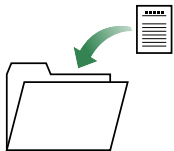
A folder is automatically created in the destination folder. Scanned documents are stored there.



BPG2808

- 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

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.