RICOH

# RICOH Streamline NX Plug-in for Microsoft® Exchange

## User's Guide

The RICOH Streamline NX Plug-in for Microsoft® Exchange (MS Exchange Plug-in) is a Scan and Fax Manager (SFM) plug-in service that distributes documents scanned using a multifunctional device (MFP) to Microsoft Exchange Server.

You can configure the appearance of the MFP display panel, and preset email recipients and other information for the Send to MS Exchange Server Service.

The Send to MS Exchange Server function allows you to scan documents to one or more email addresses as an attachment.

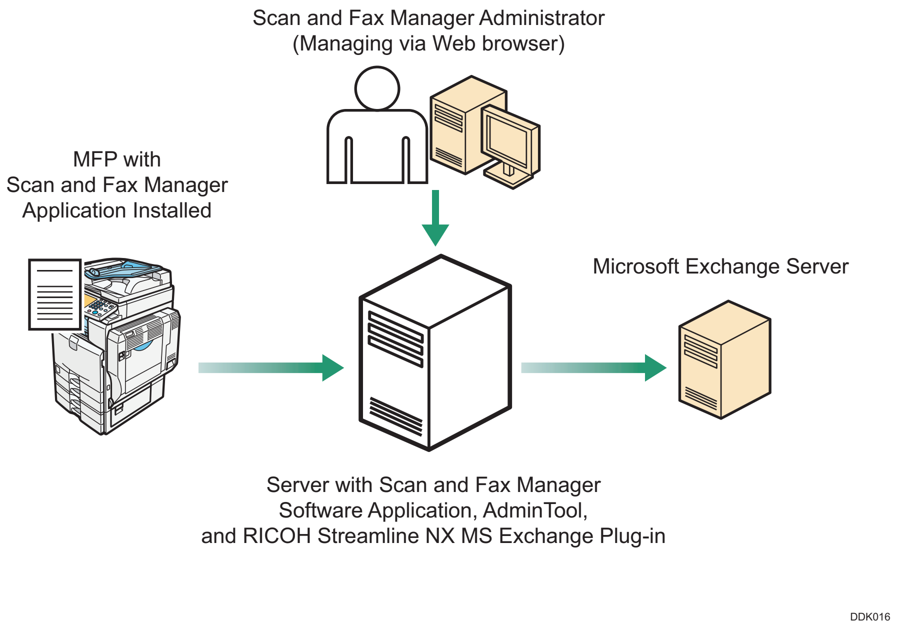


**Fig. 1:** RICOH Streamline NX MS Exchange Plug-in Workflow

**Note**

- This product is displayed as "Send to Exchange" on the MFP control panel.
- This manual explains the operation procedures for the MS Exchange 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 |
| RICOH Streamline NX Plug-in for Microsoft® Exchange | MS Exchange Plug-in |

# MS Exchange 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.

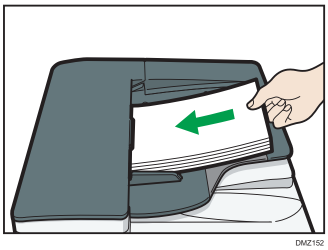

**Fig. 2:** ADF

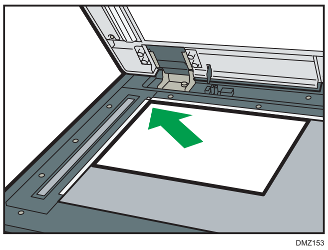

**Fig. 3:** Exposure Glass

## 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.

   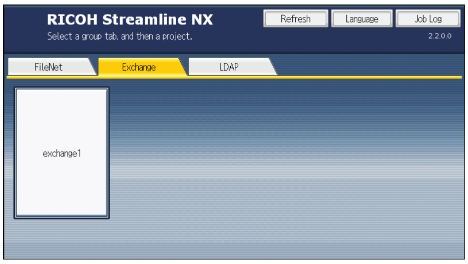
   

   **Fig. 4:** Group/Project Screen

## 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 Exchange**].

   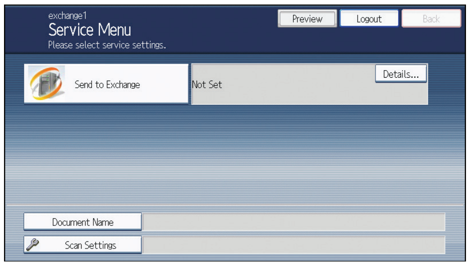
   

   **Fig. 5:** Service Menu

**Note**

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

# Step 5: Specifying a Destination (Destination Selection Screen)

## Send to Exchange Screen Overview

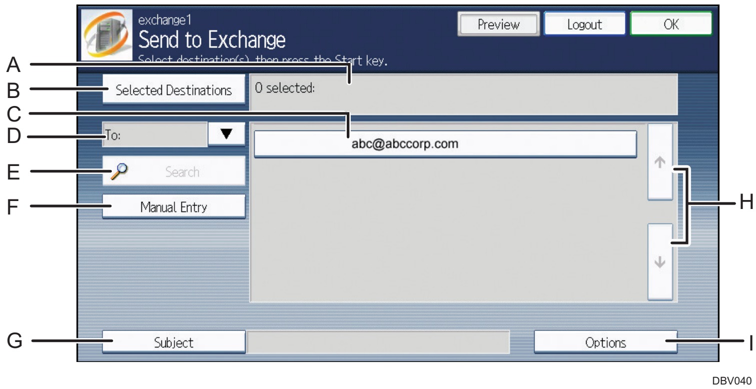


**Fig. 6:** Send to Exchange Screen

**A. Number of Selected Addresses/Email List**

Display the number of selected addresses, along with addresses that have been entered/selected.

**B. Selected Destinations**

Display a list of the email destinations currently selected. You can press destinations in this list to remove them. Press [**Reset All**] to clear all selected addresses.

**Note**

- If the "Send to Me" feature is enabled by the administrator, the email address of the login user is displayed in [**Selected Destinations**] and the data is delivered to the login user's email address.

**C. Email Address List**

Display search results.

Press [**Search**] to search for email addresses.

**Note**

- If [Search] is grayed out, the Search function has been disabled by the administrator.

**D. [To:]/[Cc:]/[Bcc:]/[ReplyTo:]**

Select the destination type for email addresses. Enter/select email addresses that will be added to the field next to [**Selected Destinations**].

**Note**

- Depending on settings made by the administrator, some or all of these options may not be displayed.

**E. Search**

Search the Email Address List for the destination email addresses.

Any names that match the specified search string can be searched.

**Note**

- If [**Search**] is not available, the function has been disabled by the administrator.

**F. Manual Entry**

Press this button to manually enter an email address with the letter keys on the display panel.

**Note**

- If a default domain is created, you need to enter only the recipient's name, for example, jsmith. The domain, for example, streamlinex.com, is automatically appended to form jsmith@streamlinex.com. For details, check with the administrator.
- If [**Manual Entry**] is not available, the function has been disabled by the administrator.

**G. Subject**

Open the letter keys screen for the entry of an email subject text. The text is displayed in the recipient's email subject field. This field may contain the pre-defined text.

You can enter an email subject of up to 128 characters.

Depending on settings made by the administrator, this field may not be displayed.

**H. Scroll key**

Display additional email addresses in the Email Address List.

**I. Options**

Display the Options screen for the Service. Depending on settings made by the administrator, this button may not be displayed.

## Procedure

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

1. Select a destination email recipient.
2. Press [**Options**] as necessary.
   The Option screen is displayed.

## Step 6: Specifying a Destination (Option Screen)

### Option Screen Overview

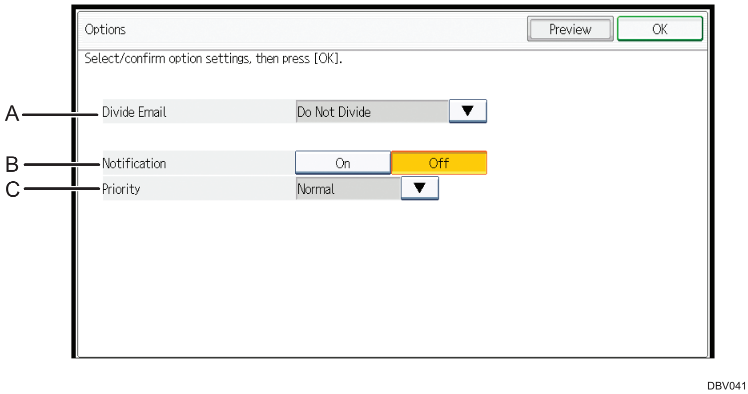


**Fig. 7:** Option Screen

**A. Divide Email**

Select a method for dividing the email.

- [**Do Not Divide**]
  Send all scanned data in one email.
- [**Page Divide**]
  Send each page of the scanned data as multiple emails.

**Note**

- If the function is not available, the function has been disabled by the administrator.

**B. Notification**

Specify whether or not to use a delivery receipt notification when To/Cc/Bcc destinations have received the email.

- [**On**]
  Send a delivery receipt notification.
- [**Off**]
  Do not send a delivery receipt notification.

**Note**

- If the function is not available, the function has been disabled by the administrator.

**C. Priority**

Select the email priority from the following:

- High
- Normal
- Low
  The default value is [**Normal**].

**Note**

- If the function is not available, the function has been disabled by the administrator.

### Procedure

1. Specify the settings of each field.
2. Press [**Preview**] to check the settings.
3. Press [**OK**].

## Step 7: 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 8: 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 9: Exit the Project

When scanning finishes, press the [**Logout**] button (see Fig. 8). The Group/Project screen (Fig. 4) will appear.

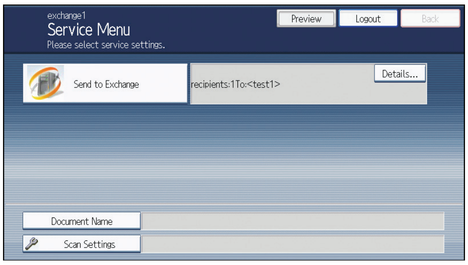


**Fig. 8:** Service Menu

## Step 10: 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.

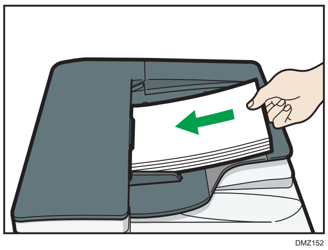


**Fig. 9:** ADF

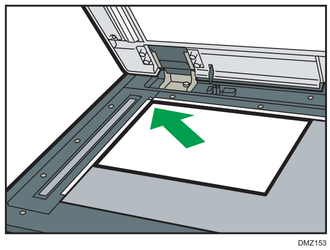


**Fig. 10:** Exposure Glass

## 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.

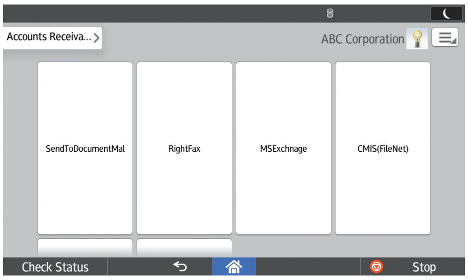


**Fig. 11:** Group/Project Screen

## 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 Exchange**].

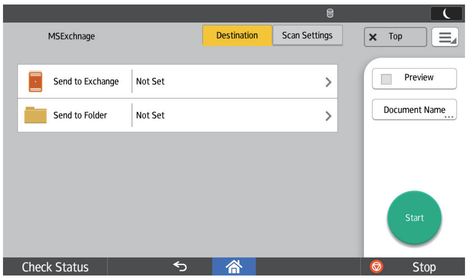


**Fig. 12:** Service Menu

**Note**

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

# Step 5: Specifying a Destination (Destination Selection Screen)

## Send to Exchange Screen Overview

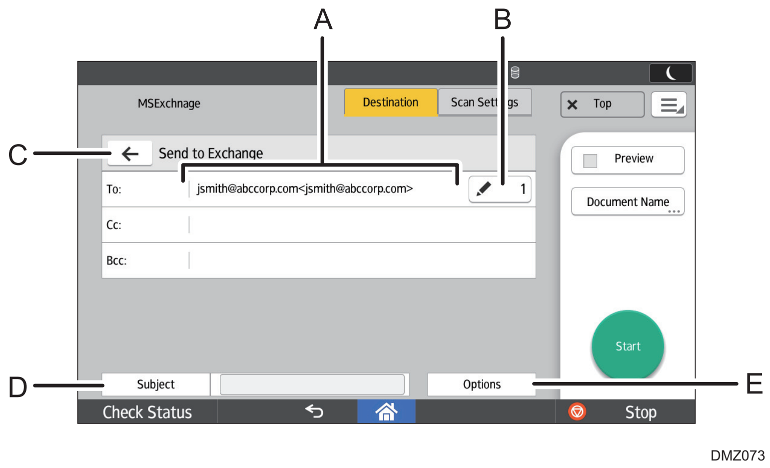


**Fig. 13:** Send to Exchange Screen

**A. Selected Destinations**

Display the email destinations currently selected. Pressing this area displays the add destination screen.

**B. Number of Selected Addresses**

Display the number of selected addresses. Pressing this button displays a list of selected email addresses.

**Note**

- If the “Send to Me” feature is enabled by the administrator, the email address of the login user is displayed here and the data is delivered to the login user’s email address.

**C.** ←

Returns to the Service Menu screen.

**D. Subject**

Open the letter keys screen for the entry of an email subject text. The text is displayed in the recipient’s email subject field. This field may contain the pre-defined text.

You can enter an email subject of up to 128 characters.

Depending on settings made by the administrator, this field may not be displayed.

**E. Options**

Display the Options screen for the Service. Depending on settings made by the administrator, this button may not be displayed.

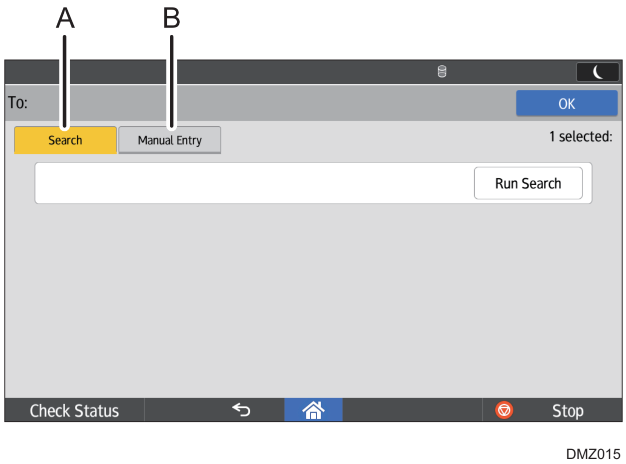


**Fig. 14:** Add Destination Screen

**A. Search**

Search the Email Address List for the destination email addresses.

Any names that match the specified search string can be searched.

Note

- If [**Search**] is not available, the function has been disabled by the administrator.

**B. Manual Entry**

Press this button to manually enter an email address with the letter keys on the display panel.

Note

- If a default domain is created, you need to enter only the recipient's name, for example, jsmith. The domain, for example, streamlinenx.com, is automatically appended to form jsmith@streamlinenx.com. For details, check with the administrator.
- If [**Manual Entry**] is not available, the function has been disabled by the administrator.

## Procedure

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

1. Select a destination email recipient.
2. Press [**Options**] as necessary.
   The Option screen is displayed.

# Step 6: Specifying a Destination (Option Screen)

## Option Screen Overview

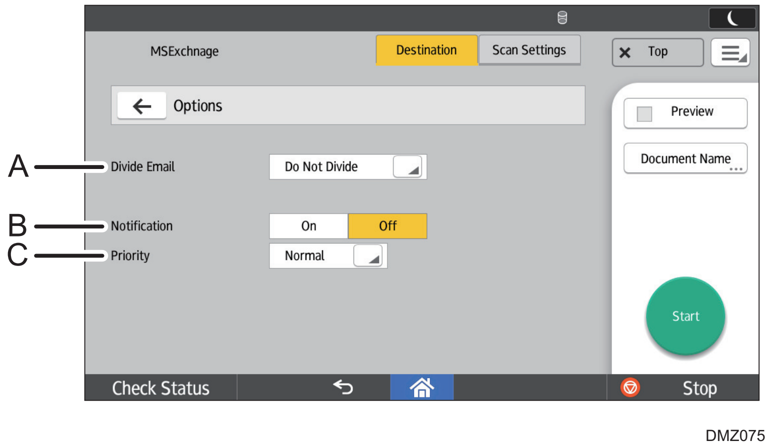


**Fig. 15:** Option Screen

**A. Divide Email**

Select a method for dividing the email.

- [**Do Not Divide**]
  Send all scanned data in one email.
- [**Page Divide**]
  Send each page of the scanned data as multiple emails.

**Note**

- If the function is not available, the function has been disabled by the administrator.

**B. Notification**

Specify whether or not to use a delivery receipt notification when To/Cc/Bcc destinations have received the email.

- [**On**]
  Send a delivery receipt notification.
- [**Off**]
  Do not send a delivery receipt notification.

**Note**

- If the function is not available, the function has been disabled by the administrator.

**C. Priority**

Select the email priority from the following:

- High
- Normal
- Low
  The default value is [**Normal**].

**Note**

- If the function is not available, the function has been disabled by the administrator.

## Procedure

1. Specify the settings of each field.

## Step 7: 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 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 8: 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 [ 1 ].
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 9: Exit the Project

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

## Step 10: 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**].