

# **RICOH Streamline NX**

## **Operating Instructions**

### **Migration Guide: Streamline NX v2 to v3**

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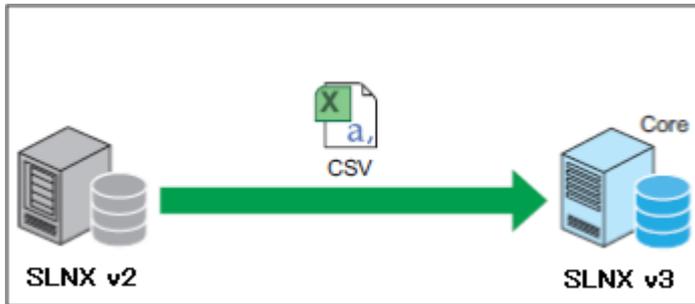
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# Read This First

Read this manual before planning and executing data migration from RICOH Streamline NX v2 to RICOH Streamline NX v3. The diagram below shows an overview of the migrating process.



## Types of Migratable Data

Only the data and settings in version 2.2.x or later of RICOH Streamline NX v2 can be migrated. See the table below for the method to migrate each data and settings to RICOH Streamline NX v3.

Migration source information	Data to be migrated(SLNX v2)	Migration method
ADM Related Data	Access Account Settings: SNMP	CSV Export, Manual Configuration
	Access Account Settings: Web Service (Device Administrator)	CSV Export, Manual Configuration
	Device Management: Device List	CSV Export/Import
	Device Management: Device Groups / Device Affiliation	CSV Export/Import
	Custom Properties: Key Name	CSV Export, Manual Configuration
	Custom Properties: Value	CSV Export/Import
	E-mail Address Book	Manual Configuration
AAM Related Data	User Settings (Non-local users)	CSV Export/Import
	User Settings (Local users)	CSV Export/Import
	Card ID Settings	CSV Export/Import

SFM Related Settings	A section of Replacement Table (Web UI: Configuration > System > System Settings)	Manual Configuration
	PDF Stamper (Web UI: Configuration > System > System Settings)	Manual Configuration
	Zone OCR Form (Tool: Zone OCR Form Setting Tool)	Manual Configuration
	A section of Services/Filters (Web UI: Configuration > System > System Settings)	Manual Configuration
	Project (Web UI: Configuration > Profile > All Projects defined in each Project)	Manual Configuration
	Profile (Web UI: Configuration > Profile > each Profile)	Manual Configuration
	Monitor Folder (Tool: Monitor Folder Setting Tool)	Manual Configuration
	Some of the setting items under Job Settings (Web UI: Configuration > System)	Manual Configuration
	Job Settings (Web UI: Configuration > System)	Manual Configuration
	Some of the setting items under Maintenance Settings (Web UI: Maintenance Settings > System Control)	Manual Configuration
	Some of the setting items under Maintenance Settings (Web UI: Maintenance Settings > System Control)	Manual Configuration
	Kerberos Option (Web UI: Configuration > System)	Manual Configuration

# Initial Server Installation and Configuration

- Perform the initial installation of RICOH Streamline NX v3.
- Set up a separate server environment from RICOH Streamline NX v2 to install Streamline NX v3.
- For details about the initial installation procedure of RICOH Streamline NX v3, see Installation Guide.
- For details about the default settings of RICOH Streamline NX v3, see "1. System Workflow", Administrator's Guide.

# Migration Procedure for Device Information

## Description

Perform the migration of the device information in the following order:

1. Access Account Settings: SNMP
2. Access Account Settings: Web Service (Device Administrator)
3. Device Management: Device List
4. Device Management: Device Groups / Device Affiliation
5. Custom Properties: Key Name
6. Custom Properties: Value
7. E-mail Address Book



Only the data listed above in SLNX v2 (Administration Manager) can be migrated.



Before performing the following procedure, unregister the devices to be migrated from SLNX v3.

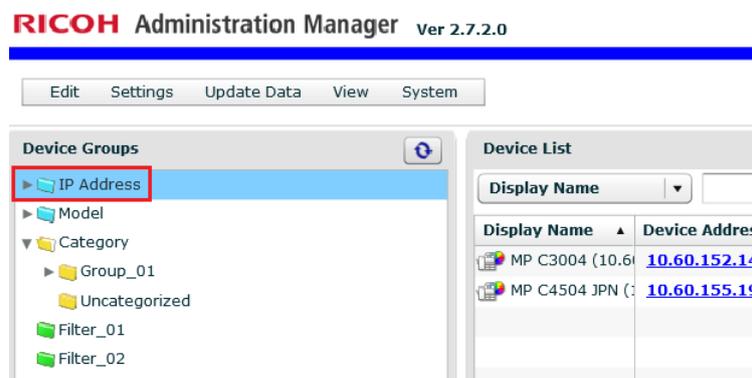
## 1. Access Account Settings: SNMP

Use the following procedure to migrate SNMP accounts:

Step 1 Export the device list from SLNX v2

Export the list of devices registered in Management Console of SLNX v2 (Administration Manager) and obtain the exported CSV file. To export the device list, select the [IP Address] group (root) on the "Device Group" pane of the device list screen.

### Sample



↓ Note

For details about the procedure, see the SLNX v2 (Administration Manager) manual.

### Step 2 Extract the SNMP accounts registered in SLNX v2

Extract the SNMPv1v2 accounts, or SNMPv3 accounts from the CSV file obtained in Step 1.

See the table below for the related columns in the CSV file.

SNMP Version	Column Header Label	Description
SNMP v1v2	<SnmPV1V2ReadCommunityName>	Read Community
SNMP v1v2	<SnmPV1V2WriteCommunityName>	Write Community
SNMP v3	<SnmPV3UserName>	User Name
SNMP v3	<SnmPV3Password>	Password (* In plain text.
SNMP v3	<SnmPV3AuthAlgorithm>	Authentication Algorithm (* Fixed to SHA1 or MD5.
SNMP v3	<SnmPV3EncryptionPassword>	Context Name
SNMP v3	<SnmPV3ContextName>	Encrypted Password (* In plain text.
SNMP v3	<SnmPV3EncryptionAlgorithm>	Encryption Algorithm (* Fixed to DES or AES128.

↓ Note

- Only the account information of either SNMPv1v2 or SNMPv3 is output on each line in the CSV file.
- For details about the format of the exported CSV file, see the manual of SLNX v2 (Administration Manager).

### Step 3 Register SNMP accounts in SLNX v3

Log in to SLNX v3 Management Console and register the accounts that have been extracted in Step 2.

↓ Note

- It is recommended not to register any redundant SNMP accounts that have been exported in Step 2 to SLNX v3. It will not cause any problem if you register redundant accounts in SLNX v3, but doing so may degrade the maintainability of the migrated data.
- For the registration procedure of SNMP accounts, see the following sections in the SLNX v3 online help:
  - Top Page > Administrator's Guide > Managing Devices > Adding a Device to the Device

List > Configuring an Access Account

- Top Page > Administrator's Guide > List of Setting Items > Discovery & Polling > Access Profiles > SNMP

## 2. Access Account Settings: Web Service (Device Administrator)

Use the following procedure to migrate the device manager account:

Step 1 Export the device list from SLNX v2

Export the list of devices registered in Management Console of SLNX v2 (Administration Manager) and obtain the exported CSV file. To export the device list, select the [IP Address] group (root) on the "Device Group" pane of the device list screen.

Sample



**Important**

You can skip this step if you have already obtained the CSV file in "Access Account Settings: SNMP".

**Note**

For details about the procedure, see the SLNX v2 (Administration Manager) manual.

Step 2 Extract the device administrator account from SLNX v2

Extract the device administrator account from the CSV file obtained in Step 1. See the table below for the related columns in the CSV file.

Column Header Label	Description
<WebServiceUserName>	User Name
<WebServicePassword>	Password (* In plain text.

↓ Note

- For details about the format of the exported CSV file, see the SLNX Administration Manager v2 manual.

Step 3 Register the device administrator account in SLNX v3

Log in to SLNX v3 Management Console and register the account that have been extracted in Step 2.

↓ Note

- It is recommended not to register any redundant accounts in the file exported in Step 2 to SLNX v3. It will not cause any problem if you register redundant accounts in SLNX v3, but doing so may degrade the maintainability of the migrated data.
- For the registration procedure of device administrator accounts, see the following sections in the SLNX v3 online help:
  - Top Page > Administrator's Guide > Managing Devices > Adding a Device to the Device List > Configuring an Access Account
  - Top Page > Administrator's Guide > List of Setting Items > Discovery & Polling > Access Profiles > Device Administrator

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### 3. Device Management: Device List

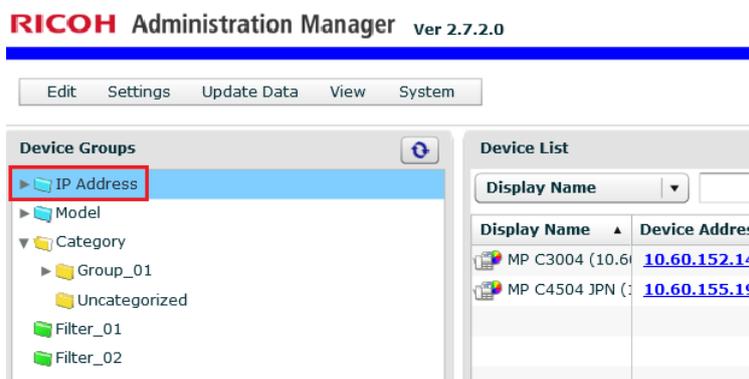
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Use the following procedure to migrate the registered devices:

Step 1 Export the device list from SLNX v2

Export the list of devices registered in Management Console of SLNX v2 (Administration Manager) and obtain the exported CSV file. To export the device list, select the [IP Address] group (root) on the "Device Group" pane of the device list screen.

Sample





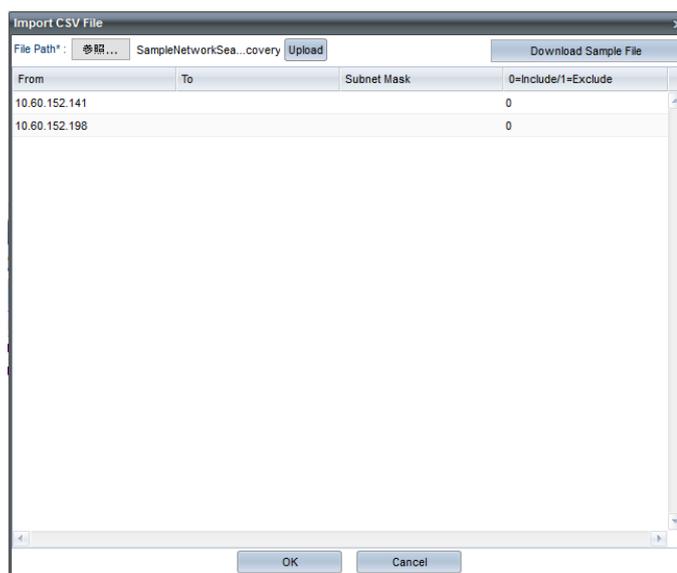
## Discovery Range CSV File > Network Search

### Step 4 Generate the device search setting in SLNX v3

Generate a new Discovery setting in "Discovery & Polling > Discovery > Network Search", and specify the following items while generating the setting:

- Access Accounts > Device Administrator Access  
Specify all the administrator accounts created in Access Account Settings: Web Service (Device Administrator) as "Assigned Account". If necessary, specify any account.
- Access Accounts > SNMP Access  
Specify all the administrator accounts created in Access Account Settings: SNMP as "Assigned Account". If necessary, specify any account.
- Discovery Range (Network Search)  
Import the CSV file created in Step 3 Generate the CSV file to specify the device search scope in SLNX v3.

### Sample



Import the CSV file created in Step 3 Generate the CSV file to specify the device search scope in SLNX v3.

#### Note

- For details about how to import device information, see the following sections in the SLNX v3 online help:
  - Top Page > Administrator's Guide > Managing Devices > Adding a Device to the Device List > Searching for Devices

- Top Page > Administrator's Guide > List of Setting Items > Discovery & Polling > Discovery > Network Search

#### Step 5 Perform device search in SLNX v3

Execute the Discovery settings created in Step 4 Generate the device search setting in SLNX v3.

#### Note

- For details about how to import the device information, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > Managing Devices > Adding a Device to the Device List > Searching for Devices

#### Important

- Perform the following procedure after the Discovery performed in the aforementioned procedure is completed.

---

## 4. Device Management: Device Groups / Device Affiliation

---

Use the following procedure to create device groups and perform the migration of device affiliation information.

#### Important

The procedures for generating a single group structure (group-tree) and allocating devices to the generated group are described in this section.

If you want to perform the migration of devices into more than one group structure (group-tree), you need to do the same following steps within this section for each group structures (group-trees) of SLNX v2.

#### Step 1 Export the device list from SLNX v2

Export the list of devices registered in Management Console of SLNX v2 (Administration Manager) and obtain the exported CSV file. To export the device list, select the root group of each group that has been created manually on the "Device Group" pane of the device list screen.

#### Sample





**★ Important**

- If you are planning to migrate any of the following data, skip the steps after Step 4 Generate the device search setting in SLNX v3, and proceed to the migration procedure of each data:
  - Custom Properties: Key Name
  - Custom Properties: Value

**Step 4 Import device information to SLNX v3**

Import the CSV file created in Step 3 Generate the CSV file to specify the device search scope in SLNX v3.

**↓ Note**

- For details about how to import the device information, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > Managing Devices > Adding a Device to the Device List > Adding a Device to the Device List > Importing Devices from a CSV File

**★ Important**

- There is no simple method for checking the device not imported while the device information in SLNX v3 is imported. To check for any device not imported, export the list of devices registered in SLNX v3 after importing the device list from SLNX v2, and then manually compare the exported CSV file with the imported CSV file.

---

## 5. Custom Properties: Key Name

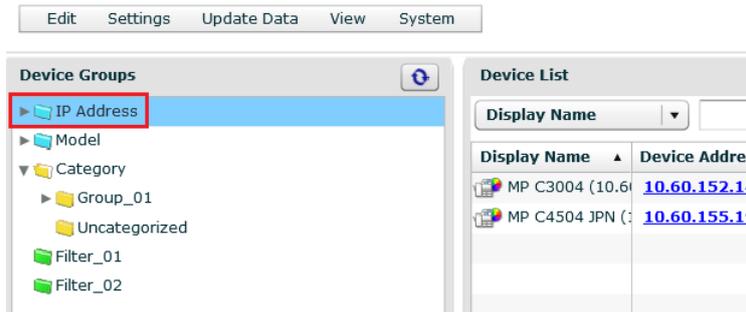
---

Use the following procedure to migrate the key names of custom properties:

**Step 1 Export the device list from SLNX v2**

Export the list of devices registered in Management Console of SLNX v2 (Administration Manager) and obtain the exported CSV file. To export the device list, select the [IP Address] group (root) on the "Device Group" pane of the device list screen.

Sample



**Important**

- You can skip this step if you have already obtained the CSV file when performing any of the followings:
  - Access Account Settings: SNMP
  - Access Account Settings: Web Service (Device Administrator)
  - Device Management: Device List

**Note**

For details about the procedure, see the SLNX v2 (Administration Manager) manual.

**Step 2 Extract the key names from SLNX v2**

Refer to the key name list in the custom properties of SLNX v2 (Administration Manager) and check for the registered key names.

Next, extract all the columns in the custom properties of each device information that has been output in Step 1 Export the device list from SLNX v2. The same names as the key names of the custom properties in SLNX v2 (Administration Manager) that you have confirmed in the previous step are used in the column header of the custom properties. See the table below for the related columns in the CSV file.

Column Header Label	Description
<Custom Properties Key Name>	The value in the custom properties registered in SLNX v2 (Administration Manager). The column header name will be the same as the key name in the custom properties.

**Note**

For details about the procedure, see the SLNX v2 (Administration Manager) manual.



## Sample



### ★ Important

- You can skip this step if you have already obtained the CSV file when performing any of the followings:
  - Access Account Settings: SNMP
  - Access Account Settings: Web Service (Device Administrator)
  - Device Management: Device List
  - Custom Properties: Key Name

### ↓ Note

For details about the procedure, see the SLNX v2 (Administration Manager) manual.

#### Step 2 Extract the key value in SLNX v2

Refer to the key name list in the custom properties of SLNX v2 (Administration Manager) and check for the registered key names.

Next, extract all the columns in the custom properties of each device information that has been output in Step 1 Export the device list from SLNX v2. The same names as the key names of the custom properties in SLNX v2 (Administration Manager) that you have confirmed in the previous are used in the column header of the custom properties. See the table below for the related columns in the CSV file.

Column Header Label	Description
<Custom Properties Key Name>	The value in the custom properties registered in SLNX v2 (Administration Manager). The column header name will be the same as the key name in the custom properties.



## Device Information CSV File

### Step 4 Import device information to SLNX v3

Import the CSV file created in Step 3 Generate the CSV file to specify the device search scope in SLNX v3.

#### Note

- For details about how to import the device information, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > Managing Devices > Adding a Device to the Device List > Adding a Device to the Device List > Importing Devices from a CSV File

#### Important

- There is no simple method for checking the device not imported while the device information in SLNX v3 is imported. To check for any device not imported, export the list of devices registered in SLNX v3 after importing the device list from SLNX v2, and then manually compare the exported CSV file with the imported CSV file.

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## 7. E-mail Address Book

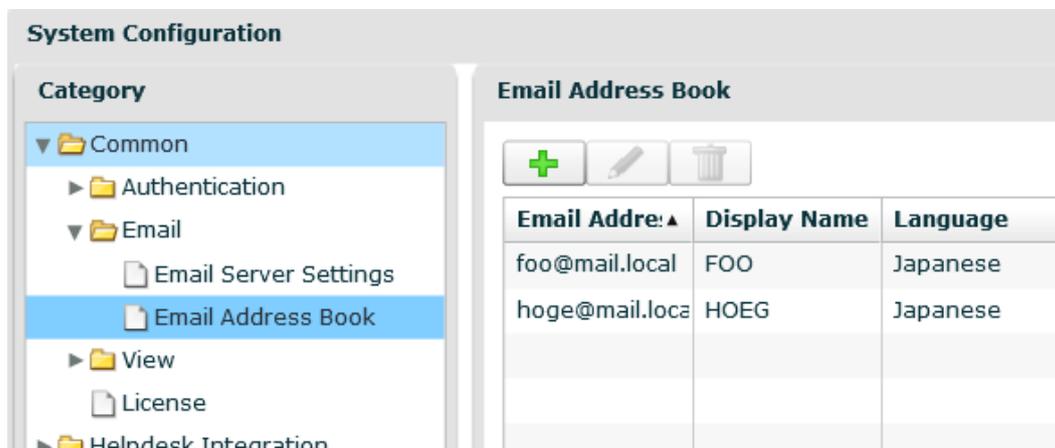
---

Use the following procedure to migrate e-mail accounts:

### Step 1 Obtain the registered e-mail accounts (SLNX v2)

Refer to the system settings of SLNX v2 (Administration Manager) and obtain the registered e-mail accounts.

#### Sample



The screenshot shows the 'System Configuration' window. On the left, a tree view under 'Category' shows 'Email Address Book' selected. On the right, the 'Email Address Book' section contains a table with two entries. Above the table are three icons: a green plus sign, a pencil, and a trash can.

Email Address	Display Name	Language
foo@mail.local	FOO	Japanese
hoge@mail.local	HOEG	Japanese

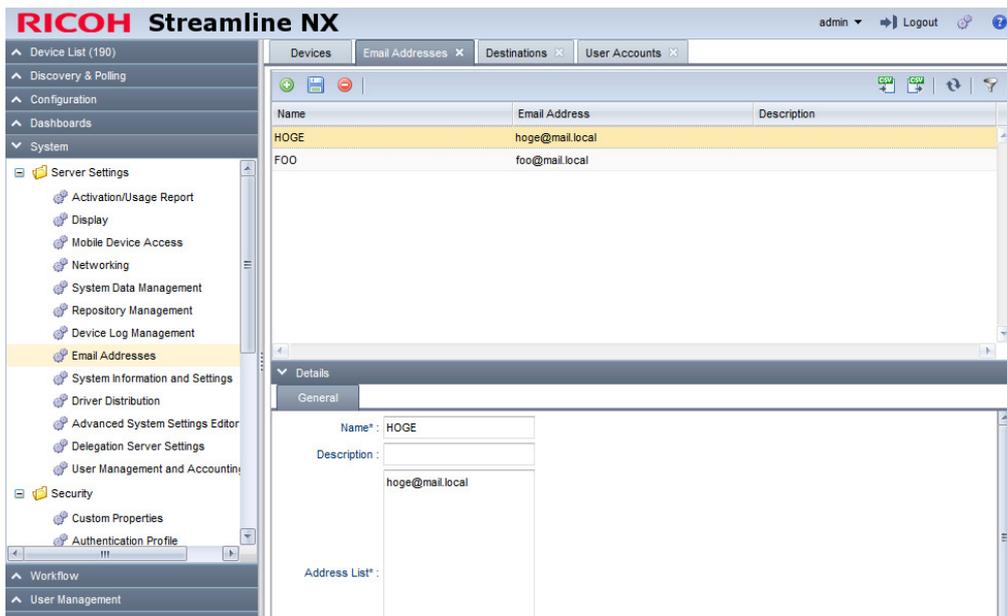
#### Note

For details about the procedure, see the SLNX v2 (Administration Manager) manual.

### Step 2 Register e-mail addresses (SLNX v3)

Register the e-mail accounts obtained in Step 1 Obtain the registered e-mail accounts (SLNX v2) to the e-mail address list in SLNX v3.

#### Sample



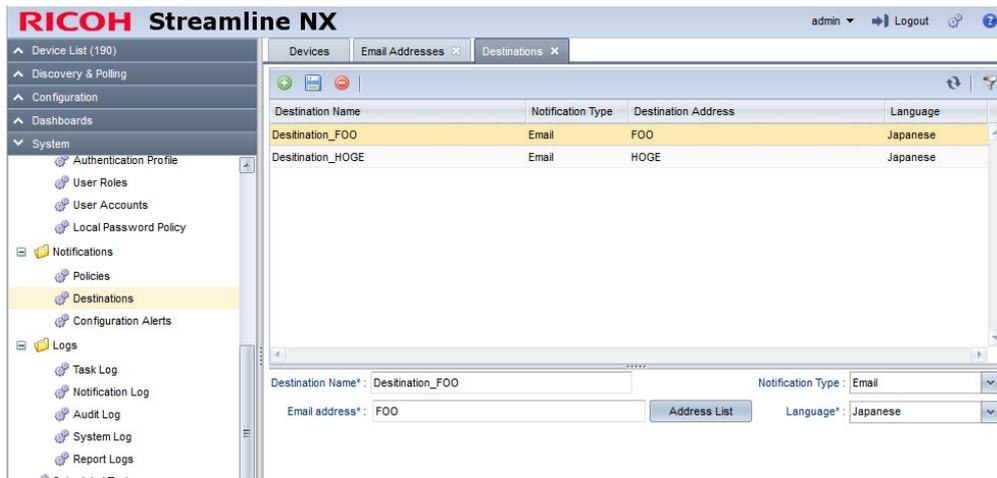
#### Note

- For details about how to register e-mail accounts, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > System > Server Settings > E-mail Address

### Step 3 Create notification destination in SLNX v3

Create a notification destination (Notification Type: E-mail) in SLNX v3 using the e-mail account registered in Step 2 Register e-mail addresses (SLNX v3).

#### Sample



**Note**

- For details about how to register e-mail accounts, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > Managing Devices > Notifying the Device Status by E-mail > Creating a Destination

# Migration Procedure for User Information

The procedure for performing the migration of data from SLNX v2 to SLNX v3 is described below.

Migration methods vary depending on the user type of the user information in SLNX v2.

See the table below for the migration method of each user type.

User Type	User Information	Card Information
LDAP User (external user)	The data can be migrated using any of the followings: 1) Task Synchronization 2) Exporting and Importing User Data	The data can be migrated while 1) Task Synchronization is performed if the card ID exists on LDAP and you intend to import the data by synchronizing tasks. Perform the following step if registration was performed using the method except the one mentioned above. 3) Importing Card
Local User (internal user)	The data can be migrated only by the following: 2) Exporting and Importing User Data	The data can be migrated only by the following: 3) Importing Card

Use the following procedure to perform the migration of data in the order of User Information and Card Information:

## 1) Task Synchronization

Select the following menu item on the Configuration menu tab of ADM in SLNX v2.

Server Preference > Authentication Management

Select the following menu item in SLNX v3.

System > Security > Authentication Profile

Refer to all settings of Authentication Management used in SLNX v2 and create Authentication Profile in the same settings.

Also, specify Search Base in <User Data Synchronization> under Authentication Management as Base DN in Authentication Profile. Be careful not to specify Search base in <Server Settings>.

Correct

### <User Data Synchronization>

Task Synchronization  On  Off

Search base

Search Query \* (&(objectClass=user)(userPrincip

Incorrect

### <Server Settings>

Server Name \*

Search base

After completing the procedure, select the following menu item in SLNX V3:

User Management > Synchronization Tasks

Create a separate task for each Authentication Profile that has been created and select Update Users and Add New Users in User Synchronization while creating the task. After completing the procedure, execute the created task.

▼ Synchronization Task Properties

General Authentication Profile Schedule Notifications

Task Name\* :

Description :

User Synchronization\* : Update Users Only ▼

- Update Users Only
- Update Users and Add New Users
- Add New Users Only

## 2) Exporting and Importing User Data

Export the user information from SLNX v2 to a CSV formatted file.

To export the information, access the administrator's page on AAM Server, and then select the following menu:

Maintenance > [Import/Export] User Information

Edit the information in the CSV file exported from SLNX v2 as described below and create the user data CSV file. Also, access the following and perform CSV import from the Management



5	Display Name
6	E-mail Address
7	Fax Destination
8	Card ID
9	Group Name
10	Effective Flag
11	Copier (Full Color)
12	Copier (Auto Color Selection)
13	Copier (Two-color)
14	Copier (Single Color)
15	Copier (Black & White)
16	Printer (Color)
17	Printer (Black & White)
18	Other Functions Document Server
19	Other Functions Fax Destination
20	Other Functions Scanner
21	Other Functions SDK1
22	Other Functions SDK2
23	Other Functions SDK3
24	User Alias Name
25	PIN Code
26	Local Login Password
27	Extension 1
28	Extension 2
29	Extension 3
30	Extension 4
31	Extension 5
32	Extension 6
33	Extension 7
34	Extension 8
35	Extension 9
36	Extension 10
37	Classification Code
38	Home Directory
39	Cost Center
40	Department

5	User Home Folder	38
6	Department	40
7	Cost Center	39
8	Permissions	None
9	LDAP Synch	None
10	Enforce Color Page Limit	None
11	Enforce Account Limit	None
12	Default Color Page Limit	None
13	Color Page Balance	None
14	Default Account Limit	None
15	Account Balance	None

41	User Role
42	Secondary PIN

### 3) Importing Card Data

Create a card data CSV file using the information in the 8th column of the CSV file exported from SLNX v2. Also, access the following and perform CSV import from the Management Console in SLNX v3 in advance and download the sample file.

User Management > Cards

1. Delete line from the 2nd line to 7th line, and 9th line and later.
2. Replace the remaining lines with each other.
3. Copy the 1st line, and then insert the copied data before the 2nd line.
4. Copy the contents of the CSV file below the 5th line in the sample file.
5. Insert "Yes" in the 4th line.

If the user possesses more than one card, the CSV file exported from SLNX v2 contains multiple card data merged separated by the delimiter character, and you must divide the data as described in the following procedure:

1. Separate each card ID using a semicolon (;) as the delimiter.
2. Specify the 1st item in the separated card ID on the 1st and 2nd lines in the sample file.
3. Enter "User Name" on the 1st line in the user data CSV file on the 3rd line of the sample file.
4. Repeat Steps 2 and 3 shown above as many times as the number of divided card IDs.

After completing the procedure, import the created card data CSV file into SLNX v3.

If the number of items in the data imported from SLNX v2 is too large, divide the file into multiple files containing about 2000 items each.

#### Example

"9999;5555" that has been extracted from the 8th line of the CSV file containing the user data, and saved to a file.

↓

```
"9999","9999"," user001",Yes,,
"5555","5555"," user001",Yes,,
```

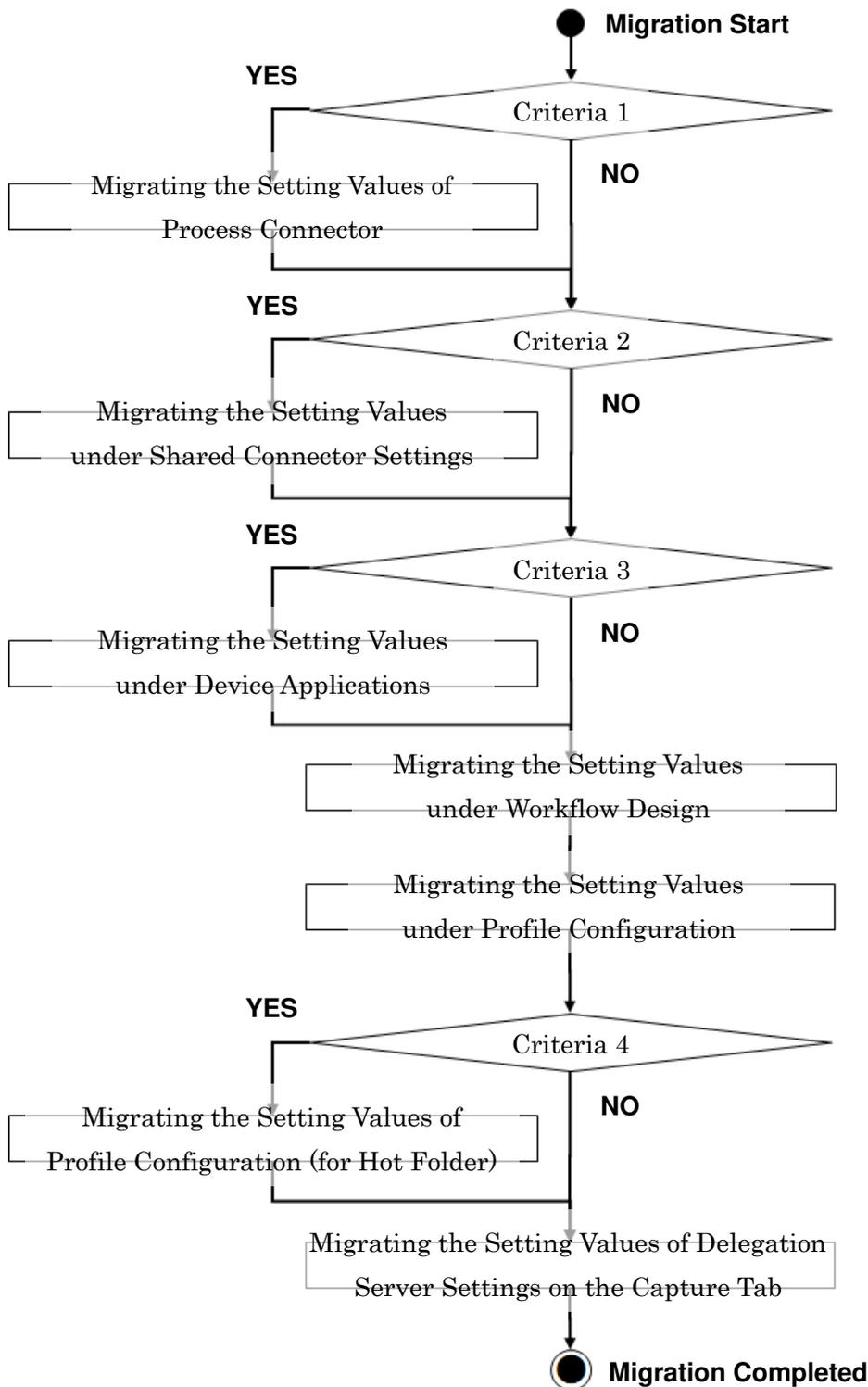
**Table 2 (for reference) Items in Card Data CSV file of SLNX v3**

No. (Column)	Name
1	Card Name
2	Card Number
3	User Name
4	Enabled
5	Temporary Card
6	Effective Date
7	Expiry Date

# Migration Procedure for Profile Information

## Description

The diagram below shows an overview of the procedure to migrate the settings from SLNX v2 to SLNX v3. Perform the migration procedure as shown in the following flow chart:



#### Criteria 1

Any of the following settings of SLNX v2 Scan and Fax Manager (hereafter "SFM") must be migrated:

- Any setting of Replacement Table (Web UI: Configuration > System > System Settings)
- Any setting of Zone OCR Form (Tool: Zone OCR Form Setting Tool)
- Any setting of PDF Stamper (Web UI : Configuration > System > System Settings)

#### ↓ Note

- The items correspond to the settings under [Workflow > General] in SLNX v3.

#### Criteria 2

The following settings in SLNX v2 SFM must be migrated:

- Any setting of Services/Filters (Web UI : Configuration > System > System Settings)

#### ↓ Note

- The items correspond to the settings under [Workflow > Shred Connector Settings] in SLNX v3.

#### Criteria 3

The following settings in SLNX v2 SFM must be migrated:

- Any Project in which any value except Project is specified in the Type settings of the Project Properties (Web UI : Configuration > Profile > corresponding Profile setting)

#### ↓ Note

- A project in which any value except Project is specified in the Type settings of the project properties is intended to be transitioned to a function of the device or SLNX Secure Print.
- The items correspond to the settings under [Workflow > Shred Connector Settings] in SLNX v3.

#### Criteria 4

The following settings in SLNX v2 SFM must be migrated:

- All settings of Monitor Folder (Tool: Monitor Folder Setting Tool)

#### ★ Important

- Before performing this procedure, migrate the settings related to the Project in which One-touch Scan is enabled and is referred from each Monitor Folder setting (Web UI: Configuration > Profile > corresponding Project > corresponding Project Settings) into SLNX v3.

↓ Note

- The item corresponds to the entry in Input Source: Hot Folder of the setting [Workflow > Workflow Profile > Profile Configuration] in SLNX v3.

## 1. Migrating the Setting Values of Process Connector

This section describes how to migrate the following settings under the [General] section of the below process connectors in SLNX v3:

### 1.1 Replacement Table

### 1.2 Zone OCR Form

### 1.3 PDF Stamper

↓ Note

- Metadata Database Connection is not available in SLNX v3 and SLNX v2 SFM and cannot be migrated using this procedure.

### 1.1 Replacement Table

For details about how to migrate the Replacement Table settings, see the "Setting – Replacement Table" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".

★ Important

The Flow Redirector filter is no longer supported in SLNX v3, and the related settings in SLNX v2 SFM (the filter criteria of Replacement Table, and any Project with the corresponding filter applied) cannot be migrated.

↓ Note

- Some setting items of Replacement Table in SLNX v3 (#8 and #11 in the table below) correspond to certain setting items of the Metadata Converter filter in SLNX v2 SFM. If a Project that uses the Metadata Converter filter does not exist in SLNX v2 SFM, specify properly the related setting values of #8 and #11 indicated in the table accordingly in SLNX v3. Also, if more than one Metadata Converter filter setting that refers to an entry on certain Replacement Table exists in SLNX v2 SFM, create multiple Replacement Table settings that have the same values in #1 through #5 but differ in the values of #8 and #11 in the table.

#	Setting item (SLNX v2 SFM / SLNX v3)	SLNX v2 SFM (*1)	SLNX v3 (*1)
1	Replacement Table Name / same as left (*2)	RT	RT
2	Auto Entry / same as left	RT	RT

3	Default Output / same as left	RT	RT
4	Using Regex / Regex	RT	RT
5	Export File Character Encoding / same as left	RT	RT
6	Display the button on the Service Menu. / same as left	MC	MC
7	Display Name / same as left	MC	MC
8	Comparison Target Metadata / Input Metadata	MC	RT
9	Replacement Table Name / same as left (*3)	MC	MC
10	Select Action when Table Data does not Match / same as left	MC	MC
11	Metadata for Comparison Result / Output Metadata	MC	RT

(\*1) Legend:

RT: Replacement Table

MC: Metadata Converter

(\*2) Enter any text string into the text box in both SLNX v2 SFM and SLNX v3

(\*3) Select a value from the dropdown menu in both SLNX v2 SFM and SLNX v3

- For details about Replacement Table, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > General > Replacement Table

### 1.2 Zone OCR Form

For details about how to migrate the Zone OCR Form settings, see the "Setting – Zone OCR" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".

#### ★ Important

- If the image file that was used to configure the Zone OCR Form settings in SLNX v2 SFM is no longer available, prepare an appropriate image file.

#### ↓ Note

- For details about Zone OCR Form, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > General > Zone OCR Form

### 1.3 PDF Stamper

For details about how to migrate the Zone OCR Form settings, see the "Setting – PDF Stamper" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".

#### ↓ Note

- For details about PDF Stamper, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > General > PDF

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## 2. Migrating the Setting Values under Shared Connector Settings

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If you need to migrate any settings under Services/Filters in SLNX v2 SFM (Web UI: Configuration > System > System Settings), see the "Plug-in" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".

 Note

- For details about Shared Connector Settings, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > Shared Connector Settings

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## 3. Migrating the Setting Values under Device Applications

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If projects that have been transitioned to a device function (Copier, Scanner, Printer, Fax, or Document Server) or SLNX Secure Print exist in SLNX v2 SFM, create Device Application settings that correspond to the function to migrate in SLNX v3.

 Note

- For details about Device Applications, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > Device Applications

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## 4. Migrating the Setting Values under Workflow Design

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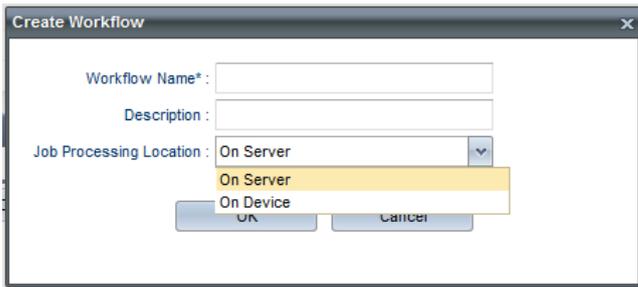
The section describes how to migrate the settings of Workflow settings ([Workflow > Workflow Design]) in SLNX v3 that correspond to a Project in SLNX v2 SFM. Perform the following operations on the screen of SLNX v3 while referring to the screen of SLNX v2 SFM that you are migrating from. Also, the settings that are required in this operation must have been created in advance in Migrating the Setting Values of Process Connector and Migrating the Setting Values under Shared Connector Settings.

 Note

- For details about Workflow Design, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > Workflow Design

### Steps

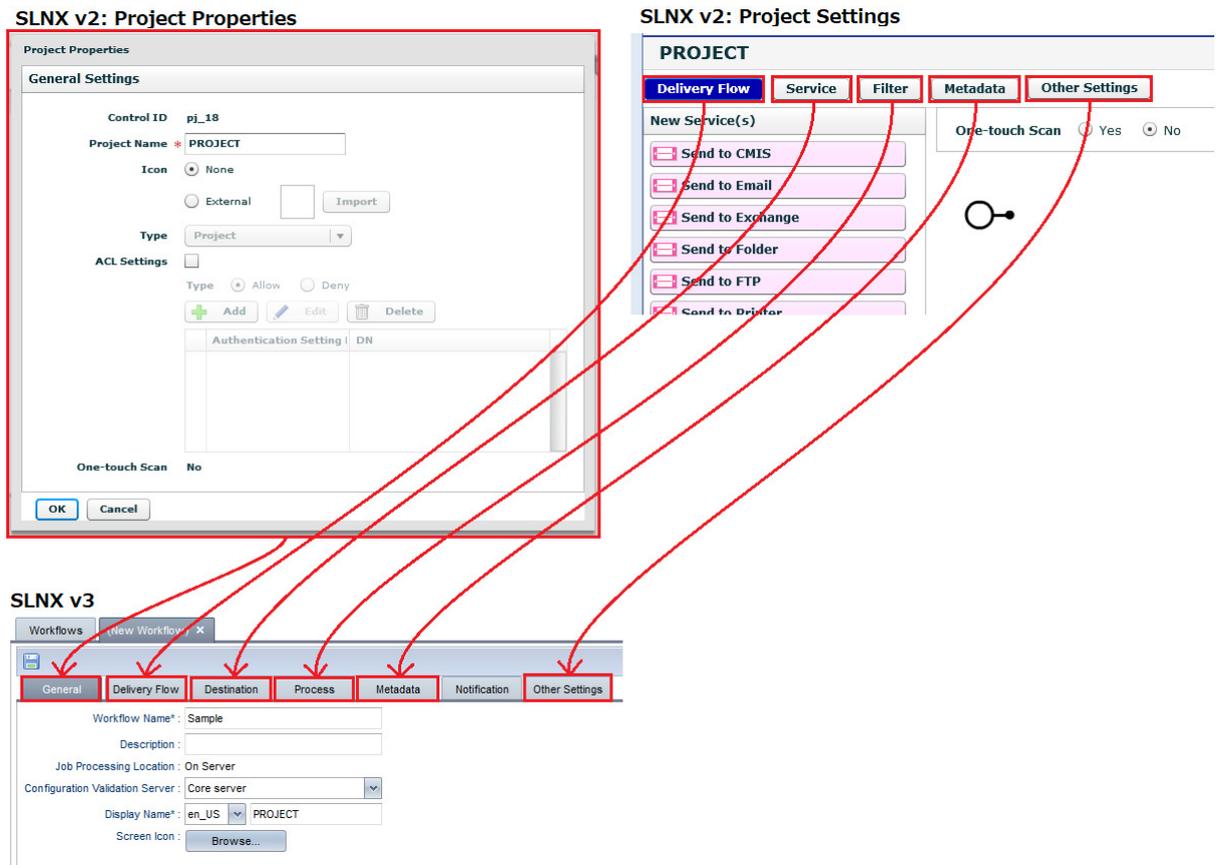
- 1 Create a new Workflow.



- Workflow Name: Enter an appropriate string that is not used in SLNX v2 SFM.
- Description: Enter an appropriate string that is not used in SLNX v2 SFM.
- Job Processing Location: The item to be selected in this setting varies as follows depending on the property "Type" of the Project in SLNX v2 SFM:
  - Under normal operation: Select "On Server".
  - Under operation for Siemens:
    - Project (Server) → Select On Server
    - Project (Serverless) → Select On Device

2 Perform the migration of the setting values in Workflow.

Sample



**★ Important**

- In the SLNX v2 Management Console, the language at the log-in will be applied as the

language setting for the setting items that support multilingual display. To view the setting value for a language on the SLNX v2 SFM Management Console, log out first, and then log in with an intended language to the Management Console again. On the other hand, in the SLNX v3 Management Console, you can change/confirm each setting value while switching the language without the log-in/log-out for the SLNX v3 Management Console. The table below shows the setting items you can change the language for while changing/confirming each setting.

Setting item (SLNX v2 SFM)	Setting item (SLNX v3 SFM)
"Project Name" of Project Properties	"Display Name" at "General" view of Workflow
"Display Name" of Service(s)/Filter(s)	"Display Name" of each Connectors
"Body" at [Send to E-mail Option Settings] view of Send to E-mail	same as left
"Subject" at [Service] view of Send to E-mail	"Subject" at [Destination] view of Send to E-mail
"Body" at [E-mail Option Settings] view of Send to Exchange	same as left
"Subject" at [Service] view of Send to Exchange	"Subject" at [Destination] view of Send to Exchange
"Display Name" at [General Settings] view of each parts on Metadata tab	same as left
"Default Document Name" at [Other Settings] view of Project	same as left

 Note

- For details about each tab, see the SLNX v3 online help
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > Workflow Design
- "General" tab
 

Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.

Display Name in SLNX v3 corresponds to Project Name in SLNX v2 SFM.
- "Delivery Flow" tab
 

Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.

For details, see the "Plug-in" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".

 Note

\* In SLNX v3, you can select Connectors that have been created in advance in

Migrating the Setting Values under Shared Connector Settings as a Shared Connectors.

\* For the additional information about the changes made to Connector that can be specified in Delivery Workflow from SLNX v2 SFM, see the following:

Service(s) / Filter(s) (SLNX v2 SFM)	Connector (SLNX v3)
Flow Redirector	N/A
Send to SharePoint	N/A
Send to SharePoint (Enhanced)	Send to SharePoint
PDF Converter	PDF Converter * Only in case of "On Device" workflow, and this is not same as the below one.
PDF Converter (Enhanced)	PDF Converter * Only in case of "On Server" workflow, and this is not same as the above one.

\* In the Send to the E-mail plugin that can be specified in Delivery Workflow, the setting item E-mail Attachment Format ([Service > Send to E-mail tab > Options] on the Project screen) of the corresponding plugin in SLNX v2 SFM do not exist.



Be sure to perform the migration of the One-touch scan settings.

- "Destination" tab  
Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.  
For details, see the "Plug-in" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".
- "Process" tab  
Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.  
For details, see the "Plug-in" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".
- "Metadata" tab  
Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.



- The Metadata fields  and  in SLNX v3 SFM are integrated into the Metadata field  in SLNX v3.
- "Notifications" tab  
Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.



- For details about the settings on the Notification tab, see the SLNX v3 online help.
  - Top Page > Administrator's Guide > Managing Document Delivery Functions > Configuring the Notification Function
- "Other Settings" tab  
Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.

## 5. Migrating the Setting Values under Profile Configuration

The section describes how to migrate Workflow Profile settings ([Workflow > Workflow Profile > Profile Configuration]) in SLNX v3 that correspond to a Profile in SLNX v2 SFM. Perform the following operations on the screen of SLNX v3 while referring to the screen of SLNX v2 SFM that you are migrating from. Also, the settings required for this operation must have been created in advance in Migrating the Setting Values under Device Applications and Migrating the Setting Values under Workflow Design.

### Note

- For details about Profile Configuration, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > Workflow Profile > Profile Configuration

### Steps

- 1 Create a new Workflow Profile.



- A) Profile Name: Enter an appropriate string that is not used in SLNX v2 SFM.
- B) Description: Enter an appropriate string that is not used in SLNX v2 SFM.
- C) Input Source: Select MFP that do not exist in SLNX v2 SFM.

### Important

\* The language you have selected when logging in to the Management Console is applied automatically to the setting item that support multilingual display when the values are saved in SLNX v2 SFM. To view the audio setting value for each language, log out first, and then log in to Management Console again. On the other hand, you can change the language to use in each of such settings while specifying the setting in SLNX v3. The table below shows the setting items in Profile Configuration settings that the aforementioned criteria apply to.

Setting item (SLNX v2 SFM)	Setting item (SLNX v3)
"Screen Title" at [Profile Properties] view of Profile	"Display Name" at [General] tab of Profile Configuration

## 2 Migrate the Setting values of Workflow Profile

### A) "General" tab

Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.

Display Name in SLNX v3 corresponds to Screen Title in SLNX v2 SFM.

### B) "Workflow" tab

Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.

#### Sample

**SLNX v2**

Profile Name: Sample Profile

Group02  
Group01  
Group02

Sample Project A  
Sample Project B

**SLNX v3**

RICOH Streamline NX

Profile Name	Description	Version	Input Source	Update D...	Updated By
mobile		1	Mobile	2017/10/05 2...	admin
Profile Name		1	MFP	2017/12/25 1...	admin

Profile Configuration

General | Workflows | Preview | Associated Devices/Groups

Capture Workflows

Group Name\*: en\_US | Group02

Display:  Yes  No

Group01  
Group02  
Sample Project A  
Sample Project B



- You cannot change the button layout of each Workflow on the operation panel.

### C) "Preview" tab

This tab is intended to present the preview image of the displayed contents on the operation panel and is not a subject of migration.

D) "Associated Device Groups" tab

This tab is intended to confirm the device that refers to the corresponding Workflow Profile and is not a subject of migration.

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## 6. Migrating the Setting Values of Profile Configuration (for Hot Folder)

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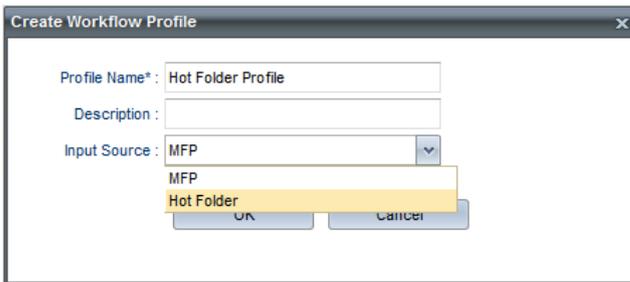
This section describes the migration procedure of the Monitor Folder settings (Tool: Monitor Folder Setting Tool) in SLNX v2 SFM. Perform the following operations on the screen of SLNX v3 while referring to the Monitor Folder Setting Tool screen of SLNX v2 SFM that you are migrating from: Also, the settings required for this operation must have been created while One-touch Scan is enabled in advance in Migrating the Setting Values under Device Applications and Migrating the Setting Values under Workflow Design.

 Note

- For details about Profile Configuration, see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > Workflow > Workflow Profile > Profile Configuration

### Steps

1 Create a new Workflow Profile.



- A) Profile Name: Enter an appropriate string that is not used in SLNX v2 SFM.
- B) Description: Enter an appropriate string that is not used in SLNX v2 SFM.
- C) Input Source: Select Hot Folder. The value is not available in SLNX v2 SFM.

2 Migrate the Setting values of Workflow Profile

A) "General" tab

Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.

Input Source in SLNX v3: The item Display Name does not exist in Workflow Profile of a Hot Folder.

B) "Workflow" tab

Migrate the values of settings in SLNX v2 SFM to the corresponding settings on this tab in SLNX v3.

For details, see the "Setting - HotFolder" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".

C) "Associated Device Groups" tab

This tab is intended to for confirming the device that refers to the corresponding Workflow Profile and is not a subject of migration.

## 7. Migrating the Setting Values of Delegation Server Settings on the Capture Tab

This section describes the migration procedure of the settings that applied to SLNX v2 SFM in general. Perform the following operations on the screen of SLNX v3 ([System > Server Settings > Delegation Server Settings > Capture tab]) while referring to the corresponding screen of SLNX v2 SFM that you are migrating from.

For details, see the "Setting - Capture" sheet in the attached file "SFM\_GUI\_Mapping.xlsx".

**Note**

- The specifications for the setting values of Error Job Storage Period ([System > Server Settings > Delegation Server Settings > Capture tab > Device Workflow]) have been changed from SLNX v2 SFM in SLNX v3. Convert the value accordingly when specifying the setting in SLNX v3.

SLNX v2 SFM	SLNX v3
<p>"hours" AND "minutes"</p> <p>Errored Job Storage Settings (0 - 720) 1 hours (0 - 59) 0 Min.</p>	<p>"minute(s)" OR "hour(s)" OR "day(s)"</p> <p>Auto Delete Error Jobs : Scan : <input type="checkbox"/> Fax : <input checked="" type="checkbox"/></p> <p>Error Job Storage Period : 1 day(s) Job Storage Capacity Alert : 100 Mi minute(s) hour(s) day(s)</p>

- For details about Delegation Server Settings (Capture), see the following section in the SLNX v3 online help:
  - Top Page > Administrator's Guide > List of Setting Items > System > Server Settings > Delegation Server Settings

# Migrate the Print Queues (SPM)

You can now perform the migration of the printer queues to use either the existing SPM Print Server or a new Print server.

- When creating a new SLNX v3 environment, you may want to create a new Print Server. In this case, you cannot migrate any information automatically. Instead, you need to setup a new DS Print server as if it were a new installation creating the Direct Print printers as well as the SLNX Secure Print printers. Instruct users to use this new Print Server when switching over to SLNX v3.

Important

Update the printer definitions on all workstations after the new print server is configured.

- If you prefer to re-use your existing SPM Print Server, you can install the SLNX v3 DS software onto the same server as the existing SLNX v2 SPM server. Use the instructions in section 6.1 below to create a new printer to point to the v3 system for testing purposes.

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## Convert a Device to use SLNX v3

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For testing purposes, configure a device first:

1. Create a new printer and ensure it correctly points to the SLNX V3 Secure Port.
2. Send a test page to the new printer.
3. Install SLNX V3 embedded on the MFP. To do so, launch the SLNX Admin Tool and create a new Embedded Application Task to install the Embedded Application template “SLNX Embedded Install” on the device you want to test.

Reference

Refer to SLNX v3 Administrator’s Guide for further instructions to perform this step.

4. Run the task. After the install is complete, release the print job from Step 2 above.
5. Follow the steps in the SLNX v3 Admin Guide to configure the device in the SLNX v3 Admin Tool fully.

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## Convert Remaining Devices to use SLNX v3

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You can either convert the remaining print queues manually to use the SLNX v3 port or you can run a command to convert all devices at once. These instructions will guide you through the command process.

1. When you are ready to convert all V2 printers over to V3, open a command prompt and navigate to the root location where the Migration Tool is installed. Enter the command:  
`ConvertSLNXPrintersToV3.exe`

This command switches all the V2 printers to print to the V3 ports. Users who used to print

and track with V2 will now be using V3.

If you need to revert back to using V2 ports, run the command:

`RevertSLNXPrintersToV2.exe`

**Note**

If a printer was not converted from V2 to V3, it will not be reverted back to V2 with this command.

2. Confirm that the printers are all updated to use the SLNX v3 port.
3. Run the same Embedded Application task that you created when testing the single device, but apply the task to all devices.

# Migrate the Embedded Application

When you migrate Embedded applications from V2 to V3, overwrite installation is not supported. Embedded applications need to be migrated by following steps on Admin Console.

1. Create uninstall templates

Create uninstall templates for AA Manager, SF Manager and SP Manager (Configuration > Configuration Templates > Embedded Applications).

2. Create V2 uninstall and V3 install task

Create V2 uninstall and V3 install as one task (Configuration > Configuration Tasks).

First select a V2 uninstall template, and then select a V3 install template as Target Template.

e.g.

Uninstall Template for AA Manager (336724240)

Uninstall Template for SF Manager (336724260)

Uninstall Template for SP Manager (336724270)

Uninstall Template for AA Manager for SOP (1411384064)

Uninstall Template for SF Manager for SOP (1411384084)

Uninstall Template for SP Manager for SOP (1411384094)

SLNX Embedded Install

3. Execute task

Execute the task created in Step 2.

## Migrate the Client Tool

1. Perform an overwrite installation if you are upgrading from RICOH Streamline NX v2 PC Client to RICOH Streamline NX v3 PC Client.

For details about the installation procedure, see "Installing RICOH Streamline NX PC Client", Installation Guide.

2. To configure PC Client, see PC Client Operation Guide.

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