



GlobalScan™

Administrator's Guide



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RICOH

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All screens used within this guide are for illustration purposes only, i.e., filenames, field entries, etc., may vary based on actual system configuration.

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Introduction

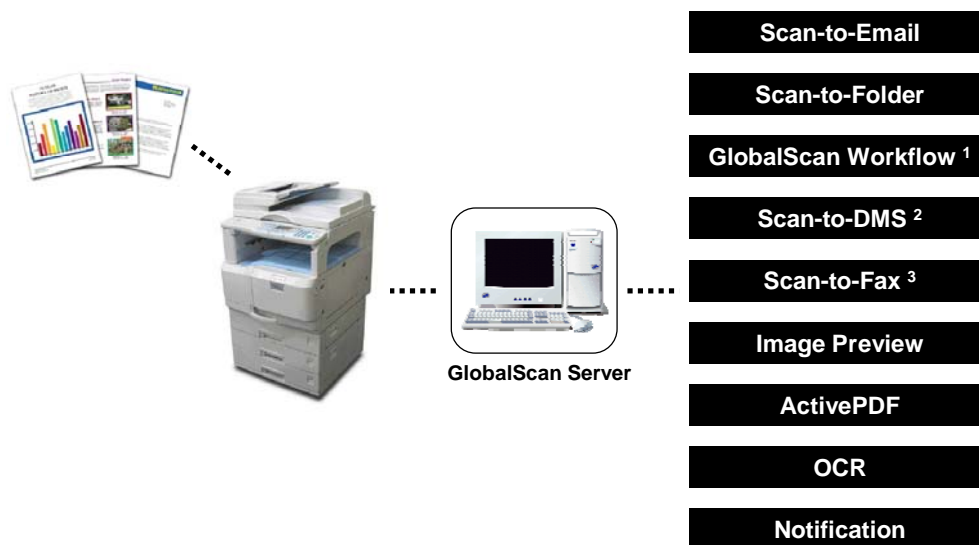
About GlobalScan

GlobalScan enables a compatible copier/Multifunctional Device (hereafter referred to as MFD) to scan documents directly to email or a folder, as well as perform Optical Character Recognition (OCR). In addition, facsimile functions are supported via the optional RightFax Plug-in.

Designed as a powerful yet easy-to-use paper document capture and distribution system, GlobalScan integrates seamlessly with your mail infrastructure to significantly boost workgroup productivity. This is achieved by combining network scanning functionality within an accessible copier platform. Most importantly, dramatic cost efficiencies are gained by speeding throughput of common business transactions that may otherwise require slower and more costly methods of communication.

GlobalScan Components

The GlobalScan system consists of two primary components, GlobalScan Server software and GlobalScan MFD firmware. Once installed, the GlobalScan Server acts as an efficient digital document routing system that accepts scanned documents from MFDs, creating digital files of common business documents – contracts, invoices, brochures, photographs, reports, etc. Working together, the GlobalScan Server and the MFD enable timely delivery of these files to destinations around the corner or around the globe.



¹ Requires installation of GS v3.1 Workflow Suite Standard Edition and Connector software (bundled with GS v3.1).

² Available GlobalScan SDK Toolkit enables customized scan functionality.

³ Requires optional RightFax Plug-in.

About This Guide

This guide is divided into five primary sections:

1. **Multifunctional Device Configuration** – This section contains instructions for setting MFD parameters, for example, GlobalScan Server IP address, DNS IP, protocol (HTTP/HTTPS) and proxy server settings.
2. **About Setting Levels** – This section provides an overview of how GlobalScan's system, profile, and project levels interact.
3. **GlobalScan WebAdmin Module Configuration** – This section contains instructions on configuration and management of connected MFDs through GlobalScan's WebAdmin Module.
4. **GlobalScan Management** – This section contains instructions on the management and monitoring of connected MFDs, project icons, jobs, logs, and the optional Failover service.
5. **Appendix** – This section contains important reference material.

How to Read This Guide

The following conventions are used in this guide to explain procedures, provide additional information, and emphasize important considerations.

Convention	Description
Important:	Indicates information that must be read in detail. Example: Important: This procedure will not delete the project.
Note:	Indicates supplementary information. Example: Note: This is a standard feature of GlobalScan.
<u><i>Italic underscore</i></u>	Indicates where you can find additional information in this guide. Example: See <u><i>Appendix K: Glossary of Terms</i></u> .
Bold face (blue/red)	Indicates a specific step or action to be taken. Example: 1. Enter the URL: http://IP address/gsadmin .
[Button Name]	Indicates a key or button on the control panel, computer screen or MFD touch screen. Example: Press the [Scanner] key.

Term	Abbreviation
Multifunctional Device	MFD or Device
System Administrator	Administrator
GlobalScan Service	Service or plug-in

GlobalScan Documentation

The following documentation is available on the GlobalScan v3.1 Installation CD:

GlobalScan v3.1 Server Software Installation Guide

This guide covers important pre-installation requirements and server preparation procedures that must be performed prior to (and after) installation of the GlobalScan software.

GlobalScan v3.1 Administrator's Guide (this guide)

This guide explains how to utilize GlobalScan's WebAdmin module to configure and manage GlobalScan Server settings and operations, for example, creation of profiles and projects, and selection of required Services. Configuration of the connected MFD(s) is covered as well.

GlobalScan v3.1 User's Guide

This guide explains how to perform walk-up scan operations from the MFD control panel, for example, Scan-to-Email, Scan-to-Folder and/or Scan-to-Fax.

GlobalScan v3.1 User's Quick Reference Guide

This reference contains a summary of the User's Guide that steps the user through the basic scan-to functions.

GlobalScan v3.1 Workflow Suite (Standard Edition)

- **Quick Start Guide** – This reference is a basic overview of procedures required to link GlobalScan v3.1 WebAdmin Module settings (Profile/Project/Service) with the GlobalScan v3.1 Workflow Suite application.
- **Framework** – This guide covers procedures required to license the GlobalScan v3.1 Workflow Suite (Standard Edition) software, configuring workflows using Process Designer, starting the service using Service Manager, and monitoring the status of running workflows using Status Monitor.
- **Reference Guide** – This guide covers procedures required to configure and use Capture, Process and Route components of GlobalScan v3.1 Workflow Suite. RRT configuration, troubleshooting tips and restrictions and limitations are also covered.

RightFax User's Quick Reference Guide

This reference contains a summary of the RightFax procedures outlined in the User's Guide. Scan-to-Fax capabilities require the optional RightFax Plug-in. For more information, see [*Appendix F: Optional RightFax Plug-in*](#).

GlobalScan v3.1 Server Release Notes

This file contains information on what is new, version history, known issues and limitations, system requirements, etc.

Note: Viewing of PDF files requires a current version of Adobe® Acrobat® Reader.

Feature Highlights

<ul style="list-style-type: none"> ▪ Supports up to 250 GlobalScan-enabled MFDs per GlobalScan Server; runs as Windows Service ▪ Intuitive operation through the MFD's touch-screen display; features tab-style navigation ▪ Newly-developed graphic project screen (offered on select MFD models) ▪ New Image Preview feature allows users to view and modify scanned images prior to processing ▪ Create individual projects; user presses project button on MFD to quickly access functions; supports One-touch Scan ▪ Offers Administrator a highly-configurable user interface ▪ Supports a fully-pluggable design for nearly all GlobalScan features (Authentication, Email, Scan-to-Folder, Notification, etc.) ▪ Add/remove services on a project level, enabling customization based on user needs ▪ User Authentication <ul style="list-style-type: none"> - NT, Novell and LDAP/LDAPS Authentication - Login synchronization enables a single set of credentials to provide access to shared services - Each project can be represented by a different Authentication method - Uses HTTPS (or HTTP) protocol for secure (or non-secure) communication between MFD and GlobalScan Server ▪ Scan-to-Email <ul style="list-style-type: none"> - Send documents as email using your existing SMTP/SMTP-AUTH, MS Exchange or Lotus Notes server - Browse and select email addresses in Global Address Book (via LDAP) - Search Address Book by keyword and wild card - No size limitation on Global Address Book - Send-to-Me function automatically adds the logon user's email address to Recipient List - Customize email by enabling/disabling: <ul style="list-style-type: none"> • Ad hoc (manual) email address entry • Cc, Bcc, Reply To • Default email message and subject text; sent with each outgoing message • Default email domain for easy address entry ▪ Scan-to-Folder <ul style="list-style-type: none"> - Scan directly to one or multiple local or network folders/ subfolders - Perform a folder search based on search string, with all results displayed on the MFD touch screen - Scan-to-Home¹, i.e., logon user's Home directory ▪ GlobalScan Workflow Suite (Standard Edition) - This bundled solution enables customized document capture, processing and distribution 	<ul style="list-style-type: none"> ▪ Scan-to-Fax <ul style="list-style-type: none"> - Optional Captaris® RightFax Plug-in provides an easy-to-use, reliable fax and email delivery solution ▪ Scan-to-EDMS (Enterprise Document Mngmt System) <ul style="list-style-type: none"> - User interface components are available to Application Developers through the GlobalScan SDK Toolkit, enabling customized scan functionality that addresses specific workflow requirements ▪ Mixed Broadcast allows entry of email addresses, folder destinations and fax numbers for simultaneous delivery ▪ Flexible Scan Settings <ul style="list-style-type: none"> - Mixed-size scanning; letter, legal and ledger-size originals combined in a single scan - Select scan settings (resolution, file format, simplex/duplex scan, batch scan, orientation, color, etc.) - Set scan settings as read-only, for instance, to control color scanning - Support for batch scanning, i.e., scan a lengthy document in batches and transmit as one file - Scan documents from either the automatic document feeder (ADF) or platen glass - Supports multi-page scanning from platen glass; manual paper size selection is available - Scanned document can be converted to searchable Adobe® PDF, password-protected PDF, PDF Text, ImageText, RTF (Microsoft® Word), XLS (Microsoft® Excel) via standard OCR service - Supports password-protected PDF conversion - Supports high-compression PDF format using JBIG2 (B&W) and JPEG 2000 (color) - Save color documents as PDF, JPEG or B&W Single-/Multi-Page TIFF format - Save black & white documents as PDF Image version 1.4 (default) or Single-/Multi-Page TIFF ▪ Backup and Restore feature can be command-line driven for automated scheduled backups using any third-party scheduler, including Microsoft's "AT" scheduler and Microsoft® SQL Server ▪ GlobalScan Failover provides automatic MFD Failover to secondary GlobalScan Server without restart; automatic fallback when primary server is restored ▪ Extensive log and error tracking <ul style="list-style-type: none"> - Captures originating MFD serial number, IP address, user information, destination, scan parameters; export log in XML format - Error reporting integrates with NT Event Log for easy monitoring by the Administrator ▪ WebAdmin Module displays on-screen Tooltips (help) that provides assistance with configuration and management tasks performed by the Administrator ▪ New Notification service alerts the logon user (or default user) of job status
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¹ When MFD Authentication is set to NT or LDAP with Active Directory.

System Requirements and Specifications

The following GlobalScan Server and MFD requirements must be met prior to installation of the GlobalScan system:

GlobalScan Server:

- Microsoft® Windows® Server 2003 (SP1, SP2, R2), Standard Edition, with IIS 6 installed, and all necessary security updates and patches installed
- GlobalScan v3.1 was tested and does support purchased VMware ESX software. Other virtual software products, such as Microsoft® Virtual Server 2005 and free VMware GSX, have not been tested, thus are not currently supported by GlobalScan v3.1.
- Microsoft® Internet Explorer 6.0 (SP1/SP2) and 7.0 Web browser
- Intel Pentium class processor (CPU), 1GHz or faster
- 1GB RAM or more (**Important**: If OCR is running on the same server as GlobalScan, it is recommended that 2GB of RAM be installed)
- 40GB hard drive or larger
- 10/100 Mbps network card
- TCP/IP network access
- Access to Global Address Book via LDAP
- Email capability through one or more of the following mail systems:
 - Lotus Notes 6.5, 7.0
 - Microsoft® Exchange 2000, 2003
 - Most SMTP Servers

Compatible Multifunctional Devices:

- See [Appendix A](#) for a list of GlobalScan-compatible MFDs
- Compatible MFDs must be equipped with the following:
 - Network Interface Board (NIB) option
 - Local hard disk drive
 - TCP/IP network access
- One GlobalScan Server can support up to 250 enabled MFDs
 - GlobalScan requires a dedicated server PC. Running other applications on the server may cause serious problems and service performance is not guaranteed.
 - For complete GlobalScan v3.1 functionality, the MFD must have GlobalScan v3.0 firmware installed.
 - Only limited features of GlobalScan v3.1 are supported if the MFD is running v2.x firmware.

Protocols Supported / Used:

- GlobalScan Server: TCP/IP; HTTP/HTTPS; LDAP/LDAPS; SMTP/SMTP-AUTH; SNMP; SSL
- Multifunctional Device: TCP/IP; HTTP/HTTPS; SNMP; SSL

Authentication Methods:

- LDAP/LDAPS; Win 2000/2003 Active Directory; Novell

File Format Support:

- Standard: Single-Page TIFF, Multi-Page TIFF; PDF Image; JPEG (color MFD)
- OCR Plug-in: XLS (Microsoft® Excel); RTF (Microsoft® Word); Adobe PDF, password-protected PDF, PDF ImageText; PDF Text

Important: For additional installation requirements, see [GlobalScan v3.1 Server Software Installation Guide](#).

Specifications subject to change without notice.

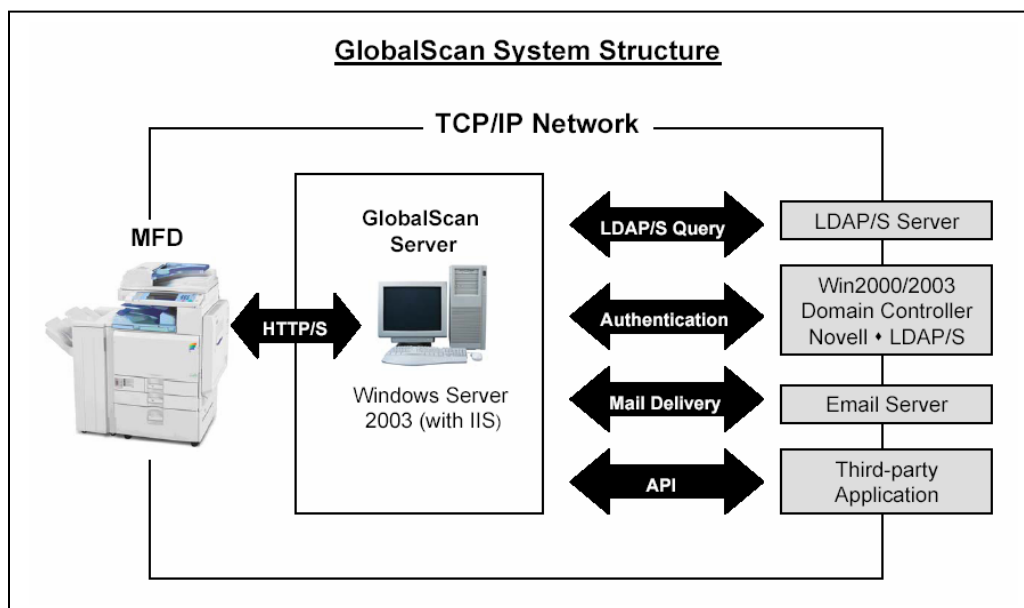
Before Getting Started

This section provides an overview of pre-installation procedures and key terms, along with a workflow scenario and tips on how to navigate the WebAdmin Module. By reading this section you will gain an understanding of how you can configure GlobalScan to create an efficient document capture and distribution system.

Setup Procedures

The following setup procedures must be completed by an authorized service technician and/or Administrator before network-connected MFDs can join in GlobalScan operation.

- ☑ **GlobalScan firmware is installed on MFD's hard drive**
GlobalScan firmware can be installed on select Ricoh-manufactured MFDs. For details, see *Appendix A: GlobalScan-compatible MFDs*.
- ☑ **User has a valid user name and password**
The Administrator assigns user names and passwords for Authentication purposes.
- ☑ **GlobalScan Server software is installed on a Windows® 2003 Server (SP1)**
See *GlobalScan Ver 3.1 Server Software Installation Guide*. Be sure to review the important notes in the *Pre-installation Requirements* section of the *Installation Guide*. Also see *System Requirements and Specifications* (in this guide).
- ☑ **MFD is configured** (covered in this guide)
- ☑ **GlobalScan WebAdmin Module is configured** (covered in this guide)



GlobalScan Services

GlobalScan supports the following standard and optional features:

Standard Services	Description
Authentication (LDAP, NT, Novell)	The MFD user must log in at the MFD before accessing system services.
Scan-to-Email	The MFD user can scan a document for transmission to one or more email addresses. Email also supports Notification, a service whereby the logon user or default user (if user's email address is not available) receives email alerts regarding job status.
Scan-to-Folder	The MFD user can direct a scanned document to one or more local and/or network folders/subfolders.
GlobalScan v3.1 Workflow Suite^{1,2} Note: To extend functionality, Express and Full Editions are optionally available (see below)	GlobalScan v3.1 Workflow Suite (Standard Edition) is a bundled plug-in that, if installed, enables capture, management, storage, retrieval and distribution of files scanned via virtually any input source, e.g., the GlobalScan-enabled MFP, network scanner, Internet Fax, etc. Supports transmission of scanned images to email, folder, fax, EDMS (Enterprise Document Management Systems), FTP and SFTP, Microsoft SharePoint, Lotus Domino.doc and any ODBC-complaint database. Custom workflows, i.e., those that integrate with any EDMS that supports XML, can be created to address unique application requirements.
Scan Settings	Controls scan parameters, such as resolution, file format, color, etc. Unless set as read-only, users can adjust the default settings at the MFD.
Image Processing: <ul style="list-style-type: none"> ■ OCR² ■ ActivePDF² ■ Image Management 	<p>Converts hardcopy documents into searchable Adobe® PDF (including password-protected PDF), RTF (Microsoft® Word), XLS (Microsoft® Excel) and Multi-Page TIFF formats.</p> <p>Converts hardcopy into Adobe® PDF files.</p> <p>Users can view a thumbnail image of the scanned document at the MFD. Also provides Multi-Page TIFF support, image alignment, and adjustment.</p>

Optional Services	Description
GlobalScan v3.1 Workflow Suite Express Edition¹	Adds device support and workflow tracking. Access all the capture, processing and distribution tools using hardware from Canon, HP, Kyocera Mita, Sharp or Xerox. Monitor every document transaction; generate detailed reports; automatically capture document meta-data.
GlobalScan v3.1 Workflow Suite Full Edition¹	Provides more application connectors. Capture files from fax servers, local or remote folders, FTP sites, desktops and MS Office applications. Deliver files to email applications, fax servers, folders, secure FTP sites, and ODBC-compliant databases, or to output devices. Send files into content management software, including MS SharePoint, Documentum, Interwoven, IBM CM, FileNet, OpenText and many others.
Captaris RightFax¹	Captaris RightFax is an optional plug-in that enables the MFD user to fax a document to one or more fax and/or email destinations via a RightFax Server. Note: For details, see Appendix F: Optional RightFax Plug-in .

¹ See [Appendix E: GlobalScan v3.1 Workflow Suite Family](#).

² Using this service requires installation of associated software components. See [GlobalScan v3.1 Server Software Installation Guide](#).

MFD Display Types

The size and appearance of the GlobalScan user interface is based on the MFD model. For instance, models that support the WVGA or SVGA touch screens can display project icons, as shown in [Fig. 1a](#) and [Fig. 1b](#).

In all, there are four different types of MFD touch screens:

1. **WVGA** Color Touch Screen [800(w) x 480(h) pixels] ([Fig. 1a](#), [Fig. 1b](#))
2. **WVGA** Black & White Touch Screen [800(w) x 480(h) pixels] (not shown)
3. **SVGA** Touch Screen [800(w) x 600(h) pixels] (not shown)
4. **HVGA** Black & White Touch Screen [640(w) x 240(h) pixels] ([Fig. 1c](#), [Fig. 1d](#))

Note: To determine which type of display an MFD supports, see [Appendix A: GlobalScan-compatible MFDs](#).

WVGA Color Touch Screen Project Screen

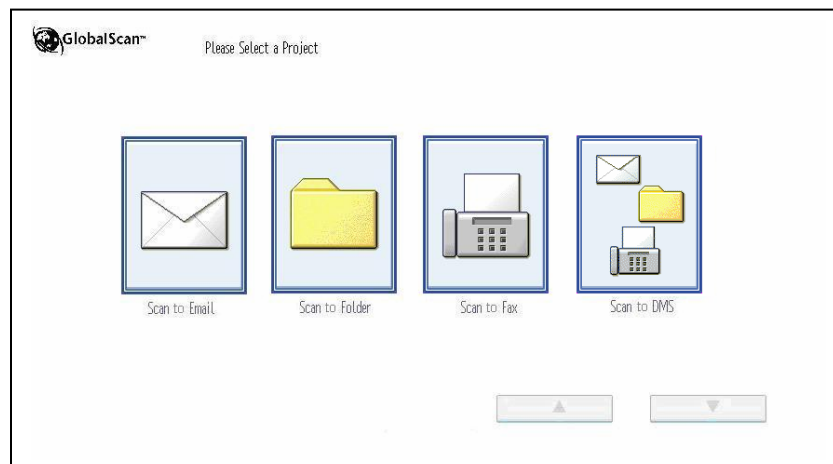


Fig. 1a

WVGA Color Touch Screen Services Screen

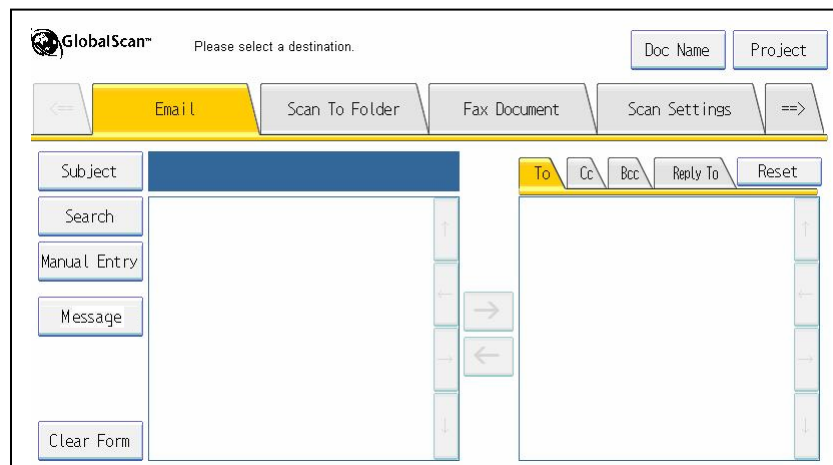


Fig. 1b

HVGA Black & White Touch Screen Project Screen

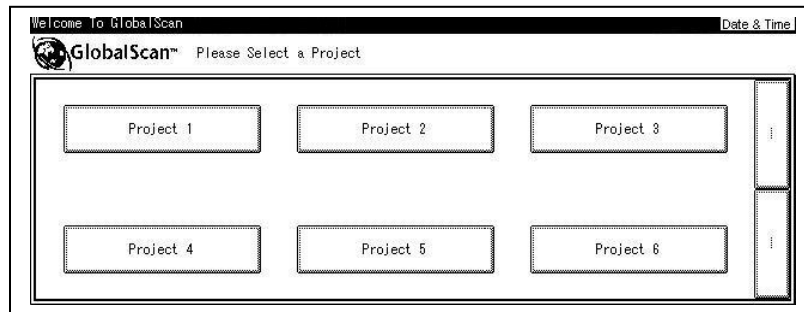


Fig. 1c

HVGA Black & White Touch Screen Services Screen

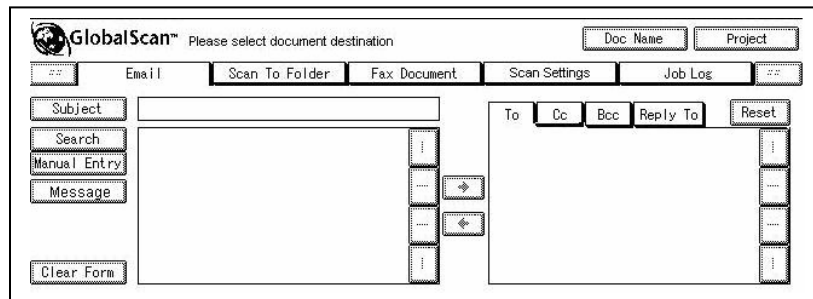


Fig. 1d

Key GlobalScan Terms *(in alphabetical order)*

Authentication

Each project can be defined by its own Authentication method. GlobalScan supports LDAP, Novell and NT Authentication. Under Authentication, when a user presses a project button, log-in is required. After entry of the required credentials (e.g., user name and password), the user presses the [Login] button; Authentication is executed.

LDAP Login

The screenshot shows a dialog box titled "GlobalScan Please Login." with the following fields: "User Name *", "Password *", and "Login" and "Cancel" buttons at the bottom.

Novell Login

The screenshot shows a dialog box titled "GlobalScan Please Login." with the following fields: "User Name *", "Password *", "NovellID Tree *", and "NovellID Context *". There are "Login" and "Cancel" buttons at the bottom.

Tree and Context fields will auto-populate.

NT Login

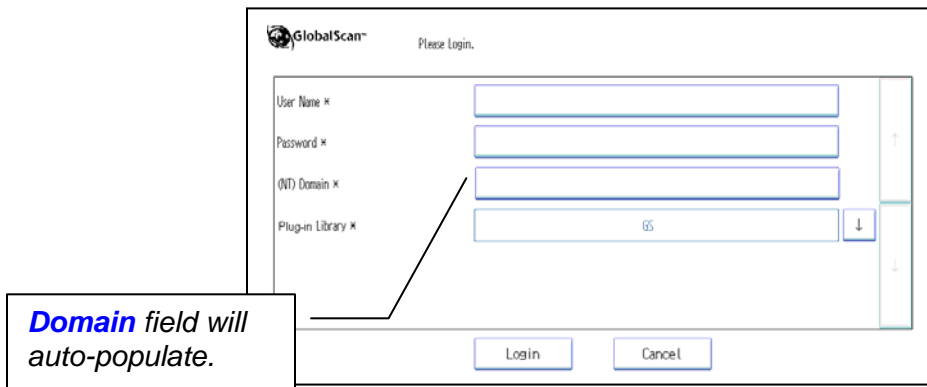
The screenshot shows a dialog box titled "GlobalScan Please Login." with the following fields: "User Name *", "Password *", and "NT Domain *". There are "Login" and "Cancel" buttons at the bottom.

Domain field will auto-populate.

GlobalScan Terms, *cont.*

Authentication, *cont.*

The GlobalScan Server will also simultaneously authenticate, e.g., the same login credentials used in NT Authentication will enable access to a third-party plug-in service.



Sample Login Screen for Shared Services

Profile

Each MFD is associated with a specific profile – parameters that define general GlobalScan settings, such as MFD Reset Time, Keep-alive Timer, etc. The profile contains one or more projects.

Project

Projects provide multiple ways of configuring services based on the specific needs of a user group. For example, the Sales Department may need to email lengthy proposals to prospective customers, while the Legal Department scans correspondence directly to a network folder, for archival purposes. Each user simply accesses the appropriate project button on the MFD touch screen, e.g., Email, Scan-to-Folder, etc. Of course, multiple GlobalScan services can be combined under one project as well, so workflow design is very flexible.

If the MFD's profile contains only one project, the services associated with that project are automatically pre-selected on the MFD. This means the Services screen appears, without requiring the user to press a project button (see [Fig. 2](#)). Note that based on GlobalScan settings, the user may or may not need to enter login credentials (see [Fig. 3](#)).

Services Screen:
One project / login not required.

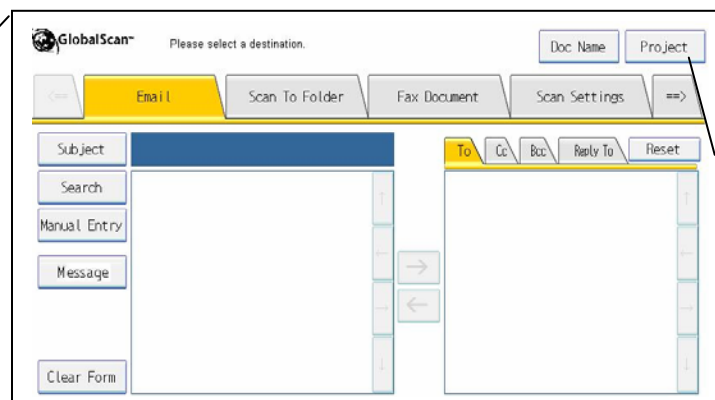


Fig. 2

When login is required, this button reads **Logout**.

GlobalScan Terms, *cont.*

Login Screen: One project / login required. After successful login, the Services screen (Fig. 2) opens.

Domain field will auto-populate.

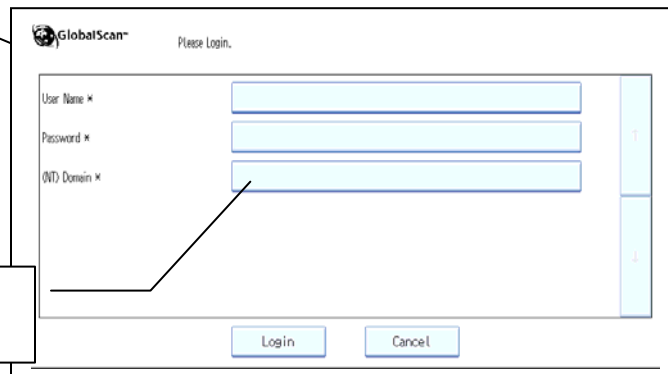


Fig. 3

When two or more projects are configured in a profile, corresponding buttons will appear on the MFD touch screen, each addressing specific application requirements. How many project buttons appear depends on the MFD model.

SVGA / WVGA Touch Screens

Project buttons appear with icons (maximum of four [4] per screen) to represent functions, making it easy for the user to intuitively select the Service, e.g., Email (see Fig. 4). Project button labels and icons are configurable, as outlined in Step 4: Add/Edit a Project.

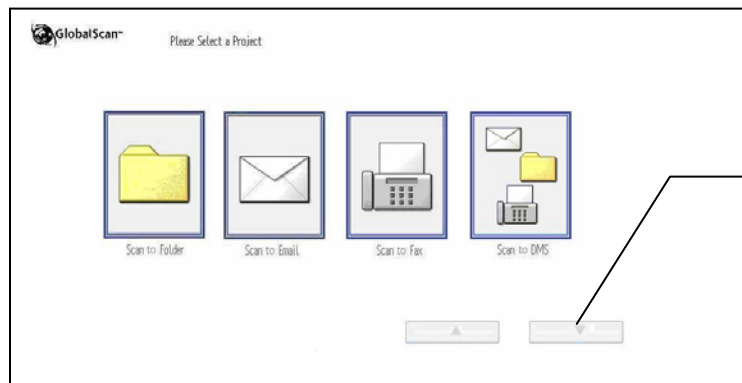


Fig. 4

Additional project buttons, if available, can be viewed by pressing the up [▲] or down [▼] button.

HVGA Touch Screen

Project buttons (maximum of six [6] per screen) appear as shown in Fig. 5. Project button labels are configurable, as outlined in Step 4: Enter/Edit a Project.

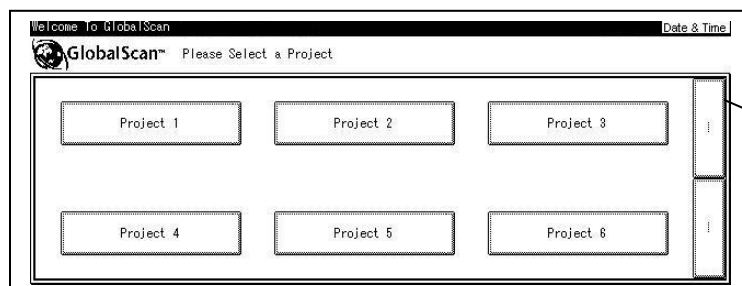


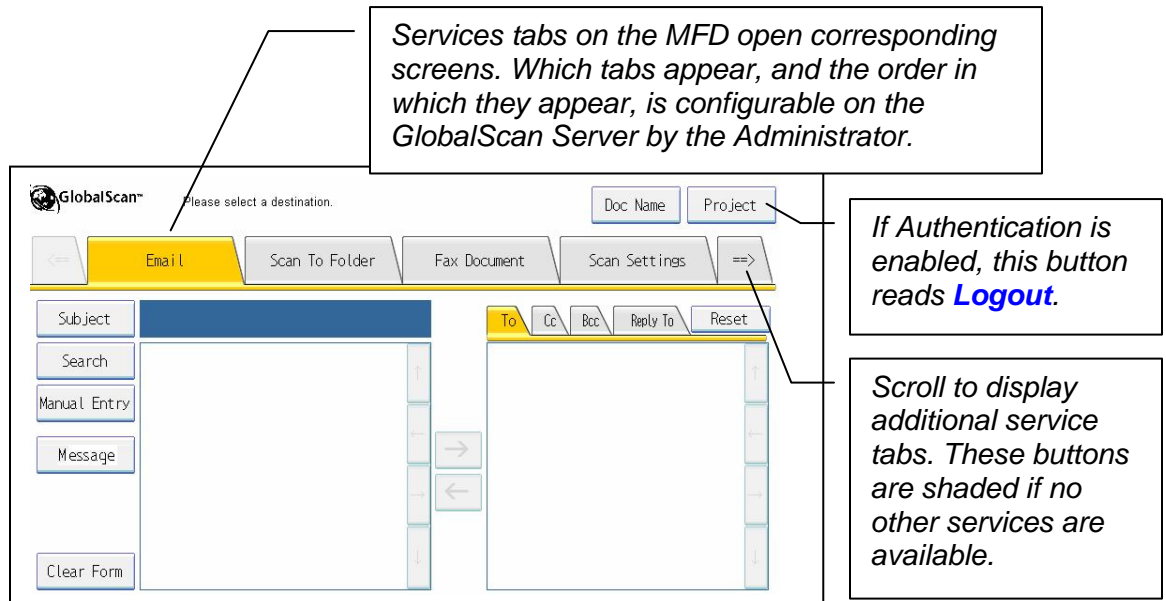
Fig. 5

Additional Project buttons, if available, can be viewed by pressing the scroll button.

GlobalScan Terms, *cont.*

Services

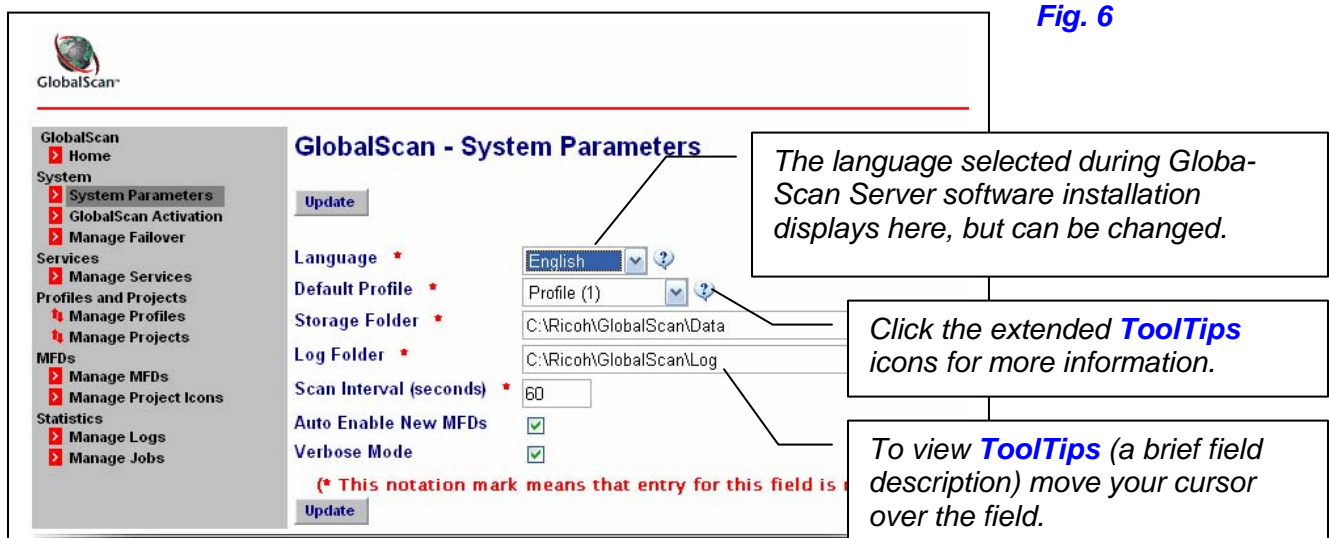
Following login (if Authentication is required), the user is presented with a list of available services, presented as tabs, for easy navigation. The term “services” includes standard and optional network scanning capabilities, for example, Scan-to-Email, Scan-to-Folder and Scan-to-Fax. For details, see [Before Getting Started](#) → [GlobalScan Services](#). The user selects a service by touching the associated tab on the MFD's touch screen.



System Parameters

Within the WebAdmin Module's System Parameters screen (see [Fig. 6](#)), you will select/enter all system-level data – settings that control GlobalScan Server operation, such as Default Profile, Storage Folder, Log Folder, etc.

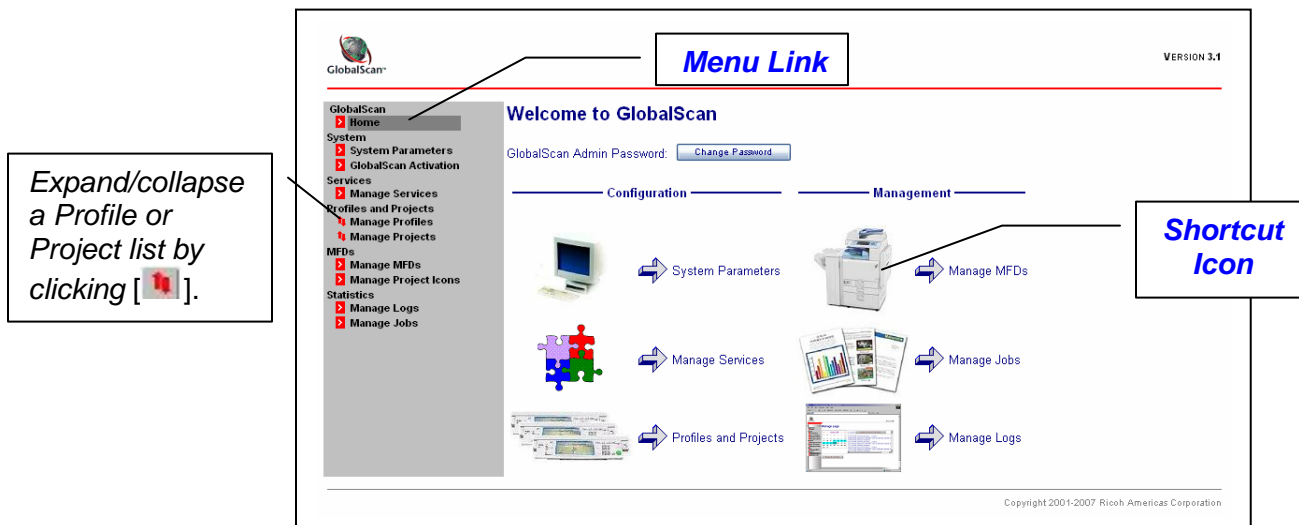
Fig. 6



GlobalScan Terms, *cont.*

WebAdmin Module

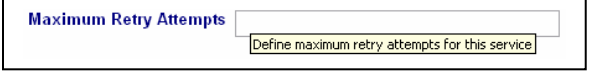


GlobalScan's WebAdmin Module enables the Administrator to configure and manage the GlobalScan Server. Following GlobalScan Server software installation, you can open the WebAdmin Module using your Web browser (Microsoft® Internet Explorer 6.0 or 7.0). After launching GlobalScan, the Home Page appears, as shown below. To access a desired function, simply click the **shortcut icon** or the corresponding **menu link**.



Note: To return to GlobalScan's Home Page from any screen, click the **Home** menu link.

On-screen Help

Within the WebAdmin Module, there are three types of on-screen help at your disposal.

Type	Description	Example
Basic ToolTips	Move your cursor over a field/button in order to display a brief description.	Email Configuration Screen: 
Extensive ToolTips	Click on the [?] adjacent to a field to open a dialog box containing an explanation of the function and any content requirements.	Image Management Screen: 
Information	Click on the [i] icon to display additional information on the topic.	Manage Services Screen: 

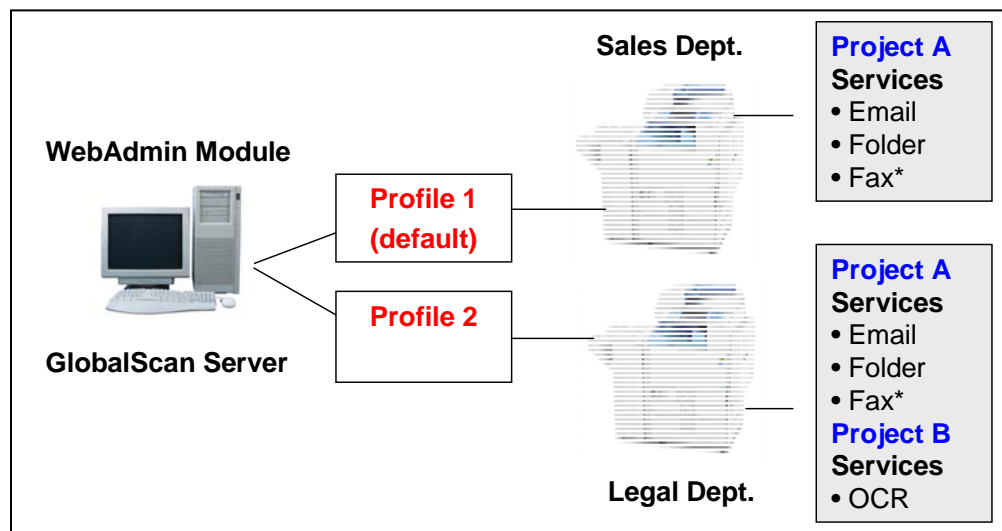
GlobalScan Terms, *cont.*

Workflow

When the MFD is powered on, the device calls the GlobalScan Server to request its profile. For example, in [Diagram A](#), the Sales Department MFD requests Profile 1, with Project A offering the MFD users Email, Folder and Fax scan services. Users of the MFD in the Legal Department accesses Profile 2, with Project A offering the same services as Profile 1, and an additional Project B which supports OCR.

Services that are available to a user depend on the project button selected from the MFD control panel. For instance, a user in either the Sales or Legal Department, can Scan-to-Email by selecting Project A.

Diagram A



*Requires optional RightFax Plug-in.

The Administrator can configure the following aspects of the MFD touch screen through the GlobalScan WebAdmin Module:

- Services that display, e.g., Email, Folder, Fax, etc.
- Display sequence of project buttons (see [Fig. 7](#), next page). For instance, if Scan-to-Email is the primary application, the Email tab can display first (see [Fig. 8](#), next page).
- Project button labels. For instance, the label can read “Scan to Email” or “Email” – text that you feel best represents the service(s) contained within the project.

GlobalScan Terms, *cont.*

Workflow, *cont.*

Again, one or more project buttons can appear on the MFD touch screen. The user simply selects a button by touching it. After doing so, the services screen opens (see [Fig. 8](#)). After a project button is selected, user login may be required. For details, see [Authentication](#) (in this section).

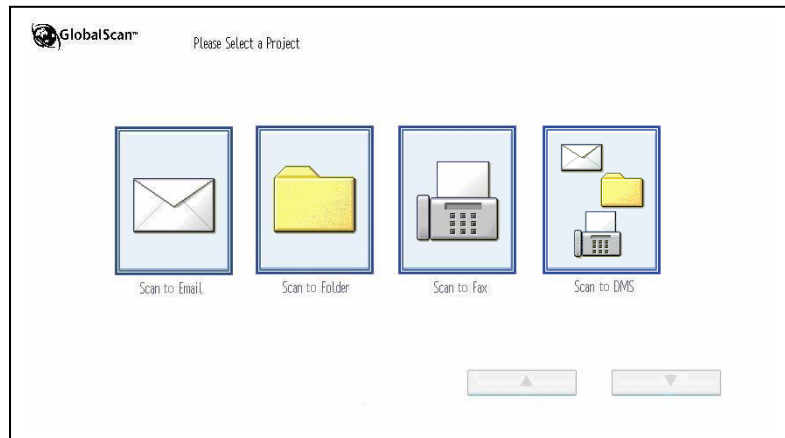


Fig. 7

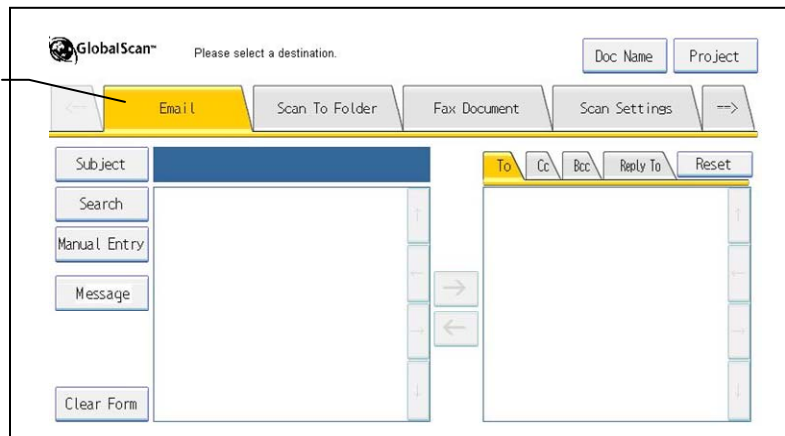


Fig. 8

Services tabs that display on the MFD are fully configurable.

Note: Also see [Appendix K: Glossary of Terms](#).

Multifunctional Device Configuration

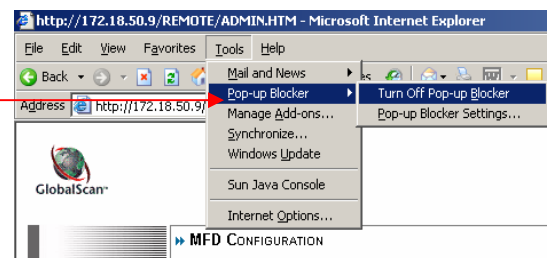
There are two ways to configure GlobalScan settings on the MFD, remotely (via the Web) or manually (via the MFD control panel).

Remote MFD Configuration (via Web)

GlobalScan v3.1 supports remote configuration for select Ricoh-manufactured MFDs (running v2.x or v3.0 firmware), enabling the Administrator to easily establish GlobalScan settings from his/her desktop. All models listed in [Appendix A: GlobalScan-compatible MFDs](#) support remote configuration. **Note:** Settings can also be entered from the MFD control panel, if desired.

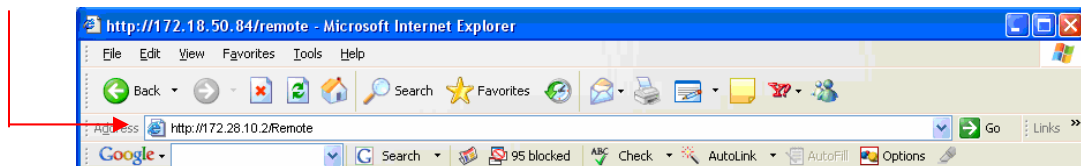
To remotely enter MFD configuration settings, proceed as follows:

1. Be sure that the target MFD is connected to the network and powered on.
2. Open your **Web browser**.
3. Turn off your browser's Pop-up Blocker. Click **Tools > Pop-up Blocker > Turn off Pop-up Blocker**.



Note: If the Pop-up Blocker is left on, you may need to wait 90 seconds before re-accessing the Web page, otherwise an error message appears, "Another configuration session exists. Please wait for a while. Try again."

4. Enter the URL: **http://MFD IP address/remote**.

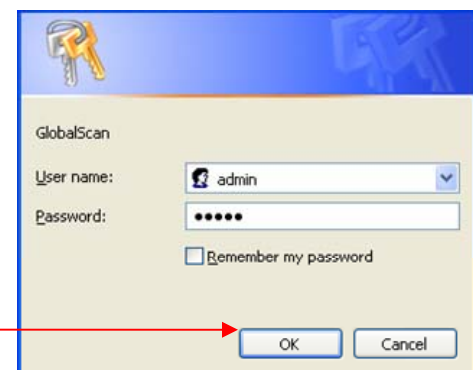


Note: If you enter the IP address of a non-compliant MFD, an "HTTP 404 – File not found" error will occur. Close the window and try again, using the IP address of a compliant MFD. See [Appendix A: GlobalScan-compatible MFDs](#).

5. Press the **[Enter]** key (or click **Go**).

Important: Only one remote session is permissible. If another session is taking place (either local or network), an error message will be displayed. Close the window and try again later.

6. Enter your **User name** (default = admin) and **Password** (default = ricoh).
7. Click the **[OK]** button.



Display reads:

MFD Configuration Page

MFD CONFIGURATION

GlobalScan Srvr *

HTTPS

Proxy Server

Proxy Port

Proxy Username

Proxy Password

Change Admin Password

* Denotes required field

MFD Configuration Page - Field Limits

MFD CONFIGURATION

GlobalScan Srvr * Max 40

HTTPS

Proxy Server Max 40

Proxy Port Max 20

Proxy Username Max 20

Proxy Password

Change Admin Password

* Denotes required field

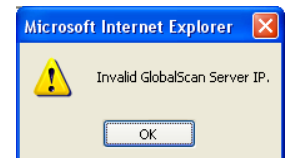
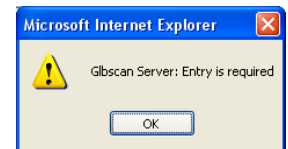
Note: When connecting to a newer MFD, an [\[Upload Image File\]](#) button will be displayed underneath the [\[Change Admin Password\]](#) button. This feature is for future implementation.

Now, you are ready to enter one (or more) of the following fields:

- GlobalScan Srvr (Required):** Enter either the server's IP address or fully qualified domain name.

Note:

- If you click the [\[Update\]](#), with the GlobalScan Srvr field blank, an error message will appear. Click the [\[OK\]](#) button, and then enter the IP address.
- If you click the [\[Update\]](#) button, but an invalid IP address was entered, an error message will appear. Click the [\[OK\]](#) button and enter a valid IP address (or server name).



- HTTPS:** Click this check box to turn HTTPS (secure HTTP) on/off.
- Proxy Server:** Enter either the proxy server's IP address or fully qualified domain name.
- Proxy Port:** Enter the proxy server port number (maximum of 20 digits).

Note: This field must be numeric. Otherwise an error message will be displayed. If this occurs, click the [\[OK\]](#) button, and then enter a numeric value.



- Proxy Username:** Enter the user name for access to the proxy server (maximum of 20 characters).

13. **Proxy Password:** Enter the password for access to the proxy server (maximum of 20 characters).

14. **Change Admin Password:** To change the admin password, click the [**Change Admin Password**] button. Enter fields (all are required). Click the [**Update**], and then click the [**Close**] button.

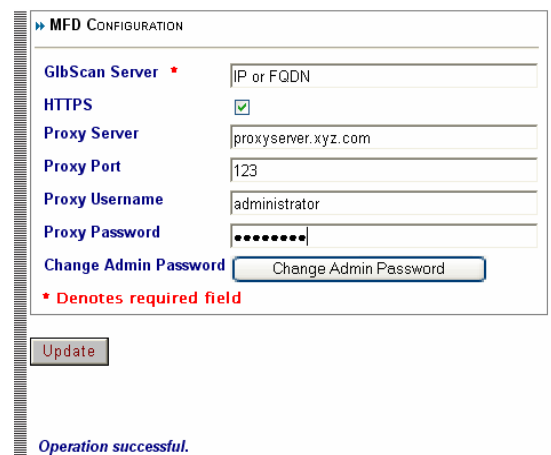
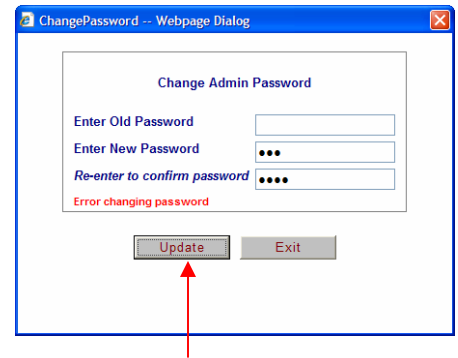
Note: If an error has been made during data entry, the display reads, "Error changing password."

15. Once all the necessary settings are entered, review the displayed data, and then click the [**Update**] button.

Display reads:

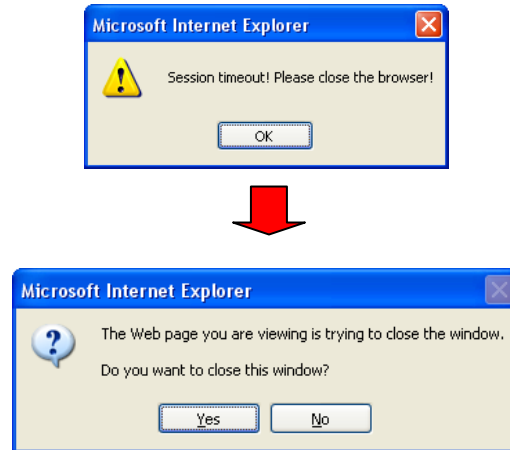
16. Close your **Web browser** [X].

Important: After editing the MFD Configuration, the MFD **must** be rebooted. See p. 34, MFD Reboot Rules.



Session Timeout

If a session timeout occurs, click the [OK] button, and then click [Yes] to close your Web browser. Reopen your browser, repeat step 4 and continue.



Note:

This will only occur if the browser is Microsoft® Internet Explorer version 7.0.

Manual MFD Configuration (via MFD control panel)

To manually enter MFD configuration settings, proceed as follows:

1. Press the [**Scanner**]¹ key on the MFD control panel (once or twice). **Note:** If you are currently logged in to a GlobalScan project, press the [**Logout**] button.

The next screen to appear depends on how many projects are configured and whether or not login is required. See *Before Getting Started* → *GlobalScan Terms*, *Projects*, for details.

2. On the MFD control panel, press and hold the [**Clear/Stop**] key (for more than 5 seconds), then release.

Display reads:

GlobalScan Ver. 3.0 Configuration Screen

Important: MFDs running v2.x and v3.0 firmware can connect to a GlobalScan v3.1 server.

Parameter	Description
GlbScan Server (Required)	IP address of the GlobalScan Server or fully qualified domain name.
Proxy Server	Proxy server IP address or fully-qualified domain name.
HTTPS	HTTPS on/off.
Proxy Port	Proxy server port number.
Proxy Username	User name for access to proxy server.
Proxy Password	Password for access to proxy server.

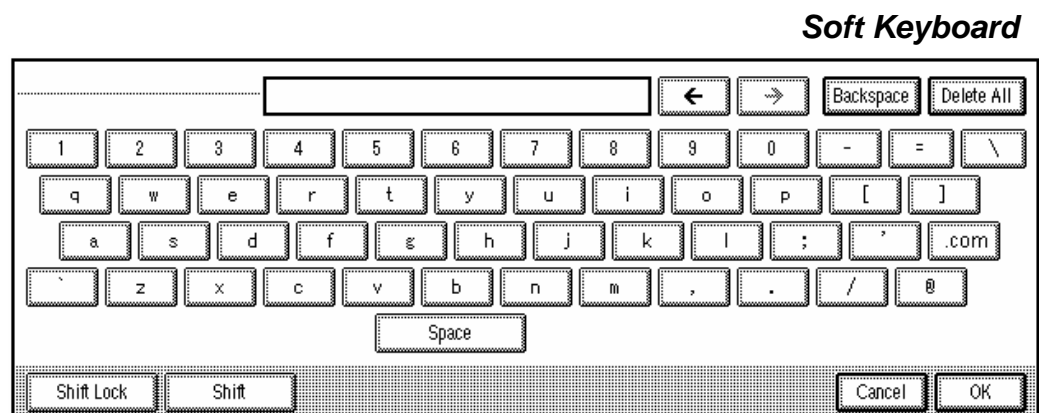
¹ A control panel key other than the [**Scanner**] key may access GlobalScan.

Note: If the MFD fails to download a profile, an error message is displayed on the MFD touch screen. From the GlobalScan Server, check that a profile has been created/selected for the MFD, then close the error window. This initiates another download attempt by the GlobalScan Server. If this action still returns an error, log out of GlobalScan (from the MFD) and open the MFD configuration screen (see previous page). Check that all parameters are correct.

Important: If any changes have been made to the MFD's configuration, you **must** reboot the MFD. See p. 34, [MFD Reboot Rules](#).

3. Select a **parameter**, e.g., press the [GlbScan Server] button.

Display reads:



Universal Soft Keyboard

Newer MFDs display the Universal Soft Keyboard. For details, see [Appendix B](#).



Note: GlobalScan's soft keyboard will reflect the localization selected in the firmware and display the character set of a selected language. See [Localization](#), next section, for details.

4. Enter/edit **data**, as needed.

Note:

- Enter characters by touching corresponding keyboard characters.
- To erase characters, right to left, press the [**Backspace**] button. To erase entire entry, press the [**Delete All**] button.
- To select a single uppercase letter or symbol, press the [**Shift**] button. To select multiple uppercase letters or symbols, press the [**Shift Lock**] button.

5. Press the [**OK**] button.

6. Repeat, if necessary.

7. Confirm the displayed information, and then press the [**OK**] button.

Localization

GlobalScan, which has been translated into five (5) languages, displays all supported language characters on the MFD, specifically, English, French, German, Italian and Spanish.

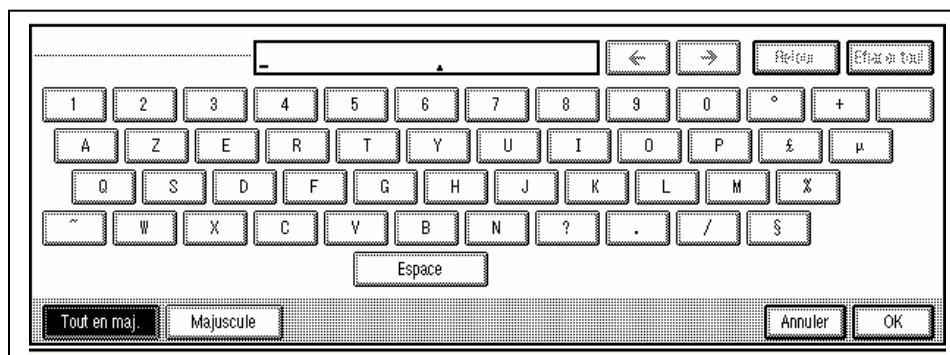
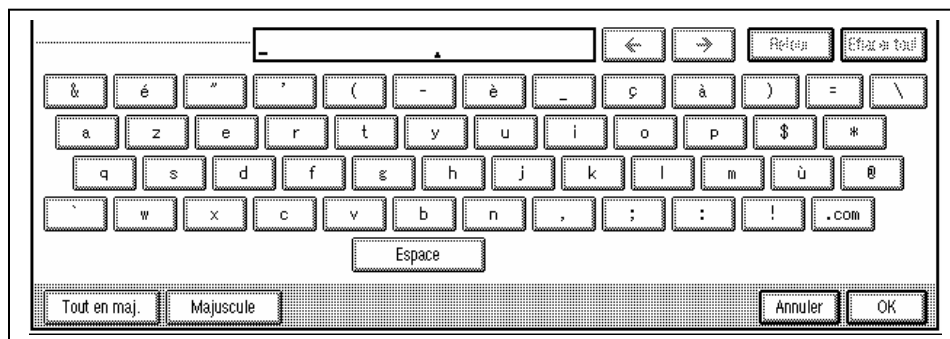
The displayed MFD language is determined by three factors:

1. GlobalScan firmware version
2. Installed language pack and subsequent language selection
3. MFD production date

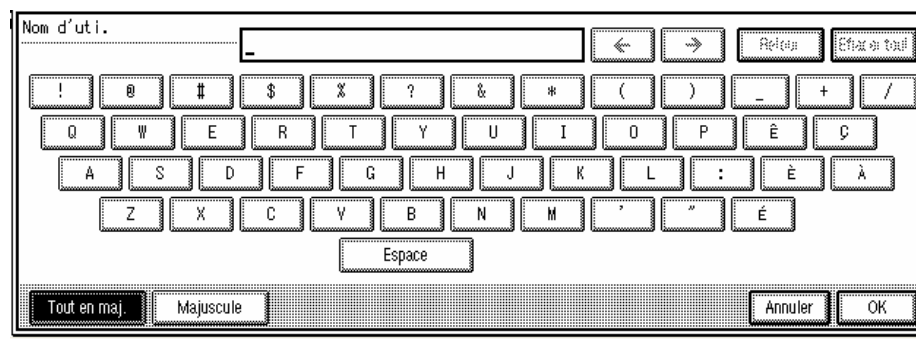
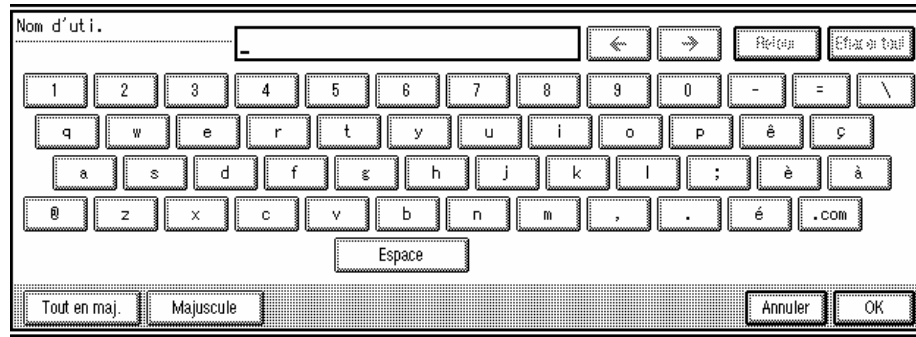
Note:

- GlobalScan's soft keyboard will reflect the localization selected in the firmware and display the special character set of the selected language.
- If an MFD does not support the Universal Soft Keyboard, and you select French as the system language, then you have the choice of the European French or French-Canadian keyboard, as shown below.
- When choosing the French-Canadian keyboard, you must also select the "French-Canadian Keyboard Layout" check box through the GlobalScan WebAdmin Module's Manage Project screen. For details, see [Step 4: Add/Edit a Project](#).

European French Soft Keyboard



French-Canadian Keyboard



Compiled Version

To determine which version of GlobalScan is currently installed on the MFD, open the GlobalScan configuration screen, as follows:

1. Press the **[Scanner]** key (once or twice). A control panel key other than the **[Scanner]** key may access GlobalScan.

Note: If you are currently logged in, press the **[Logout]** button.

2. Press and hold the **[Clear/Stop]** key (for more than 5 seconds), then release. The GlobalScan Configuration screen appears. The bottom left-hand corner of the display will indicate the version and build date.

Installed Language

Each MFD can be configured to allow the user to toggle between one of two languages, i.e., two languages can be installed and the user selects one of the two. For example, if you select Spanish within the system firmware, Spanish will be displayed within the MFD's GlobalScan screens.

Note: See your MFD Operating Instructions for details on setting the device's display language.

Important: In order for GlobalScan to acknowledge a new display language setting, you **must** reboot the MFD. See p. 34, MFD Reboot Rules.

MFD Reboot Rules

In order for the GlobalScan Server and MFD to share configuration data, it may be necessary to reboot the MFD. The conditions where reboot is *required* or *not required* are outlined below. Following the chart are instructions on how to properly reboot the device - remotely (via the Web) or manually (via the MFD's control panel).

	Action	Via...	Example	Reboot	
				Yes	No
1	Modify MFD configuration	<ul style="list-style-type: none"> Manage MFDs screen Remote MFD configuration (via device IP address) Manual MFD configuration (via device control panel) 	Change IP address, serial number or switch profiles	✓	
2	Change MFD language setting	<ul style="list-style-type: none"> User Tools key on MFD control panel 	Change MFD display language from English to Spanish	✓	
3	Modify profile configuration	<ul style="list-style-type: none"> Manage Profiles screen 	Change Profile Name, MFD Reset Time and/or Keep-alive Timer	✓	
4	Add/remove project(s) to/from a profile	<ul style="list-style-type: none"> Manage Profiles screen 	Add/remove a project or change project icon	✓	
5	Add/remove Authentication service to/from a project	<ul style="list-style-type: none"> Manage Projects screen 	Add/remove LDAP, NT or Novell Authentication service	✓	
6	Add/remove service(s) to/from a project	<ul style="list-style-type: none"> Manage Projects screen 	Add/remove Email, Scan-to-Folder, Image Management, etc.		✓
7	Modify service configuration within existing project	<ul style="list-style-type: none"> Manage Services screen 	Within Scan Settings configuration, change resolution, duplex, color scan, etc.		✓

Manual Reboot Procedure (via MFD control panel)

1. Turn the Main Power button (shown at right) off. Wait until the green LED stops blinking.
2. Turn the main rocker switch off. Location of this switch varies by MFD model.
3. Wait a moment, and then turn the MFD back on, using the main rocker switch.

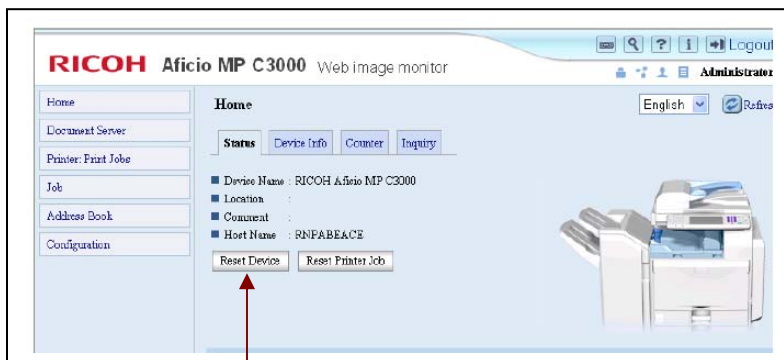


Remote Reboot Procedure (via Web Image Monitor)

Web Image Monitor is firmware built into the MFD that allows the Administrator to use a standard Web browser to remotely manage a single device connected to the network.

1. Open your **Web browser**.
2. Enter the URL: **http://MFD IP Address**.
3. Enter **User Name** (default: *admin*). Leave the **Password** field blank.
4. Click the [**Login**] button.

Display reads:



5. Click the [**Reset Device**] button.
6. Click the [**OK**] button to confirm.
7. Close your **Web browser** [**X**].

About Setting Levels

Three Levels – System, Profile, Project

This section provides an overview of GlobalScan's three setting levels – system, profile and project. After reading this section, you will be prepared to design and administer document workflows that enable MFD users to easily address their document distribution needs.

Though it is suggested you first configure settings on the system level, you can select any level that meets your installation requirements. Do you want all MFDs to use the same GlobalScan settings or would you like one or more MFDs to address unique requirements? For instance, if you configure the Scan Settings service on the system level, all MFDs will be enabled with identical scan parameters – 200dpi, PDF file format, etc. If you would like to adjust the Scan Settings for the MFD(s) in the Legal Department, for example, to enable two-sided versus one-sided scanning, then the project within that MFD's profile would reflect the change.



In short, you have the flexibility to set all parameters at once on the system level or drill down to the profile or project level to further modify settings. The ability to modify settings does not apply to just Scan Settings. All GlobalScan services (with an associated [Configure] button) can be configured on the system, profile or project level.

Setting Levels



System Level

If you want all service settings to automatically cascade (apply) to all MFDs, configure services on the system level. When values are set on the system level, all profiles and projects will automatically inherit those settings, saving time over manual entry of data within each profile and/or project. What's more, profiles and/or projects will automatically inherit any subsequent changes made on the system level, as long as the profile and/or project has inherited settings from the system level.

	DEFAULT SETTING	READ-ONLY
Batch Scan	Off	<input type="checkbox"/>
Scan Mode	Black & White	<input type="checkbox"/>
Duplex	Off	<input type="checkbox"/>
Duplex Type	Top-Top	<input type="checkbox"/>
Scan Size	AUTO DETECT	<input type="checkbox"/>
Resolution	200	<input type="checkbox"/>
Original Orientation	<input type="radio"/> <input type="radio"/>	<input type="checkbox"/>
Default Language	English	<input type="checkbox"/>
Default Color File Format	JPEG	<input type="checkbox"/>
Default Mono File Format	Single-Page TIFF	<input type="checkbox"/>
Auto Orientation	<input type="checkbox"/>	<input type="checkbox"/>

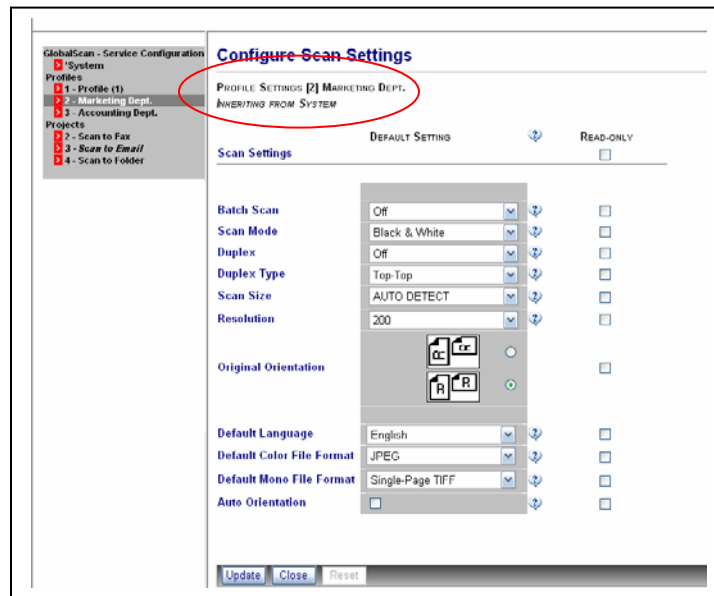
Buttons: Update, Close, Reset



Profile Level

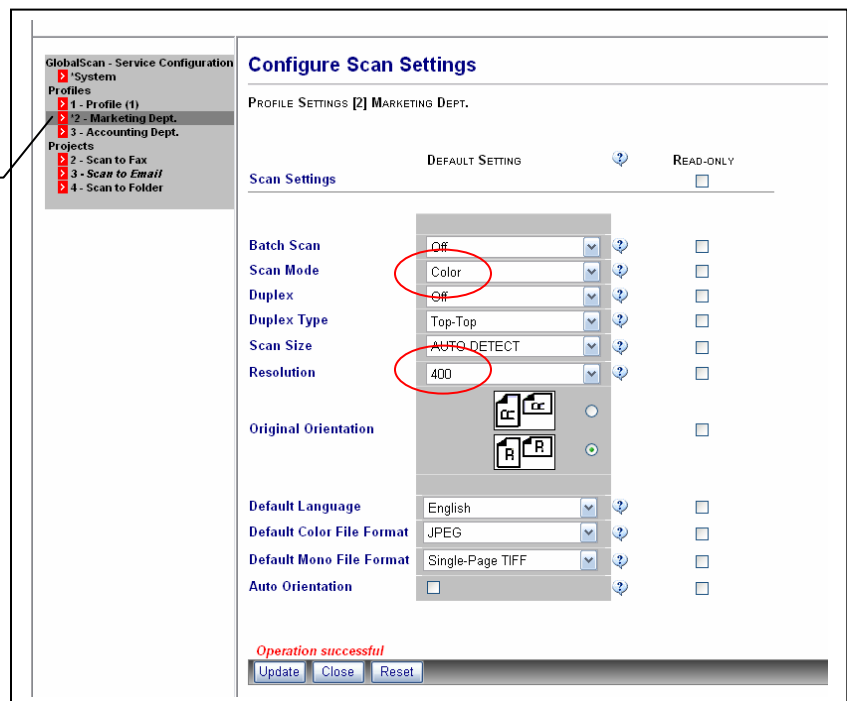
Profiles can inherit service settings from the system level (A) unless changes are made on the profile level (B). In that event, any subsequent changes on the system level will not cascade to the profile. Changes made on the profile level override those established on the system level.

A. Profile Settings Inherited from System Level



B. Profile Level Settings

An asterisk (*) preceding a profile name indicates that the profile has its own settings, not settings inherited from the system level.



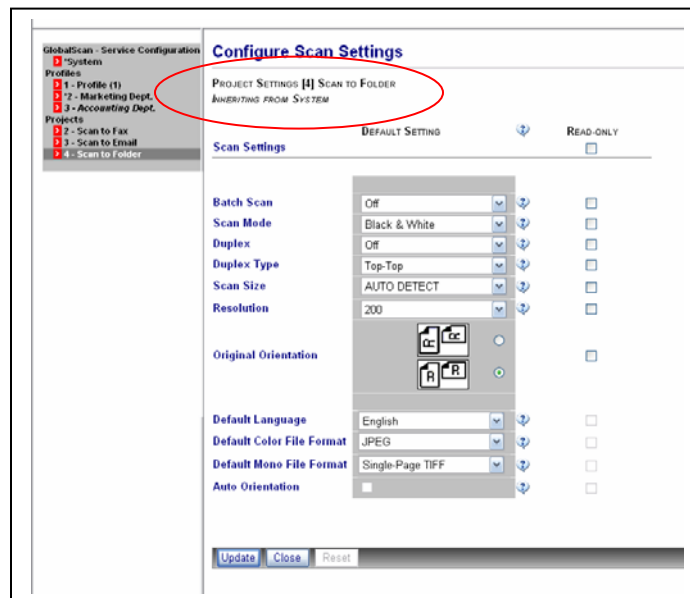


Project Level

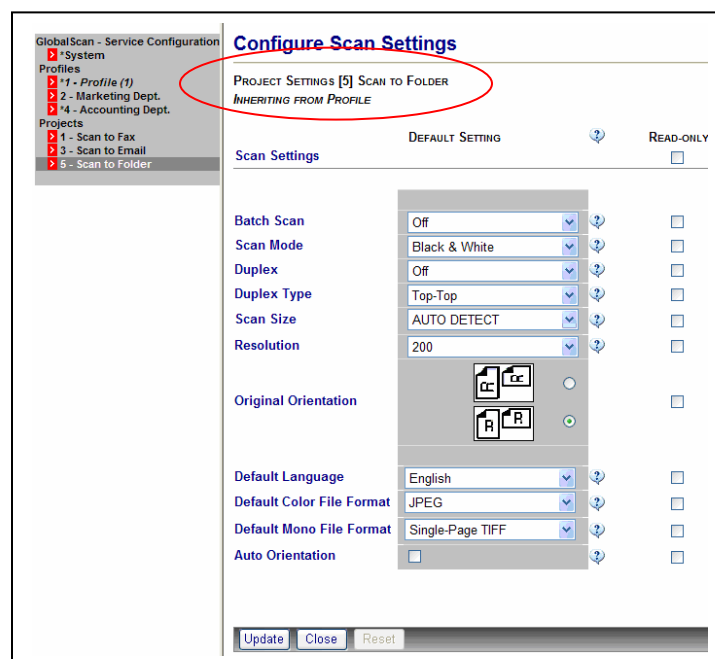
Projects can inherit service settings from either the system level or profile level.

A project can inherit settings from the system level, provided the project belongs to a profile that has inherited settings from the system level (A). A project can also inherit settings from the profile level, provided the project belongs to a profile that has its own settings (not inherited from the system level). Changes made to the profile will cascade to the project (B).

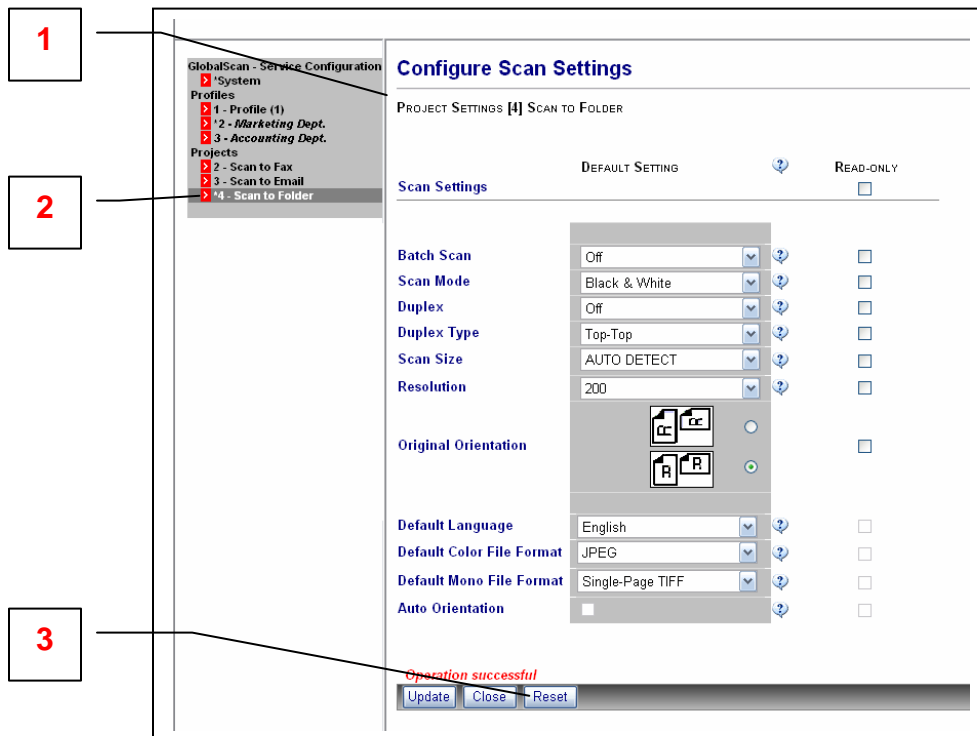
A. Project Settings Inherited from System Level



B. Project Settings Inherited from Profile Level



To set a parameter for a specific project, e.g., Black & White and 200dpi, you drill down to the project level to establish the settings (1). Settings established on the project level override any settings made on the profile or system level.



Restore Settings

As mentioned, an asterisk (*) preceding a profile and/or project name (2) indicates that the profile and/or project has its own settings, not settings inherited from the higher level.

To restore settings made on a higher level, click the [Reset] button at the bottom of the appropriate screen (3). For instance, if a project screen is open, click [Reset] to restore profile level settings. If a profile screen is open, click [Reset] to restore system level settings. On the system level, click [Reset] to restore default settings.



Inherit Password Feature

Services that support password protection can be set on the system level. Entry on the profile or project level is not necessary, as the password is “inherited” from the system level. This saves time over manual entry on the system, profile and project levels. However, if necessary, you can still set a password on the profile or project level.

Using the optional RightFax service as an example, when establishing a password for the first time, you enter the screen at the system level (click **Manage Services** > **RightFax**). After entry of the Server IP address and (Proxy) User ID, you enter the password, and then re-enter the password to confirm (see **Fig. 1**).

The screenshot shows the 'Configure RightFax' interface. On the left is a navigation pane with 'System' selected. The main area is titled 'Configure RightFax' and contains 'SYSTEM SETTINGS'. Fields include:

- Server: 555.666.777.888 (with a 'Ping' button)
- User ID: admin
- Password: masked with four dots
- Re-enter to confirm password: masked with four dots
- Test Fax Number: (with a 'Test' button)

 A red oval highlights the Password and Re-enter to confirm password fields.

Fig. 1

Click the [**Update**] button and the password fields reappear as a [**Change Password**] button (see **Fig. 2**). To change the password, simply click this button.

This screenshot is similar to Fig. 1 but shows the state after clicking 'Update'. The 'Password' and 'Re-enter to confirm password' fields are now replaced by a 'Change Password' button, which is circled in red. A red arrow points from the left to the '1 - Profile (1)' option in the navigation pane.

Fig. 2

Now, to see how the Inherit Password feature works, select a profile in the navigation pane. In this example, **Profile (1)** is selected (see **Fig. 3**).

Note that the screen includes text that reads *Inherited from System* and a **User password from System** check box. This indicates that the password entered in [Fig. 1](#) automatically applies on the profile level.

The screenshot shows the 'Configure RightFax' configuration page. On the left, a navigation menu includes 'GlobalScan - Service Configuration', 'System', 'Profiles', '1 - Profile (1)', 'Projects', and '1 - Scan to Fax'. The main content area is titled 'Configure RightFax' and shows 'PROFILE SETTINGS [1] PROFILE (1)' with the note 'INHERITING FROM SYSTEM'. The 'Server' field is set to '555.666.777.888' with a 'Ping' button. The 'User ID' field contains 'admin'. The 'Use password from System' checkbox is checked and circled in red. Below it are empty fields for 'Password' and 'Re-enter to confirm password'. At the bottom, there is a 'Test Fax Number' field and a 'Test' button.

Fig. 3

If you would like to set a different password, unique to the profile – overriding the password set on the system level - deselect the **User password from System** check box (see [Fig. 4](#)). Enter the new password and re-enter to confirm.

This screenshot is similar to Fig. 3 but shows the 'Use password from System' checkbox as unchecked. The 'Password' and 'Re-enter to confirm password' fields are now visible and empty. The 'Server' field remains '555.666.777.888' and 'User ID' is 'admin'. The 'Test' button is still present.

Fig. 4

After clicking [**Update**], the screen refreshes. A [**Change Password**] button displays, indicating that a password exists on the profile level (see [Fig. 5](#)).

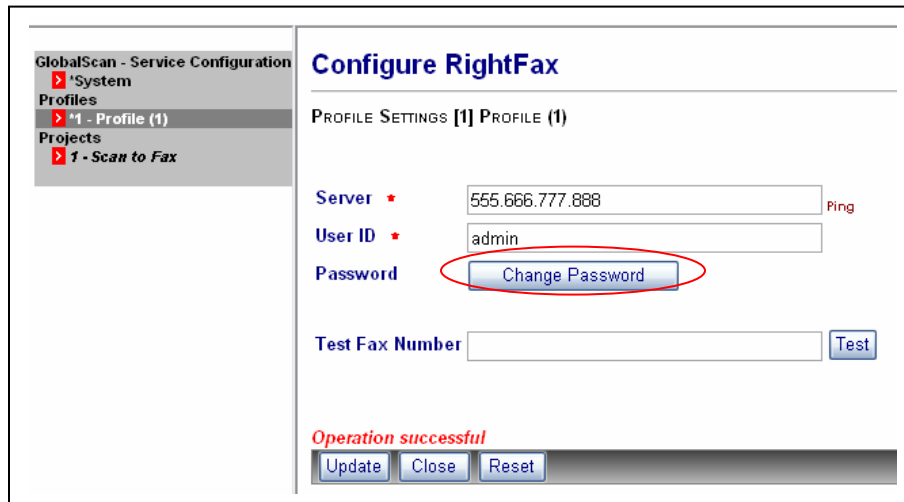


Fig. 5

This same principle applies to setting a password on the project level. When selecting the project, the screen will indicate if a profile or system level password applies by displaying a check box that reads **Use password from System** or **Use password from Profile**. To set a new password on the project level, simply deselect the check box, enter the password, and then re-enter to confirm. Click **[Update]** to save the settings.

Note:

- To restore field and password values from a previous level, click the **[Reset]** button. For example, if you are on the project level, clicking **[Reset]** will restore profile level settings. If you are on the profile level, clicking **[Reset]** will restore system level settings.
- To exit the screen without applying any changes, click the **[Close]** button, and then **[OK]**. This action **[Close > OK]** applies to any screen with a **[Close]** button. Be sure that this is the action you would like to take as all changes are permanently erased.

GlobalScan WebAdmin Module Configuration

This section describes how to configure GlobalScan Server settings via the GlobalScan WebAdmin Module. GlobalScan-enabled MFDs can then join in network-scanning operations.

Step 1: Launch GlobalScan

1. Open your **Web browser**.
2. Enter the GlobalScan Server **URL**: **http://IP address/gadmin**.
3. Press **Enter** (or click **Go**).

Display reads:

GlobalScan Home Page

The screenshot shows the GlobalScan Home Page interface. On the left is a vertical menu with the following items: GlobalScan, Home, System (with sub-items: System Parameters, GlobalScan Activation), Services (with sub-items: Manage Services, Profiles and Projects, Manage Profiles, Manage Projects), MFDs (with sub-items: Manage MFDs, Manage Project Icons), and Statistics (with sub-items: Manage Logs, Manage Jobs). A box labeled 'Menu Link' points to the 'Home' link. A box labeled 'Expand/collapse a Profile or Project list by clicking [+]' points to the plus sign next to the 'Services' section. The main content area is titled 'Welcome to GlobalScan' and includes a 'GlobalScan Admin Password:' field with a 'Change Password' button. Below this are two columns of icons and links: 'Configuration' (System Parameters, Manage Services, Profiles and Projects) and 'Management' (Manage MFDs, Manage Jobs, Manage Logs). A box labeled 'Shortcut Icon' points to the 'Manage MFDs' icon. The footer contains 'Copyright 2001-2007 Ricoh Americas Corporation'.

To return to GlobalScan's Home Page from any screen, click the **Home** menu link.

Note: If an Admin Password has been established, the screen below is displayed. Enter your case-sensitive password and click the **[Login]** button. Following login, the GlobalScan Home Page appears.

The login screen displays the text 'Welcome To GlobalScan!' in red. Below it, it says 'Please Log In With The Administrator Password:' followed by a text input field. At the bottom, there is a 'Login' button. A red arrow points from the 'Login' button back to the 'Home' link in the menu of the previous screenshot.

Step 2: Enter/Edit System Parameters

To configure general GlobalScan settings that control MFD functionality, proceed as follows:

1. Click the **System Parameters** link (or associated Home Page shortcut icon).

Display reads:

2. Select/enter the following:

- **Language** (Required) – English is the default display language. If you wish to display the GlobalScan WebAdmin Module screens in another language, click the **Language** drop-down button [v]. Select English [UK], German, French, Italian or Spanish, and then click the [**Update**] button.

Note: After clicking the [**Update**] button, the GlobalScan WebAdmin Module screens will change to reflect the selected language. Also note that when changing the language, the **Operation successful** prompt displays in the previous selected language. Click the [**Update**] button again, and all future messages are in the new language.

- **Default Profile** (Required) – Click the drop-down button [v] to select a default profile.

Note: GlobalScan provides a default profile called “Profile (1)”. When an unassigned profile MFD connects to the GlobalScan Server for the first time, this default profile is automatically assigned. The next section, [Step 3: Add/Edit a Profile](#), discusses how to add a new profile or edit an existing profile.

- **Storage Folder** (Required) – If necessary, enter path to the folder where GlobalScan job files are to be stored. The Storage Folder is the location GlobalScan uses to temporarily store the uploaded files, i.e., scanned images received from the MFD. Be sure that the directory is local to the GlobalScan Server.
- **Log Folder** (Required) – If necessary, enter path to the folder where GlobalScan log files are to be stored. The Log Folder is the location GlobalScan uses to store the log data related to GlobalScan operation. Be sure that the directory is local to the GlobalScan Server.
- **Scan Interval (seconds)** – Required field. This is the time interval the GlobalScan Job Processor waits before checking for new jobs. Enter the desired interval at which the system should check for new jobs (10 to 600 seconds). The default interval is 60 seconds.
- **Auto Enable New MFDs** – Select on or off. This setting is checked (on) by default, thus all new (unregistered) MFDs will be automatically registered with the GlobalScan Server and be capable of performing GlobalScan functions. If unchecked (off), new MFDs cannot use GlobalScan unless the Administrator enables the device manually. Even though devices are disabled, they are still registered in the Manage MFD screen, so simply enable them; there is no need to re-enter MFD information.

Note: If more MFDs connect than are licensed, and this box is checked, new MFDs are automatically disabled. Also see [GlobalScan Management, A. Manage MFDs](#).

- **Verbose Mode** – Select on or off. This setting is checked (on) by default. When selected (on), additional information will be logged for advanced support and troubleshooting purposes. After successful system setup, Verbose Mode can be turned off in order to reduce the amount of log file data.

3. After verifying the settings, click the **[Update]** button.

Step 3: Add/Edit a Profile

A profile defines GlobalScan parameters for the MFDs, such as the Profile Name, MFD Reset Time, etc. Multiple Profiles can be created within GlobalScan, though just one default profile is selected for a group of MFDs, making the profile “machine-specific.”

Note:

- When the MFD connects to the GlobalScan Server for the first time, a default profile (with one project that contains default services) is automatically assigned. The default profile (and related settings) can be changed via the System Parameters screen (see [Step 2: Enter/Edit System Parameters](#)).
- At least one project must be associated with a profile, otherwise the MFD will display an error.

Important: After adding/editing a profile, the MFD(s) associated with that profile **must** be rebooted. See p. 34, [MFD Reboot Rules](#).

Add New Profile

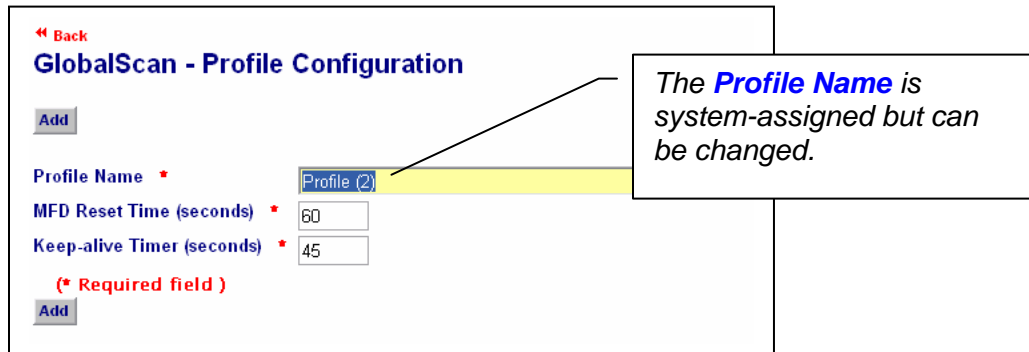
1. Click the [Manage Profiles](#) link (or associated Home Page shortcut icon).

Display reads:

If you wish to edit the default profile, [Profile \(1\)](#), see [Edit Existing Profile](#), otherwise continue.

2. Click the [\[Add\]](#) button.

Display reads:



GlobalScan - Profile Configuration

Profile Name * Profile (2)

MFD Reset Time (seconds) * 60

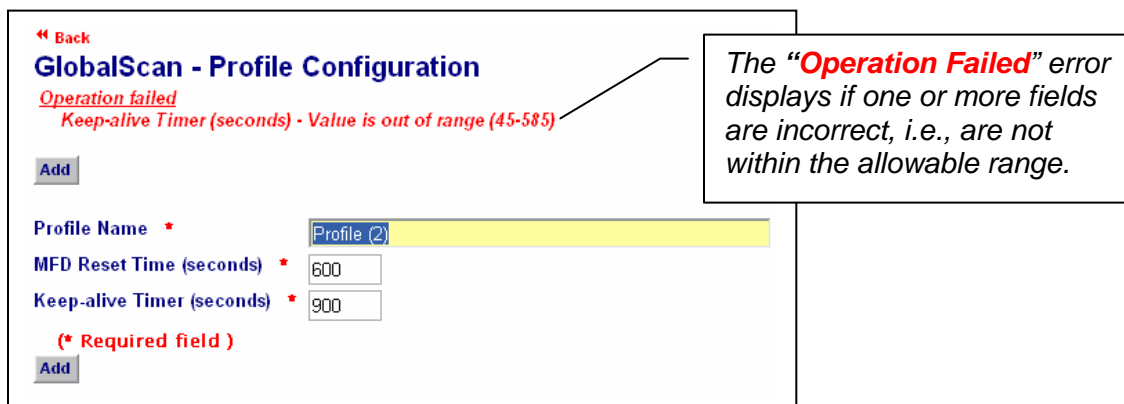
Keep-alive Timer (seconds) * 45

(* Required field)

The **Profile Name** is system-assigned but can be changed.

3. Enter the following:

- **Profile Name** (Required) – This system-assigned name can be changed. Enter, for example, *Marketing Dept.* Maximum length is 64 characters. This new name will then appear in the profile list that displays in the Manage Profiles screen.
- **MFD Reset Time** (Required) – This is the time period before the MFD ends the session with the GlobalScan Server. By default, logout is automatic if the MFD is idle for 60 seconds, i.e., no buttons on the MFD are pressed. Enter a reset time up to a maximum of 600 seconds.
Note: The MFD Reset Time cannot be less than the Keep-alive Timer.
- **Keep-alive Timer** (Required) – This number defines the time interval at which the MFDs will contact the GlobalScan Server with a request to keep the session alive. By default, the Keep-alive Timer is 45 seconds. If changing the Keep-alive Timer, it must be at least 15 seconds less than the MFD Reset Time. Since MFD Reset Time can range from 60 to 600 seconds, the Keep-alive Timer has a valid range from 45 to 585 seconds.



GlobalScan - Profile Configuration

Operation failed
Keep-alive Timer (seconds) - Value is out of range (45-585)

Profile Name * Profile (2)

MFD Reset Time (seconds) * 600

Keep-alive Timer (seconds) * 900

(* Required field)

The “**Operation Failed**” error displays if one or more fields are incorrect, i.e., are not within the allowable range.

A profile with correct settings appears below:

GlobalScan - Profile Configuration
Changes have been made but have not been saved

Add

Profile Name * Marketing Dept.

MFD Reset Time (seconds) * 60

Keep-alive Timer (seconds) * 45

(* Required field)

Add

The display indicates when changes have been made but not saved.

- Confirm accuracy of the settings, and then click the [Add] button to save the settings. The screen is now ready for entry of another profile (as shown below).

GlobalScan - Profile Configuration
Operation successful

Add

Profile Name * Profile (2)

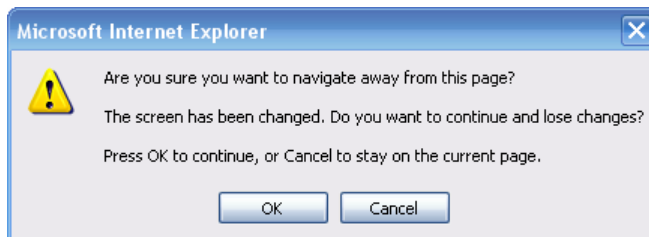
MFD Reset Time (seconds) * 60

Keep-alive Timer (seconds) * 45

(* Required field)

Add

Note: If you click the [**<<Back**] button, before clicking the [Add] button, the error message below will be displayed. If you do not want to save the changes, click the [OK] button. If you do want to save changes, click the [Cancel] to return to the current page, and then click the [Update] button.



- To add another profile, repeat 3 – 4.

After profiles are created, view the profile list as follows:

- Click the **Manage Profiles** menu link (or click the [**<<Back**] button).

Display reads:

Column	Description
A	Default Profile The default profile is selected in the System Parameters screen (see <i>Step 2: Enter/Edit System Parameters</i>).
B	Number of MFDs This column indicates the number of MFDs currently assigned to a profile. Note: A check box (far left) displays when a profile does not have MFDs associated with it, thus this column reads “0”. Only profiles that do not have MFDs associated with them, can be deleted; a default profile cannot be deleted. If a number appears, this indicates the number of MFDs assigned to that profile. To delete the profile, the MFDs associated with it must be reassigned to another profile. For details, see <i>Delete Profile</i> and <i>Reassign MFDs to Different Profile</i> .

C	Projects	Clicking this button opens the Project Configuration screen. See <u>Step 4: Add/Edit a Project</u> .
D	Delete	Clicking this button deletes a profile. Note that there is no [Delete] button for any profile that has one or more MFDs assigned to it, or for the default profile (a default profile cannot be deleted). For details, see <u>Delete Profile</u> and <u>Reassign MFDs to Different Profile</u> .

Important: After adding/removing a profile, the MFD(s) associated with that profile **must** be rebooted. See p. 34, MFD Reboot Rules.

Edit Existing Profile

To edit profile settings, i.e., Profile Name, MFD Reset Time and/or Keep-alive Timer, proceed as follows:

1. Click the **Manage Profiles** link (or associated Home Page shortcut icon).
2. Highlight the desired field entry, for instance the Profile Name (circled below).

Profile ID	Profile Name	MFD Reset Time (seconds)	Keep-alive Timer (seconds)	Default Profile	Number of MFDs	
<input type="checkbox"/> 3	Accounting Dept.	60	45	<input type="checkbox"/>	0	<input type="button" value="Projects"/> <input type="button" value="Delete"/>
<input type="checkbox"/> 2	Marketing Dept.	60	45	<input type="checkbox"/>	0	<input type="button" value="Projects"/> <input type="button" value="Delete"/>
<input type="checkbox"/> 1	Profile (1)	60	45	<input checked="" type="checkbox"/>	3	<input type="button" value="Projects"/>

3. Type new setting. In the example above, *Accounting Dept.* is changed to *Purchasing Dept.*
4. Repeat 2 – 3, as needed for **MFD Reset Time** or **Keep-alive Timer**.
5. Click the [**Update**] button. The screen refreshes, displaying the new settings.

Operation successful

Profile ID	Profile Name	MFD Reset Time (seconds)	Keep-alive Timer (seconds)	Default Profile	Number of MFDs	
<input type="checkbox"/> 2	Marketing Dept.	60	45	<input type="checkbox"/>	0	<input type="button" value="Projects"/> <input type="button" value="Delete"/>
<input type="checkbox"/> 1	Profile (1)	60	45	<input checked="" type="checkbox"/>	3	<input type="button" value="Projects"/>
<input type="checkbox"/> 3	Purchasing Dept.	60	45	<input type="checkbox"/>	0	<input type="button" value="Projects"/> <input type="button" value="Delete"/>

Important: After modifying a profile configuration, the MFD(s) associated with that profile **must** be rebooted. See p. 34, [MFD Reboot Rules](#).

Sort Profile List

To sort the profile list, proceed as follows:

1. Click the **Manage Profiles** link (or associated Home Page shortcut icon).
2. Click the category drop-down button [v].
3. Select the category to sort by.
4. Select **Ascending** or **Descending** order from the drop-down button [v].
5. Click the **[Sort]** button.

The screenshot illustrates the steps to sort the profile list. In the top image, the 'Sort' dropdown is open, showing 'Profile ID' selected (step 3) and 'Ascending' order chosen (step 4). A red arrow indicates the transition to the bottom image, where the profile list is sorted by Profile ID.

Profile ID	Profile Name	MFD Reset Time (seconds)	Keep-alive Timer (seconds)	Default Profile	Number of MFDs	Actions
1	Profile (1)	60	45	<input checked="" type="checkbox"/>	3	Projects
<input type="checkbox"/> 2	Marketing Dept.	60	45	<input type="checkbox"/>	0	Projects Delete
<input type="checkbox"/> 3	Purchasing Dept.	60	45	<input type="checkbox"/>	0	Projects Delete

Delete Profile


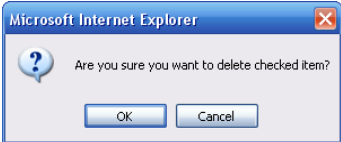
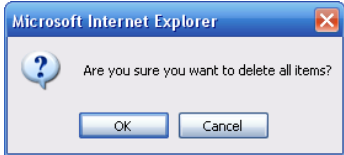
When deleting a profile, it is important to note that you do not delete any projects or any services associated with the project.

1. Click the **Manage Profiles** menu link (or associated Home Page shortcut icon).

Display reads:

Note: A **[Delete]** button will not display if MFDs have been assigned to the profile or the profile is a default profile. To delete such a profile, the MFDs must first be reassigned to a different profile (or assigned a different profile as the default profile). See [Reassign MFDs to Different Profile](#), to follow.

2. Use one of the following three methods to delete the profile(s):

A. Delete One Profile	B. Delete Multiple Profiles	C. Delete All Profiles
<ul style="list-style-type: none"> • Click the [Delete] button associated with the profile. <p>Display reads:</p>  <ul style="list-style-type: none"> • Click the [OK] button. 	<ul style="list-style-type: none"> • Click the check box(es) associated with the profiles you would like to delete. • Click [Delete Checked Items] button. <p>Display reads:</p>  <ul style="list-style-type: none"> • Click the [OK] button. 	<ul style="list-style-type: none"> • Click the [Delete All] button. <p>Display reads:</p>  <ul style="list-style-type: none"> • Click the [OK] button.

Reassign MFDs to Different Profile

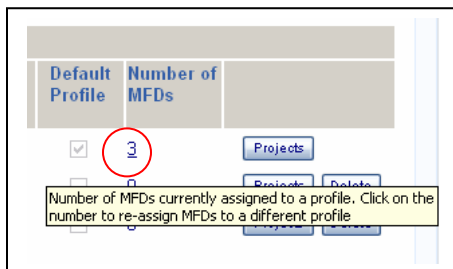
In order to delete a profile that has MFDs assigned to it, you must first reassign the devices to a different profile. To do so, proceed as follows:

1. Click the **Manage Profiles** menu link (or associated Home Page shortcut icon).

Display reads:

Profile ID	Profile Name	MFD Reset Time (seconds)	Keep-alive Timer (seconds)	Default Profile	Number of MFDs	
1	Profile (1)	60	45	<input checked="" type="checkbox"/>	3	Projects
<input type="checkbox"/> 2	Marketing Dept.	60	45	<input type="checkbox"/>	0	Projects Delete
<input type="checkbox"/> 3	Accounting Dept.	60	45	<input type="checkbox"/>	0	Projects Delete

2. Click on the number, e.g., **3**, within the **Number of MFDs** column.



3. Click the **Profile** drop-down button [v], and then select the new profile.



4. Click the [**Update**] button. Screen refreshes with MFD assigned to the selected profile.

Note:

- To close the window without saving changes, click [**Close**].
- For instructions on deleting a profile, see [Delete Profile](#) (previous section).

Step 4: Add/Edit a Project

Projects provide a way to group services based on specific application needs. For example, the Sales Department may email proposals to prospective customers, while the Legal Department may scan documents for archival in a network folder. Thus, a project contains the services (e.g., Scan-to-Email, Scan-to-Folder) needed to address users' document capture and distribution needs.

Note:

- There can be one or multiple projects per profile; the user simply scrolls through all available project buttons from the MFD touch screen.
- If there is only one project in the profile, the project's associated services will automatically display on the MFD touch screen.
- Projects can be shared between profiles.

Add New Project

Important: After adding a new project to a profile, the MFD(s) running that specific profile **must** be rebooted. See p. 34, MFD Reboot Rules.

1. Click the **Manage Projects** menu link (or associated Home Page shortcut icon).

Display reads:

The [Update], [Add], [Delete Checked Items] and [Delete All] buttons are duplicated at the top and bottom of the screen. This enables easier access to functions within longer project lists.

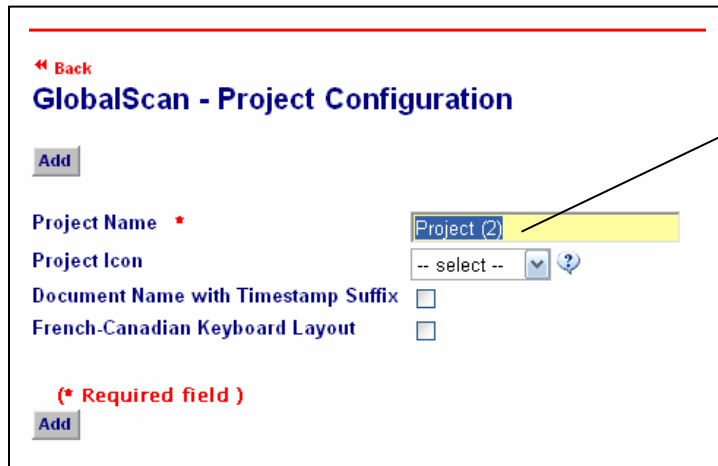
For your convenience, GlobalScan Project (1) as a default project.

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If you wish to edit the default project, **Project (1)**, see Edit Existing Project, otherwise continue.

2. Click the **[Add]** button.

Display reads:



The Project Name is system-assigned, but can be changed.

3. Enter the following information:

- **Project Name** (Required) – The system-assigned project name can be changed. Enter, for example, *Scan to Email*. The maximum length is 25 characters. The project name corresponds to a button on the MFD touch screen (circled below). Project names cannot be the same.

WVGA/SVGA Touch Screen

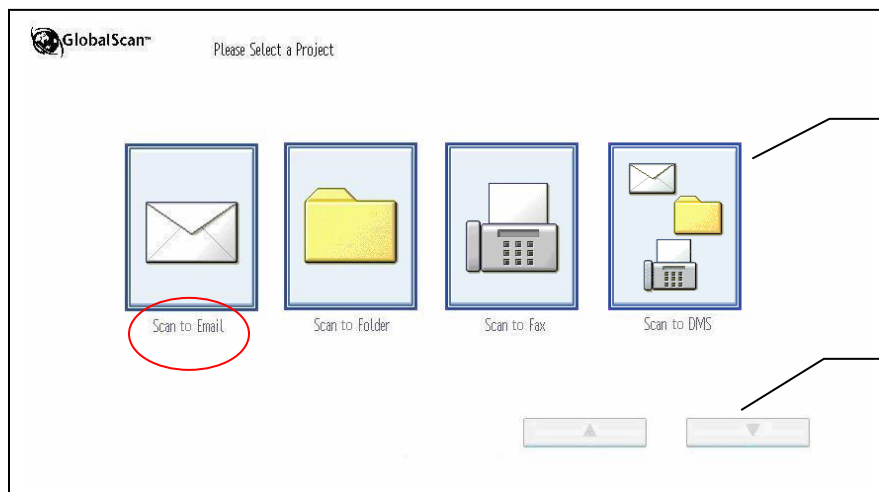


Fig. 7

The WVGA / SVGA touch screens support up to four (4) project buttons per screen.

The user can scroll up/down to view/select a project button.

Note: The appearance of project buttons will vary based on MFD model and GlobalScan configuration settings. For details, see [Before Getting Started](#), [GlobalScan Terms](#), [Project](#).

HVGA Touch Screen

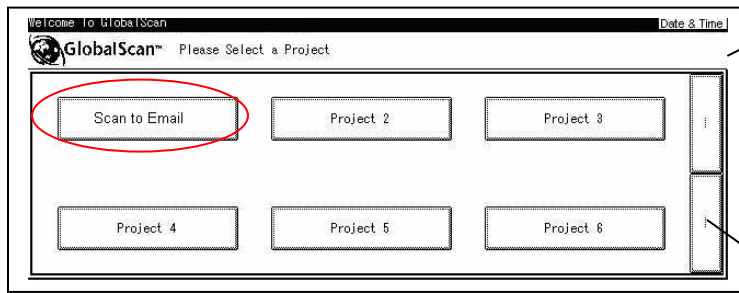
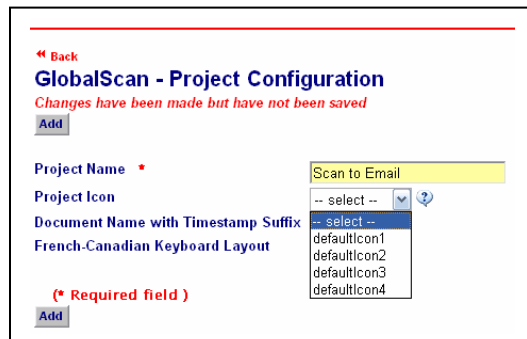






Fig.8

HVGA touch screens supports up to six (6) project buttons per screen.

The user can scroll up/down to view/select a project button.

- Project Icon** – MFD models that support the WVGA/SVGA touch screen can display project icons that enable the user to intuitively select the desired service (see Fig. 7). To determine which type of display a MFD supports, see *Appendix A: GlobalScan-compatible MFDs*. To select a project icon, click the **Project Icon** drop-down button [v]. Display reads:



Name	Image	Description
DefaultIcon1		Represents a project with Scan-to-Email service.
DefaultIcon2		Represents a project with Scan-to-Fax service.
DefaultIcon3		Represents a project with Scan-to-Folder service.
DefaultIcon4		Represents a project with multiple services. Note: If no project icon is selected for a project, this icon will be displayed on the MFD touch screen by default.

Note: For more information, see *GlobalScan Management, B. Manage MFD Project Icons*.

- **Document Name with Timestamp Suffix** – Select on or off. Unchecked (off) by default. If checked (on), a timestamp is appended to the scanned image's file name, e.g., doc name_yyyymmddhhmmss. If the user has not entered a document name via the MFD, a timestamp is created and applied – as the document name – by the GlobalScan Server during job processing.
- **French-Canadian Keyboard Layout** – When French is set as the MFD's display language, the soft keyboard layout will be European French. If this check box is selected, the keyboard layout will be French-Canadian. This feature only applies to older MFDs that do not support the Universal Soft Keyboard. See [Appendix B: Universal Soft Keyboard Support \(by brand/model\)](#).

Display reads:

GlobalScan - Project Configuration
Changes have been made but have not been saved

Project Name * Scan to Email
Project Icon defaultIcon1
Document Name with Timestamp Suffix
French-Canadian Keyboard Layout

(* Required field)

4. Confirm accuracy of the settings, and then click the **Add** button. Fields are automatically cleared and ready for entry of another project.

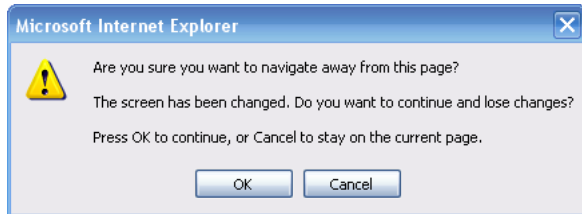
Display reads **Operation successful**.

GlobalScan - Project Configuration
Operation successful

Project Name * Project (2)
Project Icon -- select --
Document Name with Timestamp Suffix
French-Canadian Keyboard Layout

(* Required field)

Note: If you click the [**<<Back**] button, before clicking the [**Update**] button, the error message below will be displayed. If you do not want to save the changes, click the [**OK**] button. If you do want to save changes, click [**Cancel**] to return to the current page, and then click the [**Update**] button.



5. To enter another project, repeat 3 – 4.
6. To confirm that the project has been added to the list, click the **Manage Projects** link (circled below).

Display reads:

GlobalScan - Manage Projects

Update Add Delete Checked items Delete All

Sort Project Name Ascending

Project ID	Project Name	Project Icon	Document Name with Timestamp Suffix	French-Canadian Keyboard Layout	
<input type="checkbox"/> 1	Project (1)	-- select --	<input type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 2	Scan to Email	defaultIcon1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 3	Scan to Folder	defaultIcon3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete

Update Add Delete Checked items Delete All

Edit Existing Project

To edit basic project settings, i.e., Project Name, Description, Timestamp Suffix and/or Keyboard Layout, proceed as follows:

1. Click the **Manage Projects** menu link (or associated Home Page shortcut icon).

Display reads:

GlobalScan - Manage Projects

Update Add Delete Checked Items Delete All

Sort Project Name Ascending

Project ID	Project Name	Project Icon	Document Name with Timestamp Suffix	French-Canadian Keyboard Layout	
<input type="checkbox"/> 1	Project (1)	-- select --	<input type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 2	Scan to Email	defaultIcon1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 3	Scan to Folder	defaultIcon3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete

Update Add Delete Checked Items Delete All

2. Click the desired column entry. In the example above, **Project (1)** will be changed to **Scan to Fax**.

Note: For a description of each field, see the previous section.

3. Change each entry, as needed, and then click the **[Update]** button. The Manage Projects screen refreshes, reflecting the new settings.

Display reads:

GlobalScan - Manage Projects

Operation successful

Update Add Delete Checked Items Delete All

Sort Project Name Ascending

Project ID	Project Name	Project Icon	Document Name with Timestamp Suffix	French-Canadian Keyboard Layout	
<input type="checkbox"/> 2	Scan to Email	defaultIcon1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 1	Scan to Fax	defaultIcon2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 3	Scan to Folder	defaultIcon3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete

Update Add Delete Checked Items Delete All

Sort Project List

To sort the project list, proceed as follows:

1. Click the **Manage Projects** menu link (or associated Home Page shortcut icon).
2. Click the category drop-down button [v].
3. Select the category to sort by.
4. Select **Ascending** or **Descending** order from the drop-down button [v].
5. Click the [**Sort**] button.

The image shows two screenshots of the 'GlobalScan - Manage Projects' interface. The top screenshot shows the 'Sort' dropdown menu open, with 'Project ID' selected. A red arrow points from the top screenshot to the bottom screenshot, which shows the project list sorted by Project ID.

Top Screenshot: GlobalScan - Manage Projects
Operation successful
 Buttons: Update, Add, Delete Checked items, Delete All
 Sort: -- select -- (dropdown), Ascending (dropdown)
 Table columns: Project ID, Project Name, Project Icon, Document Name with Timestamp Suffix, French-Canadian Keyboard Layout
 Table rows:
 1 | Scan to Fax | defaultIcon2 | [?] | [x] | [] | [Services] [Delete]
 2 | Scan to Email | defaultIcon1 | [?] | [x] | [] | [Services] [Delete]
 3 | Scan to Folder | defaultIcon3 | [?] | [x] | [] | [Services] [Delete]

Bottom Screenshot: GlobalScan - Manage Projects
 Buttons: Update, Add, Delete Checked items, Delete All
 Sort: Project ID (dropdown), Ascending (dropdown)
 Table columns: Project ID, Project Name, Project Icon, Document Name with Timestamp Suffix, French-Canadian Keyboard Layout
 Table rows:
 1 | Scan to Fax | defaultIcon2 | [?] | [x] | [] | [Services] [Delete]
 2 | Scan to Email | defaultIcon1 | [?] | [x] | [] | [Services] [Delete]
 3 | Scan to Folder | defaultIcon3 | [?] | [x] | [] | [Services] [Delete]

Delete Project

This procedure deletes only the project, not the services associated with that project.

1. Click the **Manage Projects** menu link (or associated Home Page shortcut icon).

Display reads:

The screenshot shows the 'GlobalScan - Manage Projects' interface. At the top, there are buttons for 'Update', 'Add', 'Delete Checked Items', and 'Delete All'. Below these is a 'Sort' dropdown set to 'Project ID' and 'Ascending'. The main table has the following data:

Project ID	Project Name	Project Icon	Document Name with Timestamp Suffix	French-Canadian Keyboard Layout	Services	Delete
<input checked="" type="checkbox"/> 1	Scan to Fax	defaultIcon2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services	Delete
<input type="checkbox"/> 2	Scan to Email	defaultIcon1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services	Delete
<input type="checkbox"/> 3	Scan to Folder	defaultIcon3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services	Delete

Below the table, there are three callout boxes: 'B' points to the disabled 'Delete Checked Items' button, 'C' points to the 'Delete All' button, and 'A' points to the 'Delete' button for the first project.

Note: The [**Delete Checked Items**] button (B) is disabled (gray) until a project check box (circled above) is selected.

2. Use one of the following three methods to delete the project(s):

A. Delete One Project	B. Delete Multiple Projects	C. Delete All Projects
<ul style="list-style-type: none"> • Click the [Delete] button associated with the project. <p>Display reads:</p> <ul style="list-style-type: none"> • Click the [OK] button. 	<ul style="list-style-type: none"> • Click the check box(es) associated with the projects you would like to delete. • Click [Delete Checked Items] button. <p>Display reads:</p> <ul style="list-style-type: none"> • Click the [OK] button. 	<ul style="list-style-type: none"> • Click the [Delete All] button. <p>Display reads:</p> <ul style="list-style-type: none"> • Click the [OK] button.

Step 5: Add Services to a Project

Services can now be selected for a project. For instance, users in the Marketing Department may require the Scan-to-Email service. In addition, the user may be required to log in (authenticate) before using email. In that event, you will add the *Email* and *Authentication* service. After adding the service(s) to the project, it will be necessary to configure the service(s), which is covered in [Step 7: Configure Services](#).

Important:

- If you are adding the ActivePDF and/or OCR service to a project, you must install related components on the GlobalScan Server. For more information, see [GlobalScan v3.1 Server Software Installation Guide](#) → [Pre-installation Requirements](#) → [Plug-in Preparation](#).

To add services to a project, proceed as follows:

1. Click the **Manage Projects** menu link (or associated Home Page shortcut icon).

Display reads:

GlobalScan - Manage Projects

Update Add Delete Checked items Delete All

Sort Project ID Ascending

Project ID	Project Name	Project Icon	Document Name with Timestamp Suffix	French-Canadian Keyboard Layout	
<input type="checkbox"/> 1	Scan to Fax	defaultIcon2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 2	Scan to Email	defaultIcon1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 3	Scan to Folder	defaultIcon3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete

Update Add Delete Checked items Delete All

2. Click the **[Services]** button associated with the project.

Display reads:

[Back](#)

GlobalScan - Project's Services

Project ID 2
Project Name Scan to Email

Update Remove Checked items Remove All

Sort Service Name Ascending

Service ID	Service Name	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required	
<input type="checkbox"/> 2	Job Log	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	98			Remove
<input type="checkbox"/> 13	Job Tracking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>				Remove
<input type="checkbox"/> 1	Scan Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	99			Configure Remove

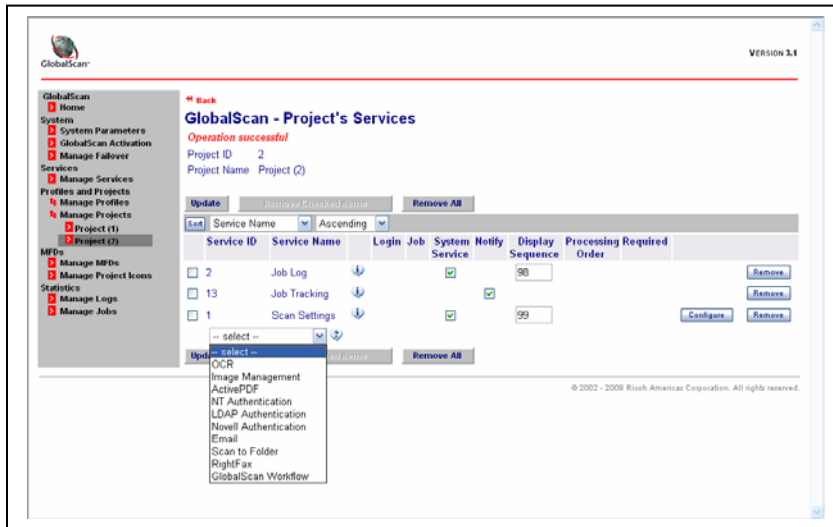
-- select --

Update Remove Checked items Remove All

Note: By default, **Job Log**, **Job Tracking** and **Scan Setting** services (as shown above) are added to each new project. Job Log and Scan Settings tabs will display on the MFD touch screen; Job Tracking is an internal service, thus will not display. These services can be removed, if necessary. See [Remove Services](#), to follow.

3. Click the **Services** drop-down button [v].

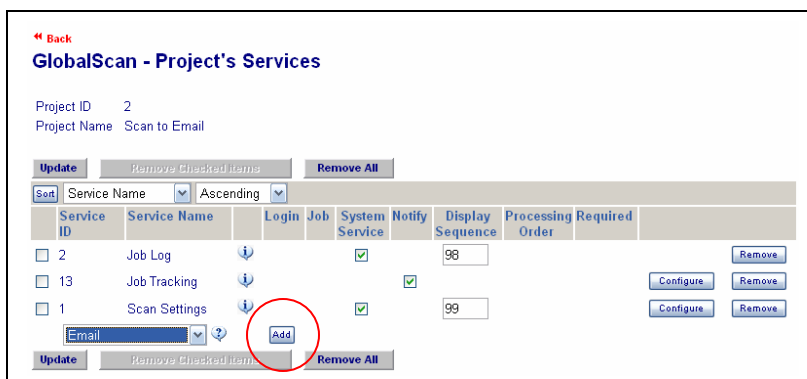
Display reads:



4. Click the desired service. In the above example, **Email** was selected.

Important: You cannot add RightFax to a project unless the correct CD Key is activated. For more information, see [Appendix F: Optional RightFax Plug-in](#).

Display reads:



5. Click the **[Add]** button.

Display reads:

GlobalScan - Project's Services
Operation successful
Project ID 2
Project Name Scan to Email

Update Remove Checked Items Remove All

Sort Service Name Ascending

Service ID	Service Name	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required	
<input type="checkbox"/> 10	Email	↓	✓		✓			<input type="checkbox"/>	Configure Remove
<input type="checkbox"/> 2	Job Log	↓		✓		98			Remove
<input type="checkbox"/> 13	Job Tracking	↓			✓				Configure Remove
<input type="checkbox"/> 1	Scan Settings	↓		✓		99			Configure Remove

-- select --

Update Remove Checked Items Remove All

For details on each column heading, see [Service Roles](#), to follow.

6. To add additional services, repeat 3 – 5.

Display reads:

GlobalScan - Project's Services
Operation successful
Project ID 2
Project Name Scan to Email

Update Remove Checked Items Remove All

Sort Service Name Ascending

Service ID	Service Name	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required	
<input type="checkbox"/> 10	Email	i	✓		✓			<input type="checkbox"/>	Configure Remove
<input type="checkbox"/> 4	Image Management	i	✓	✓					Configure Remove
<input type="checkbox"/> 2	Job Log	i		✓		98			Remove
<input type="checkbox"/> 8	LDAP Authentication	i	✓					✓	Configure Remove
<input type="checkbox"/> 13	Job Tracking	i			✓				Configure Remove
<input type="checkbox"/> 1	Scan Settings	i		✓		99			Configure Remove

-- select --

Update Remove Checked Items Remove All

Click the information **ToolTip** icon to view a brief description of the service.

For details on sorting a list of Services, see [Sort Project's Services](#).



If only one role is defined, it cannot be deselected (disabled).

7. Click the [Update] button to save the project.

Service Roles

The following column heading (and associated check boxes) provides a summary of each service. Each plug-in will have at least one role check box, which cannot be deselected.

Note: The fields/check boxes can also be customized by developers, and thus can vary based on workflow needs.

A Service ID	B Service Name	C Information	D Login	E Job	F System Service	G Notify	H Display Sequence	I Processing Order	J Required
<input type="checkbox"/> 10	Email		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
<input type="checkbox"/> 4	Image Management			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="text" value=""/>	<input type="text" value=""/>	

- A. Service ID** – This read-only field identifies the selected service numerically.
- B. Service Name** – This read-only field lists the type of service, e.g. Email, OCR, etc.
- C. Information** – Click on the Information icon to display additional information about the service.
- D. Login** – This check box indicates if a specific service perform an Authentication function. This check box cannot be unchecked if it is the only function for the project's services.
- E. Job** – Check to add this service as a Job Processing service in the project.
- F. System Service** – Indicates that the service can perform special user interface (UI) functions in the project.
- G. Notify** – This plug-in capability only appears within the Email service. When checked, Notification service is added to the project. If the *Job* and *Notify* check boxes are selected (see below), the logon user, or default notification user, will receive an email regarding job status, i.e., whether delivery was successful or not. If the *Job* check box is not selected (disabled) and the *Notify* check box is selected (enabled), job types other than email will generate a notification email, for example, if sending a fax (via a RightFax Server) or scanning to a folder. In this case, the Email tab will not display on the MFD touch screen.

G. Notify cont.

Service ID	Service Name	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required	Configure	Remove
<input type="checkbox"/> 10	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/> 8	LDAP Authentication	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	Configure	Remove
<input type="checkbox"/> 3	OCR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/> 11	Scan to Folder	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	Configure	Remove

H. Display Sequence: Select the order in which the service tabs should appear on the MFD display by entering a numeric value. The lower the number, the higher the priority. In other words, the lowest number will appear as the left-most tab. In the example below, the Display Sequence is *Email > Scan To Folder > Fax Document*, etc. If the Display Sequence is left blank, tab display order will be random.

Services Tabs

User can scroll to view additional services. If no other services exist, the button is shaded.

I. Processing Order – The Processing Order allows GlobalScan users the flexibility to perform a single scan operation with the resulting files in different formats. For instance, users can receive a TIFF file by email and also receive the same document as a PDF file that is directly deposited to a folder.

By setting the Processing Order, GlobalScan Job Processor can efficiently and accurately perform the requested conversion. If this step is not performed, the MFD user may select one file format, but the recipient then receives an unexpected file format. By establishing the processing order, you prevent this from occurring.

The following chart breaks the services down into three levels – **A**, **B**, and **C**. Within the Processing Order column (see previous page), enter a numerical value that corresponds to service's level.

I. Processing Order cont.

For example, RightFax is assigned a value of “1”, OCR/Image Management/ActivePDF is assigned a value of “2”, “3” and “4” (in any order), and Email/Scan-to-Folder is assigned a value of “5” and “6” (in any order).

Level	Service	Function
A	RightFax	Data is sent to the RightFax Server in raw data format (e.g., TIFF). No image processing is required.
B	OCR Image Management ActivePDF	Data is converted to the supported file format. For details, Step 7: Configure Services → D: Configure Scan Settings Service → GlobalScan File Format Support → At-A-Glance .
C	Email Scan-to-Folder GlobalScan Workflow	Scan data is forwarded to the selected email, folder or EDMS destination(s).

Note: When services overlap, as is the case with OCR and ActivePDF – which can both generate PDFs – the service with the lower value will pick up the job first. By default, the second service will ignore the request. Likewise, Image Management and OCR both support Multi-Page TIFF, so the service with the lower value will perform the file conversion.

The project below contains all of the services that require a processing order value and illustrates how the fields can be set.

GlobalScan - Project's Services

Operation successful

Project ID 1
Project Name Multiple Services

Update Remove Checked Items Remove All

Sort	Service Name	Ascending	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required	Configure	Remove
<input type="checkbox"/>	ActivePDF		<input type="checkbox"/>	<input checked="" type="checkbox"/>				4	<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/>	Email		<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	1	5	<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/>	Image Management		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		6	3	<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/>	Job Log		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		5		<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/>	OCR		<input type="checkbox"/>	<input checked="" type="checkbox"/>				2	<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/>	RightFax		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		3	1	<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/>	Scan Settings		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		4		<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/>	Scan to Folder		<input type="checkbox"/>	<input checked="" type="checkbox"/>			2	6	<input type="checkbox"/>	Configure	Remove
<input type="checkbox"/>	GlobalScan Workflow		<input type="checkbox"/>	<input checked="" type="checkbox"/>			7	7	<input type="checkbox"/>	Configure	Remove

-- select --

Update Remove Checked Items Remove All

If a particular service, for example, RightFax has not been added to the project, simply adjust the processing order accordingly with OCR's value set to “1”, Image Management to “2”, and so forth.

- J. Required** – If checked, the service must be completed before a job can be submitted from the MFD to the GlobalScan Server. If the service has not been completed, the [Start] key on the MFD control panel will not turn green, a requirement for a scan operation to be executed.

Sort Project's Services

To sort the services list, proceed as follows:

1. Click the **Manage Projects** menu link (or associated Home Page shortcut icon).
2. Click the category drop-down button [v].
3. Select the category to sort by.
4. Select **Ascending** or **Descending** order from the drop-down button [v].
5. Click the [Sort] button.

The screenshot shows the 'GlobalScan - Project's Services' interface. The top part shows the project details: Project ID 2, Project Name Scan to Email. Below this are buttons for 'Update', 'Remove Checked Items', and 'Remove All'. The 'Sort' dropdown menu is open, showing options: Service Name, Service ID, Login, Job, System Service, Notify, Display Sequence, Processing Order, and Required. The 'Service ID' option is selected. The 'Ascending' order is also selected. A red arrow points to the bottom screenshot, which shows the same interface but with the services sorted by Service ID. The services are: 1 Scan Settings, 2 Job Log, and 10 Email. The 'Sort' dropdown is now closed and shows 'Service ID' and 'Ascending'.

Service ID	Service Name	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required
1	Scan Settings			✓	✓	1	1	✓
2	Job Log			✓		2		
10	Email	✓			✓	1	1	✓

Remove Service from Project

If you wish to de-associate a service from a particular project, proceed as follows:

Note: Services are permanent, so this procedure will not delete the actual service, only remove it from the project.

1. Click the **Manage Projects** menu link (or associated Home Page shortcut icon).

Display reads:

GlobalScan - Manage Projects

Update Add Delete Checked items Delete All

Sort Project Name Ascending

Project ID	Project Name	Project Icon	Document Name with Timestamp Suffix	French-Canadian Keyboard Layout	
<input type="checkbox"/> 2	Scan to Email	defaultIcon1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 1	Scan to Fax	defaultIcon2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 3	Scan to Folder	defaultIcon3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete

Update Add Delete Checked items Delete All

2. Click the [**Services**] button associated with the project (circled above).

Display reads:

GlobalScan - Project's Services

Project ID 2
Project Name Scan to Email

Update Remove Checked Items Remove All

Sort Service Name Ascending

Service ID	Service Name	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required	
<input type="checkbox"/> 10	Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	1	<input checked="" type="checkbox"/>	Configure Remove
<input type="checkbox"/> 4	Image Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	Configure Remove
<input type="checkbox"/> 2	Job Log	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2		<input type="checkbox"/>	Remove
<input checked="" type="checkbox"/> 8	LDAP Authentication	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	Configure Remove
<input type="checkbox"/> 1	Scan Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3		<input type="checkbox"/>	Configure Remove

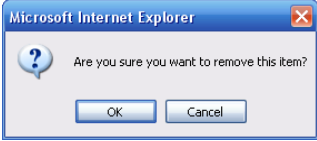
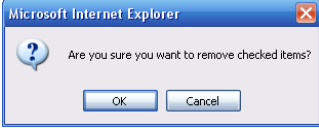
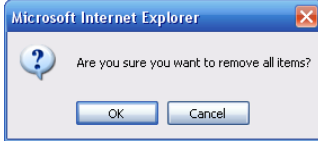
-- select --

Update Remove Checked Items Remove All

B **C** **A**

Note: The [**Remove Checked Items**] button (**B**) is disabled (grayed) until a service check box (circled above) is selected.

3. Use one of the following three methods to remove a service from the project:

A. Remove One Service	B. Remove Multiple Services	C. Remove All Services
<ul style="list-style-type: none"> Click the [Remove] button associated with the service. <p>Display reads:</p>  <ul style="list-style-type: none"> Click the [OK] button. 	<ul style="list-style-type: none"> Click the check box(es) associated with the services you would like to remove. Click [Remove Checked Items] button. <p>Display reads:</p>  <ul style="list-style-type: none"> Click the [OK] button. 	<ul style="list-style-type: none"> Click the [Remove All] button. <p>Display reads:</p>  <ul style="list-style-type: none"> Click the [OK] button.

Step 6: Add Projects to a Profile

After services have been added to a project, you are ready to add the project to the appropriate profile. To do so, proceed as follows:

1. Click the **Manage Profiles** menu link (or associated Home Page shortcut icon).

Display reads:

Profile ID	Profile Name	MFD Reset Time (seconds)	Keep-alive Timer (seconds)	Default Profile	Number of MFDs	
<input type="checkbox"/> 3	Accounting Dept.	60	45	<input type="checkbox"/>	0	Projects Delete
<input type="checkbox"/> 2	Marketing Dept.	60	45	<input type="checkbox"/>	3	Projects
<input type="checkbox"/> 1	Profile (1)	60	45	<input checked="" type="checkbox"/>	0	Projects

In the above example, *Accounting Dept.* is the default profile. We will add two projects, *Scan to Email* and *Scan to Folder* to that profile.

2. Click the [**Projects**] button (circled above).

Display reads:

« Back

GlobalScan - Profile's Projects

Profile ID 3
Profile Name Accounting Dept.

Project ID	Project Name	Display Sequence	Services
No Data To Display			

-- select --

3. Click the project drop-down button [v].

Display reads:



« Back

GlobalScan - Profile's Projects

Profile ID 3
Profile Name Accounting Dept.

Sort Project Name Ascending

Project ID	Project Name	Display Sequence
No Data To Display		

-- select --

- select --
- Scan to Fax
- Scan to Email
- Scan to Folder

- Click the **Project Name**, for example, **Scan to Email**.

Display reads:



« Back

GlobalScan - Profile's Projects

Profile ID 3
Profile Name Accounting Dept.

Sort Project Name Ascending

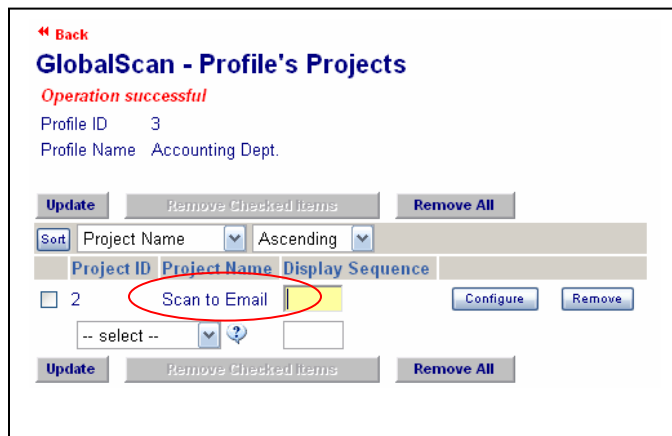
Project ID	Project Name	Display Sequence	Services
No Data To Display			

Scan to Email

Add

- Click the **[Add]** button.

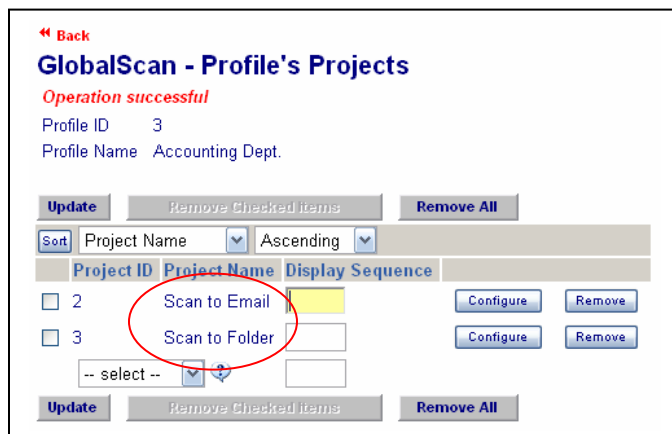
Display reads:



The service now appears in the profile's project list.

- Repeat 2 – 5, selecting another **Project Name**, for example, **Scan to Folder**.

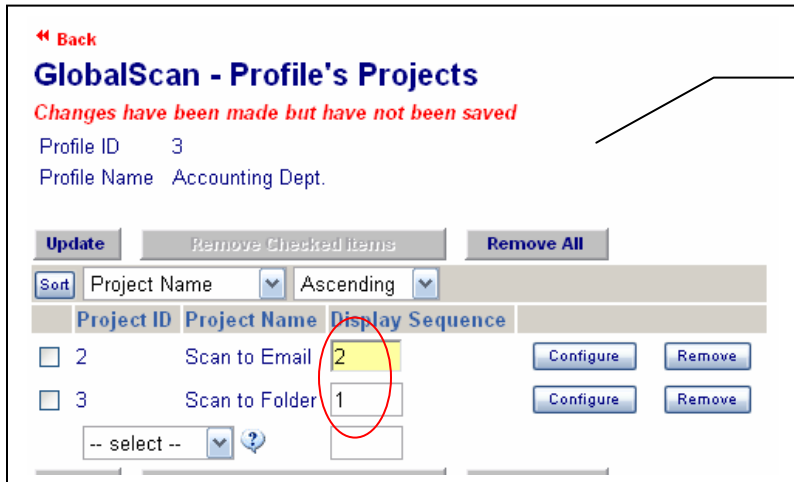
Display reads:



- Next, enter the **Display Sequence**, i.e., the order in which the project buttons will appear on the MFD touch screen.

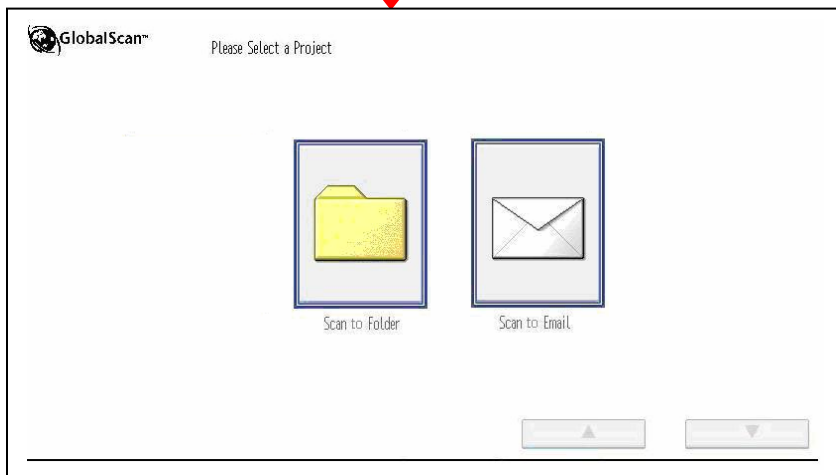
For instance, if you would like the [Scan to Folder] button to appear first, place a "1" in that column.

Display reads:



Though this profile has two projects, Scan to Email and Scan to Folder, these Services can be combined within just one project.

MFD Touch Screen



8. Click the [Update] button to save the settings. Display reads **Operation successful**.

Important: Whenever a project is added into a profile, the MFD(s) associated with that profile **must** be rebooted. See p. 34, MFD Reboot Rules.

Sort Profile's Projects

To sort the profile's project list, proceed as follows:

1. Click the **Manage Profiles** menu link (or associated Home Page shortcut icon).
2. Click the category drop-down button [v].
3. Select the category to sort by.
4. Select **Ascending** or **Descending** order from the drop-down button [v].
5. Click the [**Sort**] button.

The image shows two screenshots of the 'GlobalScan - Profile's Projects' interface. The top screenshot shows the initial state where the 'Sort' dropdown is set to 'Project Name' and the order dropdown is set to 'Ascending'. A red arrow points to the bottom screenshot, which shows the result after clicking the 'Sort' button, with the 'Sort' dropdown set to 'Display Sequence' and the order dropdown still set to 'Ascending'. The project list is now sorted by Display Sequence.

Initial State (Top Screenshot):

- Profile ID: 3
- Profile Name: Accounting Dept.
- Sort: Project Name
- Order: Ascending
- Project List:

Project ID	Project Name	Display Sequence
3	Scan to Folder	1
2	Scan to Email	2

Final State (Bottom Screenshot):

- Profile ID: 3
- Profile Name: Accounting Dept.
- Sort: Display Sequence
- Order: Ascending
- Project List:

Project ID	Project Name	Display Sequence
3	Scan to Folder	1
2	Scan to Email	2

Remove Project from Profile

If you wish to de-associate a project from a particular profile, proceed as follows:

Important: This procedure will not delete the actual project. It will only remove the project from the profile.

1. Click the **Manage Profiles** menu link (or associated Home Page shortcut icon).

Display reads:

Profile ID	Profile Name	MFD Reset Time (seconds)	Keep-alive Timer (seconds)	Default Profile	Number of MFDs
<input type="checkbox"/> 3	Accounting Dept.	60	45	<input type="checkbox"/>	0
<input type="checkbox"/> 2	Marketing Dept.	60	45	<input type="checkbox"/>	3
<input type="checkbox"/> 1	Profile (1)	60	45	<input checked="" type="checkbox"/>	0

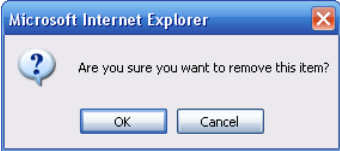
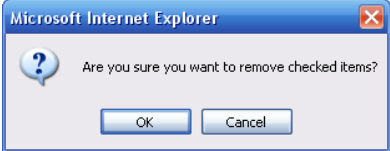
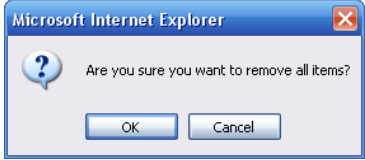
2. Click the [**Projects**] button associated with the profile.

Display reads:

Project ID	Project Name	Display Sequence
<input type="checkbox"/> 2	Scan to Email	2
<input checked="" type="checkbox"/> 3	Scan to Folder	1

Note: The [**Remove Checked Items**] button (B) is disabled (grayed) until a project check box (circled above) is selected.

3. Use one of the following three methods to remove a project from a profile:

A. Remove One Project	B. Remove Multiple Projects	C. Remove All Projects
<ul style="list-style-type: none"> Click the [Remove] button associated with the project (button on far right). <p>Display reads:</p>  <ul style="list-style-type: none"> Click the [OK] button. 	<ul style="list-style-type: none"> Click the check boxes (far left) associated with the project you would like to remove. Click [Remove Checked Items] button. <p>Display reads:</p>  <ul style="list-style-type: none"> Click the [OK] button. 	<ul style="list-style-type: none"> Click the [Remove All] button. <p>Display reads:</p>  <ul style="list-style-type: none"> Click the [OK] button.

Important: If a project has been removed it is no longer associated with a profile, thus any MFDs running that profile **must** be rebooted. See p. 34, MFD Reboot Rules.


Step 7: Configure Services

At this point, you have accomplished the following tasks:

- ✓ Set system parameters (Step 2)
- ✓ Added a profile (Step 3)
- ✓ Added a project (Step 4)
- ✓ Added services to a project (Step 5)
- ✓ Added projects to a profile (Step 6)

The next step is to configure GlobalScan services, e.g., Email, Scan-to-Folder, Scan Settings, etc.

1. Click the **Manage Services** menu link (or associated Home Page shortcut icon).



Any service with a [Configure] button can be set on the system, profile or project level. For details, see [About Setting Levels](#).

Click this button to view additional information about the service.

Standard and Optional GlobalScan Services

Standard Services	Description	Section (to follow)
Authentication (LDAP, NT, Novell)	If enabled, requires the MFD user to log in at the MFD control panel before accessing system functions.	A
Email	If enabled, the MFD user can scan a document for transmission to one or more email addresses. Email also supports a Notification service whereby the user and/or Administrator receives email alerts regarding job status.	B
Scan to Folder	If enabled, the MFD user can direct a scanned document to a local or network folder/subfolder.	C

Standard and Optional GlobalScan Services, cont.

Standard Services	Description	Section
<p>GlobalScan v3.1 Workflow Suite¹</p> <p><i>Note:</i> To extend functionality, Express and Full Editions are optionally available (see below)</p>	<p>GlobalScan v3.1 Workflow Suite (Standard Edition) is a bundled solution that, if installed, supports transmission of scanned images to email, folder, fax, EDMS (Enterprise Document Management Systems), FTP and SFTP, Microsoft SharePoint, Lotus Domino.doc and any ODBC-complaint database. Custom workflows, i.e., those that integrate with any EDMS that supports XML, can be created to address unique application requirements.</p>	<p>D</p>
<p>Scan Settings</p>	<p>Controls scan parameters, such as resolution, file format, color, etc. Users can adjust these settings at the MFD, unless set as read-only.</p>	<p>E</p>
<p>Job Tracking</p>	<p>Job Tracking is an internal service which tracks and exports data in XML format to the Log folder.</p>	
<p>Image Processing:</p> <ul style="list-style-type: none"> ■ OCR¹ ■ ActivePDF¹ ■ Image Management 	<ul style="list-style-type: none"> ■ Converts hardcopy documents into searchable Adobe® PDF (including password-protected PDF), RTF (Microsoft® Word), XLS (Microsoft® Excel) and Multi-Page TIFF formats. ■ Converts hardcopy into Adobe® PDF files. ■ Users can view a thumbnail image of the scanned document at the MFD. Also provides Multi-Page TIFF support, image alignment, and adjustment. 	<p>F</p>
Optional Services	Description	Appendix
<p>GlobalScan Workflow v3.1 Suite Express Edition¹</p>	<p>Adds device support and workflow tracking. Access all the capture, processing and distribution tools using hardware from Canon, HP, Kyocera Mita, Sharp or Xerox. Monitor every document transaction; generate detailed reports; capture document metadata automatically.</p>	<p>E</p>

Optional Services	Description	Appendix
GlobalScan Workflow v3.1 Suite Full Edition¹	Provides more application connectors. Capture files from fax servers, local or remote folders, FTP sites, desktops and MS Office applications. Deliver files to email applications, fax servers, folders, secure FTOP sites, and ODBC-compliant databases, or to output devices. Send files into content management software, including MS SharePoint, Documentum, Interwoven, IBM CM, FileNet, OpenText and many others.	E
Captaris RightFax¹	Captaris RightFax is an optional plug-in that enables the MFD user to fax a document to one or more fax and/or email destinations via a RightFax Server.	F

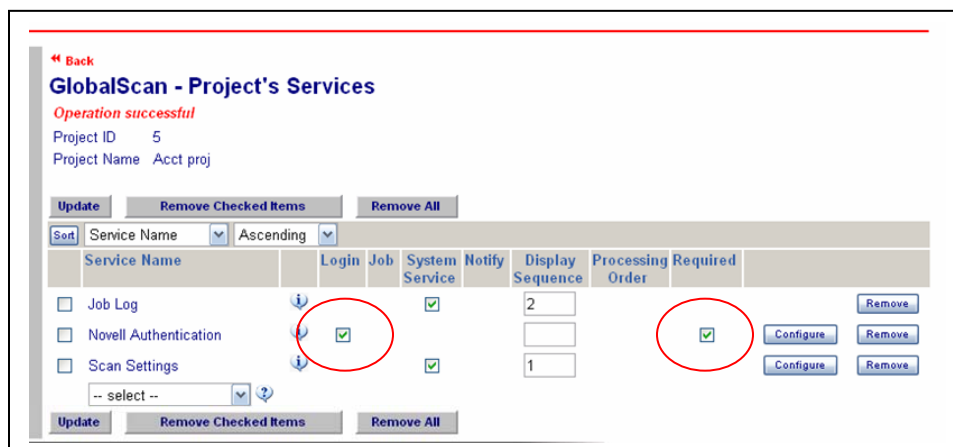
¹ Using this service requires installation of associated software components. See [GlobalScan v3.1 Server Software Installation Guide](#).

Start by locating the service that applies to your document workflow needs. For example, to configure the Scan-to-Email service, go to [B. Configure Email Service](#).

A. Configure Authentication Services

GlobalScan supports LDAP, NT and Novell Authentication. Thus, if your company requires user Authentication at the MFD control panel, i.e., entry of a user name/password and, possibly, domain, configure the settings as follows:

Important: The MFD user will be prompted for their user name/password as long as an Authentication service is added into the project and the *Login* and *Required* check boxes are selected, as shown below. Note that the user will be prompted for their credentials even if the *Required* field is not checked. However, GlobalScan will only Authenticate the user when both the *Login* and *Required* check boxes are selected.

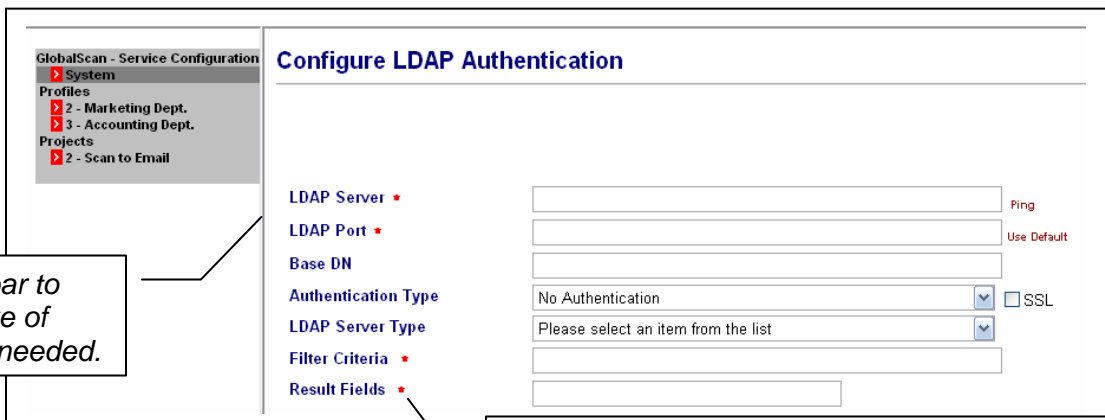


LDAP Authentication

- From the **Manage Services** screen, click [LDAP Authentication](#), the associated **Configure** button.

Note: If you wish to configure NT or Novell Authentication, proceed to that section.

Display reads:



Drag this bar to change size of window, if needed.

The asterisk (*) indicates that the field is required.

- Choose the level to configure LDAP Authentication settings on....

System Level

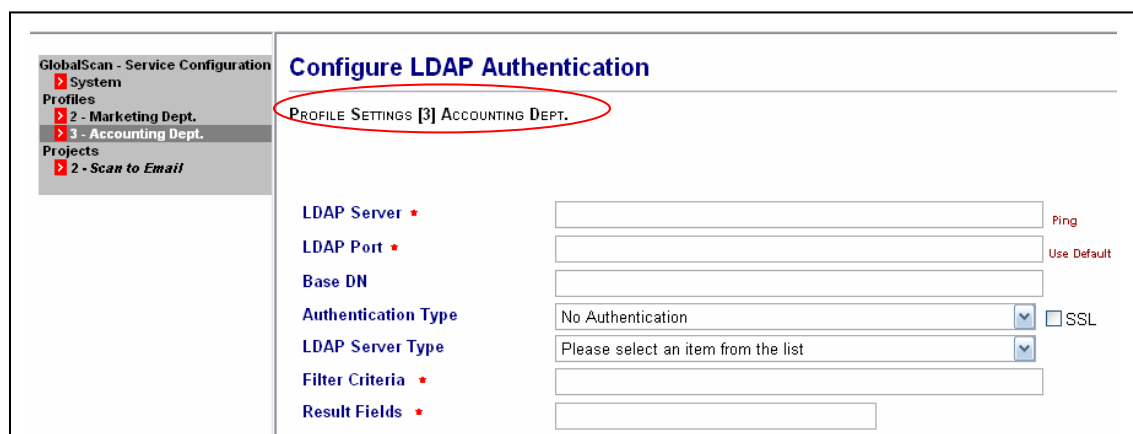


By default, you enter the LDAP Configuration screen at the system level, as shown in above screen. Settings made at the system level apply to all MFDs, unless you change settings on the profile or project level.

Profile Level



In the screen to follow, the *Accounting Dept.* profile has been selected, thus LDAP settings entered here will apply to that profile. Any projects within that profile will inherit those values, unless changes are made on the project level.

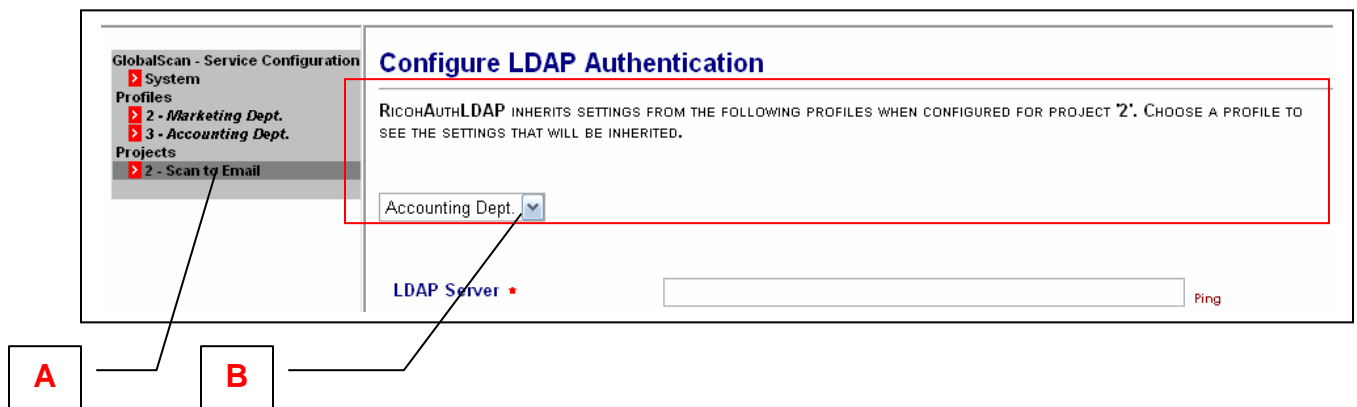


Project Level



In the screen below, the *Scan to Email* project has been selected (see **A**, next page). To save setup time, you can choose which profile you would like the project to inherit LDAP settings from (see **B**, next page). After choosing a profile, the screen refreshes with those settings. After entering the settings and clicking [**Update**], the project has its own settings, not those inherited from the profile or system level. This enables you to customize MFD operation down to a specific MFD or group of MFDs. For example, the same Active Directory Server may apply to all departments except Human Resources which uses a different Netscape Directory Server. In that event, adjust settings on the project level.

Project Level *cont.*



3. After selecting the level, enter the LDAP settings as follows:

Note: If NT or Novell is selected, proceed to the respective section (below).

- **LDAP Server** (Required) – Enter LDAP Server IP address or name.

Important: If using SSL (LDAPS), the DNS name of the LDAPS Server must be entered.

- **LDAP Port** (Required) – Default LDAP port is 389. If using SSL (LDAPS), the default port is 636.
- **Base DN** – Enter Base Distinguished Name.
- **Authentication Type** – Select Authentication method from the drop-down [v].

GlobalScan supports the following Authentication methods:

- **No Authentication** – Also referred to as Anonymous.
- **Basic Authentication** – Also referred to as Proxy User. The following information is required:
 - **Proxy User DN** – The user name for access to the proxy server.
 - **Proxy User Password** – Click the **[Change Password]** button to reset.
 - **Re-enter to Confirm Password** – Re-enter Password to confirm.
- **SSL** – By selecting the SSL check box, Secure Socket Layer protocol provides both Authentication and data security. It encapsulates the TCP/IP socket so that a DN and a password are sent over SSL to secure the communication.

Important: When implementing a self-certificate with CA (Certificate Authority) from Active Directory, for example, an additional procedure may be executed on the Microsoft Management Console (MMC). For information, see [GlobalScan v3.1 Server Software Installation Guide](#) → [Appendix I: SSL \(Secure Socket Layer\) Support](#).

- **Kerberos Authentication** – Kerberos Authentication is available (within the Authentication Type drop-down) when Active Directory is selected (within the LDAP Server Type drop-down).

Authentication Type	Kerberos Authentication	<input type="checkbox"/> SSL
LDAP Type	Active Directory	
Filter Criteria *	{&(objectClass=organizationalPerson)(sAMAccountName={0})}	
Result Fields *	sAMAccountName	

- **LDAP Type** – Select one of the three LDAP types from the drop-down [v].

LDAP Type	Active Directory
Filter Criteria *	Please select an item from the list
Result Fields *	Active Directory Netscape Directory Server/Sun IPlanet Custom

- **Active Directory** – If selected, the Filter Criteria and Results Fields are automatically populated, as follows. Adjust, as needed.

Filter Criteria: The default LDAP Filter Criteria field is as follows:

- **(&(objectClass=organizationalPerson)(sAMAccountName={0}))**

- **Field Name** – For example, enter **sn=jones**.
 - **Search Criteria** – From the drop-down [v], select **Equal**, **Begins With** or **Contains**.
 - **Others** – From the drop-down [v], select **Blank**, **Not Blank** or **Others**.
 - **Filter Criteria** – Specify default Filter Criteria. For example, enter **UID=jsmith**.
 - **User Name** – Enter login ID.
 - **Password** – Enter login password.
 - **Test Login** – Click this button to initiate test.
4. After verifying all settings, click the [**Update**] button to save the settings. Display reads **Operation successful**.
5. Click the [**Close**] button or close the window [**X**].

Novell Authentication

In order to implement Novell Authentication, the Novell client and Novell ActiveX components must be installed on the GlobalScan Server. For more information, see [GlobalScan v3.1 Server Software Installation Guide](#) → [Additional Server Preparation](#) → [Appendix H: Novell Component Installation](#).

After the necessary components are installed on the GlobalScan Server, you can enter Novell Authentication settings as follows:

1. From the **Manage Services** screen, click [Novell Authentication](#) or the associated **[Configure]** button.

Display reads:

2. Select the level on which to establish Novell settings - system, profile or project. See [LDAP Authentication](#).

Note: If a Novell Tree and Context are applied to a specific Profile, this will allow connection of different MFDs to different Novell Trees.

3. After selecting the level, set the following parameters:
 - **Tree** (Required) – This drop-down will allow you the select a default Novell tree for Authentication purposes.
 - **Context** (Required) – This drop-down will allow you the select a default Novell Context for Authentication purposes.

- **Login UI Config** – This drop-down will allow you to select the Novell Authentication that will be displayed on the MFD.
4. If you wish to test NDS Authentication, enter the following settings under “Test Novell NDS Account. If not, proceed to the next step.
- **User Name** – Enter Novell NDS account user name.
 - **Password** – Enter Novell NDS account password.
 - **Test Login** – Click this button to test NDS Authentication.
 - **Get Account Properties** – Click this button to view NDS account properties.
5. Click the [**Update**] button to save settings.
6. Click the [**Close**] button or close the window [**X**].

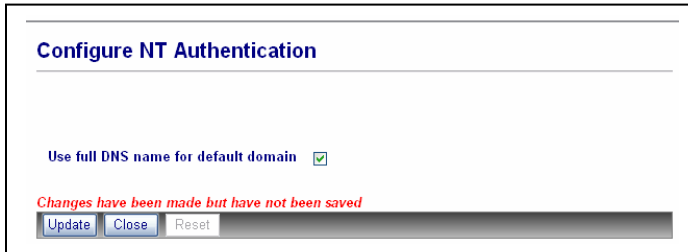
Important: You must reboot the MFD in order to apply new or revised Authentication service settings to the device. See p. 34, *MFD Reboot Rules*.

NT Authentication

To enter NT Authentication settings, proceed as follows:

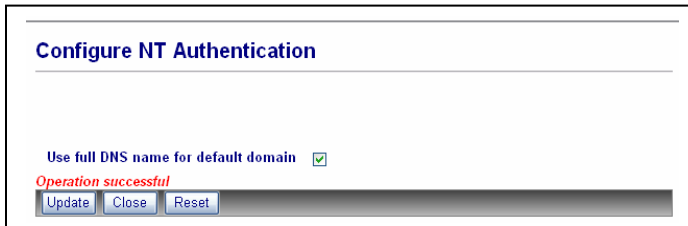
1. From the **Manage Services** screen, click **NT Authentication** or the associated [**Configure**] button.

Display reads:



2. Click the **Use full DNS name for default domain** check box. When checked, the login domain is displayed on the MFD's display in full DNS format. If unchecked, the login domain will be displayed in pre-Windows 2000 domain name format.
3. Click the [**Update**] button.

Display reads:



4. Click the [**Close**] button or close the window [**X**].

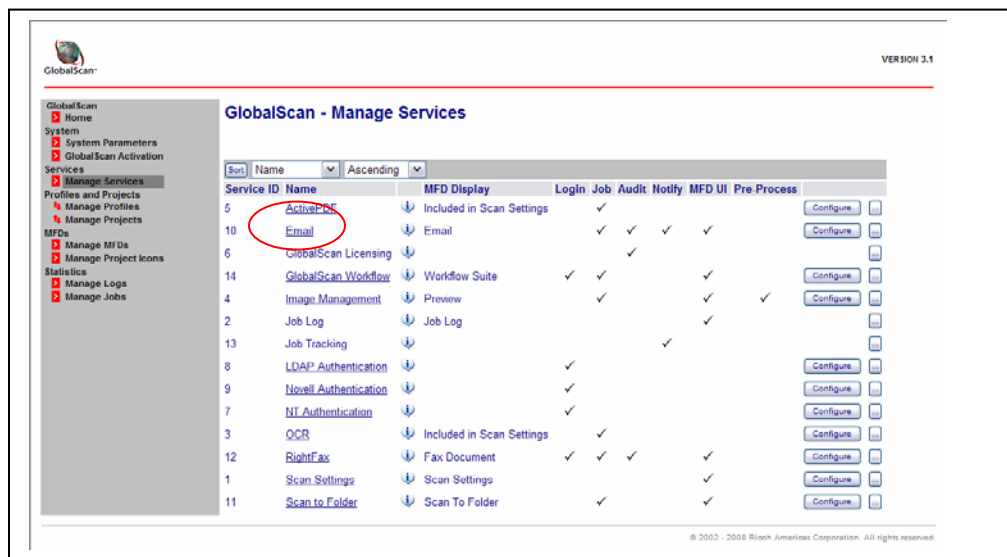
Note: Click [**Reset**] to clear check box and delete the configuration record.

B. Configure Email Service

The Scan-to-Email service allows the MFD user to scan a hardcopy document for transmission to one or more email addresses.

To configure the Scan-to-Email service, proceed as follows:

1. From the **Manage Services** screen, click **Email** or the associated **[Configure]** button.



Email Configuration Screen

GlobalScan - Service Configuration

- System
- Profiles
 - 2 - Marketing Dept.
 - 3 - Accounting Dept.
- Projects
 - 2 - Scan to Email

Configure Email

SYSTEM SETTINGS

MAIL SYSTEM SETTINGS

Mail System: SMTP

Attachment Size limit (MB): 0

Default Email for Notification: [Yellow Highlighted]

Default Sender Email Address: [Yellow Highlighted]

Maximum Retry Attempts: 3

SMTP SETTINGS

Mail Server: [Empty] Ping

Enable SMTP-AUTH:

SMTP Port: [Empty] Use Default

Server Timeout (seconds): [Empty]

EMAIL OPTIONS

Show CC Allow Address Search

Show BCC Allow Message Entry

Show Reply-To Send-To-Me

Allow Ad-Hoc Email Address Entry

ADVANCED SETTINGS

[Message & Subject Text]

[Set Email Defaults]

TEST CONFIGURATION

Sample Recipient Address: [Yellow Highlighted] [Test Mail]

Sample Sender Address: [Yellow Highlighted]

[Update] [Close] [Reset]

Drag this bar to change size of window, if needed.

Email can act as a Notification service when you specify an email address to receive notification regarding job status. **Important:** For this service to work, you must select the Notify check box for the Email service inside the project screen.

- Choose the level you would like to configure the Scan-to-Email service on.

System Level



By default, you enter the Email Configuration screen at the system level; screen reads "System Settings," as shown above. Settings made at the system level apply to all MFDs, unless you change settings on the profile or project level.

Profile Level



In the screen below, the *Accounting Dept.* profile has been selected. Email settings entered here will apply to that specific profile. Any projects within that profile will inherit those values, unless changes are made on the project level.

Project Level



In the screen below, the *Scan to Email* project has been selected (A). To save setup time, you can choose which profile you would like the project to inherit Email settings from (B). After choosing a profile, the screen refreshes with those settings. After entering the settings and clicking Update, the project has its own settings, not those inherited from the profile or system level. This enables you to customize MFD operation down to a specific MFD or group of MFDs. For example, you may want to allow manual address entry from some MFDs, but not others. In that event, adjust settings at the project level.

3. After selecting the level, enter the Email settings as follows:

Mail System Settings

- **Mail System** – Click the drop-down button [v] and select one of the following. Note that the screen will change based on which mail system is selected.
 - **SMTP**
 - **Lotus Notes**
 - **Microsoft® Exchange** (same settings as SMTP)
- **Attachment Size Limit (MB)** – Required field. Enter a maximum file size for an attachment to email. The default setting is zero (0), which means there is no attachment file size limit.

Important: If you scan a multi-page document as email, and the file exceeds the Attachment Size Limit, the recipient will receive two or more separate emails. For example, if the limit is set for 5MB, and the scanned document is 8MB, the first message will contain a file attachment no more than 5MB in size. The rest will be contained in another email.
- **Default Email for Notification** – Enter the default email address of the individual to receive a notification email regarding job status, for example, the Administrator.
- **Maximum Retry Attempts** – Enter the number of times the system should attempt to deliver the job, for example, 3.

SMTP Settings

SMTP settings will change dynamically based on the selected mail system (SMTP or Microsoft® Exchange). Enter the settings that apply to your installation.

SMTP

- **Mail Server** (Required) – Specify the mail server's name or IP address.
- **Default Sender Email Address** (Required) – Enter the email address to be used if the logon user's email address cannot be retrieved during the logon process. This provides a default identity for email sent when not using Authentication or when Authentication does not provide an address.
- **Enable SMTP-AUTH** – Select this check box to use SMTP-AUTH to send email. If enabled, select Current User or Proxy User from the Authentication Type drop-down.
- **SMTP Port** (Required) – The SMTP port default is 25.
- **Server Timeout (Seconds)** – The Server Timeout default is 300 seconds. Enter new value.

Microsoft® Exchange

If selected, enter SMTP settings (listed above).

LOTUS Settings

If users prefer to use Lotus Notes as the mail system at the profile or project level, Lotus Notes must be select as the mail system at the system level. Enter the Lotus password, then re-enter to confirm. No SMTP settings are necessary.

Email Options

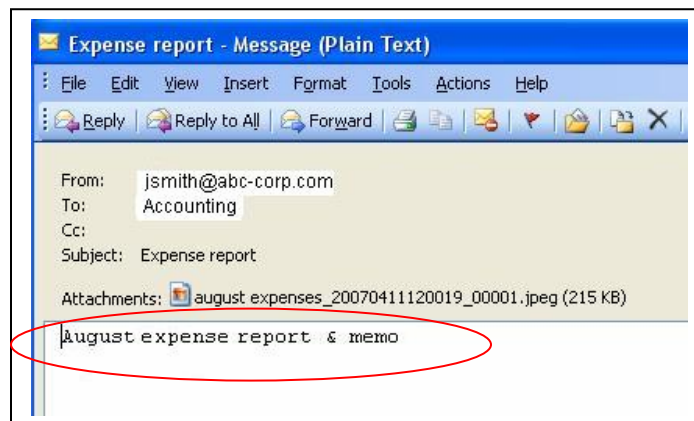
Email options include six features that can be enabled/disabled, as needed.

- Show CC**¹ – Enable or disable Courtesy Copy via check box. If enabled, the user can enter/select (on the MFD touch screen) email addresses to receive a copy of the message.
- Show BCC**¹ – Enable or disable Blind Courtesy Copy via check box. If enabled, the user can enter/select (on the MFD touch screen) email addresses that are to receive a blind carbon/courtesy copy of the message.
- Show Reply-To**¹ – Enable or disable via check box. If enabled, the user can enter/select (on the MFD touch screen) an email address that is to receive a reply message from the recipient(s). This means that if a recipient clicks "Reply (to Sender)," the return message is automatically directed to this address, not the originating email address.

¹ If disabled (unchecked) the CC, BCC, Reply-To tabs on the MFD's display will be shaded (unavailable), thus no email address entries can be made.

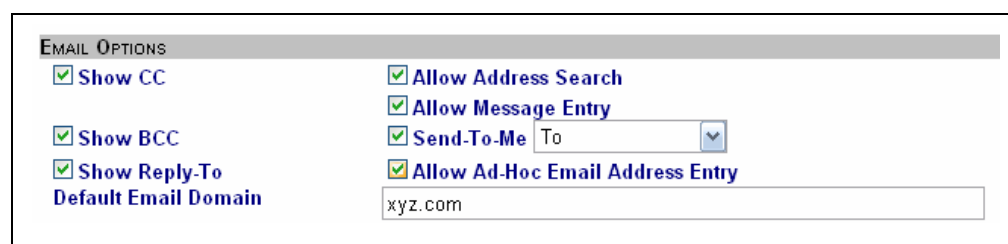
Show Reply-To is useful if, for example, mail is sent via a Lotus Notes system that automatically identifies all mail as coming from the individual who configured the client (inbox). By entering a Reply-To address at the time of transmission any response is automatically sent to the actual sender or perhaps a third party.

- Allow Address Search** – Enabled or disable via check box. If enabled, the user can search for email addresses in the Global Address Book of the LDAP Directory Server (additional settings appear (see *Email Lookup Settings*, to follow). If disabled, the user can only enter addresses manually via the soft keyboard, provided the “Allow Ad Hoc Email Address Entry” check box is selected. If “Allow Address Search” is deselected and “Allow Ad Hoc Email Address Entry” is selected, the CC, BCC and Reply-To addresses can be entered manually from the soft keyboard.
- Allow Message Entry** – Enable or disable via check box. If enabled (checked), the “Message” button on the MFD touch screen will allow the user to enter email message text (circled below). The user’s message will be appended to any text you enter under the Advanced Settings’ **[Message & Subject Text]** button; details to follow. If disabled (unchecked), the user cannot enter message text from the MFD.



Note: See *Advanced Settings, Message & Subject Text*, to follow.

- Allow Ad Hoc Email Address Entry** – Enable or disable via check box. If disabled (unchecked), the user cannot manually enter an email address via the soft keyboard. Therefore, to limit email communication to addresses stored in the Global Address Book, uncheck the “Allow Ad Hoc Email Address Entry” check box and check “Allow Address Search.” If enabled (checked), an additional **Default Email Domain** field will be displayed (as shown below). Enter the default domain so the user only needs to type, for example, “jthomas” via the soft keyboard. The domain “xyz.com” will be automatically appended. The result: **jthomas@xyz.com**.



- Send-To-Me** – Enable or disable via check box. If enabled (checked), the logon user's email address is added to the mail recipient list, provided that the email address can be retrieved. If so, emails sent via GlobalScan will also be delivered to the logon user's email address. Also, indicate how the email should be sent by clicking the adjacent drop-down button [v]. Select To, CC, or BCC.

Note:

- By enabling Send-To-Me, the user can perform a **One-touch Scan**. For details, see [Step 8: Create One-touch Scan](#).
- If Send-To-Me is enabled, and “Allow Address Search” and “Allow Ad-Hoc Email Address Entry” are disabled, the user will only be able to email to his/her address.

Email Lookup Settings

If “Allow Address Search” and/or “Send-To-Me” are enabled, additional parameters will be displayed, as shown below.

Enter the following additional fields:

- **LDAP Server** (Required)
 - **LDAP Port** (Required)
 - **Base DN**
 - **LDAP Type** (Required)
 - **Authentication Type**
- For a description of each field, see [A. Configure Authentication Services](#) → [LDAP Authentication](#).*
- **Sender Search Filter** (Required) – Specify the filter and attribute used to locate the sender from LDAP server.
 - **Sender Email Attribute** (Required) – Specify the attribute used to identify the sender's email address from LDAP server. The default value is **mail**.
 - **Sender Display Name Attribute** (Required) – Specify the attribute used to identify the sender's name.
 - **Recipient Search Filter** (Required) – Specify the filter and attribute used to execute an email address lookup on the LDAP server.

Examples:

a. If format **cn={0}*** is used, a search for “les” locates:

- charles smith
- lester frank
- lorraine lester
- steven morales

In this example, “les” can appear anywhere within the address.

b. If format **cn={0}*** is used, a search for “les” locates:

- lester frank
- Lester, lorraine

In this example, only addresses that start with “les” are located.

c. If format **cn={0}*** is used, a search for “les” returns:

- Smith, charles
- steven morales

In this example, only addresses that end with “les” are located.

- **Recipient Email Attribute** (Required) – Enter recipient email lookup attribute. The default setting is **mail**.

- **Recipient Display Name Attribute** (Required) – Specify the attribute used to identify the recipient's name, for example, **cn** or **sn, givenname**.

Advanced Settings

You can set default email message text to append to each outgoing email message, along with a default subject line text.



- **Message & Subject Text** – Click this button if you wish to enter default email message and subject line text to append to each outgoing email message. The maximum length of email subject text is 64 characters.

Note: Email message text can be set on the project level in order to address the needs of a specific group of users. For example, the email message text may read, *“This email contains confidential account information.”*

	Email Message Text	Email Subject Text
Deutsch		
English	This email contains confidential information	Expense report
English(UK)		
Français		
Italiano		
Español		
LanguageXX		

The subject line appears on the MFD touch screen and can be edited or erased by the user.

Message text entered here is not visible to the user, i.e., does not display on the MFD touch screen.

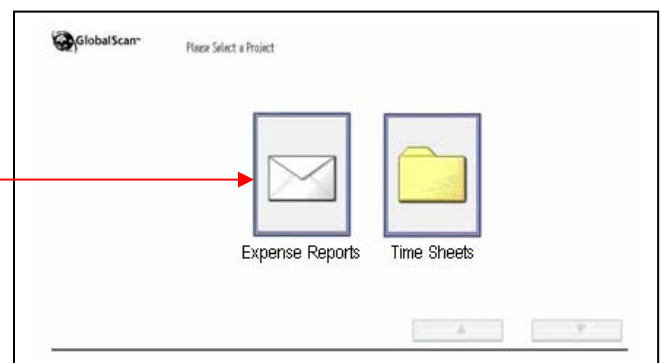
Note: You can change email message text to any displayed language, such as French, by entering text in the corresponding field. The GlobalScan Server must be running v3.1 software and the MFD must be running v3.0 firmware.

To have empty email default message text (user and admin enter no text), both the GlobalScan Server and MFD must be running v3.x software and firmware.

- **Set Email Defaults** – Click this button in order to set email addresses as defaults for To, CC, BCC or Reply-To. This can be done on the project level to address the needs of a specific group of users. For example, a CC (Courtesy Copy) or BCC (Blind Courtesy Copy) of each email sent from the MFD in the Accounting Department can be forwarded to the officer responsible for ensuring compliance with federal regulations governing financial disclosure.

The screenshot shows the 'ADVANCED SETTINGS' window with the 'Set Email Defaults' button selected. Below it, there are sections for 'Default Search Results' and 'Default Selected Addresses'. The 'Default Selected Addresses' section includes fields for 'Reply-To', 'To', 'CC', and 'BCC'. Each field has a table with 'Display' and 'Value' columns. The 'To' row is circled in red, with 'Accounting' in the 'Display' column and 'ajones@xyz.com' in the 'Value' column.

One-touch Scan – To enable users to press one button to scan, for example, expense reports to a specific email address, enter the address in value field, within the **To** row (circled above). Also, enter **Display** information to further guide the user. This is a fast way to establish a project that requires no user input. The user simply places the document on the MFD's ADF or platen glass, selects the [**Expense Reports**] project button (the button label is customizable), then presses the [**Start**] key to initiate the scan.



Note: For details on the One-touch Scan feature, see [Step 8: Create One-touch Scan](#).

Test Configuration

To perform a test of the search configuration, enter a **Sample Recipient Address** and **Sample Sender Address**, and then click the **[Test Mail]** button.

If the **Allow Address Search** check box has been selected, the **Test Search Criteria** field displays, as shown. Enter the search criteria, e.g., sm, and press the **[Test Search]** button.

4. After verifying the settings and, if desired, testing the configuration, click the **[Update]** button. Display reads **Operation Successful**.
5. Click the **[Close]** button or close the window **[X]**.

C. Configure Scan-to-Folder Service

GlobalScan's Scan-to-Folder service enables the MFD user to scan hardcopy documents directly to a selected folder/subfolder on a local or network directory. The user can perform one or both of the following operations related to Scan-to-Folder:

1. **Scan to Home** – If NT or LDAP (with Active Directory) Authentication is selected, the logon user can perform Scan To Home functions, i.e., scan directly to his/her Home directory.
2. **Scan to Folder** – The user can select a predefined public folder. Enter the folder Path and Description (via the Scan To Folder screen). Note that for network shared folders, additional procedures are required. For information, see *GlobalScan v3.1 Server Software Installation Guide* → *Appendix A: Assign Identity to GlobalScan Components*.

Note: Users can scan to one or more public folders, regardless of whether Authentication is on or off. So, unlike Scan to Home, Scan to Folder is not dependent upon logon credentials, i.e., all MFDs that share the same profile can view/select the displayed folder(s).

The following additional Scan-to-Folder features are supported:

- Administrators can set different predefined folders per project.
- Administrators can set any predefined folder as a default folder destination.
- Users can search subfolders by typing a search string from predefined root folder.
- Users can navigate a subfolder from any predefined root folder.
- Users can Scan-to-Home, or directly to their Home folder.

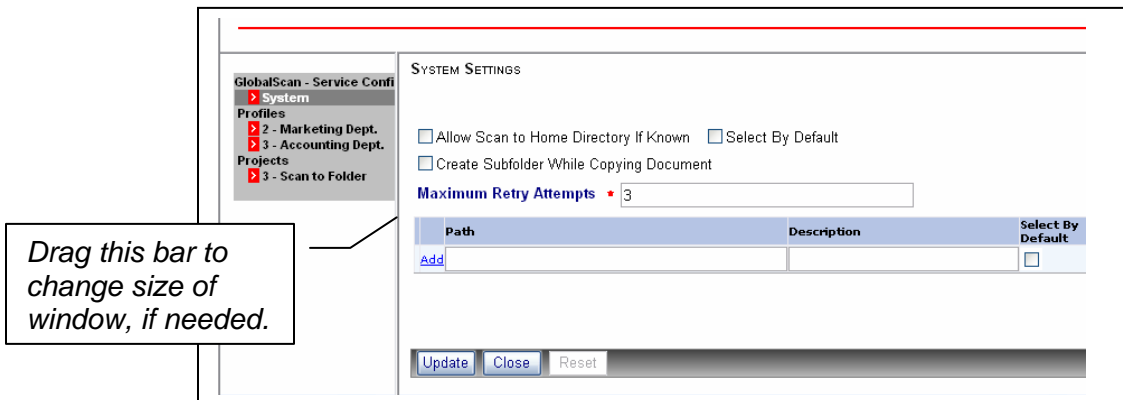
Note: Scanning to a subfolder on a user's Home directory is not supported.

To enter Scan-to-Folder service settings, proceed as follows:

1. From the **Manage Services** screen, click **Scan to Folder** or the associated **[Configure]** button.

Service ID	Name	MFD Display	Login	Job	Audit	Notify	MFD UI	Pre-Process
5	ActivePDF	Included in Scan Settings		✓				
10	Email	Email	✓	✓	✓	✓		
6	GlobalScan Licensing				✓			
14	GlobalScan Workflow	Workflow Suite	✓	✓			✓	
4	Image Management	Preview	✓				✓	✓
2	Job Log	Job Log					✓	
13	Job Tracking					✓		
8	LDAP Authentication		✓					
9	Novell Authentication		✓					
7	NT Authentication		✓					
3	OCR	Included in Scan Settings		✓				
12	RightFax	Fax Document	✓	✓	✓		✓	
1	Scan Settings	Scan Settings					✓	
11	Scan to Folder	Scan To Folder	✓				✓	

Scan-to-Folder Configuration Screen

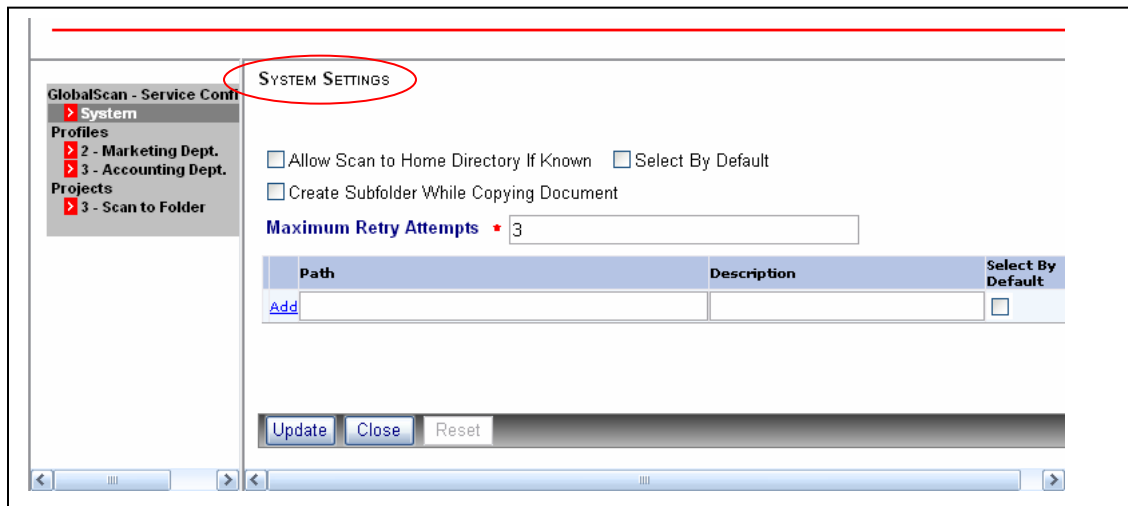


2. Choose the level you would like to configure Scan-to-Folder settings on.

System Level



By default, you enter the Scan-to-Folder Configuration screen at the system level; screen reads "System Settings," (circled below). Settings made at the system level apply to all MFDs, unless you change settings on the profile or project level.



Profile Level



In the screen below, the *Accounting Dept.* profile has been selected, thus Scan-to-Folder settings entered here will apply to that profile. Any projects within that profile will inherit those values, unless changes are made on the project level.

Project Level



In the screen below, the *Scan to Folder* project has been selected. If settings are changed here, the project will have its own set of predefined folders, overriding those established on the profile or system level. This enables you to customize Scan-to-Folder operation down to a specific MFD or group of MFDs.

3. After selecting the level, select/enter the Scan-to-Folder settings as follows:

- **Allow Scan to Home Directory If Known** – If enabled (checked), the logon user can select his/her Home directory as a target to deposit scanned documents. This directory, for example, “Jsmith – Home,” will automatically appear on the MFD’s touch screen as a default destination.

Note:

- Scan-to-Home operates in Microsoft® environments only.
- Scan-to-Home requires User Authentication (NT or LDAP with Active Directory).

- **Select by Default** – If enabled (checked), the logon user’s Home directory is automatically selected as the default target for scanned documents. This enables the user to perform a **One-touch Scan**. For details, see Step 8: Create One-touch Scan.
- **Create Subfolder While Copying Document** – Check this option to create a subfolder whose name corresponds to the user’s login ID. This option is ignored if/when:
 - ... a user’s Home folder is selected.
 - ... there is no Authentication service in the project.
 - ... destination folder is chosen that corresponds to the user’s login ID.
- **Maximum Retry Attempts** – Enter the maximum number of times the system should attempt to store the job to the selected destination folder(s).
- **Path** (Required) - Enter the folder path, which can be a UNC (e.g., \\computename\foldername) or local path (e.g., c:\temp). The maximum path length is 255 characters.

Note: The user can search folders/subfolders in the predefined root folder by entering a search string (on the MFD touch screen).

- **Description** – Enter the path description. The description appears to the user when the folder list is displayed on the MFD’s touch screen. The maximum description length is 30 characters.

Display reads:

Path	Description	Select By Default
Add c:\contracts\corporate office	real estate transactions	<input type="checkbox"/>

4. Click the **[Add]** button.

- To enter another **Path** and **Description**, do so and then click the [**Add**] button again.

Display reads:

Configure Scan To Folder

SYSTEM SETTINGS

Allow Scan to Home Directory If Known Select By Default

Create Subfolder While Copying Document

Maximum Retry Attempts • 3

	Path	Description	Select By Default
1	Delete c:\contracts\corporate office	real estate transactions	<input type="checkbox"/>
2	Delete c:\correspondence\legal	acquisitions and mergers	<input type="checkbox"/>
	Add		<input type="checkbox"/>

Changes have been made but have not been saved

[Update](#) [Close](#) [Reset](#)

- Repeat 5, if necessary.
- After all fields are entered and verified, click the [**Update**] button. Display reads **Operation successful**.

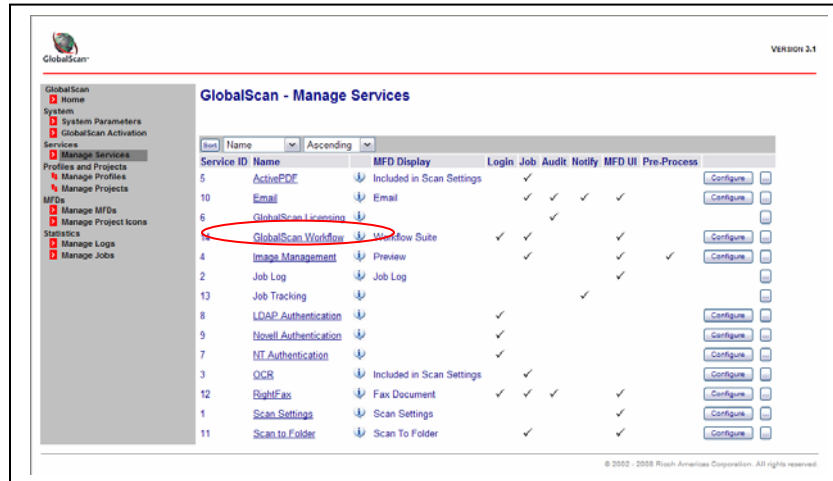
Note: To delete a Path/Description, click the associated [**Delete**] button, and then click the [**Update**] button.

- Click the [**Close**] button or close the window [**X**].

D. Configure GlobalScan Workflow Suite Service

If the GlobalScan v3.1 Workflow Suite (Connector) software is installed on the GlobalScan v3.1 Server you must set the Capture Server IP Address and Port, as follows:

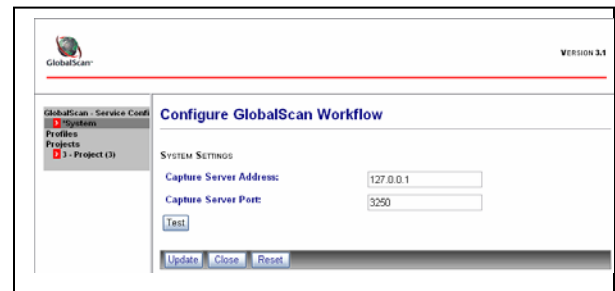
1. From the **Manage Services** screen, click **GlobalScan Workflow** or the associated [**Configure**] button.



Display reads:

2. Enter the **Capture Server (IP) Address**.
3. Enter the **Capture Server Port (Number)**.

Note: If the Workflow Suite Standard Edition software is installed on the same server as GlobalScan, the default IP address is 127.0.0.1. The default port number is 3250.

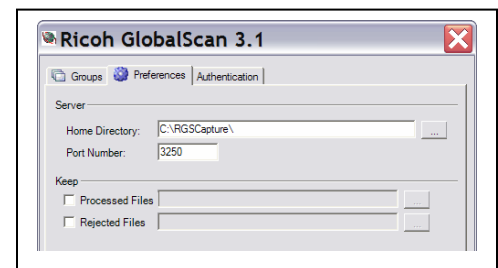


Important: The port must match the Preferences setting within the GlobalScan v3.1 Workflow Suite Process Designer. See *GlobalScan v3.1 Workflow Suite Standard Edition Reference Guide*.

4. Click [**Update**] to save settings.

Note:

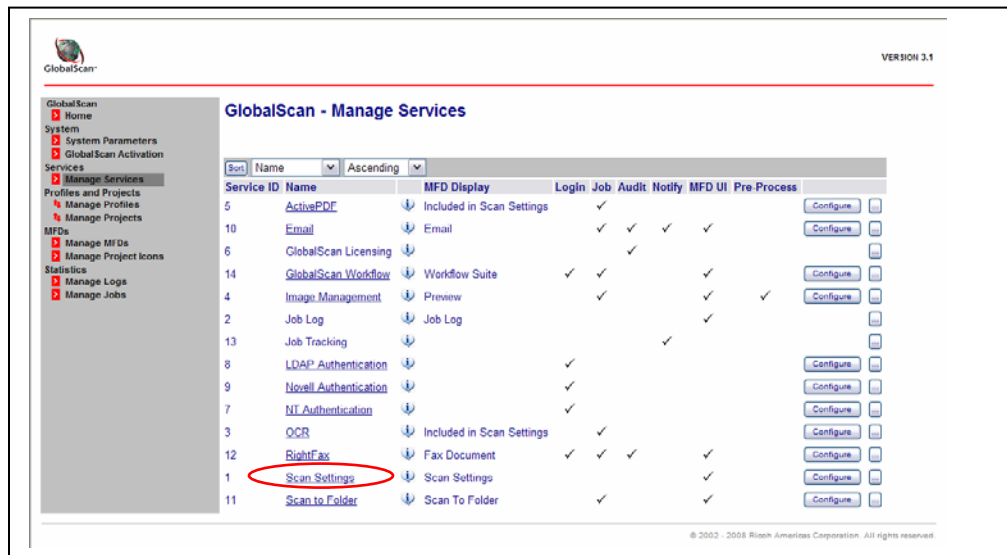
- The [**Update**] button is only enabled at the System Level. On the Project Level, you only have the ability to view the IP address, port number and GSWS form name, within the group associated with the project.
- Click [**Test**] to verify that the connection to the specified Workflow Suite Standard Server is operational.
- Click [**Reset**] to clear fields. Click [**Close**] to exit, without saving settings.



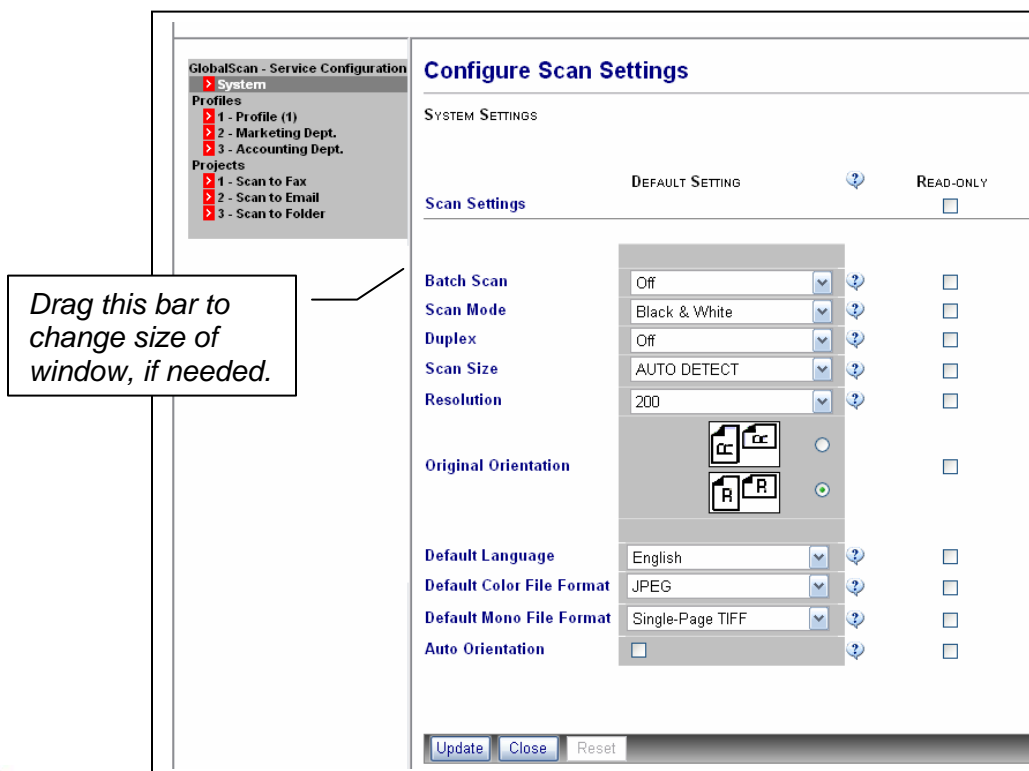
E. Configure Scan Settings Service

The Scan Settings service enables you to set the MFD's default scan parameters, e.g., resolution, file format, etc. The user (at the MFD touch screen) can override scan settings, provided the setting is not identified by the Administrator as read-only. The default values are restored after the user logs out (or the MFD times out).

1. From the **Manage Services** screen, click **Scan Settings** or the associated [**Configure**] button.



Scan Settings Configuration Screen



Scan Settings Configuration Screen

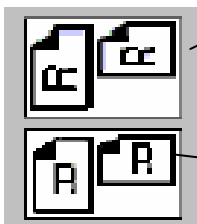
2. Choose which level you would like to configure Scan Settings on – system, profile or project. For details, see [About Settings Levels](#).
3. After selecting the level, enter Scan-to-Folder settings as follows:
 - **Batch Scan** – Select **On** or **Off**. The default setting is **Off**. If **On** is selected, the user can scan a large multi-page document in batches and transmit as one file.
 - **Color Scan** – Select **Black & White** or **Color**, whichever corresponds to the installed MFD(s).
 - **Duplex** – Select **Off** or **On**. The default setting is **Off**. If **On** is selected, the MFD will scan both sides of each page.
 - **Duplex Type** – When **Duplex** is set to **On**, select **Top-Top** or **Top-Bottom**.

- **Top-Top** – Text flows like pages in a book.
- **Top-Bottom** – Text flows like pages bound at the top.

- **Scan Size** – The default setting is **AUTO DETECT**. To change the default scan size, click the drop-down button [v] and choose from the following:

8.5 x 11 (Portrait)	A4 (Portrait)
8.5 x 11(Landscape)	A4 (Landscape)
11 x 17 (Landscape)	A5 (Portrait)
8.5 x 14 (Landscape)	A5 (Landscape)
8.5 x 13 (Landscape)	B4 (Landscape)
5.5 x 8.5 (Landscape)	B5 (Portrait)
A3 (Landscape)	B5 (Landscape)

- **Resolution** – The default setting is **200 dpi**. To change the resolution, click the drop-down button [v] and choose from **200**, **300** or **400**.
- **Original Orientation** – Defines how documents are to be placed on the MFD's automatic document feeder (ADF) or on the platen glass, thus ensuring proper rotation when viewed on a computer screen. Select the desired setting.



The **TOP** edge of the document is fed into the ADF first or is placed on the platen glass as if being fed into the ADF.

The **LEFT** edge of the document is fed into the ADF first or is placed on the platen glass as if being fed into the ADF.

- **Default Language** – The default OCR language is English. To view a complete list of languages, the OCR engine must be installed/configured (see [E. Configure Image Processing Services](#), to follow). In that case, it is possible to change the default language via the drop-down. If you select *Spanish*, for example, the *OCR Language* field on the project's *Scan Settings* screen (viewed at the MFD) will read *Spanish*. As such, the OCR engine will render scanned pages in Spanish.

Note: The user can change the language, as needed.

- **Default Color File Format** – By default, the color file format is **JPEG**. See chart to follow for additional file format availability.
- **Default Mono File Format** – By default, the mono file format is **Single-Page TIFF**. See chart to follow for additional file format availability.

Important: File formats displayed at the MFD are based on the services you have configured and added to the project.

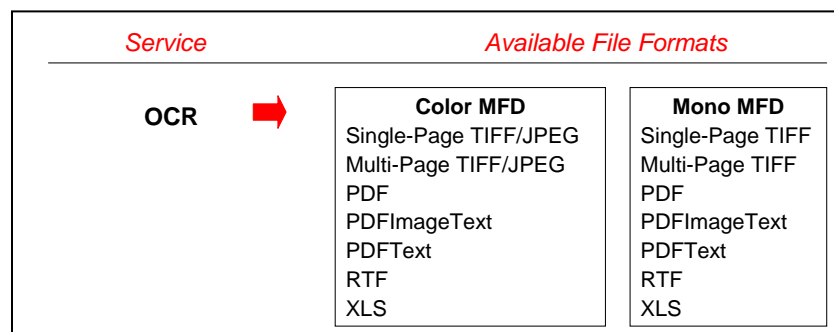
GlobalScan File Format Support, At-a-Glance

	Service		
	Image Management	ActivePDF	OCR
Color MFD File Formats	<ul style="list-style-type: none"> Single-Page TIFF/JPEG Multi-Page TIFF/JPEG <p>Note: With [Color Scan] button enabled (at MFD), available file format is JPEG. With [Color Scan] button disabled, available file formats are Single-Page TIFF and Multi-Page TIFF.</p>	<ul style="list-style-type: none"> Single-Page TIFF/JPEG Adobe® PDF <p>Note: With [Color Scan] button enabled (at MFD), available file formats are JPEG and PDF. With [Color Scan] button disabled, available file formats are Single-Page TIFF and PDF.</p>	<ul style="list-style-type: none"> Single-Page TIFF/JPEG Multi-Page TIFF/JPEG PDF PDF ImageText PDF Text RTF XLS <p>Note: With [Color Scan] button enabled, all formats are available, except Single-Page TIFF. With [Color Scan] button disabled (at MFD), all file formats are available, except JPEG.</p>
Mono MFD File Formats	<ul style="list-style-type: none"> Single-Page TIFF Multi-Page TIFF 	<ul style="list-style-type: none"> Single-Page TIFF Adobe® PDF 	<ul style="list-style-type: none"> Single-Page TIFF Multi-Page TIFF PDF PDF ImageText PDF Text RTF XLS

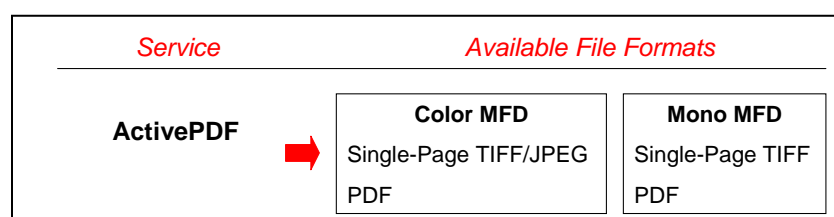
Examples of possible service settings and resulting file format availability follow:

Single Services

- When adding just the **OCR** service to a project:



- When adding just the **ActivePDF** service to a project:



Single Services, *cont.*

- When adding just the **Image Management** service to a project.

Service	Available File Formats	
Image Management →	Color MFD Single-Page TIFF/JPEG Multi-Page TIFF/JPEG	Mono MFD Single-Page TIFF Multi-Page TIFF

Multiple Services

- When adding **Image Management** and **ActivePDF** services to a project.

Services	Available File Formats	
Image Management + ActivePDF →	Color MFD Single-Page TIFF/JPEG Multi-Page TIFF/JPEG PDF	Mono MFD Single-Page TIFF Multi-Page TIFF PDF

- When adding **Image Management**, **ActivePDF** and **OCR** services to a project.

Services	Available File Formats	
Image Management + ActivePDF + OCR →	Color MFD Single-Page TIFF/JPEG Multi-Page TIFF/JPEG PDF PDFImageText PDFText RTF XLS	Mono MFD Single-Page TIFF Multi-Page TIFF PDF PDFImageText PDFText RTF XLS

Important: When multiple services overlap, i.e., perform the same function, it is important that you establish the Processing Order. For instance, both ActivePDF and OCR can convert a scanned image into PDF format. By setting the Processing Order, GlobalScan Job Processor can efficiently control data flow.

To set the Processing Order, see [Step 5: Add Services to a Project](#) → [Service Roles](#) → [I. Processing Order](#).

- **Auto-Orientation** – If this check box is selected, the OCR engine will attempt to automatically determine whether or not rotation is required.
- 4. After all fields are selected and verified, click the [**Update**] button. Display reads ***Operation successful.***
- 5. Click the [**Close**] button or close the window [**X**].

F. Configure Image Processing Services

GlobalScan v3.1 supports the following standard Image Processing services:

- OCR
- ActivePDF
- Image Management

To configure Image Processing services, continue with the applicable section.

Configure OCR Service

Important: In order to correctly configure the OCR service, you **must** configure the OCR Engine. See [GlobalScan v3.1 Server Software Installation Guide](#) → [Appendix B: OCR Engine Installation and Configuration](#).

To establish OCR settings, proceed as follows:

2. From the **Manage Services** screen, click **OCR** or the associated **[Configure]** button.

The screenshot displays the 'GlobalScan - Manage Services' web interface. On the left is a navigation menu with options like Home, System Parameters, GlobalScan Activation, Services, Profiles and Projects, MFDs, and Statistics. The main area shows a table of services. The 'OCR' service (Service ID 3) is circled in red. Each service row includes a 'Configure' button.

Service ID	Name	MFD Display	Login	Job	Audit	Notify	MFD UI	Pre-Process
5	ActivePDF	Included in Scan Settings						
10	Email	Email						
6	GlobalScan Licensing							
14	GlobalScan Workflow	Workflow Suite						
4	Image Management	Preview						
2	Job Log	Job Log						
13	Job Tracking							
8	LDAP Authentication							
9	Novell Authentication							
7	NT Authentication							
3	OCR	Included in Scan Settings						
12	RightFax	Fax Document						
1	Scan Settings	Scan Settings						
11	Scan to Folder	Scan To Folder						

OCR Configuration Screen

GlobalScan - Service Configuration

- System
- Profiles
 - 2 - Marketing Dept.
 - 3 - Accounting Dept.
- Projects
 - 3 - Scan to Folder

Configure OCR

SYSTEM SETTINGS

Root Folder *

Invalid File Format Handling: Ignore

Heartbeat Folder *

Heartbeat Interval (minutes) *

PDF Document Security

Read Password

Re-enter to confirm password

Edit Password

Re-enter to confirm password

Advanced Settings >>

Changes have been made but have not been saved

Update Close Reset

Drag this bar to change size of window, if needed.

OCR services can be set on the system, profile or project level...

System Level



By default, you enter the OCR Configuration screen at the system level; screen reads “System Settings,” (circled below). Settings made at the system level apply to all MFDs, unless you change settings on the profile or project level.

GlobalScan - Service Configuration

- System
- Profiles
 - 2 - Marketing Dept.
 - 3 - Accounting Dept.
- Projects
 - 3 - Scan to Folder

Configure OCR

SYSTEM SETTINGS

Root Folder *

Invalid File Format Handling: Ignore

Heartbeat Folder *

Heartbeat Interval (minutes) *

Profile Level



In the screen below, an *Accounting Dept.* profile has been selected, where OCR settings have been inherited from the system level. You can adjust settings here that will apply to the specific profile. Any projects within that profile will inherit those values, unless changes are made on the project level.



Project Level



In the screen below, the *Scan to Email* project has been selected. As the header indicates, the project has inherited settings from a profile. If settings are changed here, the project will have its own OCR settings, overriding those set on the profile or system level. This enables you to customize MFD operation down to a specific MFD or group of MFDs. For example, you may want to set PDF as the default scan file format for the MFD in the Engineering Department. In that event, you would select that setting on the project level.



Start your OCR services configuration on the system level. Settings can then be adjusted on the profile or project level, as noted above.

1. Enter/select each OCR settings as follows:

- **Root Folder** (Required) – Enter the folder path you specified during OCR engine installation and configuration. This path, e.g., c:\ocr, is the repository used by the OCR engine during job processing. For more information, see [GlobalScan v3.1 Server Software Installation Guide](#) → [Appendix B: OCR Engine Installation and Configuration](#).

- **Invalid Format Handling** – Click the drop-down button [v]. Select **Ignore** or **Return Error** to specify what should happen when an unknown file type is encountered. This setting determines how the GlobalScan Server will handle an unrecognized file format, i.e., one that is not included in the default recognized file format list (see **Recognized File Formats**, to follow).
 - **Ignore** is the default setting. If a file format is encountered, other than the recognized file formats, the scan job will continue to be processed but the requested conversion will not take place.
 - **Return Error** is only recommended if, for instance, a back-end document management system requires a specific file format. If a file format is encountered, other than the recognized file formats, the scan job will fail.

Note: The **Ignore** and **Return Error** rule also applies to ActivePDF, covered in the next section.

- **Heartbeat Folder** (Required) – Enter the path that links GlobalScan to the OCR engine heartbeat folder, e.g., c:\ocr.
- **Heartbeat Interval (minutes)** – Required field. This setting tells GlobalScan how often to check for the latest time stamp (of the heartbeat file) created by the OCR engine. The heartbeat interval set here should be greater (e.g., 10 minutes) than the heartbeat interval set during OCR engine installation and configuration. (e.g., 5 minutes). For more information, see *GlobalScan v3.1 Server Software Installation Guide* → *Appendix B: OCR Engine Installation and Configuration*.

What is a Heartbeat? A heartbeat is a file named “heartbeat.dat” located in the OCR heartbeat folder, e.g., c:\ocr, which is generated by the OCR engine (File Conversion Program). GlobalScan’s Job Monitor service examines this file in order to determine whether or not OCR is up and running. If GlobalScan does not see the updated time stamp of the “heartbeat.dat” file at the specified interval, an error condition occurs, telling the Administrator that OCR is not operational.

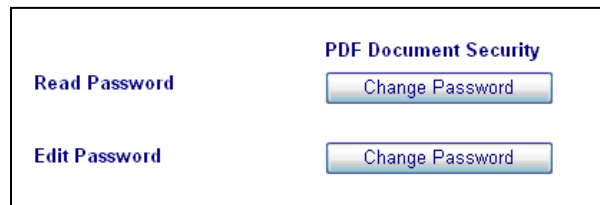
- **PDF Document Security** – To password-protect PDF files created by GlobalScan, enter the **Read Password** and/or **Edit Password** fields.

PDF Document Security	
Read Password	<input type="text"/>
ReEnter To Confirm	<input type="text"/>
Edit Password	<input type="text"/>
ReEnter To Confirm	<input type="text"/>

- **Read Password** – If this password is set, the recipient will be prompted to enter this password before viewing, printing and/or editing the document.
- **Edit Password** – If this password is set, the recipient can open the document without a password. The password is only required if the recipient wishes to modify the document security settings, that is, enable printing and/or editing of the file.

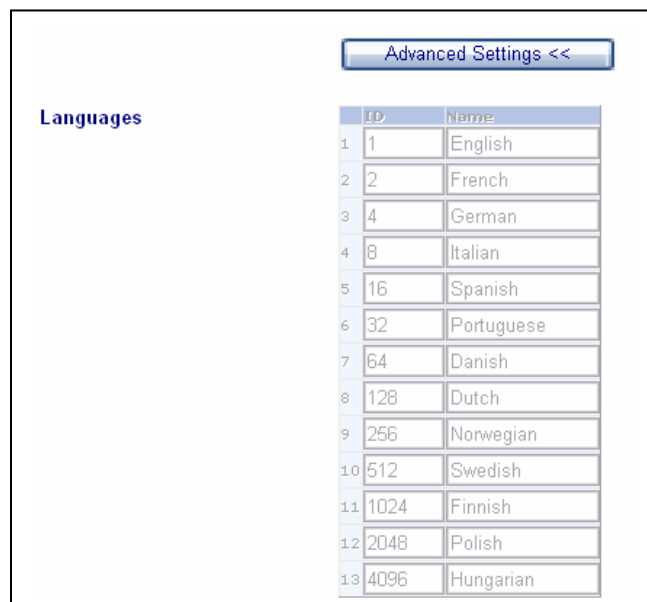
Note:

- If neither password is set, there is no restriction on opening, printing and/or editing of the file.
- If both passwords are set, the file can be opened with either password but a user can only set or change document security settings with the **Edit Password**.
- If both passwords are set, the display will change, as shown below. To change or delete the password, click on the associated [**Change Password**] button.



Important: If you forget a password, there is no way to recover it from the document. Store passwords in a separate secure location in case you forget them.

- **Advanced Settings** – Click this button to display the following fields:
 - **Languages** – After the OCR engine is installed/configured, this field is read-only, as shown below. If the OCR engine is not installed/configured and running, this information will not display.



- **Recognized File Formats** – The current OCR engine recognizes TIFF, TIF, JPEG and JPG file formats.

Recognized File Formats	
1	TIFF
2	TIF
3	JPEG
4	JPG
<input type="button" value="Add"/> <input type="text"/>	

Note: If you add a file format, via the **[Add]** button, the OCR engine will either ignore the format (continue processing) or return an error (terminate processing), whichever setting has been selected within the **Invalid Format Handling** drop-down menu.

2. After all fields are entered/selected, click the **[Update]** button. Display reads **Operation successful**.
3. Click the **[Close]** button, or close the window **[X]**.

Note: Click the **[Reset]** button to perform one of the following functions:

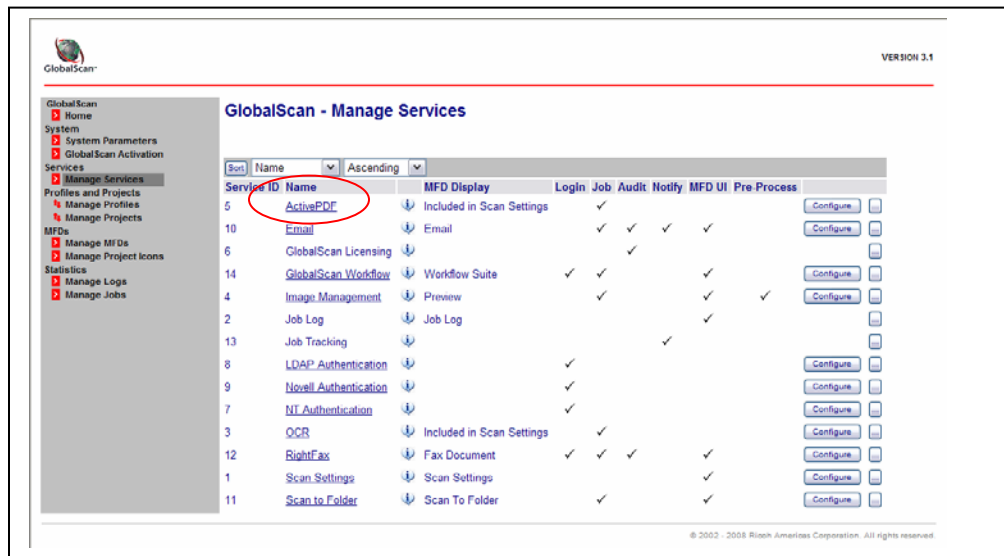
- On **System Level**, resets field values to default system settings.
- On **Profile Level**, resets field values to current system-level settings.
- On **Project Level**, resets field values to the selected profile-level settings.

Configure ActivePDF Service

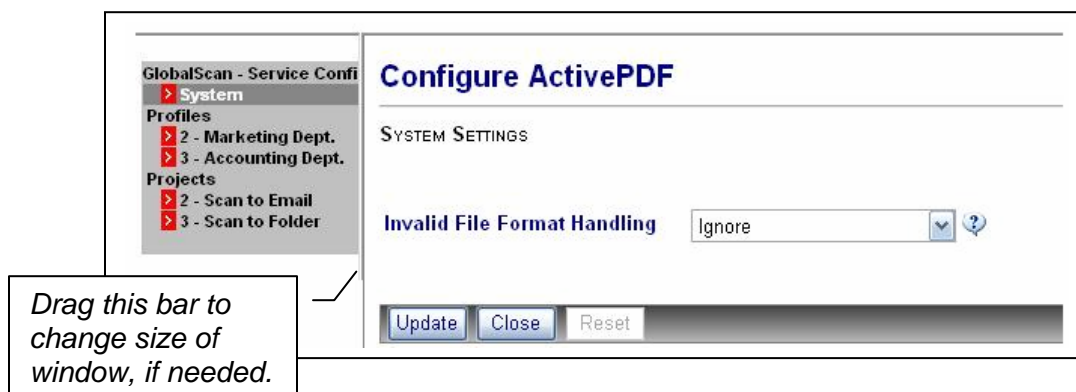
Important: Using this service requires installation of associated software components. See *GlobalScan v3.1 Server Software Installation Guide* → *Appendix G: ActivePDF Installation*.

To establish ActivePDF settings, proceed as follows:

1. From the **Manage Services** screen, click **ActivePDF** or the associated [**Configure**] button.



ActivePDF Configuration Screen



2. Choose the level you would like to configure ActivePDF settings on....

System Level



By default, you enter the ActivePDF Configuration screen at the system level; screen reads “System Settings,” (circled below). Settings made at the system level apply to all MFDs, unless you change settings on the profile or project level.

Profile Level



In the screen below, an *Accounting Dept.* profile has been selected, thus Active PDF settings entered here will apply to that profile. Any projects within that profile will inherit those values, unless changes are made on the project level.

Project Level



In the screen below, the *Scan to Email* project has been selected. If settings are changed here, the project will have its own set of ActivePDF settings, overriding those established on the profile level. This enables you to customize operation down to a specific MFD or group of MFDs.

After selecting the level, enter ActivePDF settings as follows:

3. Click **Invalid File Format Handling** drop-down button [v]. Select **Ignore** or **Return Error** to specify what should happen when an unknown file type is encountered. This setting determines how the GlobalScan Server will handle an unrecognized file format.
 - **Ignore** is the default setting. If a file format is encountered, other than the recognized file formats, the scan job will continue to be processed, but the requested conversion will not take place.
 - **Return Error** is only recommended if, for instance, a back-end document management system requires a specific file format. If a file format is encountered, other than the recognized file formats, the scan job will fail.

Note: The **Ignore** and **Return Error** rule also applies to OCR. See [Configure OCR](#).
4. After fields are selected and verified, click the [**Update**] button to save the settings. Display reads **Operation successful**.
5. Click the [**Close**] button or close the window [**X**].


Note: Click the [**Reset**] button to perform one of the following functions:

- On **System Level**, resets field values to default system settings.
- On **Profile Level**, resets field values to current system-level settings.
- On **Project Level**, resets field values to the selected profile-level settings.

Configure Image Management Service

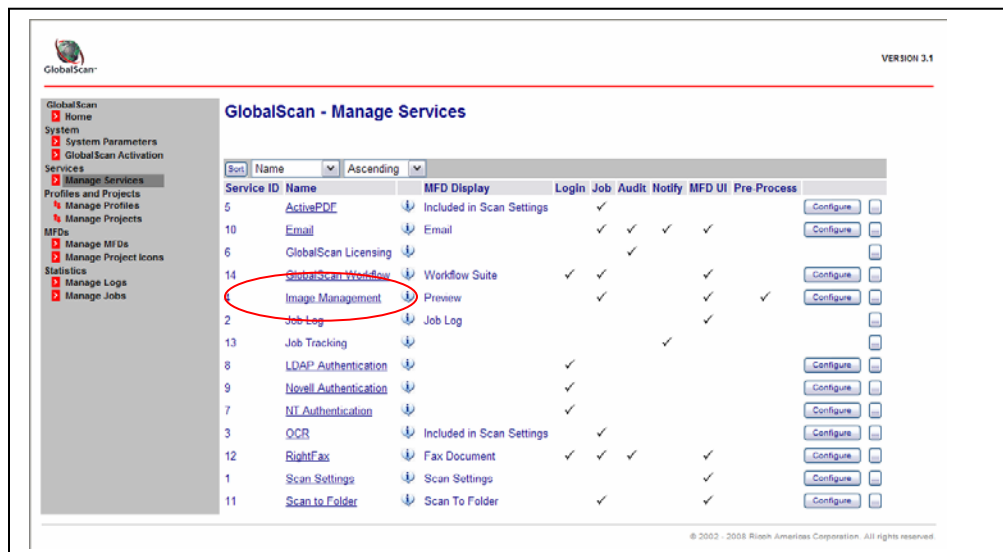
GlobalScan Image Management Service supports viewing of thumbnail images from the MFD touch screen, that is, digital images of scanned pages that have not yet been processed by the GlobalScan Server.

Thumbnail Feature Support

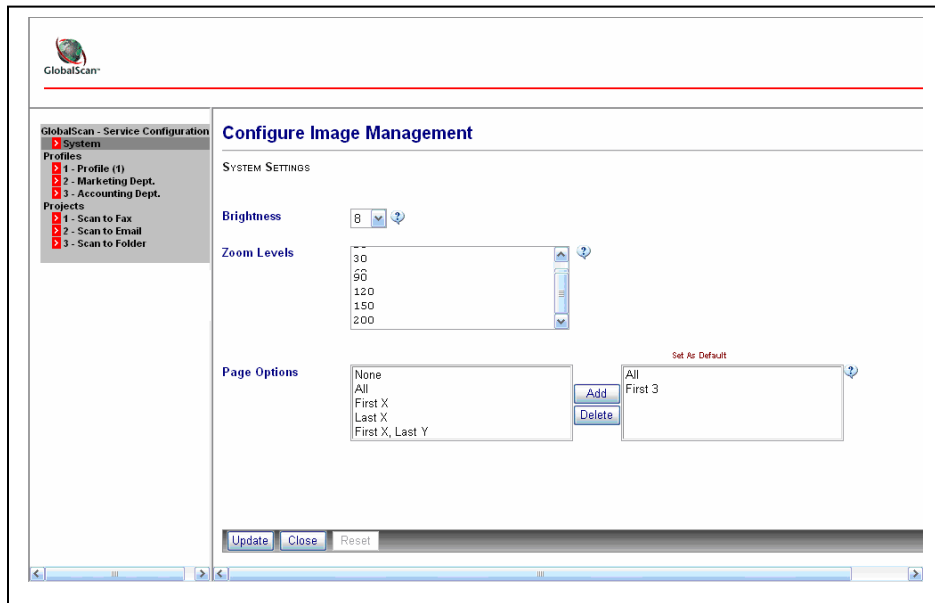
Administrator	User
<ul style="list-style-type: none"> • Can enable/disable Image Preview service. • Can display every image as a thumbnail. • Can display only certain images as a thumbnail. • Can establish settings on system, profile or project level. 	<ul style="list-style-type: none"> • Can go directly to a specific thumbnail image. • Can zoom in and out. • Can pan a zoomed image. • Can rotate an image. • Can delete unwanted image, e.g., a blank page. • Can save all changes made to an image. • Can discard all changes made to an image. • Can stop scan operation and resubmit job. • Can view up to six (6) thumbnail images per screen on WVGA/SVGA touch screen. • Can view up to four (4) thumbnail images per screen on HVGA touch screen.

To establish Image Preview service settings, proceed as follows:

1. From the **Manage Services** screen, click **Image Management** or the associated [**Configure**] button.



Display reads:

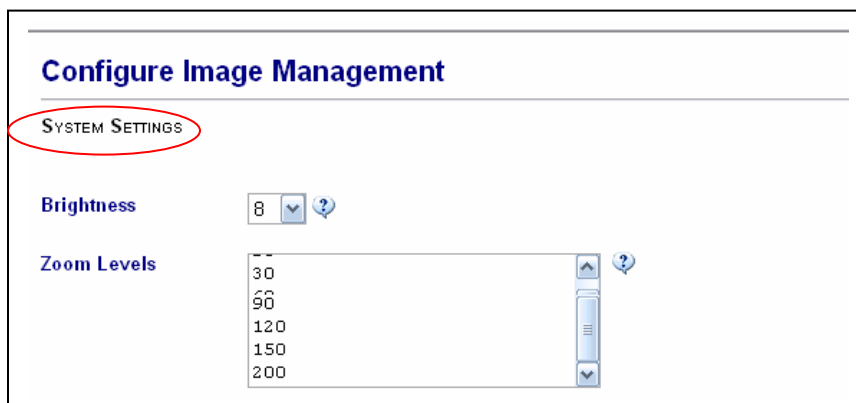


2. Choose the level you would like to configure Image Preview settings on.

System Level



By default, you enter the Image Preview Configuration screen at the system level; screen reads “System Settings,” (circled below). Settings made at the system level apply to all MFDs, unless you change settings on the profile or project level.



Profile Level



In the screen below, an *Accounting Dept.* profile has been selected, thus Imaging service settings entered here will apply to that profile. Any projects within that profile will inherit those values, unless changes are made on the project level.

Project Level



In the screen below, the *Scan to Email* project has been selected. In this example, the project has inherited settings from Profile 3, *Accounting Dept.* If settings are changed here, the project will have its own set of Image Preview settings, overriding those established on the profile or system level. This enables you to customize the Imaging service down to a specific MFD or group of MFDs.

3. After selecting the level, enter the Image Preview settings as follows:

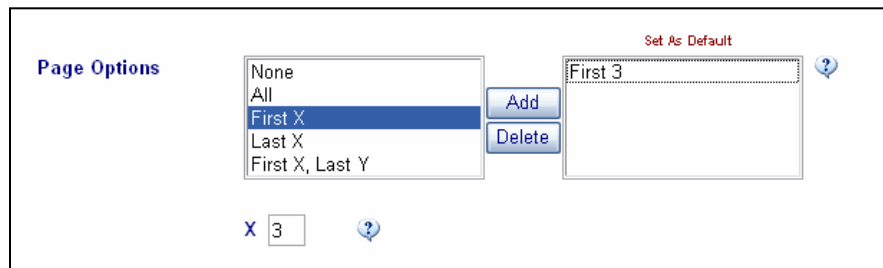
- **Brightness** – Set a value (1 to 20) for the previewed image's brightness level, not the scanned image itself. The lower the number, the less detail and brightness. This value will not be visible on the MFD touch screen.
- **Zoom Levels** – When the user presses the [Zoom] button, the preview image is enlarged by the specified percentage. The zoom level can be any digit between 20 and 200. The default level zoom levels are **20, 30, 60, 90, 120, 150** and **200** percent. For any invalid entries,

numbers are rounded to the nearest 20 or 200 value and text values are converted to 20; the results are rounded to the nearest whole number and the list is sorted.

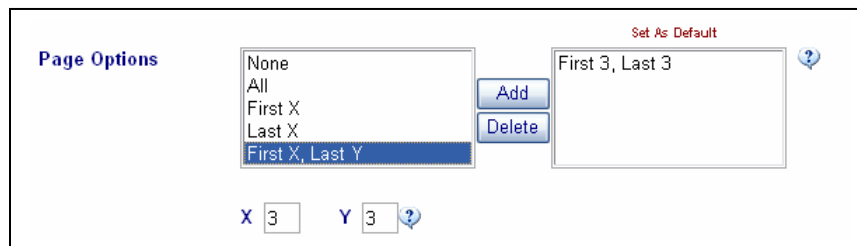
- **Page Options** – Choose the page preview options that are available to the user: **None**; **All**; **First X**; **Last X**; **First X, Last Y**. X and Y values must be between 1 and 999.

Note:

- By selecting, for instance, First X; Last X and/or First X, Last Y, you can control which parts of a scanned document the user can view. Selecting “All” means that each page of a scanned document will be available for preview. Please be aware that this setting will result in additional network traffic.
- When selecting First X or Last X, choose the number of pages that should display as thumbnails on the MFD. The default value for X is 3, which means the first three pages will be available for preview. Change the value, as needed.



- When selecting First X, Last Y, choose the number of pages that should display as thumbnails on the MFD. The default value for X and Y is 3, which means the first and last three pages will be available for preview. Change the value, as needed.



4. After fields are selected and verified, click the **[Update]** button to save the settings. Display reads **Operation successful**.
5. Click the **[Close]** button or close the window **[X]**.

Note: Click the **[Reset]** button to perform one of the following functions:

- On **System Level**, resets field values to default system settings.
- On **Profile Level**, resets field values to current system-level settings.
- On **Project Level**, resets field values to the selected profile-level settings.

Step 8: Create One-touch Scan

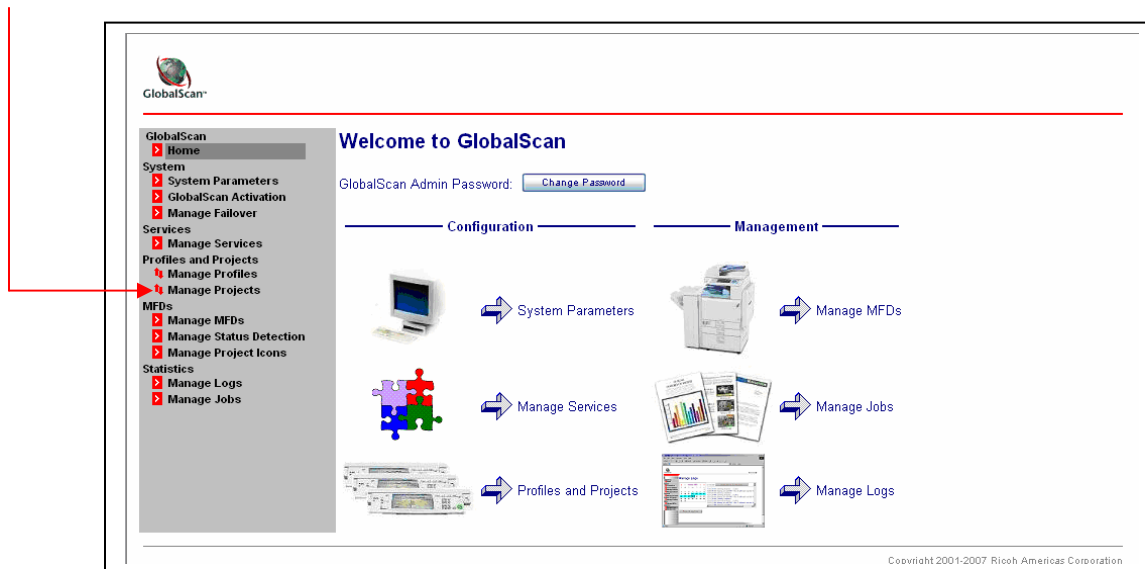
The One-touch Scan function enables the MFD user to quickly execute a scan function, since destination entry or selection is not required. For example, expense reports can be directed to email and/or folder destinations using the following features:

- A. One-touch Scan-to-Email
- B. One-touch Scan-to-Folder

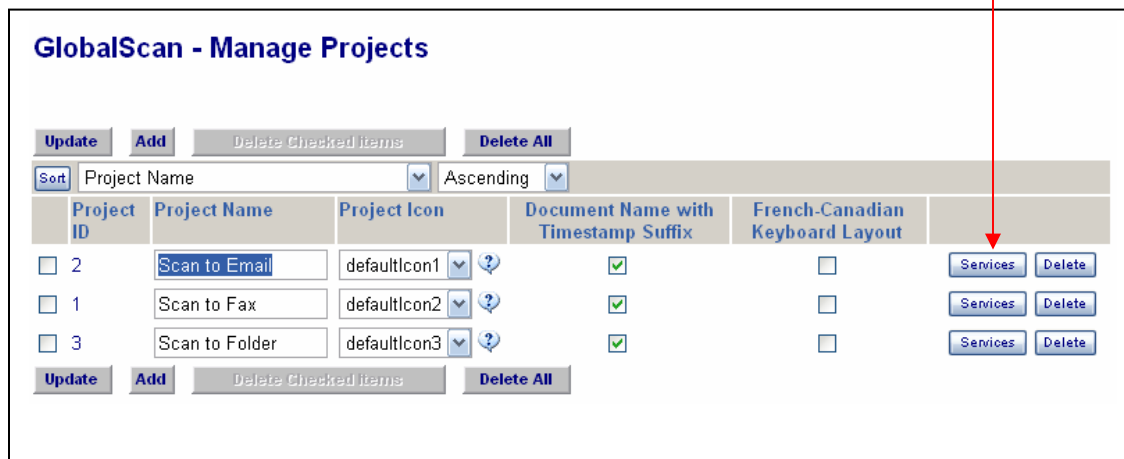
Note: These procedures assume that you have successfully completed **Steps 2 - 7**.

A. One-touch Scan-to-Email

1. Click the **Manage Projects** menu link (or associated shortcut icon).



2. Click the **[Services]** button associated with the **Project Name**.



Display reads:

GlobalScan - Project's Services

Project ID 2
Project Name Scan to Email

Update Remove Checked items Remove All

Sort Service Name Ascending

Service ID	Service Name	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required	
<input type="checkbox"/> 10	Email	↓	✓		✓	1	2	✓	Configure Remove
<input type="checkbox"/> 4	Image Management	↓	✓	✓		2	1		Configure Remove
<input type="checkbox"/> 2	Job Log	↓		✓		4			Remove
<input type="checkbox"/> 8	LDAP Authentication	↓	✓					✓	Configure Remove
<input type="checkbox"/> 1	Scan Settings	↓		✓		3			Configure Remove

-- select --

Update Remove Checked items Remove All

3. Click the **[Configure]** button associated with the **Email** service.
4. Scroll down to **Advanced Settings**, and then click the **[Set Email Defaults]** button.

Display reads:

ADVANCED SETTINGS

Message & Subject Text

Set Email Defaults

Default Search Results

Display	Value
Add	

Default Selected Addresses

Reply-To

Display	Value
Add	
To	
Add	

CC

Display	Value
Add	

BCC

Display	Value

5. In the **To** row (circled above), click on the **Display** field and enter text, e.g., Accounting.

6. Click on the **Value** field and enter the email address, e.g., ajones@xyz.com. This value will display on the MFD touch screen as the default recipient.
7. Click the **[Add]** button to complete the entry.

Note: If you do not complete this step, the fields will reappear empty, i.e., the entry will not be applied.

8. To add another destination (email address) repeat 5 - 7.

Display reads:

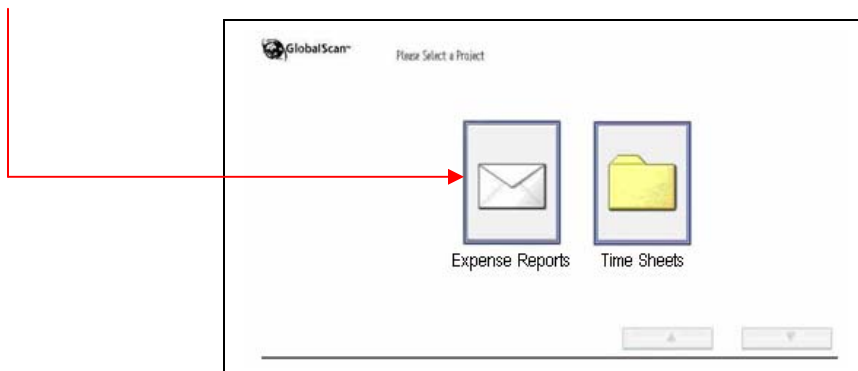
The screenshot shows the 'ADVANCED SETTINGS' window with the following sections:

- Message & Subject Text** and **Set Email Defaults** buttons.
- Default Search Results**: A table with 'Display' and 'Value' columns, and an 'Add' button.
- Default Selected Addresses**:
 - Reply-To**: A table with 'Display' and 'Value' columns, and an 'Add' button.
 - To**: A table with 'Display' and 'Value' columns. The first row has 'Accounting' in the Display column and 'ajones@xyz.com' in the Value column. There is a 'Delete' button next to the first row and an 'Add' button below the table.
 - CC**: A table with 'Display' and 'Value' columns, and an 'Add' button.
 - BCC**: A table with 'Display' and 'Value' columns, and an 'Add' button.

The address entered here will appear on the MFD touch screen's Recipient List window.

9. When finished, click the **[Update]** button.
10. Click the **[Close]** button or close the window **[X]**

The MFD user can now simply place the document on the MFD's ADF, or platen glass, select the project button associated with One-touch Scan, and then press the **[Start]** key.



B. One-touch Scan-to-Folder

1. Click the **Manage Projects** link (or associated Home Page shortcut icon).

Display reads:

GlobalScan - Manage Projects

Update Add Delete Checked items Delete All

Sort Project Name Ascending

Project ID	Project Name	Project Icon	Document Name with Timestamp Suffix	French-Canadian Keyboard Layout	
<input type="checkbox"/> 2	Scan to Email	defaultIcon1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 1	Scan to Fax	defaultIcon2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete
<input type="checkbox"/> 3	Scan to Folder	defaultIcon3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Services Delete

2. Click the project's associated **[Services]** button.
3. Click the Scan to Folder **[Configure]** button.
4. If necessary, enter **Path** and **Description**.
5. Select **Select By Default** check box (adjacent to "Description" field).
6. Click the **[Add]** button.
7. Repeat 4 - 6, if necessary.

Display reads:

Configure Scan To Folder

RICHSCANToFOLDER INHERITS SETTINGS FROM THE FOLLOWING PROFILES WHEN CONFIGURED FOR PROJECT '3'. CHOOSE A PROFILE TO SEE THE SETTINGS THAT WILL BE INHERITED.

Accounting Dept. ▾

Allow Scan to Home Directory If Known Select By Default

Create Subfolder While Copying Document

Maximum Retry Attempts * 3

	Path	Description	Select By Default
1	Delete: c:\accounting\expense reports	Eastern region	<input checked="" type="checkbox"/>
	Add		<input type="checkbox"/>

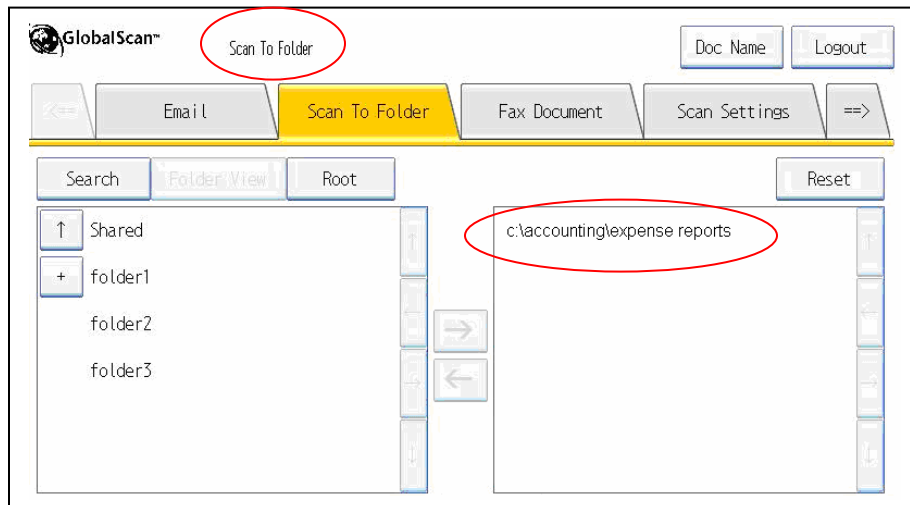
Changes have been made but have not been saved

Update Close Reset

Note: To enable the user to Scan-to-Home (their Home folder), select **Allow Scan To Home Directory If Known**, and **Select By Default** check boxes.

8. When finished, click the [Update] button.
9. Click the [Close] button or close the window [X]

The MFD's touch screen will populate with the predefined folder(s). The user places the document on the ADF (or platen glass) and presses the [Start] key. Depending on system settings, the user may need to first select a project button and/or authenticate (login).



GlobalScan Management

After the GlobalScan Server has been configured (as outlined in [GlobalScan WebAdmin Module Configuration](#)), it is then possible to monitor and manage the GlobalScan-enabled MFDs, as well as access job and log records. Additionally, images that can be applied as project button icons (on MFD models with WVGA/SVGA touch screens) can be viewed.

Proceed to the desired section:

A. Manage MFDs	D. Manage Jobs
B. Manage Status Detection	E. Manage Logs
C. Manage MFD Project Icons	F. Manage Failover

A. Manage MFDs

The GlobalScan system has the ability to dynamically display the status of the MFD in relation to the GlobalScan Server. For example, view enabled/disabled MFDs, firmware version, serial number or IP address. The Manage MFDs screen will display the updated status (after device reboot).

If the MFD has been properly configured with the correct GlobalScan IP Address and DNS Server (preferred) or Domain Name Server (as outlined in [Multifunctional Device Configuration](#)), then the MFD will automatically be registered after the MFD is rebooted (see p. 34, [MFD Reboot Rules](#)). This **Auto Registration** process means that you are not required to add the machine manually, unless you wish to select a different default profile.



Edit Existing MFD Configuration

To modify the configuration of an MFD, for example, change the default profile, proceed as follows:

1. Click the **Manage MFDs** menu link (or associated Home Page shortcut icon).

GlobalScan - Manage MFDs

Total Licenses Purchased 50
 Total Number of Enabled MFDs 3
 Total Number of Disabled MFDs 0
 Total Number of MFDs 3

Update Add Delete Checked Items Delete All

Sort Serial Number Ascending

Serial Number	Profile Name	Enabled	Device Name	IP Address	Firmware Version	
<input type="checkbox"/> K0123456789	Accounting Dept.	<input checked="" type="checkbox"/>	K0123456789	111.222.333.444	3.0	Configure Delete
<input type="checkbox"/> P9876543210	Marketing Dept.	<input checked="" type="checkbox"/>	P9876543210	222.333.444.555	3.0	Configure Delete
<input type="checkbox"/> A2345678901	Marketing Dept.	<input checked="" type="checkbox"/>	A2345678901	333.444.555.666	3.0	Configure Delete

Update Add Delete Checked Items Delete All

Manage MFDs Screen

- **Total Licenses Purchased** – Identifies the number of licensed MFDs based on the purchased CD Key.
- **Total Number of Enabled MFDs** – Identifies the number of MFDs that currently communicate with the GlobalScan Server. The total number of enabled MFDs must be equal to or less than the number specified by the license. For example, if you have a 10-MFD license, the total number of enabled MFDs cannot exceed 10. If the total number of enabled MFDs exceeds the maximum allowed, an error message is displayed.
- **Total Number of Disabled MFDs** – Identifies the number of MFDs that do not currently communicate with the GlobalScan Server.
- **Total Number of MFDs** – Identifies the total number of enabled MFDs. Note that disabled devices do not contribute to the total, only the number of enabled MFDs, thus the total number of MFDs can be greater than the number specified by the license key.
- **Serial Number** (Required) – Identifies the MFD's serial number. No two MFD serial numbers can be the same.
- **Profile Name** (Required) – Click the drop-down button [v] to select the MFD's default profile. The serial number will be associated with this profile. If you have changed the default profile from the Manage MFDs screen, be sure to click the [Update] button to save the setting.

- **Enabled** – If checked (on), the MFD can connect to the GlobalScan Server, i.e., can join in GlobalScan operations. If unchecked (off), the MFD is disabled, thus cannot connect. If an MFD has been disabled, an error message will be displayed on the MFD's touch screen.

Note: You can enable/disable an MFD from the Manage MFDs screen , just be sure to click the [Update] button to save the setting.
- **Device Name** – Identifies the MFD's serial number, though this field is editable to any name you wish to use to describes this device.
- **IP Address** – This is the IP address of the MFD. When machines connect to the GlobalScan Server, GlobalScan tries to determine the machine's IP address, so that when the Manage MFDs screen is opened, the machine's IP address will display. This feature accommodates machines that connect via Dynamic Host Configuration Protocol (DHCP) or are set with static IP addresses. The IP address field can be edited, as needed.

Important: When changing the IP address, it does NOT change the IP address of the machine; only the IP address that the server “thinks” is the MFD's.

Note: If the SmartDeviceMonitor utility is installed on the GlobalScan Server, you can click the IP address and view real-time device status and settings. See About SmartDevice-Monitor, to follow.

- **Firmware Version** – This read-only field identifies the firmware version of the connected MFD.

2. Click the [Configure] button associated with the MFD (circled below).

GlobalScan - Manage MFDs

Total Licenses Purchased 50
Total Number of Enabled MFDs 3
Total Number of Disabled MFDs 0
Total Number of MFDs 3

Update Add Delete Checked items Delete All

Sort Serial Number Ascending

Serial Number	Profile Name	Enabled	Device Name	IP Address	Firmware Version	
<input type="checkbox"/> K0123456789	Accounting Dept.	<input checked="" type="checkbox"/>	K0123456789	111.222.333.444	3.0	<input type="button" value="Configure"/> <input type="button" value="Delete"/>
<input type="checkbox"/> P9876543210	Marketing Dept.	<input checked="" type="checkbox"/>	P9876543210	222.333.444.555	3.0	<input type="button" value="Configure"/> <input type="button" value="Delete"/>
<input type="checkbox"/> A2345678901	Marketing Dept.	<input checked="" type="checkbox"/>	A2345678901	333.444.555.666	3.0	<input type="button" value="Configure"/> <input type="button" value="Delete"/>

Update Add Delete Checked items Delete All

Display reads:

GlobalScan - MFD Configuration

Serial Number * K0123456789

Device Name K0123456789

IP Address 111.222.333.444

Profile Name * Accounting Dept.

Enabled

(* Required field)

3. Modify field(s), as needed. Below, we have changed the **Device Name** to 2035e and selected **Marketing Dept.** as the **Profile Name**.

GlobalScan - MFD Configuration

Serial Number * K0123456789

Device Name 2035e

IP Address 111.222.333.444

Profile Name * Marketing Dept.

Enabled

(* Required field)

4. Click the [**Update**] button.

Display reads:

GlobalScan - MFD Configuration

Operation successful

Serial Number * K0123456789

Device Name 2035e

IP Address 111.222.333.444

Profile Name * Marketing Dept.


Enabled

(* Required field)

5. Click the [**<< Back**] button to view the modified screen.
6. Choose another menu link or close your Web browser [**X**].

Important: You must reboot the MFD(s) after revising MFD configuration settings. See p. 34, *MFD Reboot Rules*.

About SmartDeviceMonitor (SDM)

When the SmartDeviceMonitor for Client utility has been installed on the GlobalScan Server, you will see a **Status** column with traffic light icons  on the Manage MFDs screen.

Important:




- See [GlobalScan v3.1 Server Software Installation Guide](#) → [Appendix E: SmartDeviceMonitor for Client Installation](#) for instructions on installing SDM.
- See [B. Manage Status Detection](#), to follow.

GlobalScan - Manage MFDs

Total Licenses Purchased 50
Total Number of Enabled MFDs 3
Total Number of Disabled MFDs 0
Total Number of MFDs 3

Update Add Delete Checked Items Delete All

Sort Serial Number Ascending

Status	Serial Number	Profile Name	Enabled	Device Name	IP Address	Firmware Version	
	K0123456789	Accounting Dept.	<input checked="" type="checkbox"/>	2035e	111.222.333.444	3.0	Configure Delete
	P9876543210	Marketing Dept.	<input checked="" type="checkbox"/>	3235C	222.333.444.555	3.0	Configure Delete
	A2345678901	Marketing Dept.	<input checked="" type="checkbox"/>	2075SP	333.444.555.666	3.0	Configure Delete

Update Add Delete Checked Items Delete All

With installation of SmartDeviceMonitor, the system will retrieve the Device Name from the MFD upon reboot; **the field is read-only**. If the Device Name cannot be retrieved, the MFD serial number appears.

The Serial Number field appears here as a read-only field, but can be edited by clicking the associated [Configure] button.

The color of the traffic light icon indicates the MFD's condition, as outlined below. Note that you can click on the icon to refresh the status of a specific MFD.

Traffic Light Status	MFD Condition
Green	Normal; paper on platen glass; ADF is lifted up; Power Save mode
Yellow	Scanner application busy; scanner resource busy
Red	ADF jam; ADF cover open; user maintenance; service call
Black	Status cannot be obtained due to error or warning message or other problem, such as: <ul style="list-style-type: none"> ■ Power off ■ Network connection is down or has errors ■ Server is not configured with proper DLLs for SNMP communication ■ Listed IP address does not respond to SNMP requests (may no longer be an MFD) ■ Listed IP address cannot be a loopback address ■ IP address is blank, i.e., address was cleared or indeterminable ■ IP address belongs to a proxy server that is using private or anonymous pass-through

Also, note that with installation of the SmartDeviceMonitor for Client, you can view real-time device status and settings, as follows:

1. Click on the MFD's **IP Address** (circled below).

Status	Serial Number	Profile Name	Enabled	Device Name	IP Address	Firmware Version	
<input type="checkbox"/>	K0123456789	Accounting Dept.	<input checked="" type="checkbox"/>	2035e	111.222.333.444	3.0	Configure Delete
<input type="checkbox"/>	P9876543210	Marketing Dept.	<input checked="" type="checkbox"/>	3235C	222.333.444.555	3.0	Configure Delete
<input type="checkbox"/>	A2345678901	Marketing Dept.	<input checked="" type="checkbox"/>	2075SP	333.444.555.666	3.0	Configure Delete



2. Navigate the links to display information regarding the MFD, e.g., configuration settings, toner and paper levels, etc.

Note: Some features of Web Image Monitor can only be accessed if the Administrator ID (User Name) and Password is known.

Sort MFD List

To sort the MFD list, proceed as follows:

1. Click the **Manage MFDs** menu link (or associated Home Page shortcut icon).
2. Click the category drop-down button [v].
3. Select the category to sort by.
4. Select **Ascending** or **Descending** order from the drop-down button [v].
5. Click the [**Sort**] button.

GlobalScan - Manage MFDs

Total Licenses Purchased 50
Total Number of Enabled MFDs 1
Total Number of Disabled MFDs 1
Total Number of MFDs 2

Update Add Delete Checked Items Delete All

Sort Serial Number Ascending

Serial Number	Profile Name	Enabled	Device Name	IP Address	Firmware Version	
-- select --						
Profile Name						
<input type="checkbox"/> Enabled	Accounting Dept.	<input type="checkbox"/>	K4340800163	172.18.50.36	2.0.4	Configure Delete
<input type="checkbox"/> Device Name	Profile (1)	<input checked="" type="checkbox"/>	L3765400419	172.18.50.37	3.0	Configure Delete
<input type="checkbox"/> IP Address						
<input type="checkbox"/> Firmware Version						

Update Add Delete Checked Items Delete All

GlobalScan - Manage MFDs

Total Licenses Purchased 50
Total Number of Enabled MFDs 1
Total Number of Disabled MFDs 1
Total Number of MFDs 2

Update Add Delete Checked Items Delete All

Sort Enabled Descending

Serial Number	Profile Name	Enabled	Device Name	IP Address	Firmware Version	
<input type="checkbox"/> L3765400419	Profile (1)	<input checked="" type="checkbox"/>	L3765400419	172.18.50.37	3.0	Configure Delete
<input type="checkbox"/> K4340800163	Accounting Dept.	<input type="checkbox"/>	K4340800163	172.18.50.36	2.0.4	Configure Delete

Update Add Delete Checked Items Delete All

Delete MFD(s) from List

To delete an MFD from the GlobalScan system, proceed as follows:

1. Click the **Manage MFDs** menu link (or associated Home Page shortcut icon).

Display reads:

GlobalScan - Manage MFDs

Total Licenses Purchased 50
Total Number of Enabled MFDs 2
Total Number of Disabled MFDs 0
Total Number of MFDs 2

Update Add Delete Checked Items Delete All


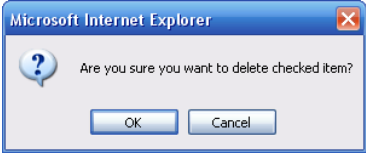
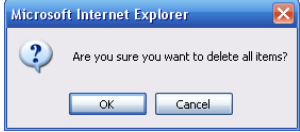
Sort Serial Number Ascending

Serial Number	Profile Name	Enabled	Device Name	IP Address	Firmware Version	
<input checked="" type="checkbox"/> P9876543210	Marketing Dept.	<input checked="" type="checkbox"/>	P9876543210	222.333.444.555	3.0	Configure Delete
<input type="checkbox"/> A2345678901	Marketing Dept.	<input checked="" type="checkbox"/>	A2345678901	333.444.555.666	3.0	Configure Delete

Update Add Delete Checked Items Delete All

B **C** **A**

2. Use one of the following three methods to delete the MFD(s):

A. Delete One MFD	B. Delete Multiple MFDs	C. Delete All MFDs
<ul style="list-style-type: none"> • Click the [Delete] button associated with the MFD. <p>Display reads:</p>  <ul style="list-style-type: none"> • Click the [OK] button. 	<ul style="list-style-type: none"> • Click the check boxes associated with the MFDs you would like to delete. • Click [Delete Checked Items] button. <p>Display reads:</p>  <ul style="list-style-type: none"> • Click the [OK] button. 	<ul style="list-style-type: none"> • Click the [Delete All] button. <p>Display reads:</p>  <ul style="list-style-type: none"> • Click the [OK] button.

Manually Add New MFD(s)

The **Auto Registration** process means that you are not required to add a device manually, unless you wish to select a different default profile.

To manually add an MFD, proceed as follows:

1. Click the **Manage MFDs** menu link (or associated shortcut icon).

Display reads:

2. Click the **[Add]** button.

Display reads:

3. Enter the following information:

- **Serial Number** (Required) – Enter the MFD's serial number. No two MFD serial numbers can be the same. **Important:** Make sure that the MFD serial number entry is correct.
- **Device Name** – Enter the MFD's model name or any name that describes this device.

- **IP Address** – Enter the MFD's correct IP address. **Important:** Make sure that the IP address entry is correct.
- **Profile Name** (Required) – Click the drop-down button [v] to select the MFD's default profile. The serial number entered above will be associated with this profile.
- **Enabled** – If checked (on), the MFD can connect to the GlobalScan Server, i.e., can join in GlobalScan operations. If unchecked (off), the MFD is disabled and cannot connect to the GlobalScan Server. If an MFD has been disabled in the Manage MFDs screen, an error message will be displayed on the MFD's touch screen.

Display reads:

GlobalScan - MFD Configuration

Serial Number * A9012345678

Device Name MP 9000

IP Address 777.888.999.111

Profile Name * Accounting Dept. [v] [?]

Enabled

(* Required field)

4. Click the [Add] button. The screen refreshes and is ready for the next entry.

GlobalScan - MFD Configuration

Operation successful

Serial Number * []

IP Address []

Profile Name * Profile (1) [v] [?]

Enabled

(* Required field)

5. To add another MFD, repeat 2 - 4.
6. When finished, click the **Manage MFDs** menu link to view the MFD list.
7. After manually adding an MFD, you **must** reboot the associated MFD(s). See p. 34, MFD Reboot Rules.

B. Manage Status Detection

When the SmartDeviceMonitor for Client utility is installed on the GlobalScan Server, the navigation pane will include a **Manage Status Detection** menu link (circled below). This screen allows you to set the maximum time period used by the GlobalScan Server to retrieve the status of connected/enabled MFD(s).

To set the status detection time period, proceed as follows:

1. Click the **Manage Status Detection** menu link.

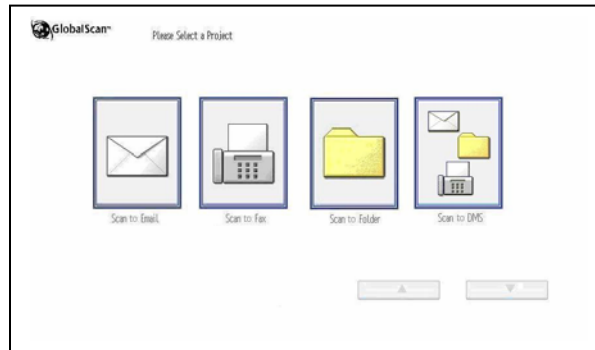
Display reads:

2. Enter the values (in seconds). Note that both fields are required.
 - **Maximum Time for Single MFD (seconds)** – This value represents the maximum time allowed for retrieving the status of an individual MFD. The valid range is 1 – 60 seconds.
 - **Maximum Time for All MFDs (seconds)** – This value represents the maximum time allowed for detecting the status of all MFDs. The valid range is 0 – 600 seconds. Setting it to zero (0) disables default status detection for all MFDs, while individual MFD status refresh is still available on-demand by clicking on a traffic light. For more information about MFD status and traffic lights, see [About SmartDeviceMonitor \(SDM\)](#).
3. Click the **[Add]** button, or if making changes to existing settings, click **[Update]**.
4. Click the **[Close]** button or close the window **[X]**.

Note: For information on SmartDeviceMonitor, see [About SmartDeviceMonitor \(SDM\)](#).

C. Manage MFD Project Icons

MFDs that support the WVGA/SVGA touch screen have the ability to display up to four icons (bitmap images) on the touch screen (as shown below). These icons (which are hard-coded on the MFD) are associated with primary GlobalScan services, e.g., Email, Scan-to-Folder, Fax or multiple services. By displaying these icons, users can intuitively select a function for faster job execution.

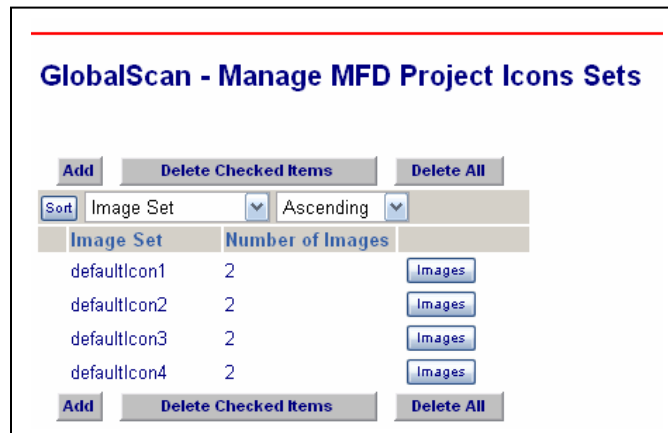


Note: To determine which type of display an MFD supports, see [Appendix A: GlobalScan-compatible MFDs](#).

To view the available images, proceed as follows:

1. Click the **MFD Project Icons** menu link.

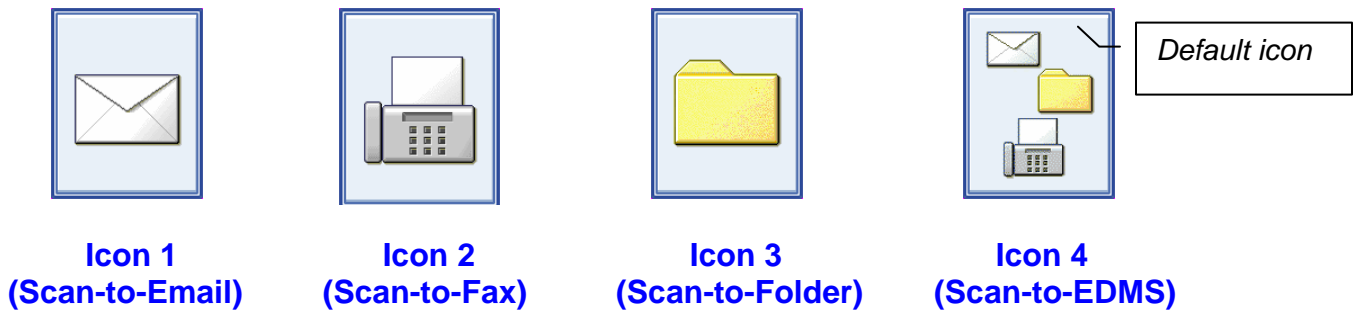
Display reads:



Note:

- The **Number of Images** column reads “2” because there are two sets of identical bitmap images, a black & white and color set. Which icon you apply to a project depends on whether the MFD’s touch screen supports black & white or color.
- DefaultIcon4 (shown below) is the default icon. If the MFD supports project icons and icons are not selected for a project, this default icon will be displayed on the MFD touch screen.
- DefaultIcons cannot be deleted.
- The [Add] button is intended for future implementation of custom project icons.

- Click the [Images] button associated with desired icon – defaultIcon1, 2, 3 or 4.

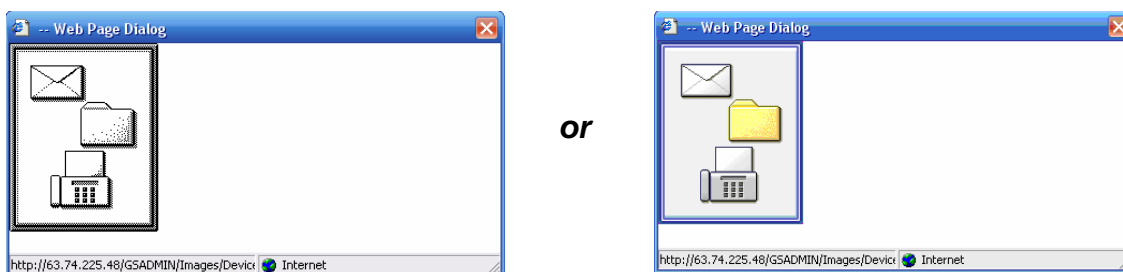


Display reads:



- Click on the black & white or color thumbnail (circled above) to view an enlargement.

Display reads:

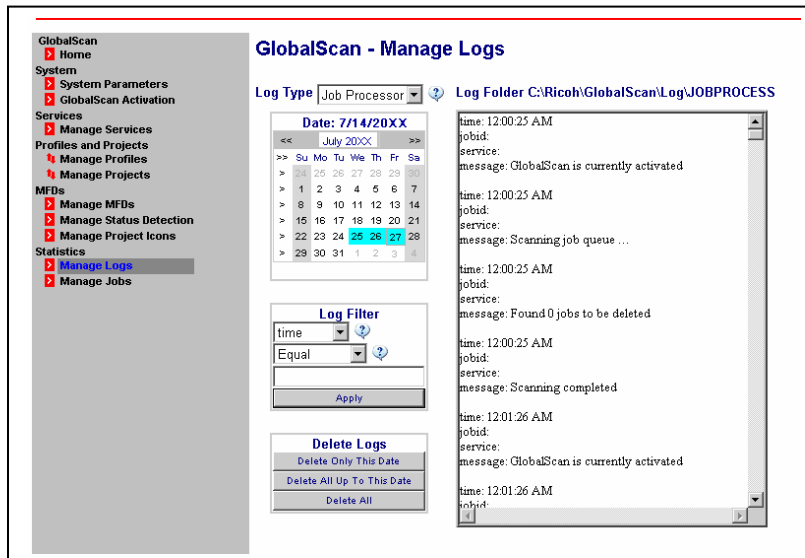


- Click another menu link or close the window [X].

D. Manage Logs

1. Click the **Manage Logs** menu link.

Display reads:



Manage Logs Screen

- **Log Type** – To display a particular log type, click the drop-down button [v] and select from the following:
 - **Job Processor** – Displays information related to core job processing.
 - **MFD** – Displays information related to communication between the GlobalScan Server and MFD(s).
 - **GlobalScan** – Displays information related to core GlobalScan functions, e.g., GlobalScan has not been activated.
 - **SDK** – Displays information related to errors that have occurred during GlobalScan's communication with a specific service (plug-in).
 - **Services** – Displays information related to plug-ins, enabling services to record its own error.
 - **Failover** – Displays information related to Failover service.

Note: Failover will only appear if the GlobalScan Server has been activated as a Primary or Secondary Server. For details on the optional Failover service, see [F. Manage Failover](#), to follow.

- **Log Folder** – The Log Folder path is displayed as a read-only field on the Manage Logs screen. This path is set by the Administrator on the System Parameters screen (see [Step 2: Enter/Edit System Parameters](#)). GlobalScan monitors all scan activity (plug-in data) using the internal Job Tracking service, with the data (in XML format) automatically exported to the designated Log Folder. In short, the Log Folder is a data repository that can be used for monitoring/tracking of job activity. The primary purpose for this data is to have an audit trail of all jobs processed by GlobalScan. Though this data is not displayed in the Manage Logs screen, as the file size can be significant, it can be viewed by opening the XML files directly.

Note: Job data includes: machine serial number, user name, MFD firmware version, document name, page count, resolution, mono/color, duplex settings, job ID, create date/time, services, retry count, execute date/time.

Important: Again, the data accumulated within the Log Folder can be extensive. It is recommended that you monitor the size of the log files and archive or purge the files as needed.

- **Date** – Displays the current date.
- **Calendar** – Identifies the months/dates where logs exist. Click the [>>] or [<<] button to open the desired month, and then click the date.
- **Log Filter** – Search for specific log entries via the Log Filter. The selections are based on the selected Log Type, so first choose the Log Type, and then the Filter.
- **Delete Logs** – To delete logs, select one of the following:
 - **Delete Only This Date**
 - **Delete All Up To This Date**
 - **Delete All**

E. Manage Jobs

The jobs that GlobalScan is currently processing are displayed here, reflected under the Status column. If a job may have failed, perhaps while being sent to the SMTP server, the details regarding that job are displayed and categorized by job name, and include date/time created, time/date of last attempt, etc.

To display job status, proceed as follows:

1. Click the **Manage Jobs** menu link (or associated Home Page shortcut icon).

Display reads:

The status of a job in progress is identified under the Status column as *Uploaded*.

The screenshot shows the 'GlobalScan - Manage Jobs' interface. At the top, it says 'Total Number of Jobs 1'. Below this are buttons for 'Delete Checked Items', 'Delete All', and 'Retry'. A 'Sort' dropdown is set to 'Time Created' and 'Descending'. A table displays one job with the following data:

Job ID	Status	Time Created	Last Attempt Time	User ID	Status Messages
15	Uploaded	7/14/20XX 10:31:17 AM			

The 'Status' column for the job is circled in red. Below the table are buttons for 'Delete Checked Items', 'Delete All', and 'Retry', and a 'Details' link.

After a job that has been processed, the Status column reads *Completed* (as shown) or *Failed*.

The screenshot shows the 'GlobalScan - Manage Jobs' interface. At the top, it says 'Total Number of Jobs 1'. Below this are buttons for 'Delete Checked Items', 'Delete All', and 'Retry'. A 'Sort' dropdown is set to 'Time Created' and 'Descending'. A table displays one job with the following data:

Job ID	Status	Time Created	Last Attempt Time	User ID	Status Messages
15	Completed	7/14/20XX 10:31:17 AM	7/14/20XX 10:32:12 AM		

The 'Status' column for the job is circled in red. Below the table are buttons for 'Delete Checked Items', 'Delete All', and 'Retry', and a 'Details' link.

When data is no longer being processed, the Status column reads *No Data To Display*.

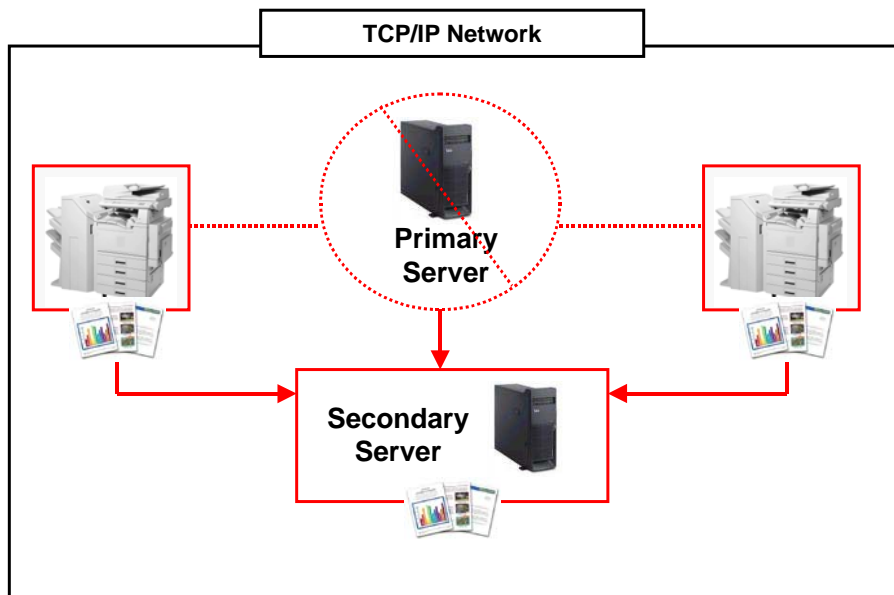
The screenshot shows the 'GlobalScan - Manage Jobs' interface. At the top, it says 'Total Number of Jobs 0'. Below this are buttons for 'Delete Checked Items', 'Delete All', and 'Retry'. A 'Sort' dropdown is set to 'Time Created' and 'Descending'. The table area displays the text 'No Data To Display', which is circled in red. Below the table are buttons for 'Delete Checked Items', 'Delete All', and 'Retry'.

Manage Jobs Screen

- **Job ID** – Sequence of upload file.
- **Status** – Whether or not the job is being uploaded (in progress) or an error was encountered.
- **Time Created** – The date and time of file upload.
- **Last Attempt Time** – The date and time of the last retry attempt.
- **User ID** – If the user logged in (authenticated) at the device, their User Name will appear here.
- **Status Messages** – Job details, including any error condition.
- **Details** – Includes additional details that pertain to that job, e.g., Profile ID, Project ID, User ID, MFD Serial Number, etc.
- **Delete** – If a job fails, a check box will display. If selected, you can click the [**Delete Checked Items**], [**Delete All**] or [**Retry**] buttons. Retry reprocesses the job. For example, if the SMTP server was not identified correctly. After the correct server is established you can retry the job.

F. Manage Failover (if applicable)

Failover is a GlobalScan v3.1 function whereby MFDs can communicate with an alternate GlobalScan Server should the primary GlobalScan Server go down. Incorporating Failover ensures maximum uptime of the GlobalScan system. Failover is transparent to the user, though once implemented he/she may be required to log in again. Once the primary server is back on line, and after the current user session on the secondary server is completed, GlobalScan operation resumes on the primary server.



Failover occurs when the MFD cannot submit a job to the primary GlobalScan Server.

Four possible causes include:

1. Network or other physical connection failure.
2. IIS Web service is down.
3. IIS Web service is up, but GlobalScan Web service is down.
4. IIS Web service and GlobalScan's Web Service are up, but primary server is in Maintenance Mode.

The prerequisites for successful GlobalScan Failover operation include the following:

- One permanent license has been activated on the primary server, i.e., the server is activated with a "03" CD Activation Key, e.g., JBVTXUI030000085.
- One permanent license has been activated on the secondary server, i.e., the server is activated with a "04" Activation Key, e.g., JBXDXUI040000045.

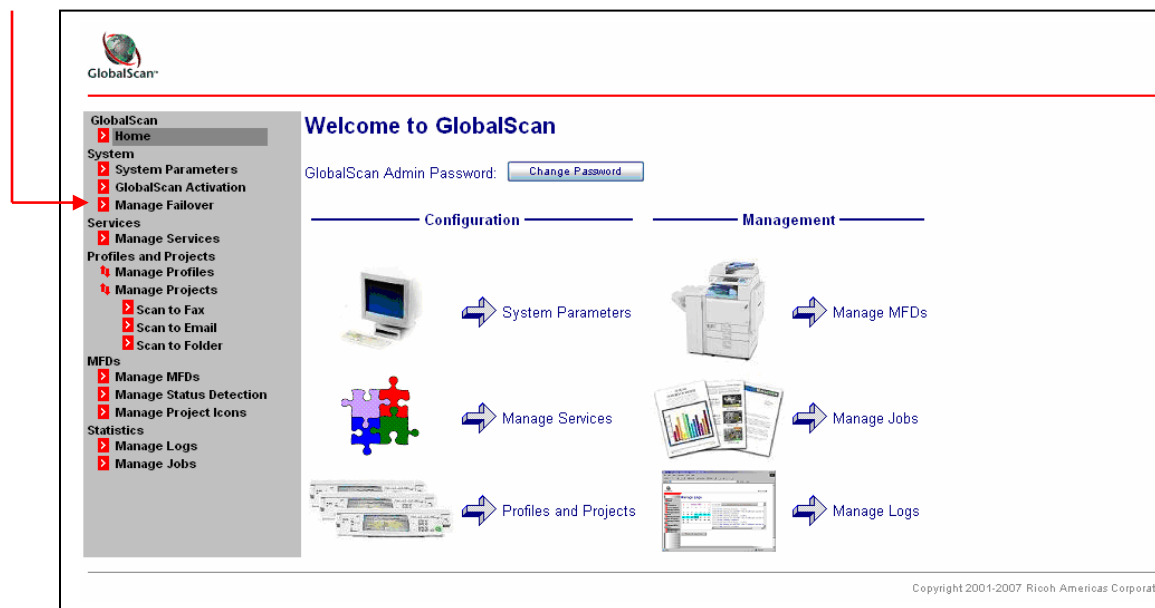
Note: Servers configured with "04" (secondary) Activation Key cannot update data with a few exceptions (explained later in this section). If needed, a secondary server can be promoted to primary server status by deactivating the "04" Activation Key and reactivating with the "03" Activation Key.

- The primary and secondary GlobalScan Servers must be configured exactly the same, including all plug-ins and plug-in client software, and most importantly, each server must have the exact same date and time zone settings, otherwise synchronization will not be completed correctly. The secondary GlobalScan Server will automatically update itself if the primary server's database configuration is modified.

Note: All GlobalScan v3.1 plug-ins are supported by the primary and secondary servers.

- GlobalScan v3.1 must be installed with the latest OCR plug-in and engine (OCR file conversion program). The OCR plug-in must be installed separately for the primary and secondary server. The OCR engine should be installed on both the primary and secondary server. If installing the OCR engine on one server, it must be on the secondary server.

A GlobalScan Server that has been activated with a “03” (primary) Activation Key or “04” (secondary) Activation Key will display “Manage Failover” as an additional menu link on the GlobalScan WebAdmin Module.



Primary Server Failover Settings

If an MFD cannot submit a job to the primary GlobalScan Server, the system will revert to Failover mode, with the secondary server processing jobs until the primary server is restored (provided the secondary server has been properly configured).

Note:

- Logical failures to submit a job, e.g., the user enters an invalid user name/password, plug-ins are not properly installed, or a plug-in server goes down, will not cause Failover.
- While changes to the GlobalScan Server's configuration can be made with jobs in queue, it is recommended that you wait until after all jobs are completed or error-out.

To access the Failover status/configuration screen on the primary GlobalScan Server, proceed as follows:

- Click the **Manage Failover** menu link (shown above).

Display reads:

GlobalScan - Primary Server's Failover Settings

Add

Drop File Location *

Secondary Server **Ping**

Drop File Creation Interval (seconds) * ?

Date/Time Drop File Last Created

Date/Time Database Last Updated

Database Updated Since Last Synchronization

Synchronization In Progress ?

Synchronize Now

Maintenance Mode

(* Required field)

Add

2. Establish Primary Server Failover Settings:

- **Drop File Location** (required) – Specify where to store the drop file (system and plug-in configuration data), either the local drive of your primary server or the UNC path of the shared folder on the secondary server. If you are using a shared folder on the secondary server, the identity running the Application Pool must have full access rights to the drop file folder on the secondary server. For more information, see [GlobalScan v3.1 Server Software Installation Guide](#) → [Appendix A.1: Set Application Pool Identity](#).

Note: The primary server can create the drop file based on time (at *Drop File Creation Interval*) or on-demand (via [**Synchronize Now**] button).

- **Secondary Server** (required) – Enter the IP address or DNS name of the secondary server, whichever is appropriate for the network configuration in use.
- **Drop File Creation Interval (seconds)** – Required. Specify the rate at which the failover server will check for database updates and possibly create a drop file. This setting will take effect when failover services are restarted or when the next Drop File Creation Interval occurs.
- **Date/Time Drop File Last Created** – This indicates when the last drop file was successfully created.
- **Date/Time Database Last Updated** – This indicates when the last update of the primary server database occurred, enabling you to determine if synchronization is performing properly.
- **Database Was Updated Since Last Synchronization** – When this check box is enabled, an update of primary server database took place after the last drop file was created.
- **Maintenance Mode** – Select this check box to take the primary server offline. Jobs currently in progress continue; no new jobs are processed. MFD(s) connect to the secondary server until the primary server is back online.

- **Synchronization in Progress** – This indicates that the secondary server is currently processing a drop file. If synchronization is in progress for more than one minute, failover may have been unsuccessful. If necessary, contact technical support.
 - **Synchronize Now** - Click this button to instruct GlobalScan to generate a drop file into the Drop File location (specified above), regardless of whether there have been any configuration changes. For this to occur, GlobalScan Failover Service must run as a user who has full access rights to the specified drop file location. For more information, see [GlobalScan v3.1 Server Software Installation Guide](#) → [Appendix A.4: Change Failover Identity Service](#).
3. Click the [Add] button to save initial settings or [Update] to save modified settings.

Display reads:

GlobalScan - Primary Server's Failover Settings

Operation successful

Drop File Location *

Secondary Server

Drop File Creation Interval (seconds) *

Date/Time Drop File Last Created

Date/Time Database Last Updated

Database Updated Since Last Synchronization

Synchronization In Progress ⓘ

Maintenance Mode

(* Required field)

Secondary Server Failover Settings

When in Failover mode, all the active MFDs on the primary server will be automatically routed to the secondary server and jobs will continue to be processed by the secondary server.

On the secondary server, most GlobalScan WebAdmin Module screens, e.g., System Parameters, Profiles and Projects, etc. are read-only, so no changes can be made. Manage Failover (Failover status/configuration screen), Manage Logs and Manage Jobs screens, however, can be accessed and updated. In addition, the secondary server will allow Administrators to change configuration settings of third-party plug-ins, though this is not recommended; **make changes at your own risk**.

Important:

- Although you can change secondary server settings, the next synchronization will override those changes, i.e., the secondary server reverts back to the settings of the primary server.
- The secondary server will not synchronize with the primary server if (1) the primary server is down, (2) there are active jobs still in the queue, or (3) any MFDs are currently connected to the secondary. Thus, it is important to never update server information while jobs are in progress. This rule applies to on-demand or timer synchronization.

To access the Failover status/configuration screen on the secondary GlobalScan Server, proceed as follows:

1. Click the **Manage Failover** menu link.

The screenshot shows the 'GlobalScan - Secondary Server's Failover Settings' page. On the left, a navigation menu lists various system management options, with 'Manage Failover' selected. The main content area contains several configuration sections:

- Drop File Location**: A text input field.
- Primary Server**: A text input field with a 'Ping' button to its right.
- Primary Server Port**: A text input field with a 'Use Default' button and a help icon.
- Primary Server Protocol Access**: A dropdown menu currently set to 'HTTP'.
- Poll Interval for Primary Server Availability (seconds)**: A text input field with the value '60'.
- Poll Interval for Synchronization (seconds)**: A text input field with the value '20'.
- Date/Time of Last Synchronization Request**: A text input field.
- Date/Time Database Last Updated**: A text input field.
- Synchronization In Progress**: A checkbox that is currently unchecked.

 At the bottom of the page, there is a red asterisk indicating that certain fields are required, and an 'Update' button is present.

Note: When the Secondary Server is activated, all GlobalScan service configuration screens are disabled, i.e., fields are shaded. As such, setting changes are prohibited.

2. Establish Secondary Server Failover Settings.

- **Drop File Location** (required) – Specify where the secondary server will pick up the drop file (system and plug-in configuration data) for synchronization – either the local drive of your secondary server or the UNC path of the shared folder on the primary server. The identity running the Application Pool must have full access rights to the drop file folder on the primary server. For more information, see [*GlobalScan v3.1 Server Software Installation Guide*](#) → [*Appendix A.1: Set Application Pool Identity*](#).
- **Primary Server** (required) – Enter the IP address or DNS name of the primary server.
- **Primary Server Port** (required) – Enter the HTTP or HTTPS port number on which the primary server is configured. Configure the port and protocol the same way devices will connect to the GlobalScan Server.
- **Primary Server Protocol Access** (required) – Choose whether the primary server is to be accessed via HTTP or HTTPS.
- **Poll Interval for Primary Server Availability** (required) – Specify the interval at which the secondary server should check the availability of the primary server (1 - 600 seconds). It is recommended that you keep the number below 10 seconds.

Note: The lower the number, the faster the MFDs can connect to the primary server. The higher the number, the less network traffic will be generated.

- **Poll Interval for Synchronization** (required) – Specify the rate at which the drop file should be polled to see if database activity has occurred. For environments that undergo frequent configuration changes, specify between 10 - 30 seconds. For environments that do not change much, specify between 60 - 600 seconds (1 to 10 minutes).
- **Synchronize Now** – Click this button to instruct GlobalScan to pick up a drop file from the Drop File location (specified above), regardless of whether there have been any configuration changes. For this to occur, GlobalScan Failover Service must run as a user who has full access rights to the specified drop file location. For more information, see [*GlobalScan v3.1 Server Software Installation Guide*](#) → [*Appendix A.4: Change Failover Identity Service*](#).
- **Date/Time Database Last Updated** – This indicates when the last successful synchronization took place, enabling you to determine if synchronization is performing properly.
- **Synchronization in Progress** – This indicates that the secondary server is currently processing a drop file. If synchronization is in progress for more than one minute, failover may have been unsuccessful. If necessary, contact technical support.

- **Date/Time of Last Synchronization Request** – This indicates when the last time a drop file was requested, and was found. If this number does not change, either the drop file cannot be found or there is a problem synchronizing with the secondary server.

Note: If the secondary server is busy, i.e., jobs are in the queue, the server cannot complete the synchronization. The date/time stamp of that last attempt is shown here.

Display reads:

GlobalScan - Secondary Server's Failover Settings

Drop File Location *	<input type="text" value="W11.222.333.444\failover"/>
Primary Server *	<input type="text" value="172.18.50.19"/> <input type="button" value="Ping"/>
Primary Server Port *	<input type="text" value="80"/> <input type="button" value="Use Default"/> <input type="button" value="?"/>
Primary Server Protocol Access *	<input type="text" value="HTTP"/> <input type="button" value="?"/>
Poll Interval for Primary Server Availability (seconds) *	<input type="text" value="60"/> <input type="button" value="?"/>
Poll Interval for Synchronization (seconds) *	<input type="text" value="20"/> <input type="button" value="?"/>
Date/Time of Last Synchronization Request	7/14/20XX 10:32:24 AM <input type="button" value="?"/>
Date/Time Database Last Updated	7/13/20XX 5:37:21 PM
Synchronization In Progress	<input type="button" value="Synchronize Now"/>
	<input type="checkbox"/> <input type="button" value="?"/>

(* Required field)

3. Click the **[Add]** button to save initial settings or click the **[Update]** button to save modified settings.

Display reads:

GlobalScan - Secondary Server's Failover Settings

Operation successful

Drop File Location *	<input type="text" value="W11.222.333.444\failover"/>
Primary Server *	<input type="text" value="172.18.50.19"/> <input type="button" value="Ping"/>
Primary Server Port *	<input type="text" value="80"/> <input type="button" value="Use Default"/> <input type="button" value="?"/>
Primary Server Protocol Access *	<input type="text" value="HTTP"/> <input type="button" value="?"/>
Poll Interval for Primary Server Availability (seconds) *	<input type="text" value="60"/> <input type="button" value="?"/>
Poll Interval for Synchronization (seconds) *	<input type="text" value="20"/> <input type="button" value="?"/>
Date/Time of Last Synchronization Request	7/14/20XX 10:32:24 AM <input type="button" value="?"/>
Date/Time Database Last Updated	7/13/20XX 5:37:21 PM
Synchronization In Progress	<input type="button" value="Synchronize Now"/>
	<input type="checkbox"/> <input type="button" value="?"/>

(* Required field)

MFD Operation

During Failover, the MFD has detected that the primary server is offline/down, thus will log out of the session (popup message is displayed on touch screen) and then switch over to the secondary server. The user will need to log back in to GlobalScan.

Note:

- The secondary server will not allow new (unregistered) MFDs to participate in GlobalScan. The unregistered MFDs can only join GlobalScan when the primary server is back online (or the secondary server is promoted to primary server status). For example, if you have five registered MFDs with the primary server and one or more new machines are added, the secondary server will only support Failover on the five registered machines.
- Failover does not support the Image Preview feature, i.e., preview images have not yet been sent to the GlobalScan server, thus will be lost. For example, if the user is in the process of viewing and modifying a scan image on the MFD touch screen and Failover occurs, those images and modifications will not be saved.

Logs

To view data regarding Failover operation on either the primary or secondary server, proceed as follows:

1. Click the **Statistics** shortcut or **Manage Logs** menu link to open the log.
2. From **Log Type** drop-down [v], select **Failover**.

Display reads:

GlobalScan - Manage Logs

Log Type: Failover (circled in red) Log Folder: C:\Ricoh\GlobalScan\Log\FAILOVER

Date: 8/1/20XX

Log Filter: time: Equal

Delete Logs: Delete Only This Date, Delete All Up To This Date, Delete All

Log Entries:

- time: 12:00:05 AM message:
- time: 12:00:05 AM message: *****
- time: 12:00:05 AM message: No configuration information for this service can be found.
- time: 12:00:05 AM message: *****
- time: 12:00:15 AM message:
- time: 12:00:15 AM message: *****
- time: 12:00:15 AM message: Failover service interval ticked in Primary Server mode (onDBChange)
- time: 12:00:15 AM message: No configuration information for this service can be found.
- time: 12:00:15 AM message:

For additional information on logs, see [D: Manage Logs](#).

For additional information on jobs, see [E: Manage Jobs](#).

Appendix

Appendix A: GlobalScan-compatible MFDs

Ricoh	Savin	Lanier	Gestetner	Display Type	Code
Aficio 2035	4035/4135G	LD035	3532	HVGA	B079
Aficio 2045	4045	LD045	4532		B082
Aficio 2035e	4035e	LD135	DSm635	HVGA	B135
Aficio 2045e	4045e	LD145	DSm645		B138
Aficio 2090e	4090	LD90e	9002e	HVGA	B070
Aficio 2105e	4105	LD0105e	10512e		B071
Aficio 2228C	C2820	LD228c	DSm328	HVGA	B147
Aficio 2232C	C3224	LD232c	DSm332		B149
Aficio 2238C	C3828	LD238c	DSm338		B190
Aficio 2022/S/P	4022	LD122	DSm622	HVGA	B089
Aficio 2027/S/P	4027	LD127	DSm627		B093
Aficio 3224C	C2410	LD124c	DSC424	HVGA	B156
Aficio 3260C	C6045	LD160c	DSm460	HVGA	B132
Aficio 5560	SDC555	LC155	CS555		B200
Aficio 3235C	C3528	LD335c	DSm435	HVGA	B178
Aficio 3245C	C4535	LD345c	DSm445		B180
Aficio 3228C	C2824	LD328c	DSm428		B202
Aficio2051	4051	LD151	DSm651	HVGA	B163
Aficio2051SP	4051sp	LD151sp	DSm651sp		B228
Aficio2060	4060	LD160	DSm660		B140
Aficio2060SP	4060sp	LD160sp	DSm660sp		B142
Aficio2075	4075	LD175	DSm675		B141
Aficio2075SP	4075sp	LD175sp	DSm675sp		B143
3035/SP/SPF/SPi/G	8035/sp/spf/spi/34g	LD235	DSm735/sp/spf/spi/g	HVGA	B264
3045/SP/SPF/SPi/G	8045/sp/spf/spi/g	LD245	DSm745/sp/spf/spi/g		B265
Aficio MP 3500	8035e	LD335	DSm735e		B296
Aficio MP 3500G	8035eg		DSm735eg		B291
Aficio MP 4500	8045e	LD345	DSm845e		B297
Aficio MP 4500G	8045eg		DSm845eg		B295
3025/SP/SPF/SPi/P	8025/sp/spf/spi/p	LD225/sp	DSm725/sp/spf/spi/p	HVGA	B205
3030/SP/SPF/SPi/P	3030/sp/spf/spi/p	LD230	DSm730/sp/spf/spi/p		B209
Aficio MP 2510	8025e	LD325	DSm725e		D007
Aficio MP 3010	8030e	LD330	DSm730e		D008
Aficio MP 5500	8055	LD255	DSm755	WVGA	B246
Aficio MP 5500SP	8055sp	LD255sp	DSm755sp	B&W	B250
Aficio MP 6500	8065	LD265	DSm765		B248
Aficio MP 6500SP	8065sp	LD265sp	DSm765sp		B252
Aficio MP 7500	8075	LD275	DSm775		B249
Aficio MP 7500SP	8075sp	LD275sp	DSm775sp		B253
Aficio MP 9000	8090	LD190	DSm790	SVGA	B234
Aficio MP 1100	8110	LD1110	DSm7110	Color	B235
Aficio MP 1350	8135	LD1135	DSm7135		B236
Aficio MP C3500	C3535	LD435c	DSm535	WVGA	B222
Aficio MP C4500	C4540	LD445c	DSm545	Color	B224
Aficio MP C2500	C2525	LD425c	DSm525	WVGA	B230
Aficio MP C3000	C3030	LD430c	DSm530	Color	B237

Appendix B: Universal Soft Keyboard Support (by brand/model)

Ricoh	Savin	Lanier	Gestetner
3035/SP/SPF/SPI/G 3045/SP/SPF/SPI/G Aficio MP 3500 Aficio MP 3500G Aficio MP 4500 Aficio MP 4500G	8035/sp/spf/spi/34g 8045/sp/spf/spi/g 8035e 8035eg 8045e 8045eg	LD235 LD245 LD335 LD345	DSm735/sp/spf/spi/g DSm745/sp/spf/spi/g DSm735e DSm735eg DSm845e DSm845eg
3025/SP/SPF/SPI/P 3030/SP/SPF/SPI/P Aficio MP 2510 Aficio MP 3010	8025/sp/spf/spi/p 3030/sp/spf/spi/p 8025e 8030e	LD225/sp LD230 LD325 LD330	DSm725/sp/spf/spi/p DSm730/sp/spf/spi/p DSm725e DSm730e
Aficio MP 5500 Aficio MP 5500SP Aficio MP 6500 Aficio MP 6500SP Aficio MP 7500 Aficio MP 7500SP	8055 8055sp 8065 8065sp 8075 8075sp	LD255 LD255sp LD265 LD265sp LD275 LD275sp	DSm755 DSm755sp DSm765 DSm765sp DSm775 DSm775sp
Aficio MP 9000 Aficio MP 1100 Aficio MP 1350	8090 8110 8135	LD190 LD1110 LD1135	DSm790 DSm7110 DSm7135
Aficio MP C3500 Aficio MP C4500	C3535 C4540	LD435c LD445c	DSc535 DSc545
Aficio MP C2500 Aficio MP C3000	C2525 C3030	LD425c LD430c	DSc525 DSc530

Universal Soft Keyboard



Note: The Universal Soft Keyboard does not display a [.com] button.

Appendix C: New Features and Enhancements

New features and enhancements introduced with the launch of GlobalScan v3.1 include:

1. RightFax Plug-in Enhancement

- Ability to send notification if error occurred when GlobalScan connects to RightFax Server.
- Allows the Administrator to test the configuration.
- Ability to support RightFax Server version 9.0 and 9.3.
- Ability to allow user to search and select his/her Private and Public Phonebook at MFD based on logon user's credential.
- Ability to support non-authenticated user to search and select Public Phonebook at MFD.
- Allow Administrator to predefine most commonly used fax destinations per project.
- The predefined fax numbers are automatically displayed for user to select after pressing [Fax Number*] button at MFD or automatically set as One-touch Scan.
- Allow Administrator to enable or disable preloading Private and Public Phonebook for user to select after pressing [Fax Number*] button at MFD.
- Allow Administrator to configure the search criteria and display format against RightFax Phonebook.
- Allow user to choose Billing Codes at MFD based on their credentials.
- Ability to verify Billing Codes at MFD based on user credentials.
- Ability to allow user to choose stored Cover Sheet at MFD based their credentials.
- Ability to allow user to add phone entry from MFD to his/her Private or Public Phonebook based on logon user's credential.
- Fully localization support.

2. GlobalScan v3.1 Workflow Suite Standard Edition

- Enhances connected MFDs and digital copiers with "Scan to" capabilities.
- Sends scanned files directly to network folders, users' desktops, content repositories, databases, email systems and other destinations.
- Captures virtually any file format (text, presentations and spreadsheets) from any source (desktop computers, scanners, digital cameras, MFDs, copiers and email).
- Creates automatic document pathways from MFDs into business-critical software, including line-of-business applications and enterprise document/content management systems.
- Helps support compliance with HIPAA, Sarbanes-Oxley and other regulations.

3. More Robust and Open Architectural Design

- Nearly all GlobalScan core components are developed on Microsoft® Windows .NET 2.0 platform.
- Utilizes .NET technology to boost GlobalScan Server performance, scalability, and stability.
- Uses Microsoft® SQL to store, retrieve and manage data more securely and efficiently.
- Supports a fully pluggable architectural design for nearly all GlobalScan features, (Authentication, Scan-to-Email, Scan-to-Folder, Notification, etc.).
- Ability to develop, enhance or replace any GlobalScan features more rapidly to meet market and individual customer needs.
- Allows system integrators to develop and replace any GlobalScan feature with their own implementation.

4. MFD Feature Enhancements

- Ability to remotely upgrade and configure GlobalScan firmware for select models.
- Allows user to cancel any ongoing scan operation for all MFD models.
- Allows user to continue an ongoing scan job after paper jam is cleared without resubmitting the entire scan job, for all MFD models.
- Ability to disallow user to change any scan setting after the Administrator sets it as read-only, for all MFD models.
- Ability to disallow user to scan document in color if the Administrator disables the feature, for all MFD models.
- Ability to provide image thumbnail/preview feature, for all MFD models.
- Ability to allow user to modify default email message text if the Administrator enables the feature, for all MFD models.

5. Image Thumbnail/Preview Support

- Ability to allow Administrator to remove image thumbnail/preview feature.
- Ability to display every image thumbnail/preview.
- Ability to display only certain image thumbnails/preview.
- Allow users to go directly to a specified thumbnail/preview, if there are multiple thumbnails/previews.
- Allow users to zoom in and out.
- Allow users to rotate any image.
- Allow users to pan a zoomed image.
- Allow users to delete any unwanted images from MFD, such as blank pages.
- Allow users to discard all changes related to thumbnails/preview.
- Allow users to save all the changes related to thumbnails/preview.
- Allow users to stop the scan operation and resubmit the entire scan job.

6. New One-touch Scan Feature

- Allows users to scan document to any predefined folder by minimum “one touch,” i.e., pressing [Start] button only, if Authentication is not required.
- Allows users to scan document to any predefined folder or Home by minimum “one touch,” i.e., pressing [Start] button only after successfully login, when Authentication is required.
- Allows users to scan document to any predefined email address by minimum “one touch,” i.e., pressing [Start] button only if Authentication is not required.
- Allows users to send document to his/her email address by minimum “one touch,” i.e., pressing [Start] button only after successfully login, if his/her email address is retrieved during logon process.
- Ability to guard against “scan to nowhere.”

7. WebAdmin Management Enhancement

- Allows the Administrator to configure any plug-ins, such as Email, Folder, Fax, etc., at the project level.
- Allows the Administrator to predefine default setting for any plug-ins at the project level.
- Ability to share any plug-in configuration made at the project level to profile and system.
- Ability to cascade any change made to any specific plug-in from a project to profile and system.
- Allows the Administrator to set scan setting as read-only, when needed.

- Allows the Administrator to set color setting as read-only, when needed.
- Allows the Administrator to remove scan setting tab from MFD, when needed.
- Allow the Administrator to remove Job Log tab from MFD, when needed.
- Ability to display MFD GlobalScan firmware version.
- Additional log categories for easier information search.
- Allows the Administrator to filter log information to find specific information.

8. Authentication Enhancement

- Ability to support Kerberos Authentication.
- Allow the Administrator to fully configure LDAP Authentication information, no hardcoded attributes.
- Ability to support UPN as user name to log on to Microsoft® Active Directory.
- Ability to apply additional logic to allow or disallow user logon through LDAP, even after he/she provides the correct user name and password.
- Ability to display either FQDN or NetBIOS name as domain name for Windows Authentication.
- Allows the Administrator to set domain name on project level.
- Ability to disallow users to log in from MFD through NT Authentication if their account is disabled or locked down.
- Allows the Administrator to test a configuration while configuring LDAP Authentication settings.

9. Scan-to-Email Enhancement

- Ability for the Administrator to retrieve user's email address through LDAP, other than attribute equal to "mail."
- Allows the Administrator to configure SMTP port number.
- Allows the Administrator to set default SMTP port number.
- Allows the Administrator to configure SMTP server timeout value.
- Allows the Administrator to set default SMTP server timeout value.
- Ability to verify SMTP address format on MFD.
- Ability to send email with empty message text.
- Ability to allow or disallow user to edit the default email message text on MFD.
- Allows the Administrator to test a search configuration while configuring email.
- Allows the Administrator to send a test email while configuring email.

10. Scan-to-Folder Enhancement

- Allows the Administrator to enable or disable creation of subfolder with user's ID.

11. Job Process Enhancement

- Removing non-Job Process-related feature out of its core module to make it more efficient.
- Allows the Administrator to set minimum scan interval ranged from 10 - 600 seconds.
- Allows the Administrator to set default scan interval as 60 seconds.
- Allows plug-in to communicate its status to Job Processor.
- Allows Job Processor to update plug-in status.
- Allows the Administrator to apply "Attachment Size Limit" feature only to email without affecting Scan-to-Folder.

12. Localization Enhancement

- Ability to have French Canadian QWERTY keyboard as input layout to any MFD models that do not support a Universal Keyboard.
- Ability to centralize all translation strings.

13. SDK Enhancement

- Allows third-party developer to develop Authentication-only plug-in.
- Allows third-party developer to develop Job Process only plug-in.
- Allows third-party developer to develop Notification-only plug-in – allows notifying users during admin- or user-configured job milestones.
- Allows third-party developer to develop Audit-only plug-in, i.e., notification of system events, such as installing/uninstalling plug-ins; activation, creation/deletion of jobs, etc.
- Allows third-party developer to develop a plug-in containing more than one feature, e.g., Audit and Notification, Job and Authentication.
- Ability to provide a new subservice, for example, mail subservice, to any plug-in.
- Allows any plug-in to implement “One Touch Scan” feature.
- GlobalScan can utilize alternative logon methods for streamlined Authentication.
- Plug-ins can provide a default user ID and/or password on the login screen.
- User ID and password are optional – they do not have to be displayed – for plug-ins that use swipe cards or biometric identification devices.
- Ability to participate in GlobalScan events, such as changes in configuration.
- Allows download of GlobalScan configuration data, such as MFDs, profiles, etc.
- Removes reliance on IIS to communicate between GlobalScan and plug-ins.
- Plug-ins can choose to support Authentication on-demand, rather than be fixed one way or the other when installed.
- Authenticating plug-ins can appear on any project that authenticates – regardless of how the project authenticates. This allows plug-ins to assume anonymous or guest modes if the project Authentication model is different from that which a plug-in supports.
- Plug-ins can select data elements of themselves to share with other plug-ins.
- Plug-ins can see shared data established by other plug-ins, e.g., a plug-in can know what domain the user has logged into, even though it has not been authenticated.
- Allows full support for bar code plug-ins, allowing complete data entry through bar codes.

14. New Notification Feature

- Allows the Administrator to enable/disable Notification services, as needed.

15. OCR Plug-in Enhancement

- Ability to support high-compression PDF format using JBIG2 (black & white) and JPEG 2000 (color).
- Ability to support searchable, but not editable, PDF file format.

16. Backward Compatibility to Support GlobalScan v2.0

- Both GlobalScan firmware v3.0 and v2.x work with GlobalScan Server v3.1.
- Both GlobalScan Server v3.1 and v2.x work with GlobalScan firmware v3.0.
- All the new features of GlobalScan Server v3.1 are supported if the MFD is running firmware v3.0.
- Only limited new features of GlobalScan v3.1 are supported if the MFD is running firmware v2.x.

17. Backup and Restore Utility

- Ability to backup all the configuration data from GlobalScan v3.x server to v3.x Server including third-party plug-in data, which is not stored inside GlobalScan repository.
- Ability to restore all configuration data from GlobalScan v3.x server to v3.x server including third party plug-in data, which is not stored inside GlobalScan repository.
- Ability to restore all configuration data from GlobalScan v2.x Server to v3.x Server including all Ricoh Plug-in, such as Scan Setting, Scan to Folder, Email (SMTP, Notes, Exchange), OCR, RightFax, LDAP authentication and Novell authentication.
- The Backup and Restore utility can be run through a GUI or executed as DOS command.

Appendix D: GlobalScan v3.x versus v2.x

	v3.x	v2.x
Maximum number of enabled MFDs	250	250
Localization support (languages)	5	5
Backward compatibility with GlobalScan v3.0 and v2.x MFDs [†]	✓	N/A
Customizable workflows with bundled GlobalScan v3.1 Workflow Suite (Standard Edition)	✓	-
Wide variety of new GlobalScan v3.1 RightFax enhancements (optional)	✓	-
New Image Preview service allows users to view image thumbnails at MFD touch screen	✓	-
New One-touch Scan feature enables fast Scan-to-Email/Folder using predefined settings	✓	-
New Notification feature alerts logon user and default user with email regarding job status	✓	-
Services can be configured on profile or project level	✓	-
System settings cascade to profile and project levels, unless configured otherwise	✓	-
Projects are independent from profiles, thus projects can be shared by a different profile	✓	-
Profile and project lists easily expand and collapse	✓	-
Standard support for OCR (Optical Character Recognition)	✓	-
Support for high compression PDF formats (JBIG2 and JPEG 2000)	✓	-
Support for password-protected PDF file format	✓	-
Configurable Job Processor that supports different file formats for a single job	✓	-
On-screen Help provides assistance with configuration/management tasks	✓	-
Large graphic project icons viewable on select MFD models	✓	-
<i>Configure</i> button is displayed on system and project levels	✓	-
Fully-configurable LDAP attributes for email (query filter) and Authentication purposes	✓	-
Viewing of Scan Settings and Job Log tabs (on MFD) can be enabled or disabled	✓	-
One or more scan settings can be set as read-only	✓	-
Apply filter to view specific log details	✓	-
Screen-change tracking; prompts Admin to click <i>Update</i> during configuration process	✓	-
Standard interface with open-architecture SDK to extend GlobalScan functionality	✓	-
Additional auditing, notification, job, Authentication and tracking plug-ins	✓	-
GlobalScan can utilize alternative logon methods for streamlined Authentication	✓	-
Tab-style navigation via MFD's touch screen with streamlined login operation	✓	✓
Display license type and related information through the WebAdmin Module	✓	✓
Project buttons for customizing workflow based on user requirements	✓	✓
<i>Clear Form</i> and <i>Reset</i> buttons erase information quickly from MFD touch screen	✓	✓
Support for multiple Authentication methods; one system per project	✓	✓
Support for multiple projects within a profile	✓	✓
Establish default scan settings on system, profile or project levels	✓	✓
Search, display, select and scan to multiple folders/subfolders	✓	✓
Allow user to choose different language for OCR conversion (per job)	✓	✓
Allow user to enable/disable auto-orientation for OCR conversion (per job)	✓	✓
Ability to support more than one optional third-party EDMS per MFD	✓	✓
Login synchronization; single set of credentials provides access to shared services	✓	✓
Support for secure LDAP/LDAPS; sends user credentials using SSL encryption	✓	✓
Support for SMTP-AUTH (Authentication); proxy user in admin or logon user ID	✓	✓
Customize email functionality (enable/disable Cc, Bcc, Reply to)	✓	✓
Create default email message text and subject; appended to each outgoing message	✓	✓
Enter default domain for fast manual address entry	✓	✓
Restrict manual (ad hoc) email address entry (LDAP lookup only)	✓	✓
Allow user to save black & white image to multiple Single-Page TIFF files	✓	✓
Advanced log and error tracking	✓	✓
Support for Failover; two GlobalScan Servers with duplicate configurations	✓	✓
Support for Lotus Notes Server	✓	✓
Backup and Restore Utility	✓	✓

[†] GlobalScan v3.1 is backward compatible with only GlobalScan v3.0 and v2.x MFD firmware. Only limited features of GlobalScan v3.1 are supported if the MFD is running v2.x firmware.

Appendix E: GlobalScan v3.1 Workflow Suite Family

Function	GlobalScan Workflow Suite		
	Standard Edition ¹	Express Edition ²	Full Edition ³
Capture Paper Documents			
Ricoh GlobalScan-enabled MFDs	✓	✓	✓
Optional Connectors for other manufacturer devices & scanners – Canon, Fujitsu, HP, Kodak, Kyocera, Sharp & Xerox	No	✓	✓
Capture Electronic Files			
Windows & PaperPort desktop	No	No	✓
Text, Delimited formats, ASCII	No	No	✓
Batch CSV file	No	No	✓
Database Queries	No	No	✓
XML	No	No	✓
Network folders/multi-folders with priority flags	No	No	✓
Secure FTP sites	No	No	✓
MS Office applications	No	No	✓
Supported Destinations			
Secure FTP sites	✓	No	✓
Fax	✓	✓	✓
Printer	✓	✓	✓
Web URL	No	No	✓
Database	✓	✓	✓
HTTP post	No	No	✓
Send to PC desktop	✓	No	✓
Supported Document Management Systems (EDMS)			
SharePoint Services	✓	✓	✓
Lotus Notes	✓	✓	✓
Captaris Alchemy	No	No	✓
Xerox DocuShare	No	No	✓
Dominos.Doc	No	No	✓
EMC Application Xtender	No	No	✓
EMC Documentum	No	No	✓
FileMagic	No	No	✓
FileNet	No	No	✓
Fortis	No	No	✓
IBM Content Manager	No	No	✓
Interwoven	No	No	✓
LaserFiche	No	No	✓
Microsoft Exchange	No	No	✓
OpenText eDocs (Hummingbird)	No	No	✓
OpenText EP Archive (IXOS)	No	No	✓
OpenText Livelink	No	No	✓
Saperion	No	No	✓
TRIM	No	No	✓
Windream	No	No	✓
Worldox	No	No	✓
Utilities for custom EDMS integrations			
XML Generator	✓	✓	✓
WebDAV	No	No	✓

Cont.

Function	GlobalScan Workflow Suite		
	Standard Edition ¹	Express Edition ²	Full Edition ³
Document Indexing			
From the device panel (manual/automatic)	✓	✓	✓
Use base code as index data	No	✓	✓
Use zonal OCR and use as index data	No	No	✓
Document Services			
Bates Stamp	No	No	✓
Watermark	No	No	✓
Automatic Notification (to a sender)			
Email notification	No	✓	✓
Fax notification	No	✓	✓
Printed notification	No	✓	✓
Personalized scan menus			
Based on directory credentials	✓	✓	✓
Microsoft Active Directory	✓	✓	✓
Novell eDirectory	✓	✓	✓
SSL support	✓	✓	✓

¹ Bundled with GlobalScan v3.1 Server software.

² Available option.

³ Available option. Also optionally supports SMARTICKET, which offers easy workflow automation via bar code recognition.

Note: For further details, visit www.riohconnects.com.

Appendix F: Optional RightFax Plug-in

Overview

The RightFax Plug-in, which supports Scan-to-Fax capabilities from the GlobalScan-enabled MFD, is currently available for GlobalScan v3.1. To implement RightFax, please contact your sales representative for information on purchasing the license needed to activate this feature.

For a complete list of available plug-ins from Ricoh and third-party developers, please ask your sales representative for a copy of the [2007 Solutions Selection Guide](#).

GlobalScan RightFax Plug-in
Description
<p>The Captaris RightFax Plug-in to GlobalScan provides an easy-to-use, easy-to-manage, reliable fax and email delivery solution that seamlessly integrates with virtually all business applications across an enterprise.</p> <p>The RightFax Plug-in is a cost-effective, speedy, and reliable means to deliver documents. By delivering via fax, email, or the Internet, companies are able to reduce the use of paper, postage, and time spent manually sending documents.</p> <ul style="list-style-type: none"> • RightFax network faxing reduces costs, saves time and improves productivity by enabling users to send and receive faxes directly from their desktop or email application. Employees no longer walk to the fax machines and manually send a fax or wait for delivery to a fax machine. • RightFax systems integrate with the most popular back-end applications to provide automated, real-time delivery and receipt of high-volume, business-critical documents.

RightFax Configuration

If the GlobalScan has been activated with a CD key that support RightFax, you can configure the necessary settings as outlined below.

Important: Prior to adding the RightFax service to a project (as outlined in [Step 5: Add Services to a Project](#), in this guide), you must also install the RightFax Client on the GlobalScan Server. For more information, see the [Plug-in Preparation](#) section of the [GlobalScan v3.1 Server Software Installation Guide](#).

1. If necessary, [launch GlobalScan](#). If necessary, see [GlobalScan WebAdmin Module Configuration](#) → [Step 1: Launch GlobalScan](#).
2. Click [Manage Services](#).
3. Click [RightFax](#) (or the associated [[Configure](#)] button).

RightFax Configuration Screen

The screenshot shows the 'Configure RightFax' screen in the GlobalScan Service Configuration application. The interface includes a sidebar with 'System' selected, and a main configuration area. The configuration fields are as follows:

- Server**: Input field with a red asterisk and a 'Ping' button.
- User ID**: Input field with a red asterisk.
- Password**: Input field.
- Re-enter to confirm password**: Input field.
- Test Fax Number**: Input field with a 'Test' button.
- Search Field**: Input field with a dropdown menu.
- Display Format**: Input field.
- Display Fields**: Input field with a dropdown menu.
- Preferred Order**: Input field with a dropdown menu.
- Auto Load Private Phonebook**: Checkbox.
- Auto Load Public Phonebook**: Checkbox.

Below the fields is a table with the following columns: ID, Fax Number, Name, and Select By Default. The table contains one row with the value 'Add' in the ID column and a checkbox in the 'Select By Default' column.

At the bottom of the configuration area are three buttons: 'Update', 'Close', and 'Reset'.

Note: If the screen reads “Client software does not appear to be installed. RightFax cannot be configured until the client software is installed and properly configured”. Please install the RightFax client software.

3. Choose the setting level - system (shown above), profile or project. For details, see [About Setting Levels](#).
4. Enter/edit the following:
 - **Server *** (Required) – Enter the RightFax Server IP address or name.
 - **User ID *** (Required) – Enter the Proxy User ID.

Note: Do not integrate this Proxy User with Windows® NT security. Also, this Proxy User needs RightFax administration privileges.

- **Password** – If applicable, enter Proxy Password.
- **Re-enter to confirm password** – Re-enter Proxy Password to confirm.

Note: The **Password** and **Re-enter to confirm password** fields only appear upon initial RightFax configuration. If the fields have been previously entered/saved, a [**Change Password**] field will display. Click that button to edit the previously set password. See [About Setting Levels](#) → [Inherit Password Feature](#).

- **Test Fax Number** – Enter a fax number of a known remote fax device and click [**Test**] button. This will tell you whether or not your RightFax server settings are correct.

RightFax Authentication

RightFax authentication is controlled through the **Login** checkbox (circled below) on the Project's Services screen. If the **Login** checkbox is not selected, as shown, GlobalScan will use proxy user credentials to perform Fax Number lookup, Cover Sheet and Billing Code selection, as well as fax communication. If the **Login** checkbox is selected, the logon user's credentials will control all of the above mentioned operations.

GlobalScan - Project's Services
Operation successful
Project ID 1
Project Name Multiple Services

Service Name	Login	Job	System Service	Notify	Display Sequence	Processing Order	Required	
ActivePDF	<input type="checkbox"/>	<input checked="" type="checkbox"/>				4		Configure Remove
Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	1	5	<input type="checkbox"/>	Configure Remove
Image Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		6	3		Configure Remove
Job Log	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		5			Remove
OCR	<input type="checkbox"/>	<input checked="" type="checkbox"/>				2		Configure Remove
RightFax	<input type="checkbox"/>	<input checked="" type="checkbox"/>			3	1	<input type="checkbox"/>	Configure Remove
Scan Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		4			Configure Remove
Scan to Folder	<input type="checkbox"/>	<input checked="" type="checkbox"/>			2	6	<input type="checkbox"/>	Configure Remove

Important: If the RightFax **Login** checkbox is selected, and the RightFax User ID “**Use Integrated Windows NT Security**” checkbox is selected, as shown at right, the RightFax Plug-in will fail to authenticate the user. If this environment exists, and authentication is required, the workaround is as follows:

- Deselect the RightFax **Login** checkbox on the Project's Services screen.
- Add **NT Authentication** into the Project. See Step 7: Configure Services → A. Configure Authentication Services → NT Authentication.

User Edit

Default Outbound Settings | Outbound Auto-Printing | Default Receive Settings
Notification | Other | Pager Notification | Administrative Pager Alerts

Identification | Permissions | Inbound Routing

User ID: gstest001
 Use Integrated Windows NT Security?
Select NT Account
Linked to 2K3_DC\gstest001

User Name: gstest001
Password: Change Password
Distinguished Name:
Group ID: SEG
Voice Mail Subscriber ID: 100
E-mail address:
SMS/Mobile Address:
Compute Disk Usage May take several seconds on a server with many faxes

OK Cancel

- **Search Field *** (Required) – Specify a valid RightFax phonebook field against which searches will be performed. The user can search either their Private Phonebook or the Public Phonebook.

Note:

- **Authentication required:** If the user presses the [Public] button, this allows him/her to search everyone else's published entries, except their own. If the user presses the [Private] button, this allows him/her to search their published and non-published phonebook entries.
 - **Authentication not required:** If the user presses the [Public] button, this allows him/her to search for everyone else's published entries, except the proxy user. If the user presses the [Private] button, this allows him/her to search the proxy user phonebook entries.
- **Display Format *** (Required) – Enter tokens the way you want to display them on the MFD touch screen. The cardinal number (e.g., 0, 1,) should correspond to ordinal position of the fields in "Display Fields," (e.g., name, company). The default setting is **{0}~[{1}]**.
 - **Display Fields *** (Required) – Enter a list of valid RightFax phonebook fields to be used in formatting the search results display. The default setting is **name,company**.
 - **Preferred Order *** (Required) – Enter a comma-separated list of valid RightFax phonebook fields in the desired order. The default setting is **faxnumberprimary, faxnumberalternate,emailaddress**.
 - **Auto Load Private Phonebook** – Select this checkbox to enable preloading of the user's Private Phonebook, thus allowing him/her to select the destination(s) immediately after pressing the [Fax Number] button on the MFD touch screen.
 - **Auto Load Public Phonebook** – Select this checkbox to enable preloading the Public Phonebook, thus allowing the user to select the destination(s) immediately after pressing the [Fax Number] button on the MFD touch screen.
 - **Preset Destination(s)** – It is also possible to set default fax destinations for a project. This enables One-touch Scan by displaying the preset destination(s) in the "To" window on the MFD touch screen. The user simply places the document on the ADF, selects the [Fax Number] button, and then presses the [Start] key.

To preset one or more destinations, it is recommended that you:

- **Enter a valid ID** in the **ID** field, and then click **[Add]**. GlobalScan will automatically determine the associated Fax Number and Name from the RightFax Server.

	ID	Fax Number	Name	Select By Default
1 Delete	123			<input type="checkbox"/>
Add				<input type="checkbox"/>

Or

- **Enter the correct Fax Number** and **Name** in the associated fields (if you do not have a valid ID), and then click **[Add]**.

	ID	Fax Number	Name	Select By Default
1 Delete		9081234567	John Smith	<input type="checkbox"/>
Add				<input type="checkbox"/>

Note:

- To preset the Fax Number for One-touch Scan, check the **Select by Default** checkbox.
- If you enter all three fields, be sure that the entries are exact. If not, GlobalScan will send the fax to the number entered in the Fax Number field, not the fax number associated with the ID on the RightFax Server.

5. After verifying the settings, click the **[Update]** button. Display reads **Operation Successful**.

Note: Click the **[Reset]** button to clear field values or set to previous level. See [About Setting Levels](#).

6. Click the **[Close]** button or close the window **[X]**.

Now that the RightFax Service has been configured on the system level, you can add the Service to any new or existing projects. For details, see [GlobalScan WebAdmin Module Configuration](#) → [Step 5: Adding Services to a Project](#).

Appendix G: GlobalScan Activation Status

GlobalScan v3.1 server software manages detailed information on CD Keys - on just one screen. This gives Administrators the ability to quickly determine the actual CD Key associated with your GlobalScan license (e.g., ABCDEFG050011746). In addition, this WebAdmin page indicates which type of CD Key is running on the server – Trial, Stand-alone, Primary/Secondary, as well as the status of GlobalScan, “activated” or “inactive.” Information regarding the *Total Number of* (1) Licenses Purchased, (2) MFDs, and (3) Enabled MFDs is also available. Any third-party services that have been installed on the GlobalScan Server are listed as well, e.g., RightFax and OCR).

To view the new GlobalScan Activation page, launch the GlobalScan WebAdmin Module, as follows.

1. Open your **Web browser**.
2. Enter the GlobalScan Server **URL**: <http://IP address/gsadmin>.
3. Press the [**Enter**] key (or click **Go**). The **GlobalScan Home Page** appears.
4. Click the **GlobalScan Activation** menu link.

Display reads, for example:

.

The GlobalScan Activation screen summarizes the following:

- **GlobalScan License Type** – Information includes activation status, for example, which type of license is running, either:
 - **Trial**
 - **Stand-alone**
 - **Primary/Secondary**

The license type is identified as either “**activated**” or “**inactive**.”

- **CD Key (or Last CD Key Used)** – This field label depends on whether or not GlobalScan is currently activated or deactivated.
 - **Activated:** The CD Key(s) is(are) displayed in this field. If the GlobalScan Server has been upgraded multiple times, then the “CD Key” field will list the currently activated CD Key and all previous CD Keys that have been used on that server, since it was first activated/upgraded.

CD Keys are displayed in descending order, with the most current CD Key listed on top. A maximum of 8 CD Keys can be displayed, so if the GlobalScan Server has been upgraded 9 times, the last 8 CD Keys will be displayed.
 - **Inactive:** If GlobalScan has been deactivated, the “CD Key” field label changes to “Last CD Key Used.” In this case, the GlobalScan Activation page will correctly retain the CD Key value of the last activation, preserving and displaying a history.
- **Number of Licensed MFDs:** This number is the total number of licenses purchased.
- **Total Number of MFDs:** This is the total number of enabled/disabled MFDs, a number that can be less than, greater than or equal to the “Total Licenses Purchased” number.
- **Total Number of Enabled MFDs:** This is the total number of enabled MFDs, a number that must be equal to or less than the number specified by the “Total Licenses Purchased” number.
- **Third-party Services:** This lists any plug-ins that are installed on the GlobalScan Server, e.g., RightFax.

5. When finished, close your Web browser [X].

Appendix H: GlobalScan Backup and Restore Utility

The GlobalScan Backup Utility is used to backup GlobalScan v3.1 data and restore data for GlobalScan v3.x or v2.x Servers. Use this function to regularly backup GlobalScan system settings, particularly if modifications to Projects, Profiles and server/MFD-related data is common. This Backup utility enables you to easily migrate GlobalScan settings to a new v3.1 server or quickly recover in the event of network/hardware failure. After performing the Backup procedure, use the Restore procedure to apply the saved database (on the same or different GlobalScan v3.1 Server).

Important: In order to successfully restore GlobalScan data, the GlobalScan Server must be activated with a Primary or Standalone CD Key.

Backup and Restore Specifications

Backup/Restore data includes the following:

- System Parameters
- Profiles
- Projects
- Services configuration
- MFDs: If the number of enabled devices in the backup file exceeds the number of licensed MFDs, for the server where data is restored, then all devices will be restored. However, the devices over the license limit will be restored with a “disabled” status, i.e., the “Enable” check box within the WebAdmin’s Manage MFDs screen will be deselected.
- Plug-in Information: For GlobalScan v2.0, only Ricoh Plug-ins will be backed up and restored. For GlobalScan v3.0 or above, all plug-in information will be backed up and restored.

Important

If you have activated the GlobalScan v3.1 Server with a CD Key that supports the optional Failover service, it is recommended that you perform the following procedures prior to running the Backup/Restore Utility:

- Place the server in Maintenance Mode (see [GlobalScan Management](#) → [F. Manage Failover](#)).
- Stop the Job Processor and Failover services (click **[Start]** > **[All Programs]** > **[Administrative Tools]** > **[Services]**. Right-click **[GlobalScan Job Service]**, and then click **[Stop]**. Next, right-click **[GlobalScan Failover Service]**, and then click **[Stop]**.

Step 1: Backup GlobalScan Data

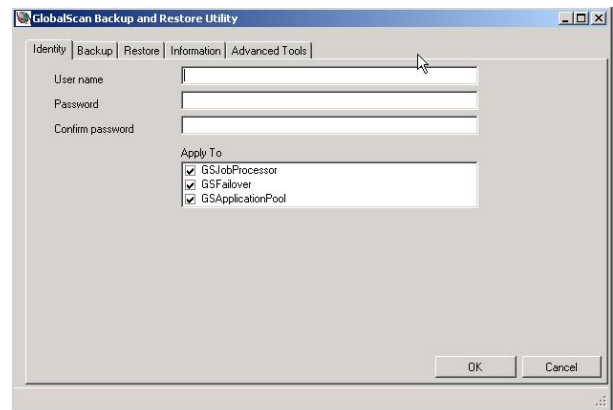
1. Click [Start] > [All Programs] > [GlobalScan].
2. Click [Utilities].



Display reads:

3. Click [Backup] tab.

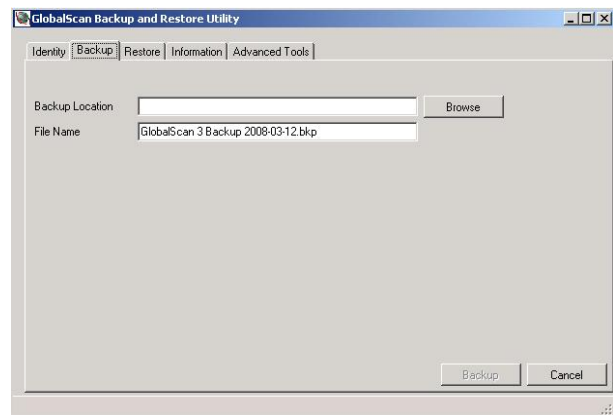
Note: If GlobalScan is not currently activated on the computer, the bottom of the screen reads, *Data restore is not available. GlobalScan server must be activated with "standalone" or "primary server" license.*



Display reads:

4. Click [Browse] to select the folder location to store the backup data, e.g., c:\temp.

Note: At this time, you can also change the file name.

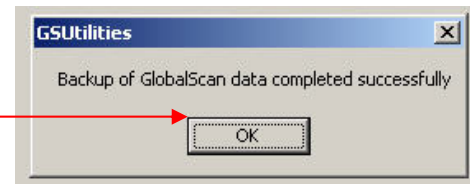
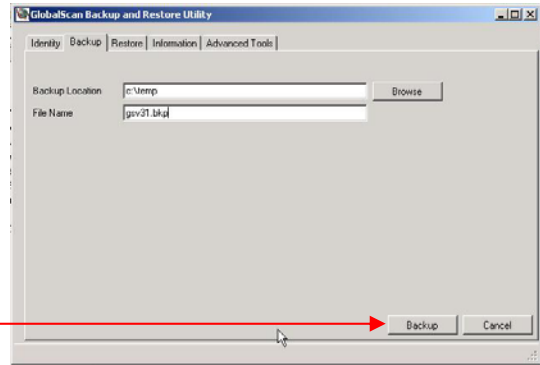


Display reads:

5. Click [**Backup**].

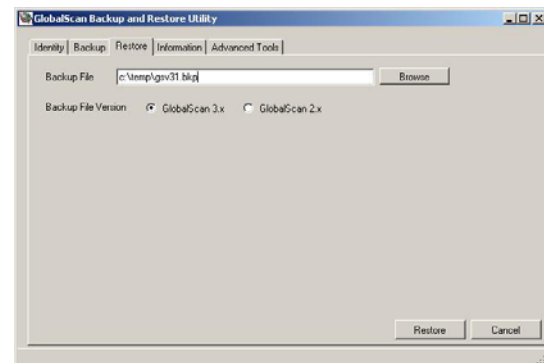
Display reads:

6. Click [**OK**].



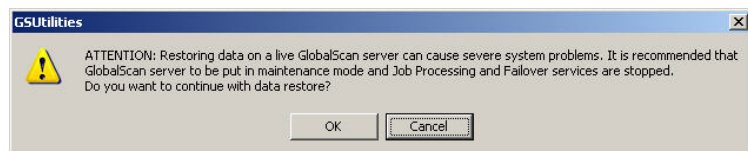
Step 2: Restore GlobalScan Data

1. Click [**Start**] > [**All Programs**] > [**GlobalScan**].
2. Click [**Utilities**].
3. Click [**Restore**] tab.
4. If necessary, click [**Browse**] and locate the folder containing the backup data file.
5. Select the Backup File Version, either GlobalScan v3.x or GlobalScan v2.x.
5. Click [**Restore**].



Display reads:

The message shown at right applies to GlobalScan Servers that are running the optional Failover service. If the Failover service is not running, continue to 7. If Failover is running, see **Important** note at the beginning of this section.



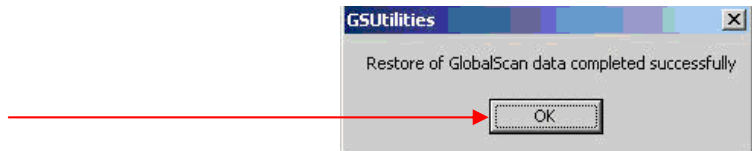
6. Click [OK].

Note: If you attempt to restore data from the incorrect file, the screen at right displays. Click [OK], repeat 4 – 7, selecting the correct .bkp file.



Display reads:

7. Click [OK].



8. Close window [X].

9. Click [Yes].

Backup and Restore with Command Line

Steps 1 and 2 cover backup and restore functions using the GlobalScan Backup/Restore Utility. It is also possible to integrate these features with a scheduling tool for automated backup and restore functionality. To do so, use the following command line syntax:

Backup Syntax

`c:\Ricoh\GlobalScan\GSutilities\bin\GSutilities backup file="c:\temp\07080.bkp"`

Restore Syntax

- For GlobalScan v3.x:
`c:\Ricoh\GlobalScan\GSutilities\bin\Gsutilities restore file="c:\temp\07080.bkp"`
- For GlobalScan v2.x:
`c:\Ricoh\GlobalScan\GSutilities\bin\Gsutilities upgrad file="c:\temp\v2backupfile"`

Note:

- GlobalScan installed directory can be a location other than c:\Ricoh. Modify as needed.
- The path (within quote marks) represents the location to store the backup/restore data. Modify as needed.

Information Tab

The Information screen within the GlobalScan Backup and Restore Utility enables you to configure settings that controls the gathering of log history and thread information. To configure settings, proceed as follows:

1. Click the [**Information**] tab.
2. Click the [**Options**] button.

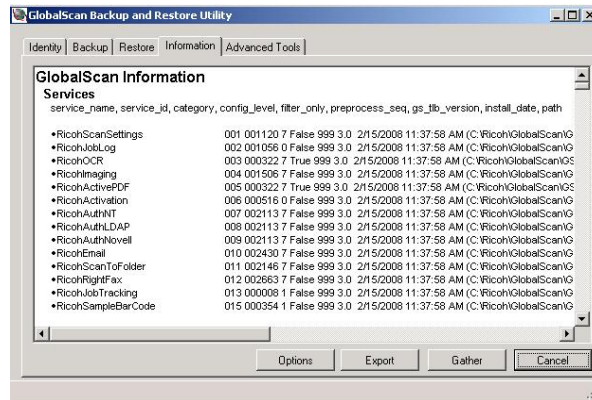
Display reads:

3. Enter/select the following:
 - **Log History (days)** – Specify how many days, including today, to go back and collect log files from GlobalScan and IIS.
 - **Compressed Files Located** – Specify where to place compressed files when exporting system information.
 - **Get Threat Information** – Specify whether or not to include thread information when gathering process information. By not choosing this option, you greatly speed up the information gathering, but when diagnosing hangs, this option should be selected.
 - **Thread Samples** – Specify how many times you want to check on a thread that is initially set as “waiting.” When a process is hanging, it can be detected by seeing if any threads inside it are waiting indefinitely for an event to occur, thus it is in a “wait” state. A thread that, in a snapshot of time, is listed as waiting doesn’t mean a process is hanging. Instead a thread that is listed as waiting over a period of time is a more likely indicator of a hanging process.
 - **Thread Sample Interval (milliseconds)** – Specify how much time (in milliseconds) to wait between sampling a thread’s wait state. The longer amount of time a more accurate indicator of a hanging thread, at the expense of having to wait a longer time to gather

process thread information. For this reason, it is recommended to specify a number of more than 100 milliseconds.

4. Click [OK].
5. Click [Gather].

Display reads, for example:

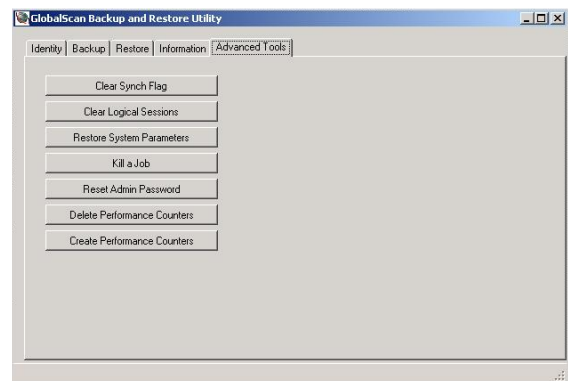


6. If you wish to export the data for analysis or troubleshooting, click [Export]. Follow the screen prompts. Note that many files will be created. The zip file contains all the files also created for easy file transfer.

Advanced Tools Tab

The Advanced Tools screen supports additional functionality within the GlobalScan Backup and Restore Utility, specifically:

- **Clear Synch Flag** – If the optional Failover service is running, click this button to clear the synch flag if an error has occurred. This can also be achieved by restarting the Failover service.
- **Clear Logical Sessions** – Click this button to clear all session data on the GlobalScan Server. This can also be achieved by restarting IIS.
- **Restore System Parameters** – Click this button to restore the System Parameters data to a state just before the last synchronization occurred. This applies only to a secondary server who has no System Parameter record, and who has a backup of this table.
- **Kill a Job** – Click this button to kill a job that appears stuck in the queue. To complete this task, it may be necessary to reboot or restart services related to the plug-in, in order that the back-end can release resources.



- **Reset Admin Password** – Click this button to reset the administrative password to a blank value.
- **Delete Performance Counters** – Click this button to delete performance counters used by GlobalScan.
- **Create Performance Counters** – Click this button to create (or reset existing) GlobalScan performance counters.

Appendix I: GlobalScan MFD Error Codes

Code	Display Message
101	Get profile failed. Please ask administrator for help. Or Click OK button to try again.
102	Login failed. (102)Try Again.
103	Communication failed. Please ask administrator for help. Or Click OK button to try again.
104	Pease logout first.
107	Invalid proxy port number. Try Again.
110	Please input at least 2 characters.
111	GetEmailAddr() failed. Try Again.
113	Failed to get file system information.
114	hard disk is getting full. Please wait for a while. If this error continues to happen, please reboot.
117	Invalid email address.
118	Invalid DNS IP.
119	Invalid GlobalScan server IP.
120	Invalid GlobalScan server IP. For name resolving, please enter DNS IP.
121	Invalid Proxy IP.
122	Invalid Proxy IP. For name resolving, please enter DNS IP.
126	A filename cannot contain any of the following characters: \\:*?\<>
127	No matches found.
128	Get login page failed. Please ask administrator for help.
129	Required login Info empty
130	Failed to download file format list.
133	GlobalScan Server IP is not defined. Please ask administrator for help.
134	Failover does not succeed, GlobalScan Servers are down. Please ask administrator for help.
135	Failover does not succeed, GlobalScan Server IP is not defined. Please ask administrator for help.
136	Unable to connect to the GlobalScan server. Press OK to try again.
137	GlobalScan reset timer expired. Press OK to proceed.
138	Another remote configuration session exists. Please wait for a while. Try Again.
139	Press OK to continue.
201	Scan failed Try again.
202	Scan failed: paper jam. Try again.
203	Cannot detect original size. Select scan size and reset originals. Scanning cancelled.
204	Scan failed. Cannot create scan files.
205	Scan failed. Cannot get file info.
206	Scan failed. Cannot get page info.
207	Scan failed. Cannot open the page.
208	Scan failed. Cannot close the page.
209	Scan failed. Cannot delete the page.
210	Scan failed. Cannot get work area.
211	Scan failed. Cannot write to hard disk.\nlf this error continues to happen, please reboot.
212	Scan failed. Failed to open a scan job.
213	Scan failed. Exceeded max data capacity. Check the scanning resolution.
214	Scan engine is busy. Please turn MFD off. Wait 30 seconds and turn MFD On.
301	Upload failed. Failed to write to hard disk. If this error continues to happen, please reboot.

402	Get Folder failed.
403	Please select a folder to upload.
404	There is no folder list.
405	Can't select/enter multiple items.
501	Getting Information from Server failed.
502	Please Make a Selection.
503	No List Entries Returned from Server
601	Getting Information from Server failed.
602	Please Make a Selection.
701	Getting Information from Server Failed.
702	Required Field Can Not Be Empty.
703	Get Index Summary Data from Server Failed.
704	No Index Entries Returned from Server
705	Invalid Validation Code Returned from Server.
802	Get Services failed. Please ask administrator for help.
803	Get Session Manager failed. Please ask administrator for help.
901	GlobalScan internal XML error.
902	Parse XML file failed.
903	Create XML file failed.
1001	Failed to Send Keyboard Validation Request to Server.
1002	Keyboard Input Validation failed.
1101	Failed to Send Reset Form Request to Server.
1102	Reset Form failed.
1201	Minimum Search String Length is
1202	Failed to Send Search Request to Server.
1203	Failed to Perform Search Action on Server.
1204	Multiple Search Selection is disallowed.
1205	Failed to Send Manual Entry Validation Request to Server.
1206	Manual Entry Validation Failed.
1207	No Matched Search Result Returned from Server
1208	Get server version failed. Please ask administrator for help. Or Click OK button to try again.
1209	Preview Upload failed. Please ask administrator for help.
1210	Thumbnail image download failed. Please ask administrator for help.
1211	Preview download error
1212	Only numeric characters are valid.
1213	Page Number is out of range
1214	Fail to redraw window. Please ask administrator for help.
1215	Error downloading preview image
1216	Failed to update thumbnail info
1301	Get default value failed. Please ask administrator for help. Or Click OK button to try again.
1302	Maximum of items selected.
1303	Please input more characters.
1304	Too many characters entered.

Appendix J: Frequently Asked Questions

Q. What does the GlobalScan Server do?

A. The Server acts as a digital document routing system that accepts scanned documents (from properly equipped multifunctional devices) and creates digital files for electronic transmission over your network as an attached email, fax or file.

Q. Can GlobalScan reduce my overnight delivery costs?

A. Yes! GlobalScan can significantly reduce your overnight package delivery expenses by scanning your documents and sending them in a PDF format at a fraction of the cost. What's more, the document is delivered to its destination within seconds, not one or more days.

Q. How many multifunctional devices can a single GlobalScan Server service/support?

A. GlobalScan will support up to 250 enabled MFDs with a single GlobalScan Server installed within your organization.

Q. What is required to connect a multifunctional device to a GlobalScan Server?

A. See [System Requirements and Specifications](#).

Q. Which email systems are supported by GlobalScan?

A. GlobalScan sends email via Lotus Notes, Microsoft® Exchange, using SMTP and most SMTP servers, with or without Authentication.

Q. What is GlobalScan Workflow Suite Standard Edition?

A. GlobalScan Workflow Suite Standard Edition is a server-based software application bundled with GlobalScan v3.1. This open and scalable solution allows users to capture, process and distribute document to multiple locations, including email, folder, fax, EDMS (Enterprise Document Management Systems), FTP and SFTP, Microsoft SharePoint, Lotus Dominos.Doc and any ODBC-complaint database.

Q. How does GlobalScan communicate with our mail server?

A. GlobalScan uses LDAP or LDAPS (secure LDAP) to access all the Global Address Books that reside on your mail server.

Q. What is the advantage of LDAP and LDAPS?

A. Since GlobalScan Server is installed on the same network as the Global Address Book, GlobalScan is able to access stored directory information on your server, using LDAP. This means that the GlobalScan Server does not maintain its own Address Book, resulting in less administrative burden on the system and Administrator. LDAPS adds another layer of security by encrypting the exchange of data between the GlobalScan Server and LDAP Directory Server. **Note:** The Directory Server must also support LDAPS, otherwise address lookup through LDAPS is not supported.

Q. Are the documents that I send secure?

A. Yes, provided HTTPS is used. Each document scanned to the GlobalScan Server can be transmitted using SSL (Secure Sockets Layer) and is designed to protect passwords and content from prying eyes.

Q. What data exchange format is used?

A. XML is the sole data exchange format for all data transfer between the multifunctional device and GlobalScan Server.

Q. Which Novell client version does GlobalScan support?

A. GlobalScan can run on Novell client version 4.9 (SP3 or SP4).

Q. Can I name the document I am scanning?

A. Yes. Each time you scan a document you have the ability to name the scanned image.

Q. Can I insert a subject into the email?

A. Yes. You can type a subject for every email you send. In addition, default email text can be set by the Administrator, which you can accept or remove prior to scanning the document.

Q. Can I perform text searching on a scanned image?

A. Yes. A scanned image is searchable if the PDF Image/Text file format (available with the OCR service) is used to create the file.

Q. Can I search through the Global Address Book for an email address?

A. Yes. You can search using at least two characters of the user's name. Lotus Notes users, enter the first two characters of the recipient's last name. Microsoft® Exchange users, enter the first two characters of the recipient's first name. **Note:** Actual search criteria will depend on LDAP or LDAPS settings.

Q. Can a document be sent via email to someone who is not in a Global or Personal Address Book?

A. Yes. This is also called "ad hoc" email address entry, a feature that allows you to manually enter any valid email address.

Q. Can I send a document to several people on a single scan?

A. Yes. You can select any number of email users from the touch-screen display of the multifunctional device and it will be distributed to all the recipients (users/groups) you have entered/selected.

Q. The LCD panel has returned to copy mode. How do I return to scan mode?

A. If no action is performed within 60 seconds (default setting), the system screen defaults to copy mode. If this should occur, simply press the [Scanner] button again and the display will be restored. **Note:** A key other than [Scanner] may be allocated to GlobalScan.

Q. Can I scan a group of originals that are of different sizes, e.g., letter and legal sizes?

A. Yes. It is possible to scan originals of difference sizes from the document feeder. Scanning of different sizes from the platen glass is not supported.

Q. How does the Batch Scan function work?

A. Batching allows you to scan a lengthy document in batches, and transmit the document as one file. You scan the first “batch” of pages, then you are prompted to “Set the next original and press Start.” This process is repeated until all pages have been scanned. If the Batching is a frequently used function, your GlobalScan Administrator can set the default to “On,” so there is no need to access the Scan Settings screen, unless you wish to turn the function “Off.” Also note that if the scanning process has been initiated from the platen glass, subsequent scans must also take place from the platen glass. This also applies if scanning has been initiated from the ADF. **Note:** Scanning of half-letter size paper from the platen glass is not supported.

Q. Does GlobalScan support color scanning?

A. Yes. Using the color multifunctional device (with scanner option), documents can be scanned in color and attached as a JPEG or color PDF file to any valid email address.

Q. Can a user choose the scan resolution for a document?

A. Yes. A default scan resolution (200-, 300- or 400-dpi) is set by the Administrator, though a user can reset the resolution via the MFD’s touch screen, unless set as read-only. The selected resolution is applied to all scans until the user logs out or the MFD times out.

Q. How does the Image Preview feature work?

A. Image Preview, a feature of GlobalScan v3.1, allows the user to view thumbnail images, and, if necessary, modify a scanned document directly from the MFD touch screen, i.e., before the job is processed. This ensures scan accuracy and reduces network congestion by possibly eliminating unwanted pages, e.g., blank pages. **Note:** Image Density cannot be changed in Image Preview mode.

Q. How do I retrieve an email that was created by the GlobalScan Server?

A. The scanned document automatically appears as an attachment within your email inbox. Double-click the filename to open.

Q. Does GlobalScan integrate with RightFax?

A. Yes, Ricoh offers a RightFax Plug-in to GlobalScan. GlobalScan will support RightFax Server version 8.7, 9.0 and 9.3. The RightFax client must be installed on the GlobalScan Server. You must also create a RightFax Proxy User Account with Administrator privileges; this must not integrate with Windows® NT.

Q. Does GlobalScan support OCR (Optical Character Recognition)?

A. Yes, GlobalScan OCR service is a standard feature that enables users to convert hard copy documents into a variety of popular file formats.

MFD Type	File Format Support
Black & White	TIFF, PDF, PDF ImageText, PDF Text, RTF, XLS
Color	JPEG, TIFF*, PDF, PDF ImageText, PDF Text, RTF, XLS

*As a black & white image.

Q. Can the MFD scan double-sided documents to GlobalScan?

A. Yes, GlobalScan's Scan Settings screen enables the user to not only select resolution and file format, but also original type, i.e., single-sided or double-sided, provided the Administrator has not set the parameter(s) as read-only. When scanning double-sided documents the user can also select the text orientation (top-to-top or top-to-bottom) and identify page orientation (standard or 90-degree).

Q. What does the Scan-to-Me function within GlobalScan do?

A. GlobalScan's Scan-to-Me function adds the logon user's email address to the email recipient list, so each time he/she logs on, the scanned file is sent to their email inbox, as well as to any other selected addresses,

Q. What does the Scan-to-Home function within GlobalScan do?

A. GlobalScan's Scan-to-Home function enables the logon user to select his/her Home directory as a target to deposit scanned documents. If enabled, this option, for example, "Jsmith - Home," will automatically appear when the Folder List button (on the MFD's touch screen) is pressed.

Q. How does the One-touch Scan function work?

A. The One-touch Scan function enables the MFD user to quickly execute a scan function; destination entry or selection is not required. For example, expense reports can be directed to the one or more email addresses or local/network folders at the touch of a button.

Q. Can I be notified via email regarding job status?

A. Yes. GlobalScan v3.1 supports a Notification service so that the Administrator and logon user can be alerted as to job status.

Appendix K: Glossary of Terms

Adobe® PDF – Adobe® Portable Document Format (PDF) is the open de facto standard for electronic document distribution worldwide. PDF is a universal file format that preserves all the fonts, formatting, graphics, and color of any source document, regardless of the application and platform used to create it.

Authentication – Authentication verifies the identity of the MFD user by requiring him/her to enter a valid user name and password via the MFD's touch screen. These "login credentials" are compared against a database of authorized users, thus granting or denying access to system functions. Authentication allows the System Administrator to improve security by monitoring machine usage.

dpi (dots per inch) – dpi is a measure of resolution for input devices, such as copiers and scanners, and output devices, such as printers and fax machines. Also see *Resolution*.

HTTP (Hypertext Transfer Protocol) – The protocol used by the World Wide Web for sending HTML pages from a server computer to a client computer or application, such as GlobalScan.

HTTPS (Secure HTTP) – The protocol used by the World Wide Web for sending and receiving secure HTML pages. HTTPS encrypts the data stream between the GlobalScan Server and the Administrator's Web browser.

IP Address – A computer or device that is connected to a TCP/IP network must have an IP address, a unique 32-bit binary number that precisely identifies the location of that computer on the network.

JPEG (Joint Photographic Experts Group) – A committee of computer graphics experts, jointly sponsored by the ISO (International Standards Organization) and the CCITT (Consultative Committee for International Telephone and Telegraph), that developed the JPEG graphics standards.

LDAP (Lightweight Directory Access Protocol) – A method of accessing directory information stored on a server. It permits an LDAP-enabled client to search for and view user information stored in an LDAP directory.

LDAPS (Lightweight Directory Access Protocol – Secure) – LDAPS utilizes encryption to protect the exchange of data. The Directory Server must also support LDAPS, otherwise address lookup through LDAPS is not supported.

NIC (Network Interface Card) – A NIC is an expansion board inserted into a device so the system can be connected to a network.

Operating System – An operating system is the most important program that runs on a computer. Every general-purpose computer must have an operating system to run other programs. Operating systems perform basic tasks, such as recognizing input from the

keyboard, sending output to the monitor, keeping track of files and directories on the disk and controlling peripheral devices such as printers, copiers, scanners, fax machines and MFDs.

Resolution – Images and text are scanned into the MFD by converting them into sequences of dots. The frequency of dots determines the quality of the image. More dots results in higher resolution and higher quality image or text. Also see *dpi*.

Scan-to-Email – Sends hardcopy documents as an email message from the MFD to one or more addresses (email inboxes).

Scan-to-Fax – Sends hardcopy documents from the MFD to a remote fax destination via your company's fax server.

Scan-to-Folder – Sends hardcopy documents from the MFD to one or more network folders for purposes of file sharing, archival, etc.

Server – A centralized computer system on a network that shares its resources with other computers.

SMTP (Simple Mail Transfer Protocol) – Designed to efficiently and reliably transfer mail across TCP/IP networks, including the Internet. SMTP defines the interaction between mail systems to facilitate the transfer of electronic mail even when the mail systems are on different types of computers or running different operating systems. SMTP is required to send or receive mail over the Internet.

SSL (Secure Socket Layer) – Software used for communication between a Web browser and the server. SSL encrypts mail communications so they can be read only by the intended recipients. SSL is a protocol that uses "certificates" to authenticate the client and server and uses a public/private key "pair" to encrypt and decrypt communications. All of the major browsers are SSL enabled.

SmartDeviceMonitor for Client – When installed on the GlobalScan Server, the SmartDevice-Monitor for Client utility displays the status of connected GlobalScan-enabled devices, letting you know which devices can participate in scan operations. In addition, the Administrator can check configuration settings, toner/paper levels and other useful information right from a desktop PC.

TCP/IP (Transmission Control Protocol/Internet Protocol) – A set of standards (protocols) for data transmission and error correction that allows the transfer of data from one Internet-linked computer to another.

TIFF (Tagged Image File Format) – One of the most widely supported file format for storing bit-mapped images on a computer.

URL (Uniform Resource Locator) – The URL is an addressing system that allows a user to specify documents or resources anywhere on the Internet.

Web Browser – A browser is a software application used to locate and display Web pages, e.g., Microsoft® Internet Explorer.

Web Image Monitor – Web Image Monitor is firmware built into the controller of the MFD that enables a System Administrator to manage settings on a single device. No separate utility software is required. All that's needed is a standard Web browser – Internet Explorer – and the device's IP address.

Windows, Microsoft® – A family of operating systems for personal computers. Windows dominates the personal computer world, running (by some estimates), 90 percent of all personal computers.

WWW (World Wide Web) – The name given to a particular section of the Internet that allows the transfer of information in a multi-media format and which offers easy access to users.

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