



File Management Utility

User Guide



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Examples of the operations given in this guide support the Windows 7 printing environment. Essentially the same operations are used for Windows XP, Windows Server 2003, and Windows Server 2008 environments.

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1 File Management Utility

The File Management Utility (FMU) distributes documents scanned on a multi-function print system (MFP) to specified network folders or computers. The user can set the criteria for distributing the scanned files. Advanced distribution criteria are available for certain MFPs.

Starting the Application

If the application is not set to start automatically, you can start it manually.

Note: In **Preferences** in the main screen, you can set the application to start automatically.

- 1 Open the application.
- 2 In the Windows system task bar, right-click the **File Management Utility** icon.
- 3 In the context menu, click **Open FMU**. If **Open FMU** is grayed out, restart File Management Utility with administrator privileges.

Add Devices

Specific MFPs on a network can be selected for use with the application. Use the **Add Device Wizard** to select devices by IP address or host name.

Adding Devices

You can add devices for the application with the **Add Device Wizard**.

- 1 In the main screen, click **Add**.
- 2 In the **Add Device Wizard**, enter the **IP address** or the **Host name** of the MFP you wish to add, and then click **Add**.
- 3 Enter another **IP address** or **Host name** if necessary. The devices you enter appear in the list on the right.
- 4 Click **Next**.
- 5 In the **Communication Settings** page, specify the SNMP type (SNMPv1/v2 or SNMPv3).

If you specify SNMPv1/v2, enter the **Read community** and **Write community** for the MFP. The read community name for the device will be used in requesting information, while the write community name is sent will

all SNMP receive and send requests, and must match the community values on the device.

If you specify SNMPv3, enter the login **User name** and **Password** for the MFP.

- 6** If the device is enabled with authentication, for **Change authenticate mode**, select **Use local authentication** or **Use settings on the device** as required.
- 7** Continue entering the remaining communication setting information as appropriate.
- 8** Click **Search**. The application adds the printing systems you have specified to the list in the main screen.

Communication Settings

Communication settings specify the **Login user name** and **Password** used with the device. Either local authentication or settings specified on the device can be used.

Specifying Communication Settings

- 1** In the main screen, select a printing system in the device list.
- 2** Click **Communication**.
- 3** Enter the **Login user name** and **Password**, if authentication is set on the device.
- 4** For **Authentication mode switch**, select **Use local authentication** or **Use settings on the device**.
- 5** Select **SSL** to provide security for network communication.
- 6** Click **OK**.

Delete a Device

Removes the selected device from the device list in the main FMU screen.

To delete a device from the list, highlight the device and click **Delete**. A message appears confirming the device will be deleted. Click **OK**.

Preferences

You set several parameters that control how File Management Utility operates, including starting that application automatically.

To select FMU preferences, follow these steps:

Start automatically

Select this option, so that FMU is configured to start automatically and run as a resident application when the computer is started. If the receiving folder or

error folder have not been specified or cannot be found, then the application will not monitor or distribute files.

Folder for deleted files

Select **Keep deleted files** to save deleted files in this folder. Set the path by clicking **Browse**, or entering the folder name. Select **Maximum folder size (MB)** and specify the size in megabytes if needed. Click **Empty deleted files folder** to erase all deleted files.

Folder for error files

FMU requires a local error folder for any files that it fails to distribute. A network folder cannot be used as the error folder. Set the path by clicking **Browse**, or entering the folder name.

Note: If the error folder has been removed while FMU is running, or not found for any reason, the application will not distribute files. Then, the error folder must be created and the path to the folder must be established. Restart FMU.

2 Receiving Folder

The receiving folder is a shared folder on a computer that holds scanned data files. When a document is scanned on an MFP, the data file is transferred to a specified receiving folder. The application checks this folder, and applies distribution criteria to the files in the folder. If the receiving folder is not specified, the application will not distribute files.

Add a Receiving Folder

- 1 In the main screen, click **File receiving**.
- 2 In the **File receiving folders** dialog box, click **New**. The **Folder settings** tab becomes active. An **ID** is automatically assigned to the folder.
- 3 Enter a name for the receiving folder. Or, click **Browse** to select the path to a folder, and then click **OK**. The name of the folder is automatically entered as the **Share name**.
- 4 Change the **Share name**, if desired.
- 5 Enter the **User name** and **Domain name** for accessing the receiving folder. Click **Add**. **User domains** displays the receiving folder as: *user name (user name@domain)*. If no domain name is specified, the receiving folder is shown as: *user name (PC name\user name)*.
- 6 Click the **Receiving settings** tab.
- 7 Leave **Filter by File type** selected to allow only files with specified file types to be saved in the receiving folder. When unchecked, with no file type entered, all file types will be saved. You can type an extension for a file type and click **Add** to add it to the list in **Select file type**. You can delete a file type by highlighting the extension in the list and clicking **Delete**.
- 8 In the **Advanced Options** section, select **Poll every (seconds)**, and then select the interval for the application to monitor the receiving folder. To make the receiving folder a hidden folder, select **Hidden folder**. You can also make a receiving folder hidden by adding a dollar sign (\$) at the end of the share name in step 4. To display a pop-up window when a file is distributed, select **Display notifications**.
- 9 Click **Apply** to add the folder to the list of receiving folders. The receiving folder appears in the file receiving folders list box, along with the settings you have specified.
- 10 Click **Close** to return to the main screen.

Note: If you added a receiving folder in the Windows XP Workgroup environment, right-click the shared folder to open its properties. In **Network sharing and security** under **Sharing**, check the **Allow network users to change my files** check box.

Editing a Receiving Folder

- 1** In the main screen, click **File receiving**.
- 2** In the **File receiving folders** list, select a folder to edit.
- 3** To edit the **User domains** for the folder, select the **User domain** you want to change from the list. The **User name** and **Domain** information appear above.
- 4** Edit this information as needed, and click **Save**.
- 5** To edit the file types on the **Receiving settings** tab, make the necessary changes, then click **Save**.
- 6** Edit **Advanced Options** as needed.
- 7** Click **Apply** to update the folder information.
- 8** Click **Close** to return to the main screen.

Deleting a Receiving Folder

- 1** In the main screen, click **File receiving**.
- 2** In the **File receiving folders** dialog box, select one or more receiving folders to delete.
- 3** Click **Delete** . A message is displayed confirming that the receiving file will be deleted. Click **OK**.
- 4** Click **Close** to return to the main screen.

3 Distribution Folder

The distribution criteria are applied to each file in the receiving folder, and each file that meets the criteria is distributed accordingly.

Distribution Settings

You can use the **Distribution settings** tab to define what files are handled by the application, and how they are distributed.

Receiving ID

To use a specific receiving folder as a condition, enter the ID assigned for the receiving folder, or click **Select** and choose a receiving folder from the list.

File type

Specify the file extension when using it as a condition for distributing files.

File name

Specify the file name when using it as a condition for distributing files. Up to five file names can be specified. Click **Add** to add the scan file to the list below **File name**. You can delete a file name from the list by clicking **Delete**. Wildcards may also be used (“*” for multiple characters, “?” for single characters.)

User name

Specify the user name when using it as a condition for distributing files. The user name is the name used when the workflow is executed on the MFP.

Host name

Specify the host name when using it as a condition for distributing files. Click **Add** to include the host name in the list box below this button. To delete a host name from the list, select the name and click **Delete**.

User defined

Enter a description for the user-defined information input on the MFP panel. You can create up to five settings. When the workflow is executed, the information entered in **Select item**, **Enter comment**, and **Enter value** is used. One or more items must be set in the workflow.

Set time/Date

Select this option and set the **Start time** and **End time**. If you select **Daily**, then the specified start/end times will be used for daily distributions. The **Set time/Date** settings must be set in the workflow.

Actions

Click the drop-down menu and select one of the following: **None** to specify no optional action, or **Delete** file to specify that scan data should be deleted without distributing the file, or **Replace existing file** to replace an existing file with the same name in the destination.

Attach information file

Select this option to specify attaching an information file to the image file when distributing scan data.

Adding Distribution Settings

- 1 In the main screen, click **File distribution**.
 - 2 In the **File distribution folders** dialog box, click **New**. The **Folder settings** tab becomes active. An **ID** is automatically assigned to the folder.
 - 3 Enter a **Name** for the distribution folder.
 - 4 In **Folder**, enter the destination for the distribution folder, or click **Browse** and select the folder path. You cannot specify a folder already used as the receiving folder, deleted folder, or error folder.
 - 5 If the distribution folder requires authentication, enter the **User name** and **Password**.
 - 6 Click **Add** to save the distribution folder settings. The distribution folder appears under **List of folders**. You can enter up to 10 distribution folders.
 - 7 Make settings in **Filter by** in the left side of the **Distribution settings** tab as needed. These settings apply to files scanned from all types of MFP systems.
 - 8 Set the options in the **Advanced** options area as needed. These settings apply to files scanned from MFP systems that support workflow functions.
 - 9 Select the action that is performed when the distribution conditions match.
 - None**
If selected, no action is taken.
 - Delete file**
If selected, files are moved to the delete folder.
 - Replace existing file**
If selected, existing files at the destination are overwritten, if they have the same name as the transferred file.
-
- Note:** If the destination folder is missing, the files are moved to the error folder.
-
- 10 If necessary, select **Attach information file** to send the information file along with the scan data file. If not selected, the information file is sent to the deleted folder.
 - 11 Click **Apply** to add the folders to the distribution folder list. According to the settings, distribution folders are shown in the folder list.

Edit or Delete Distribution Settings

- 1** In the main screen, click **File distribution**. The **File distribution folders** list shows the current distribution folders, and the **Folder settings** tab is active.
- 2** To delete a distribution folder, select the **ID** and click **Delete**. A message is displayed confirming that the file will be deleted. Click **OK**.
- 3** In the **File distribution folders** list, select the **ID** for the distribution settings you want to edit. On the **Folder settings** tab, change or delete any of the distribution settings. When finished, click **Apply** to save the revised settings.
- 4** Click the **Distribution settings** tab to display additional settings criteria. Change or delete any of the distribution settings, and then click **Apply**.
- 5** When finished editing distribution settings, click **Close** to return to the main screen.

4 Workflow

A customized button can be displayed on the operation panel of an MFP to trigger a custom workflow.

Workflow

With FMU, you can create custom workflows for handling scanned documents. The added workflows can be selected and run from the **Application** or **Favorites** screen on the MFP operation panel.

Adding a Workflow

To add a workflow while the device is enabled with authentication, the **Login user name** and **Password** for the MFP must be correctly set in **Communication settings**. The maximum number of workflows that can be added depend on the device model.

Note: **Login user name** and **login password** may not be entered in the **Windows XP Workgroup** environment.

- 1 Select the MFP in the main list, and click **Workflow**.
- 2 In the **Workflows** dialog box, click **New**. You can delete a workflow in the list by selecting it and clicking **Delete**.
- 3 Enter the registered **Name** for the workflow, to a maximum of 32 characters.
- 4 Enter the **Owner** name for the workflow, to a maximum of 64 characters. This is a mandatory entry when user authentication is set to ON for the MFP, and not available when authentication is OFF. On some models, when user authentication is ON, the login user name is registered automatically and so it is not available.
- 5 Click the **Access settings** menu and select the publicity setting for the workflow: **None** for only the owner can have access, or **Published** for shared access. When user authentication is set to OFF, this item appears as **None** and is not available.
- 6 Enter the **Password** to access the workflow, to a maximum of 64 characters (to a maximum of 16 characters for some models). This option is available only when the **Access setting** is set to **Published**.
- 7 On the right section of the **Workflow settings** tab, enter the **File name** for the scan file. If the same file name exists on the destination folder, the file name is changed using date information.

- 8 If on a network, in **Send folder (Share name)**, enter the share name for sending scan data, or click **Browse** and select the path to the share name folder.
- 9 In **Personal Computer (IP address or Host name)**, enter the IP address or host name of the PC that sends scan data. You can enter a maximum of 39 ASCII characters.
- 10 In **Login user name**, enter the user name for SMB transfer, to a maximum of 64 characters. Then in **Login password**, enter the login password for the SMB transfer, to a maximum of 64 characters.
- 11 Click **Apply** to save the workflow settings.
- 12 Click **Close** to return to the main screen.

Note: You need to set the front panel controls for some models.

Front Panel Controls

You can create a custom workflow and assign it to a button that appears on the operation panel. This feature allows a user to conveniently use a predefined set of conditions and distribution paths for handling scanned documents. The workflow guides the user to enter information that the application uses to distribute the scanned document to the correct folder.

Adding a Front Panel Control

- 1 In **Select type of control**, select the type of control to display on the operation panel.
- 2 In **Select type of instruction**, choose the prompt message.
- 3 In **Enter title of control**, enter the name of the control.
- 4 Click **Add** to add the control to **List of controls**.

Adding Selections to a Selection List

If **Select item** is chosen for the type of control, you can set up a list of selections that can be chosen at the operation panel. The items appear as buttons or check boxes, depending on the model. These selections are matched to the User defined criteria in Distribution settings.

- 1 In **Create a selection**, type a selection item.
- 2 Click **Add**. The item appears in the **List of selections** below.
- 3 You can change the order of items in the list by clicking on an item, then using the up and down buttons to move it.

- 4 Click **Apply** to save all the settings.

Specifying Scanning Preferences

You can set preferences on a device for scanning an image, depending on the device model. The check boxes on the left of each scanning option are only available on certain device models. If a check box option for a device model is set to ON, then the settings are displayed on the front panel of the device. On some device models, the check boxes are set to ON and grayed out.

- 1 In the **Workflow** dialog box, select the workflow in the workflow list. Then click the **Scanning Preferences** tab.
- 2 In the **Image settings** section, select the **Color mode** for scanning an image if the device is a color scanner model. If you select **Auto color**, the default image mode on the device will be set to **Auto color** (gray). Then select the dpi for the **Resolution** of the scan image.
- 3 In the **Black&White mode** section, select the **File type** for the scan image, and then select the **Original image**. These options are only available when **Black &White** is selected for **Color mode**.
- 4 In the **Color/Grayscale mode** section, select the following for the scan image: **File type**, **Original image**, or **Quality**. If the **File type** is set to High Compression PDF, this article has three levels.
- 5 In the **File separation** section, select **Output by page** to specify that the scan file will be output one page per file. You can select **Continuous scan** to specify allowing multiple scanning.
- 6 When finished selecting scan preferences, click **Apply** to save the settings for the selected workflow.
- 7 Click **Close** to return to the main screen.

Specifying Import and Export Settings

You can copy workflow settings from a device or file, or replace workflow settings on a target device.

- 1 In the **Workflow** dialog box, click **Import/Export**. The **Workflow Import/Export** wizard is displayed.
- 2 Click **Create from device** to copy settings from a device to the target device. On the **Select source device** page, select the device from the list. Click **Next**.
- 3 Click **Create from file** to copy settings from a file to the target device. On the **Select source device page**, enter the path for the settings folder.
- 4 To specify replacing the registered workflow on the target device, select **Overwrite settings on target device**. Click **Next**.

- 5 On the **Check your settings** page, click **Save to file** to save the content of the source device as a XML file. Click **End** to copy the settings from the source device or file to the target device selected in list on the **Workflow** dialog box.

The settings are copied or replaced and you are returned to the **Workflow** dialog box.

5 Job Log/History

The Job Log maintains a list of actions performed by the application. You can backup the history to a file, or clear the history. The history contains information files distributed by the application.

View the Job Log/History

- 1 In the main screen, click **Dist. History**.
- 2 To export the entire history to a file, click the **Backup** icon in the toolbar. Select **Save as** from the menu displayed. The files will be saved in XML format.
- 3 To delete the entire distribution history, click the **Clear History** icon. A message is displayed confirming that all distribution files will be deleted. Click **OK**.
- 4 Click **Close** to return to the main screen.

