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File Management Utility User Guide

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FMUKDEN



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Table of Contents

Chapter 1 File Management Utility

Starting the Application 1-1

Chapter 2 Manage Devices

Adding Devices 2-1
Deleting Devices 2-1

Chapter 3 Device Login

Specifying Device Login Settings 3-1

Chapter 4 Preferences

Setting Preferences 4-1

Chapter 5 Receiving Folder

Adding a Receiving Folder 5-1
Editing a Receiving Folder 5-2
Deleting a Receiving Folder 5-2

Chapter 6 Distribution Rule

Adding Distribution Rule 6-1
    Distribution Filter 6-2
Editing Distribution Rule 6-3
Deleting Distribution Rule 6-3

Chapter 7 Distribution Log

View the Distribution Log 7-1

Chapter 8 Workflow

Adding Workflow 8-1
    Workflow Settings 8-1
    Workflow Controls 8-2
    Specifying Scanning Preferences 8-3
Editing Workflow 8-3
Deleting Workflow 8-3

Chapter 9 Import/Export Workflow

Import from Device 9-1
Import from file 9-1
Export to File 9-2

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.

2 Manage 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 Device**.
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 with 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 authentication 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 Main screen.

Deleting Devices

Removes the selected device or devices from the **Devices** list in Main screen.

To delete the devices from the list, highlight the device or select the checkbox in column header to select all devices. Click **Delete**. A message appears confirming that selected devices will be deleted. Click **Yes**.

3 Device Login

Specify the **User name** and **Password** used with the device. Select either **Use local authentication** or **Use settings on the device**.

Specifying Device Login Settings

1. In the Main screen, select a printing system in the device list.
2. Click **Device Login**.
3. Enter the **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 **TLS** to provide security for network communication.
6. Click **OK**.

4 Preferences

You can set several parameters that control how File Management Utility operates, including starting the application automatically and specifying folders for error and deleted files.

Setting Preferences

To select 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 has not been specified or cannot be found, then the application will not monitor or distribute 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.

Folder for deleted files

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

Note: If the error folder has been removed while FMU is running, or not found for any reason, the application will not distribute files. In that case, set up the path to folder, create the error folder and restart FMU.

5 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 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.

Adding a Receiving Folder

1. In the Main screen, click **Receiving Folder**.

2. In the **Receiving Folder** 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. Alternatively, 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. In **List of users**, click **Add**. The **Add User** dialog box will appear. Enter the **User name** and **Domain** name for accessing the receiving folder. Click **OK**. The user domain 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. Click the **Add** button, the **Add File Type** dialog box will display. You can type an extension for a file type and click **OK** to add it to the list. You can edit a file type by highlighting the extension in the list and clicking **Edit**. The **Edit File Type** dialog box will display. Edit the extension and click **OK**. You can delete a file type by highlighting the extension in the list and clicking **Delete**.

8. In the **Advanced options** section, select **Polling interval (sec)**, and then select the interval for the application to monitor the receiving folder. To make the receiving folder a hidden folder, select **Hide 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 **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.

Editing a Receiving Folder

1 In the Main screen, click **Receiving Folder**.

2 In the **Receiving Folder** 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 and click **Edit**. The **Edit User** dialog box will display.

4 Edit this information as needed, and click **OK**.

5 To edit the file types on the **Receiving Settings** tab, select a file type and click **Edit**. The **Edit File Type** dialog box will display.

6 Edit this information as needed, and click **OK**.

7 Edit **Advanced options** as needed.

8 Click **Apply** to update the folder information.

9 Click **Close** to return to the Main screen.

Deleting a Receiving Folder

1 In the Main screen, click **Receiving Folder**.

2 In the **Receiving Folder** dialog box, select one or more receiving folders to delete.

3 Click **Delete**. A message is displayed confirming that the **Receiving Folder** will be deleted. Click **Yes**.

4 Click **Close** to return to the Main screen.

6 Distribution Rule

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

Adding Distribution Rule

1. In the Main screen, click **Distribution Rule**.

2. In the **Distribution Rule** dialog box, click **New**. The **Folder Settings** tab becomes active. An **ID** is automatically assigned to the **Distribution Rule**.

3. Enter a **Name** for the **Distribution Rule**.

4. In **List of folders**, click **Add**. The **Add Folder** dialog box displays. 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 Rule** requires authentication, enter the **User name** and **Password**.

6. Click **OK** to save the distribution folder settings. The distribution folder appears under **List of folders**. You can enter up to 10 distribution folders.

7. In **Basic Filter** tab, click **Select**. The **Receiving folder ID** dialog will open. Select a receiving folder and click **OK**. Make settings in **Filter by** as needed. These settings apply to files scanned from all types of MFP systems.

8. Select the **Distribution Actions** that are performed when the distribution conditions match.

   Default

   If selected, no action is taken.

   Delete

   If selected, files are moved to the delete folder.

   Overwrite

   If selected, existing files at the destination are overwritten, if they have the same name as the transferred file.

Note: If the distribution folder is missing, the files are moved to the error folder.

9 If necessary, select **Attach information file (.csv)** to send the information file along with the scan data file. If not selected, the information file is sent to the deleted folder.

10 Set the options in the **Advanced Filter** area as needed. These settings apply to files scanned from MFP systems that support workflow functions.

11 Click **Apply** to add the folders to the distribution folder list. According to the settings, distribution folders are shown in the folder list.

Distribution Filter

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

Receiving folder ID

To use a specific receiving folder as a condition, 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. A maximum of ten 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).

Distribution Actions

Click the drop-down menu and select one of the following: **Default** to specify no optional action, or **Delete** file to specify that scan data should be deleted without distributing the file, or **Overwrite** existing file to replace an existing file with the same name in the destination.

Attach information file (.csv)

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

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

Host name

Specify the host name when using it as a condition for distributing files.

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.

Workflow values

Enter a description for the workflow control values on the MFP panel. You can create up to ten settings. When the workflow is executed, the values in **Item**, **Comment**, and **Number** are used. One or more items must be set in the workflow.

Set date/time

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 date/time** settings must be set in the workflow.

Editing Distribution Rule

1. In the Main screen, click **Distribution Rule**. The **Distribution Rule** dialog shows the current Distribution Rule. The **Folder Settings** tab is active.

2. Select the **ID** for the Distribution Rule you want to edit. On the **Folder Settings** tab, select from **List of folders** and click **Edit**. The **Edit Folder** dialog will display. Click **OK** to save your changes. To delete any of the List of folders, click **Delete**. When finished, click **Apply** to save the revised settings.

3. Click the **Basic Filter** or **Advanced Filter** tab to display additional settings criteria. Change any of the distribution settings, and click **Apply**.

4. When you have finished editing, click **Close** to return to the Main screen.

Deleting Distribution Rule

1. In the Main screen, click **Distribution Rule**. The **Distribution Rule** dialog shows the current distribution rule. The **Folder Settings** tab is active.

2. To delete a **Distribution Rule**, select one or more **ID** and click **Delete**. Or right-click to select an **ID**. A message is displayed confirming that the selections will be deleted. Click **Yes**.

3. Click **Close** to return to the Main screen.

7 Distribution Log

The Distribution Log maintains a list of actions performed by the application. You can back up the log to a file, or clear the log. The log contains information files distributed by the application.

View the Distribution Log

1. In the Main screen, click the **Distribution Log** icon.
2. In **Details** box, the number of distribution results are indicated.
3. To export the entire log to a file, click **Export**. Select **Save as** from the menu displayed. The files will be saved in XML format.
4. To delete the entire distribution log, click **Delete**. A message is displayed confirming that all distribution logs will be deleted. Click **OK**.
5. Click **Close** to return to the Main screen.

8 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.

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

Adding Workflow

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

Workflow Settings

1. Select the MFP in the Main screen, and click the **Workflow** icon.

2. In the **Workflow** 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 which has a maximum of 64 characters. This is a mandatory entry when user authentication is set to ON in the MFP. This is not available when user 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. Set the **Access settings** for the workflow. Check **Published** for shared access or uncheck so that only the owner can have access. When user authentication is set to OFF in the MFP, **Published** is checked by default and is not available for edit.

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 settings** is set to **Published**.

7. On the **Workflow Settings** tab, in the **Receiving folder (Share name)**, enter the share name for receiving scan data. Alternatively, click **Browse** and select the path to the receiving folder.

8 Enter the **Scanned file name** for the scan file. If the same file name exists on the destination folder, the file name is changed using date information by default. This depends on the **Distribution Action** specified in the **Distribution Rule** dialog.

9 In **Personal computer**, 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 **User name**, enter the PC user name for SMB transfer, to a maximum of 64 characters. In **Password**, enter the login PC 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.

Workflow Controls

1 In **Workflow Controls** tab, under **List of controls**, click **Add** to add a worklow control. The **Add Workflow Control** dialog will show.

2 In **Select type of control**, select the type of control to display on the operation panel.

If **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 **Workflow values** filter in **Advanced Filter** tab of the **Distribution Rule** dialog.

- In **List of selections**, click **Add** to add a selection. The **Add Item** dialog will display.
- In **Item name**, enter the name of the item selection.
- Click **OK**. The item appears in the **List of selections** table.
- You can change the order of items in the list by clicking on an item, then using the up and down arrows to move it.
- Specify the **Number of selections**. Choosing **Multiple items** to enable multi-selection of the item selection list at the operation panel.
- **Options** can also be specified. Check **Allow new items** to enable addition of new items at the operation panel. This option is not displayed on some device models. Check **Allow no selection** to make no selections on item list.

3 In **Enter title of control**, enter the name of the control.

4 In **Select type of instructions**, choose the prompt message.

5 Click **OK** to add the control to the **List of controls**.

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

Specifying Scanning Preferences

You can set preferences on a device for scanning an image, depending on the device model. The check boxes 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 a workflow from the list. Click the **Scanning Preferences** tab.

2. 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). **File type**, **Quality** and **Original Image** will be available for selection. **Quality** is not available if you set **Black&White** in **Color mode**.

3. Select the dpi for the **Resolution** of the scan image.

4. If the **File type** is set to **High Compression PDF**, you can set either **Quality**, **Standard** or **Compression**.

5. In the **File separation,** you can 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, click **Apply** to save the settings for the selected workflow.

7. Click **Close** to return to the Main screen.

Editing Workflow

1. Select the MFP in the Main screen, and click **Workflow**.

2. In the **Workflow** dialog box, click the **ID** you want to edit. **Workflow Settings** tab becomes active.

3. Make changes in the settings if needed. Click **Workflow Controls** tab or **Scanning Preferences** tab to make necessary changes, if desired.

4. Click **Apply** to save the workflow settings.

5. Click **Close** to return to Main screen.

Deleting Workflow

1. Select the MFP in the Main screen, and click **Workflow**.

2. In the **Workflow** dialog box, click **ID** you want to delete. **Workflow Settings** tab becomes active.

3 Click **Delete**. A confirmation message will display asking to delete the selected workflow, click **Yes**.

4 Click **Close** to return to Main screen.

9 Import/Export Workflow

You can copy workflow settings from one source device or file, or replace workflow settings on a multiple target devices. To enable **Import/Export Workflow**, select at least one MFP device in Main screen. This button is disabled if selected device does not support HyPAS or Sheet Extension.

Import from Device

This function can import all workflows from source device to selected target devices in Main screen.

1. Select target device or devices in Main screen. Click **Import/Export Workflow**.
2. In the **Import/Export Workflow** dialog box, select **From device** and press **Next**. If **Overwrite settings on target device** is selected, all the registered workflows on target devices are removed. New workflow settings are imported.
3. Select source MFP device from the device list. The list only consists of all registered MFP's from Main screen.
4. Click **Next**, the Summary page of Import from device will display.
5. Click **Next** to set workflows to selected devices. **Workflow Setup** will display the **Status** and **Result** during workflow setup for each MFP.
6. Click **Close** to return to the Main screen.

Note: If MFP authentication is ON, and none is specified in Device Login, the user can import workflows from source device whose Access Permission type is Free. If workflows have Password, they are not included in the import. If MFP authentication is OFF or ON, and Administrator privilege is specifed in Device Login, all workflows can be imported from source device. If User privilege is specified, all workflows cannot be imported.

Import from file

This function imports workflows from XML file to selected target devices in Main screen.

1. Select target device or devices in Main screen. Click **Import/Export Workflow**.
2. In the **Import/Export Workflow** dialog box, Select **From file** and press **Next**. If **Overwrite settings on target device** is selected, all the registered workflows on target devices are removed. New workflow settings are imported.

3 Click **Browse** to locate the XML file.

4 Click **Next** and the Summary Page will display. This page shows the selected method, source file and selected target devices.

5 Click **Next** to set workflows to selected devices. **Workflow Setup** will display the **Status** and **Result** during workflow setup for each MFP.

6 Click **Close** to return to Main screen.

Note: If MFP authentication is OFF or ON and Administrator privilege is specified in Device Login, all workflows can be imported from xml file to target devices. If User privilege is specified in Device Login, all workflows cannot be imported.

Export to File

This function exports workflows from source device to an XML File format.

1 Select at least one device in Main screen and click **Import/Export Workflow**.

2 Select **To file** and click **Next**.

3 In **Export Workflow** dialog, click **Browse** to set the target path where the XML file will be saved.Click **Next**.

4 Select a source MFP device from the device list. The list only consists of all the registered MFP's from the Main screen. Click **Next**.

5 Summary page shows selected method, source device and target file path.

6 Click **Finish** to save the file. The dialog will close after exporting the file.

Note: If MFP authentication is ON and none is specified in Device Login, the user can export workflows whose Access Permission type is Free. If the workflows have Password, workflows are not exported. If MFP authentication is OFF or ON, and Administrator privilege is specified in Device Login, all workflows can be exported to XML File. If user privilege is specified, all workflows cannot be exported.

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