

Advanced Scan to Folder



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1 Preface

This guide provides the details on how to use the workflow Advanced Scan to Folder

About This Guide

This guide is divided into following primary sections:

1. Introduction

This section lays the foundation for understanding the workflow specification

2. Cloud Service Connection

This section describes how to service connection with external cloud Services like Box, Dropbox, Google Drive, OneDrive for Business, SharePoint Online, RICOH Content Manager

3. Configuring Metadata Labels, Dictionary and Default Values

This section contains step-by-step instructions on how to configure settings related to Advanced Scan to Folder application in User Site

4. Operation of Advanced Scan to Folder Application

This section contains step-by-step instructions on how to operate Advanced Scan to folder application on MFP Operation panel

5. Limitations

Product Limitations

6. Appendix

This section contains additional reference materials

Note: The operation panel screen shot images and User Site images provided in this document are for illustrative purposes only. These images may not reflect the exact image you experience on your multi-functional printer (MFP device).

2 Introduction

What is Advanced Scan to Folder workflow?

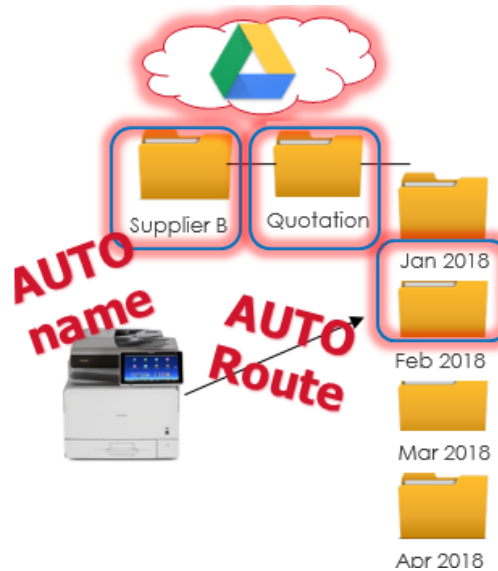
Advanced Scan to Folder is a workflow application developed on Ricoh Smart Integration Platform.

This workflow enables users to easily Scan and organize storage of documents on Cloud services, based on Metadata and Date selection on MFP Operation panel. Users can program Metadata based on their business needs and also program Metadata items in a dictionary, so that they can easily select the items, instead of typing on the operation panel. Application automatically creates folders by default based on Metadata. However, user can turn off folder creation for each Metadata. File is named based on File Name formula configured by default; however, user can enter the filename of their choice.

Sample Metadata input

Meta Data Input		
Document type	Supplier Name	Date (yy/mm/dd)
Quotation	Company A	18 / 01 / 22
Purchase Order	Company B	
Packing Slip	Company C	
Bill of Lading	Company D	
Invoice	Company E	
Sales Order	Company F	
Work Order	Company G	
.....		
Other Attribute		
		SCAN

Auto Name and Auto Route



Workflow Specification

Date	Required Format MM/DD/YYYY
Folder	Root folder selection
Metadata	Up to 5 Metadata field input are supported Metadata 1-5 are optional
OCR	Off, PDF, PDFA, WORD, EXCEL Default: Off
OCR Language	English, French, Spanish, Portuguese Brazilian
File Name	<p>Optional (If entered, this value is used as filename)</p> <p>If filename is left blank, filename is created using the formula programed in User Site (Refer to section 'Configuring default Values')</p> <p>Default Formula:</p> <p><code>_[Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())</code></p> <p>Note: If you do not plan to use 'Metadata1' Field, change the default formula as required.</p> <p>Example: <code>{Metadata1}-142019-173412.pdf</code></p>

	Where {Metadata1} is the value entered in workflow UI
Folder Structure	<p>Root Folder Metadata1 Metadata2 Metadata3 Metadata4 Metadata5 Month YYYY</p> <p>Note: Metadata 1 – 5 are optional, if user chooses not to enter these values, sub folders will not be created.</p> <p>Note:</p> <ol style="list-style-type: none"> 1. Creation of 'Month YYYY' can be disabled in User Site. 2. Creation of Folders based on Metadata can be disabled in User Site.
Time Stamp	
Time Stamp	OFF, ON
Vertical Position	Top, Middle, Bottom
Horizontal Position	Left, Center, Right
Stamp Target Pages	All Pages, Specified Pages, First Page, Last Page, Even Pages, Odd Pages
Target Page Number	Specify page numbers, when 'Specified Pages' selected is Stamp Target Pages
Remove Blank Page	OFF, ON Default: OFF

- A. Metadata labels can be configured
- B. Metadata items can be programmed as a dictionary
- C. Creation of Date Folder can be disabled
- D. Creation of Folders based on Metadata can be disabled. In this case, user can use the Metadata in File Name Formula, to create filenames based on Metadatas.
- E. Default values can be configured for Scan settings, OCR, Date format and Metadata
- F. Unused Metadata Fields can be hidden from the Operation Panel User Interface
- G. OCR Selection field and File Name entry field can be hidden from the Operation Panel User Interface.
- H. Time Stamp (Several Settings are available, some are on Operation panel and some are on User Site)
- I. Remove Blank Page: OFF & ON are available

3 Cloud Service Connection

What is Cloud Service Connection?

Before using Advanced Scan to Folder workflow, user need to establish connection (authentication) with Cloud service of choice. As of now following Cloud Services are supported.

1. Box
2. Dropbox
3. Google
4. OneDrive for Business [Office 365]
5. SharePoint online
6. RICOH Content Manager

For each Cloud Service there is a separate Advanced Scan to Folder application available On MFP Operation Panel.

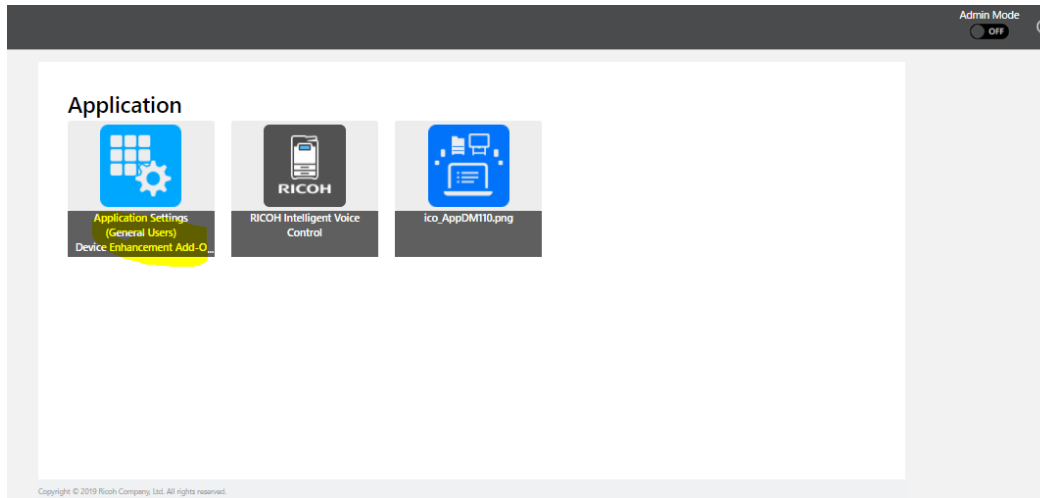
Refer to Smart Integration Cloud Service Connection User Guide for step by step instructions.

4 Configuring Metadata Dictionary, Labels and default Values

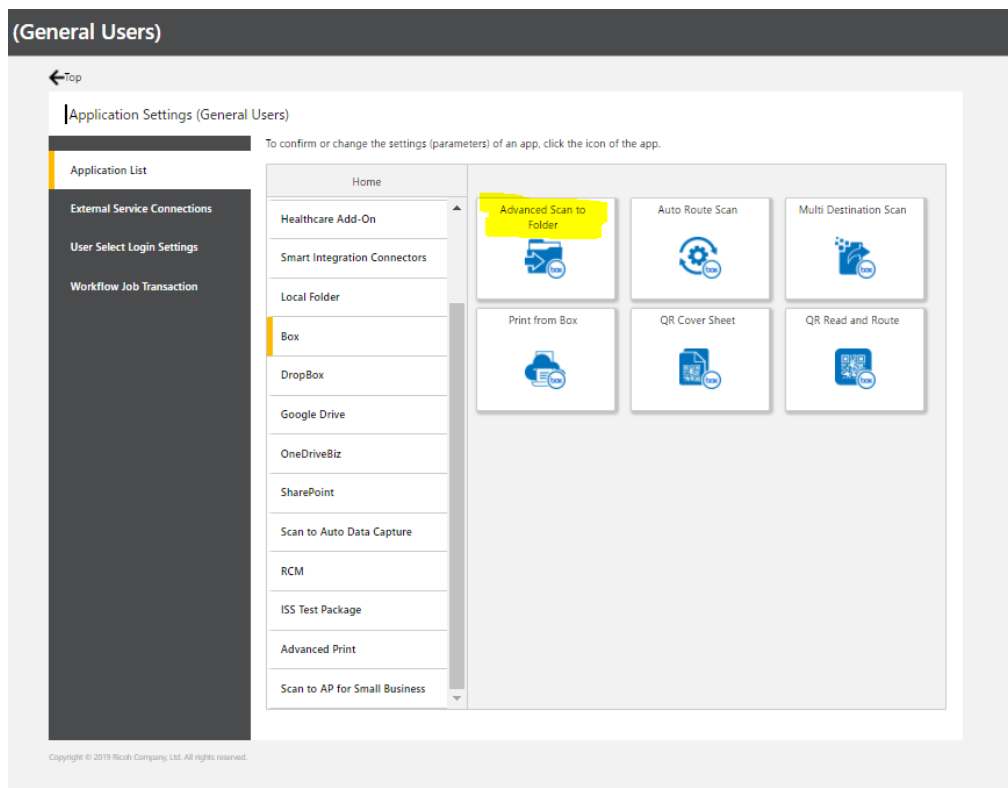
Smart Integration User Configuration Site URL

<https://na.accounts.ricoh.com/portal/login.html>

Login to above site using your credentials.



Click on 'Application settings'



Click on 'Advanced Scan to Folder'. This will display a page where all necessary parameters can be configured.

Settings (General Users)

← Application List

Advanced Scan to Folder

Cancel Save

* Mandatory field

Service Settings

Service Box

Folder * Select Folder [All Files](#)

[Open External Service Connections](#)

Common Settings

Default Screen for Folder Browsing List Screen

Default Layout for Folder Browse 2 Rows

Default Parameter Settings

Date Folder * Create

File Name Formula * _[Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW()) Check

Folder for Metadata1 * Create

Folder for Metadata2 * Create

Folder for Metadata3 * Create

Folder for Metadata4 * Create

Folder for Metadata5 * Create

Date MM/DD/YYYY

OCR OFF

☐ Hide in application

OCR Language English

Time Stamp OFF

Vertical Position Top

Horizontal Position Left

Stamp Target Pages All Pages

Above settings are available to configure.

Selecting Default Root folder

Advanced Scan to Folder Cancel Save

* Mandatory field

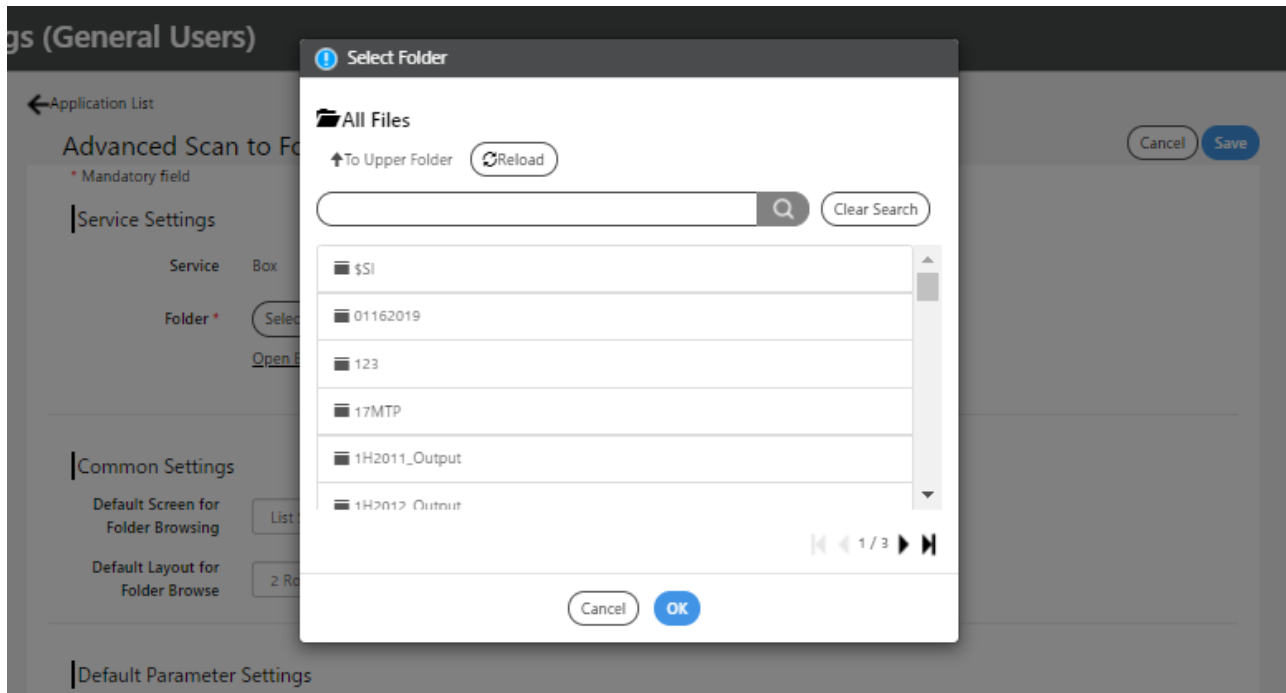
Service Settings

Service Box

Folder * Select Folder [All Files](#)

[Open External Service Connections](#)

Click on 'Select Folder' to select required default folder for this application.



Select required folder and click 'OK'

Setting up Metadata

The screenshot shows the 'Metadata 1' configuration form. It includes a 'Metadata 1' label field, a 'Change Display Name: Metadata 1' field with 'Document Type' entered, a 'Hide in application' checkbox, a 'Dictionary Label' field, a 'Dictionary Delimiter' field, an 'Import Dictionary' button, a 'Dictionary' dropdown menu, a 'Value' field, and a 'Dictionary Column Width' dropdown menu set to 'Standard'.

For each Metadata, Labels can be changed as required for your business needs. Also default value can be setup, along with Dictionary keywords which can be used as Metadata

When Labels are configured, this gets reflected on MFP Operation panel in 'Advanced Scan to Folder' application

The screenshot shows the 'Advanced Scan to Folder' application interface. The top bar includes a back arrow, the title 'Advanced Scan to Folder', the user name 'Jayasimha Nuggehalli', and links for 'Logout' and 'Job log'. The main area displays a list of metadata fields: 'Document Type', 'Vendor', 'Approver', 'Metadata 4', and 'Metadata 5'. The 'Document Type' field is highlighted with a yellow background. On the right side, there is a 'Scan Settings' panel with options for 'Auto Colo...', '1 Sided', 'Readable ...', and '300 dpi'. A large green 'Start' button is located at the bottom right of the interface.

Setting up Metadata Dictionary

Metadata 1

Metadata 1

Change Display Name: Metadata 1

Document Type

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Import Dictionary

Dictionary	Value
Invoice	
Credit Note	
Vacation Request	

Dictionary Column Width: Standard

Enter required Values in the Dictionary, also default value if necessary

When Metadata dictionary is configured, this gets reflected on MFP Operation panel in 'Advanced Scan to Folder' application

← Advanced Scan to Folder Jayasimha Nuggehalli Logout Job log

Document Type Quotation

Vendor

Approver

Metadata 4

Metadata 5

Auto Colo... 1 Sided Readable ... 300 dpi

Scan Settings

Start

Clicking on Document Type field displays Metadata selection screen

Document Type

Cancel OK

Quotation

Document Type

Quotation Receipt

Purchase Order

Clicking on item in dictionary, that value gets populated in the edit box

Note: Clear the field by pressing on X, before selecting a new value

Document Type

Cancel OK

Design Specification

Document Type

Invoice Purchase Order

Bill of Material Design Specification

Memo

Hiding Metadata in Operation Panel User Interface

Metadata 1-5 are optional fields. If these fields are not used, they can be hidden from Operation Panel User Interface

Metadata 1

Metadata 1

Change Display Name: Metadata 1

Document Type

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Import Dictionary

Dictionary	Value
Invoice	
Credit Note	
Vacation Request	

Dictionary Column Width

Standard

Check 'Hide in application' to hide this field.

← Advanced Scan to Folder Jay Nugehalli Logout Job log

* Mandatory field.

Date 11/09/2018

Folder * All Files

Metadata 1 *

OCR * OFF

File Name

Auto Colo... 1 2

1 Sided

Readable ... R

300 dpi

Scan Settings

Start

In this example Metadata 2 – Metadata 5 are hidden.

Disabling Creation of Folders for Metadata

Folder for MetaData1 *	Create ▼
Folder for MetaData2 *	Create ▼
Folder for MetaData3 *	Create ▼
Folder for MetaData4 *	Create ▼
Folder for MetaData5 *	Create ▼

If users want to use Metadata values only in File Name formula, folder creation can be turned off. Set the value to 'Do Not Create' to turn off folder creation. Each Metadata folder creation can be separately configured.

Disabling Creation of Date Folder

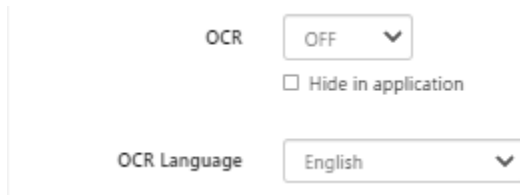
Default Parameter Settings

Date Folder *	Create ▼
---------------	----------

Selecting 'Do Not Create' in above list box will disable creating the 'YYYY Month' folder in the folder structure in the Cloud Service.

OCR & OCR Language

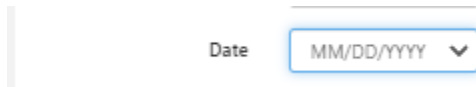
Default value for OCR and OCR Language can be configured.



A screenshot of a configuration interface for OCR settings. It features two main sections. The first section is labeled 'OCR' and contains a dropdown menu currently set to 'OFF' with a downward arrow, and a checkbox labeled 'Hide in application' which is currently unchecked. The second section is labeled 'OCR Language' and contains a dropdown menu currently set to 'English' with a downward arrow.

Date Format Selection

Default value for date format can be configured.



A screenshot of a configuration interface for date format selection. It shows a single setting labeled 'Date' with a dropdown menu currently set to 'MM/DD/YYYY' with a downward arrow.

Setting up Default File Name & File Name Key Words

File Name

File Name

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Import Dictionary

Dictionary	Value
PO	
Marketing	
Sales	

Dictionary Column Width: Standard

Enter Required Filename Default Value and also can setup dictionary of Keywords which can be used in the filename. A delimiter/separator can also be configured, if multiple keywords are used for naming the file. Check 'Hide in application' to hide the field in Operation Panel.

Setting up File Name Formula

Note: If you want to create Filename based on Formula, do not enter 'File Name' above also leave 'File Name' field blank on Operation panel. User entered File Name has higher priority than the File Name generated using Formula.

File Name Formula *

_[Metadata1]-1062021-174758

Default Formula:

_[Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())

Note: Refer to Appendix for Functions related to formula,

Note: Click on 'Check' button to validate the syntax of File Name Formula

Time Stamp

Time Stamp	OFF ▼
Vertical Position	Top ▼
Horizontal Position	Left ▼
Stamp Target Pages	All Pages ▼
Specify Stamp Target Pages	1-
Font Size (Point)	10
Time Zone *	UTC ▼
Time Format	yy/MM/dd H:mm
Border Width	0
Top and Bottom Margins	0
Left and Right Margin	0
Remove Blank Page	OFF ▼

Refer to appendix for details related to Time Stamp Settings

Remove Blank Page

Default value for Remove Blank Page can be configured.

Remove Blank Page	OFF ▼
-------------------	-------

Scan Settings

Default Scan settings can be configured here

Default Scan Settings	
Scan Color Mode	Auto Color Select ▼
Original Sides	1 Sided ▼
Document Orientation	Readable Direction ▼
Scan Resolution	300 dpi ▼
Document Size	Auto ▼
Manual Density	0 ▼
Scan Method	Normal ▼
Preview	On ▼

5 Operation of Advanced Scan to Folder Workflow Application

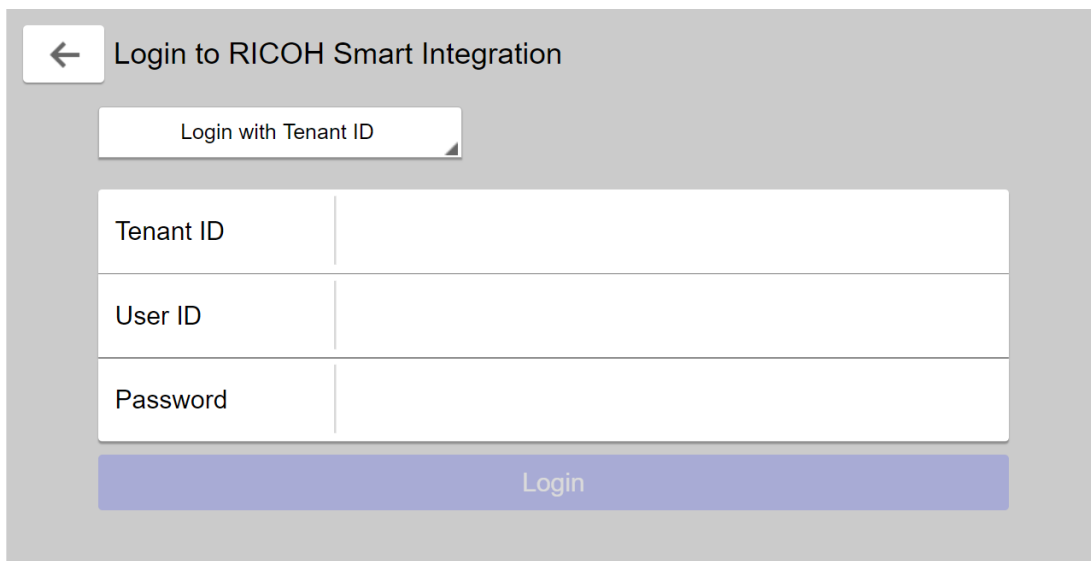
Smart Integration MFP BrowserNX URL

<https://www.na.smart-integration.ricoh.com/si-apps/pub/index.html>

Ricoh Smart Integration Initial Login

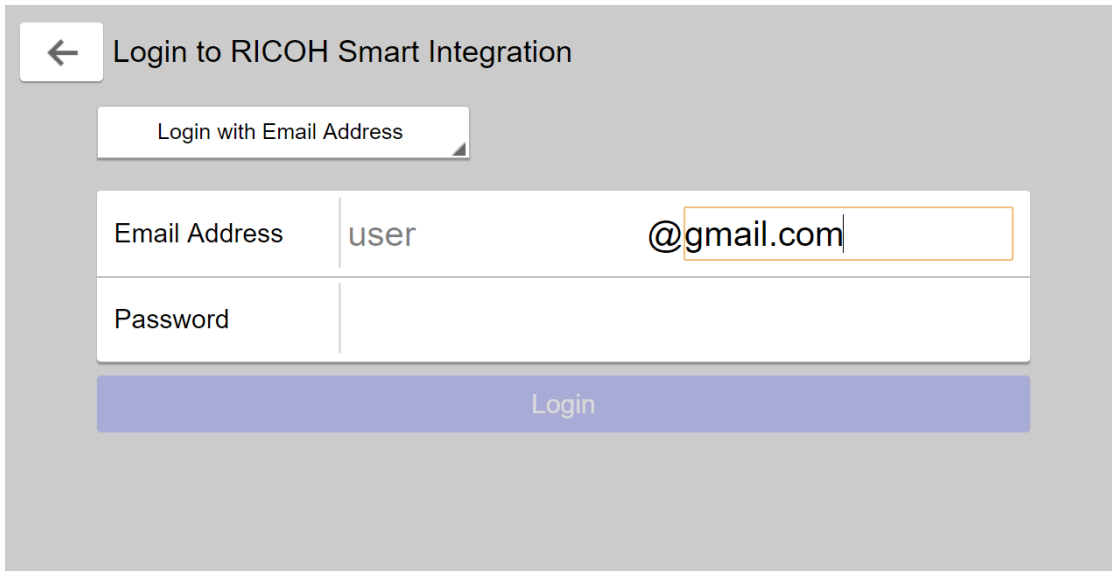
Above URL is available as Bookmark ICON on MFP. Very first time, administrator need to login to the site either using Tenant ID, User ID and Password or Email address and password.

Option 1: Login with Tenant ID



The screenshot shows a login interface for 'RICOH Smart Integration'. At the top, there is a back arrow icon and the title 'Login to RICOH Smart Integration'. Below this, there is a button labeled 'Login with Tenant ID'. Underneath the button is a form with three input fields: 'Tenant ID', 'User ID', and 'Password'. Each field has a corresponding input box to its right. At the bottom of the form is a large blue button labeled 'Login'.

Option 2: Login with Email Address



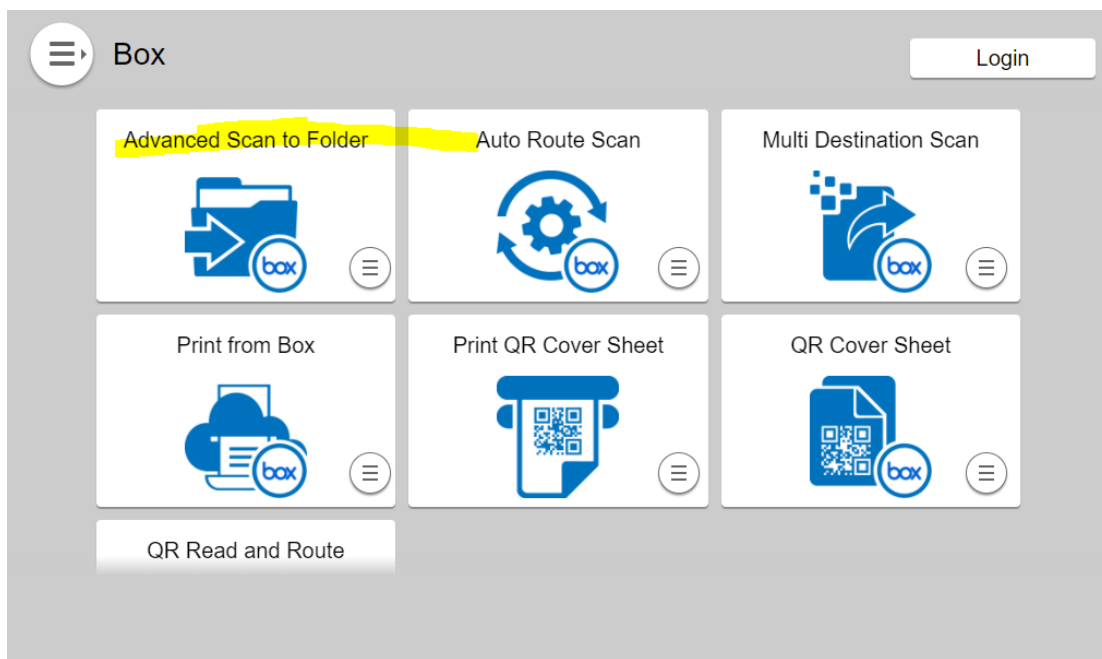
← Login to RICOH Smart Integration

Login with Email Address

Email Address	user	@gmail.com
Password		

Login

After administrator login subscribed application will be displayed



Above screen shows workflow application related to Box Cloud service.

Select 'Advanced Scan to folder' application

End User is requested to Login. Press 'Login' Button to Login.

Please log in to use Smart Scan to Folder.

Back to Home

Login

User need to login to the site either using Tenant ID, User ID and Password or Email address and password.

Option 1: Login with Tenant ID

The screenshot shows a login interface with a grey background. At the top left is a back arrow icon. To its right is the title 'Login to RICOH Smart Integration'. Below the title is a dropdown menu with the text 'Login with Tenant ID'. Underneath the dropdown are three input fields stacked vertically: 'Tenant ID', 'User ID', and 'Password'. At the bottom of the form is a wide, light blue button labeled 'Login'.

Option 2: Login with Email Address

The screenshot shows a login interface with a grey background. At the top left is a back arrow icon. To its right is the title 'Login to RICOH Smart Integration'. Below the title is a dropdown menu with the text 'Login with Email Address'. Underneath the dropdown are two input fields stacked vertically: 'Email Address' and 'Password'. The 'Email Address' field contains the text 'user' followed by '@gmail.com', which is highlighted with an orange border. At the bottom of the form is a wide, light blue button labeled 'Login'.

After successful user login 'Advanced Scan folder' Application Screen is displayed

Following Settings are available:

- A. Date
- B. Folder

Note: Nested folders based on Metadata 1 – Metadata 5 are created under the folder selected by user. User can also change default root folder in the User Site

- C. Metadata 1 – Metadata 5

(Metadata 1-5 are optional)

Note: Labels 'Metadata 1 – Metadata 5' can be changed in User Site depending on Customer's document management requirements

- D. OCR [Off, PDF, PDFA, WORD, EXCEL]
- E. OCR Language [English, French, Spanish, Brazilian Portuguese]
- F. Time Stamp
- G. Remove Blank Page

The image displays two screenshots of the 'Advanced Scan to ... Jayasimha Nuggehalli' application interface. The top screenshot shows the 'Folder' field set to 'All Files' and the 'Date' field set to '10/06/2021'. The bottom screenshot shows the 'OCR' field set to 'OFF', the 'OCR Language' set to 'English', and the 'Remove Blank Page' field set to 'OFF'. Both screenshots include a 'Scan Settings' panel on the right with options like 'Auto Color', '1 Sided', 'Readable', and '300 dpi', and a large green 'Start' button.

Date

← Advanced Scan to ... Jayasimha Nuggehalli Logout Job log

* Mandatory field.

Folder * All Files

Date 10/06/2021

Metadata 1

Metadata 2

Metadata 3

Auto Colo...
1 Sided
Readable ...
300 dpi

Scan Settings

Start

Touching on Date field displays 'Calendar' selection screen

Date Cancel OK

Oct.
10

< 2021 >

Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Note: Swipe up and down select a different month, Year can be changed using left, Right Arrow or user can input year.

Touch on required date and touch 'OK' to select date.

Metadata 1 – Metadata 5

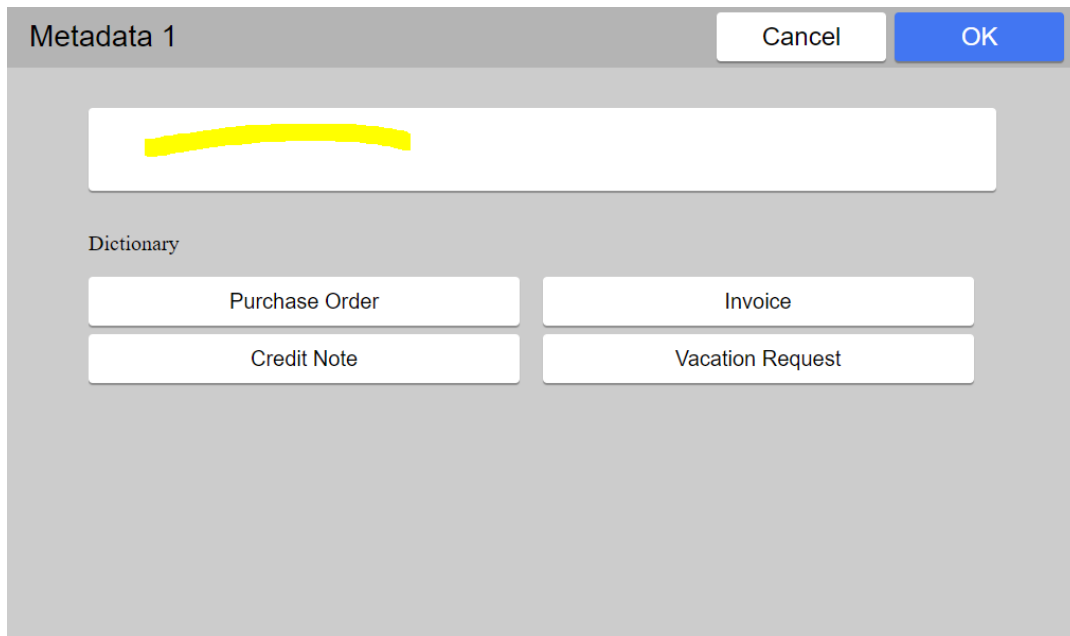
Example 1: Metadata fields with default labels

The screenshot shows a web interface for 'Advanced Scan to ... Jayasimha Nuggehalli'. The top navigation bar includes a back arrow, the title, a 'Logout' button, and a 'Job log' button. The main area contains five stacked input fields labeled 'Metadata 1' through 'Metadata 5'. To the right, there is a 'Scan Settings' panel with options: 'Auto Colo...' (with a color wheel icon), '1 Sided' (with a '1' icon), 'Readable ...' (with a 'R' icon), and '300 dpi'. Below these settings is a large green circular button labeled 'Start'.

Example 2: Metadata fields with labels configured in User Configuration site (refer to previous section on how to configure Metadata Labels)

The screenshot shows a web interface for 'Advanced Scan to Folder Jayasimha Nuggehalli'. The top navigation bar includes a back arrow, the title, a 'Logout' button, and a 'Job log' button. The main area contains five stacked input fields with custom labels: 'Document Type', 'Vendor', 'Approver', 'Metadata 4', and 'Metadata 5'. To the right, there is a 'Scan Settings' panel with options: 'Auto Colo...' (with a color wheel icon), '1 Sided' (with a '1' icon), 'Readable ...' (with a 'R' icon), and '300 dpi'. Below these settings is a large green circular button labeled 'Start'.

Touch on Metadata 1 filed to select or enter Metadata 1



Metadata 1

Cancel OK

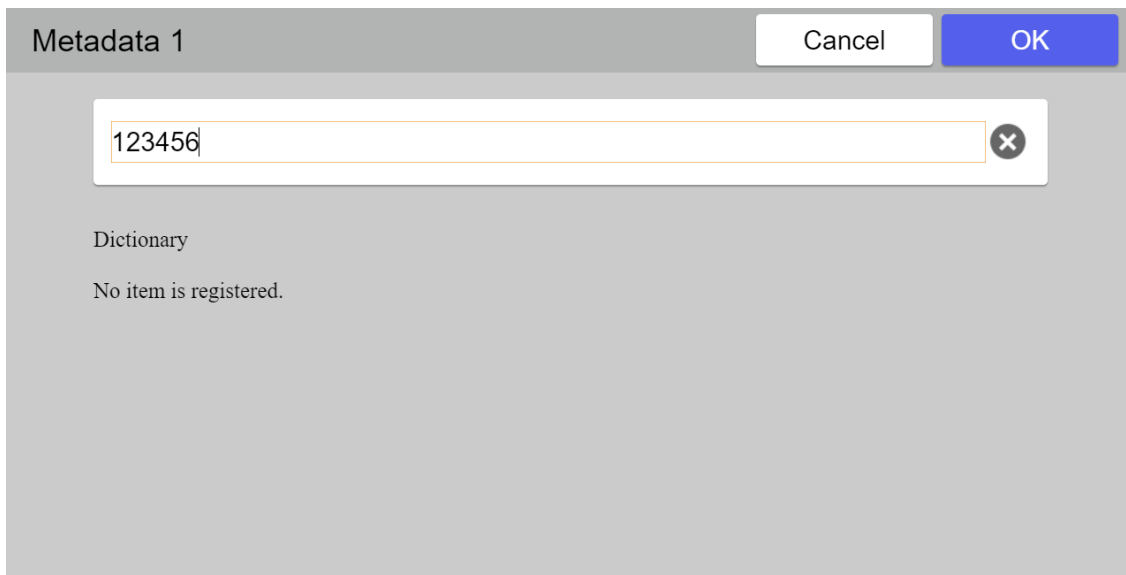
Dictionary

Purchase Order Invoice

Credit Note Vacation Request

There are two ways to enter Metadata

- A. Touch on Metadata field to enter a Metadata Value
- B. Select from Dictionary (In the above screen, there is no item registered in dictionary)



Metadata 1

Cancel OK

123456 X

Dictionary

No item is registered.

When Metadata dictionary is configured, this gets reflected on MFP Operation panel in 'Advanced Scan to Folder' application

Clicking on Document Type field displays Metadata selection screen

Clicking on item in dictionary, that value gets populated in the edit box

Note: Clear the field by pressing on X, before selecting a new value

OCR

The screenshot shows the 'Advanced Scan to ...' interface for user 'Jayasimha Nuggehalli'. It features a 'Logout' button and a 'Job log' button. The main settings area includes fields for 'Metadata 5', 'OCR' (set to 'OFF' and highlighted with a yellow brush), 'OCR Language' (set to 'English'), 'File Name', and 'Time Stamp*'. A 'Scan Settings' panel on the right contains options for 'Auto Colo...', '1 Sided', 'Readable ...', and '300 dpi', along with a 'Start' button.

Touch on OCR to select available options

The screenshot shows the 'OCR' selection dialog. It has a title bar with 'OCR' and buttons for 'Cancel' and 'OK'. The dialog lists five options: 'OFF' (selected with a yellow background), 'PDF', 'PDFA', 'WORD', and 'EXCEL', each with a radio button.

OCR Language

← Advanced Scan to ... Jayasimha Nuggehalli Logout Job log

Metadata 5 ...

OCR * OFF ...

OCR Language * English ...

File Name ...

Time Stamp* ▼

Auto Colo...
1 Sided
Readable ...
300 dpi

Scan Settings

Start

Touch on OCR Language to select available options

OCR Language Cancel OK

☒ English

☐ French

☐ Spanish

☐ Portuguese Brazilian

File Name

If filename field is empty below default filename is created, otherwise user entered filename is created.

Default: Metadata1+date+unique Identifier

The screenshot shows the 'Advanced Scan to ...' interface with the user 'Jayasimha Nuggehalli'. The interface includes a 'Logout' button and a 'Job log' button. The main settings area contains the following fields:

- Metadata 5
- OCR: OFF
- OCR Language: English
- File Name
- Time Stamp*

On the right side, there is a 'Scan Settings' panel with the following options:

- Auto Colo...
- 1 Sided
- Readable ...
- 300 dpi

A large green 'Start' button is located at the bottom right of the interface.

Touch on File Name field to enter filename or select from configured dictionary as shown below.

The 'File Name' dialog box has a 'Cancel' button and an 'OK' button. It contains a text input field for the filename. Below the input field, there is a section titled 'File Name Key Words' with the following options:

- Invoice
- PO
- Bill
- Record

Time Stamp

← Advanced Scan to Folder Jay Nuggehalli Logout Job log

Time Stamp*

Time Stamp * OFF

Vertical Position * Top

Horizontal Position * Left

Stamp Target Pages * All Pages

Auto Colo...
1 Sided
Readable ...
300 dpi

Scan Settings

Start

Remove Blank Page

← Advanced Scan to Folder Dealer Package Logout Job log

Metadata *

OCR * OFF

File Name

Time Stamp*

Remove Blank Page* OFF

Auto Colo...
1 Sided
Readable ...
300 dpi

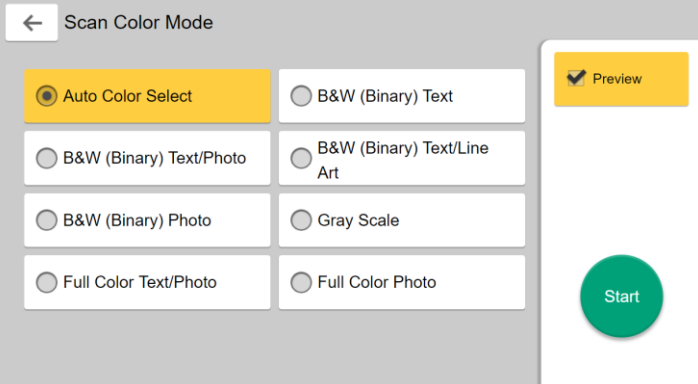
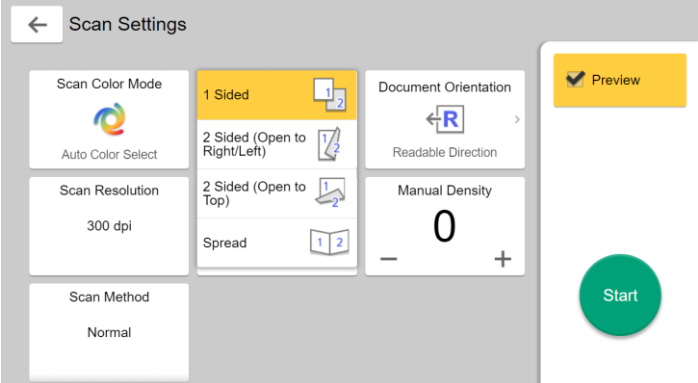
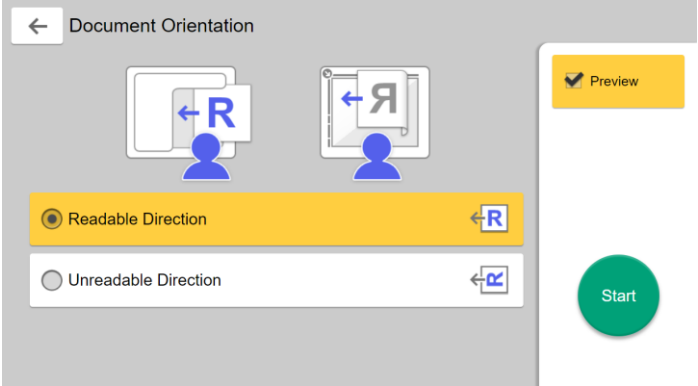
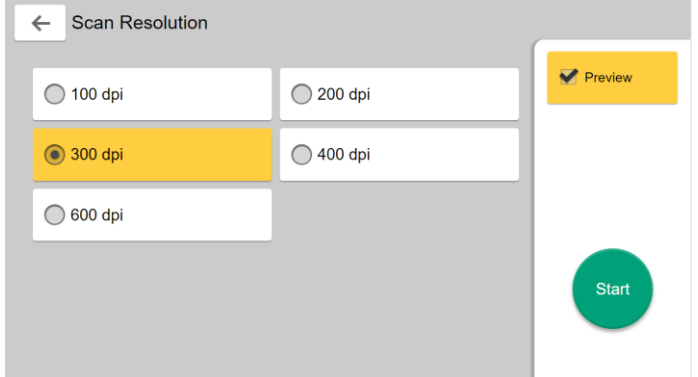
Scan Settings

Start

Scan Settings

Touch on 'Scan Settings' to display Scan Settings Screen

Checking 'Preview' will enable Scan document Preview on MFP Operation Panel.

Scan Settings	Available Options
Scan Color mode	 <p>← Scan Color Mode</p> <p> <input checked="" type="radio"/> Auto Color Select <input type="radio"/> B&W (Binary) Text </p> <p> <input type="radio"/> B&W (Binary) Text/Photo <input type="radio"/> B&W (Binary) Text/Line Art </p> <p> <input type="radio"/> B&W (Binary) Photo <input type="radio"/> Gray Scale </p> <p> <input type="radio"/> Full Color Text/Photo <input type="radio"/> Full Color Photo </p> <p>Preview</p> <p>Start</p>
Original Sides	 <p>← Scan Settings</p> <p> Scan Color Mode: Auto Color Select </p> <p> Scan Resolution: 300 dpi </p> <p> Scan Method: Normal </p> <p> 1 Sided 2 Sided (Open to Right/Left) 2 Sided (Open to Top) Spread </p> <p> Document Orientation: Readable Direction </p> <p> Manual Density: 0 </p> <p>Preview</p> <p>Start</p>
Document Orientation	 <p>← Document Orientation</p> <p> <input checked="" type="radio"/> Readable Direction <input type="radio"/> Unreadable Direction </p> <p>Preview</p> <p>Start</p>
Scan Resolution	 <p>← Scan Resolution</p> <p> <input type="radio"/> 100 dpi <input type="radio"/> 200 dpi <input checked="" type="radio"/> 300 dpi <input type="radio"/> 400 dpi <input type="radio"/> 600 dpi </p> <p>Preview</p> <p>Start</p>

Document size	<div><div>← Document Size</div><div><div><input checked="" type="radio"/> Auto</div><div><input type="radio"/> Mixed</div></div><div><div><input type="radio"/> A3 (Horizontal)</div><div><input type="radio"/> JIS B4 (Horizontal)</div></div><div><div><input type="radio"/> A4</div><div><input type="radio"/> A4 (Horizontal)</div></div><div><div><input type="radio"/> JIS B5</div><div><input type="radio"/> JIS B5 (Horizontal)</div></div><div><div><input type="radio"/> A5</div><div><input type="radio"/> A5 (Horizontal)</div></div></div> <div><div>✓ Preview</div><div>Start</div></div>
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6 SharePoint Advanced Scan to Folder

Note: Box, Dropbox, Google Drive, OneDrive for Business services, have a root folder. So, if user does not select folder, document gets scanned to root folder or default folder set in User Site. In the case of SharePoint, it is necessary to Select a Site and Library/Folder under the site, by browsing.

← Advanced Scan to Folder Jay Nuggehalli Logout Job log

* Mandatory field.

Date 11/09/2018 ...

Folder * (Unnamed folder) ...

Metadata 1 * ...

Metadata 2 ...

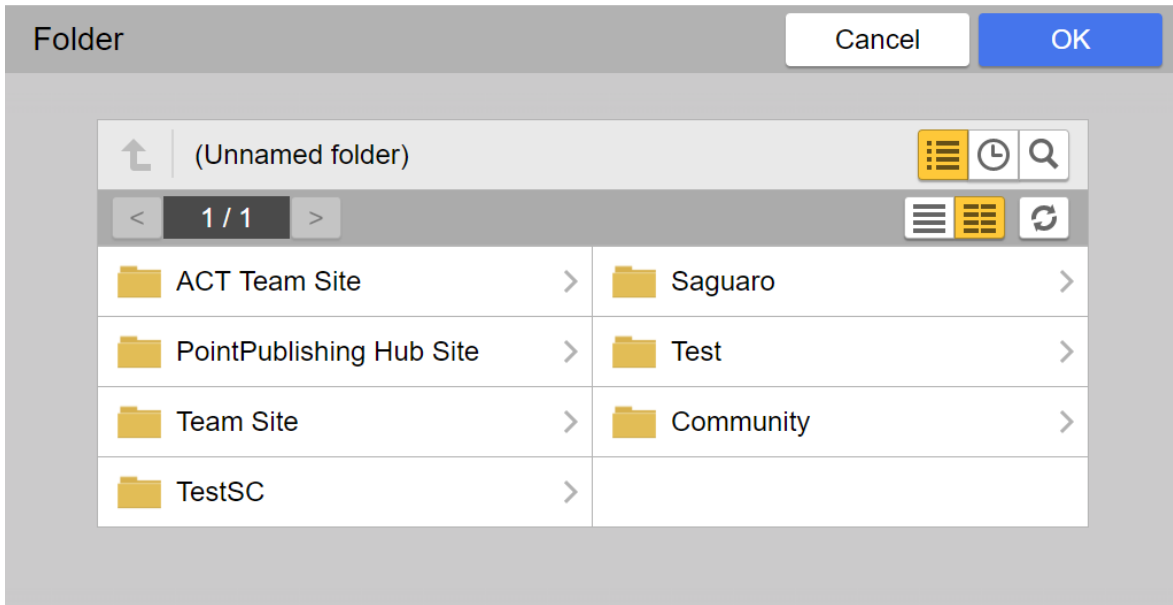
Metadata 3 ...

Auto Colo...
1 Sided
Readable ...
300 dpi

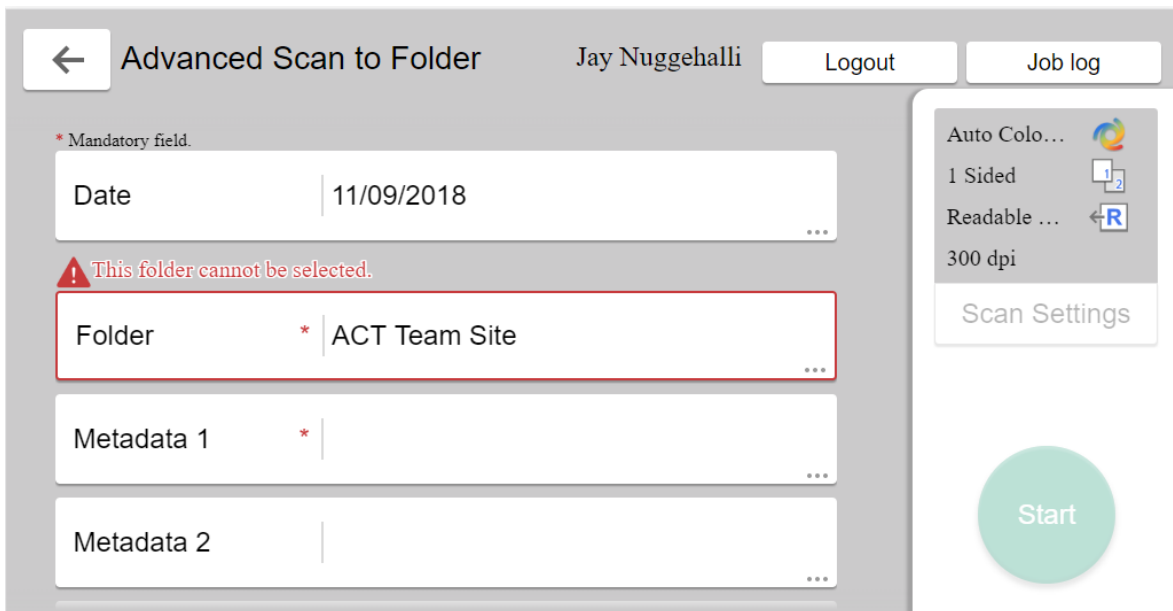
Scan Settings

Start

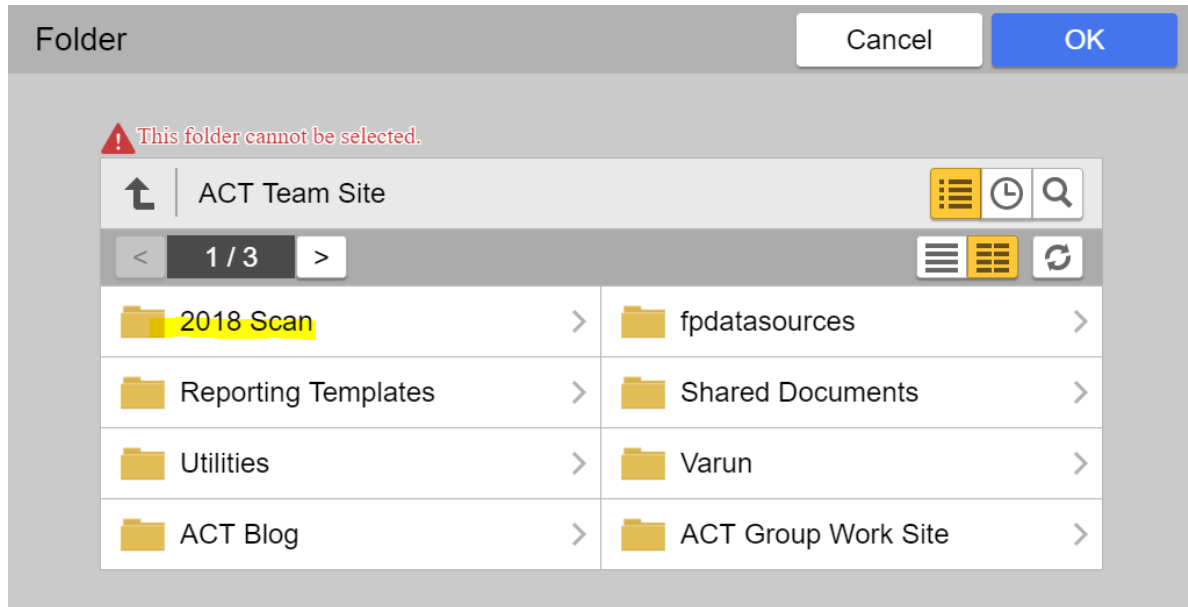
Touch on '(unnamed Folder)



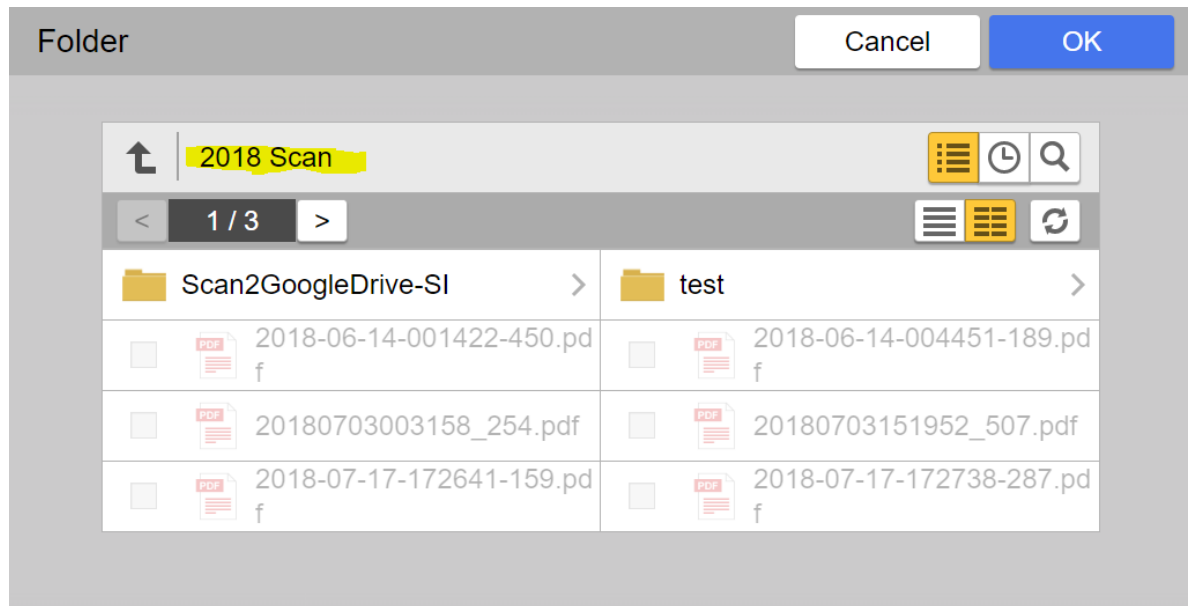
The first level listed here are sites. Document cannot be uploaded to Site; users need to select a Library/folder under a site. If users select a site, following message is displayed.



Please select a Folder listed under a site.



Touch on one of the folders, then Touch on 'OK'



7 RICOH Content Manager Advanced Scan to Folder

Note:

1. Box, Dropbox, Google Drive, OneDrive for Business services, have a root folder. So, if user does not select folder, document gets scanned to root folder or default folder set in User Site. In the case of Ricoh Content Manager, it is necessary to Select a Cabinet first by browsing.
2. RICOH Content Manager Supports Indexing feature, User can select a Document Type and also set index values, based on what is configured in RICOH Content Manager

← Advanced Scan to Folder Jay Nuggehalli Logout Job log

* Mandatory field.

Date 11/09/2018 ...

Folder * (Unnamed folder) ...

Metadata 1 * ...

Metadata 2 ...

Metadata 3 ...

Auto Colo...
1 Sided
Readable ...
300 dpi

Scan Settings

Start

Touch on '(unnamed Folder)

Folder Cancel OK

↑ (Unnamed folder) [Icons]

< 1 / 1 > [Icons]

Cab2018Test >	Jay's Cabinet >
My Cabinet jay >	Test >
Test No permission >	Test Shared Cabinet >

The first level listed here are Cabinets. Users need to select Cabinet or a folder under Cabinet. Please touch on 'Cabinet' then touch on 'OK'.

←

Advanced Scan to Folder

Jay Nuggehalli

Logout

Job log

* Mandatory field.

Date

11/09/2018

...

Folder

* Cab2018Test

...

Metadata 1

*

...

Metadata 2

...

Metadata 3

...

Auto Colo...

1 Sided

Readable ...

300 dpi

Scan Settings

Start

RICOH Content Manager Indexing

Document Type and Indexing settings are available in RICOH Content Manager. Administrator of RCM will configure Document Types and associated indexing values.

Advanced Scan to Folder displays available Document Type and associated indexing values. Users can select Document Type and indexing values before scanning.

Touch on 'Document Type' this will display available Document Types

Select desired 'Document Type'

← Advanced Scan to Folder Jay Nuggehalli Logout Job log

OCR * OFF

File Name

Document Type * engineering documents

Indexing

Auto Colo... 1 Sided Readable ... 300 dpi

Scan Settings

Start

Touch on 'indexing' this will display indexing values related to selected 'Document Type'

Indexing OK

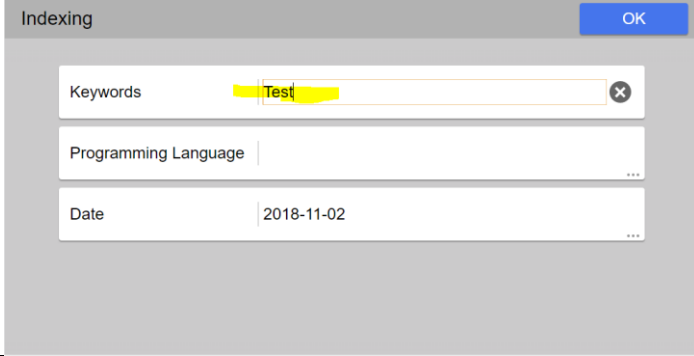
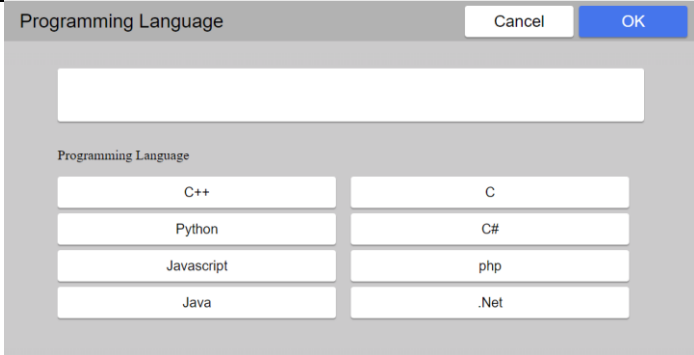
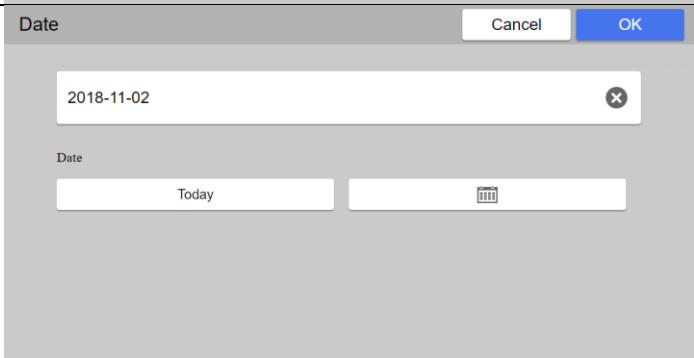
Keywords

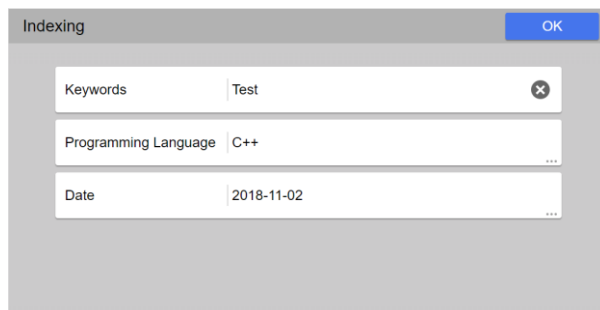
Programming Language

Date 2018-11-02

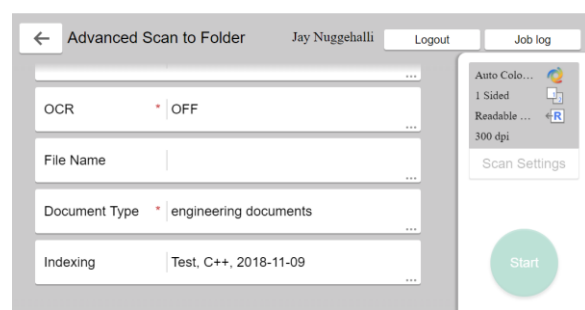
Depending on the type of values, different user input interface will be displayed.

Details of indexing values are shown below.

Keywords Type: Textbox	 <p>The Indexing dialog box has a title bar with 'Indexing' and an 'OK' button. It contains three input fields: 'Keywords' with the value 'Test', 'Programming Language' which is empty, and 'Date' with the value '2018-11-02'. Each field has a small 'x' icon on the right.</p>	
Programming Language Type: List	 <p>The Programming Language dialog box has a title bar with 'Programming Language', 'Cancel', and 'OK' buttons. It features a large empty text box at the top. Below it, under the label 'Programming Language', there is a grid of buttons for selecting a language: C++, C, Python, C#, Javascript, php, Java, and .Net.</p>	
Date Type: Date	 <p>The Date dialog box has a title bar with 'Date', 'Cancel', and 'OK' buttons. It contains a date input field with the value '2018-11-02' and a small 'x' icon. Below this, under the label 'Date', there are two buttons: 'Today' and a calendar icon.</p>	



The Indexing dialog box shows the following values: Keywords: Test, Programming Language: C++, Date: 2018-11-02. Each field has a small 'x' icon on the right.



The Advanced Scan to Folder dialog box shows the following settings: OCR: OFF, File Name: (empty), Document Type: engineering documents, Indexing: Test, C++, 2018-11-09. On the right side, there is a 'Scan Settings' section with 'Auto Color' (checked), '1 Sided', 'Readable' (checked), and '300 dpi'. A large green 'Start' button is at the bottom right.

8 Limitations

Advanced Scan to Folder Limitations

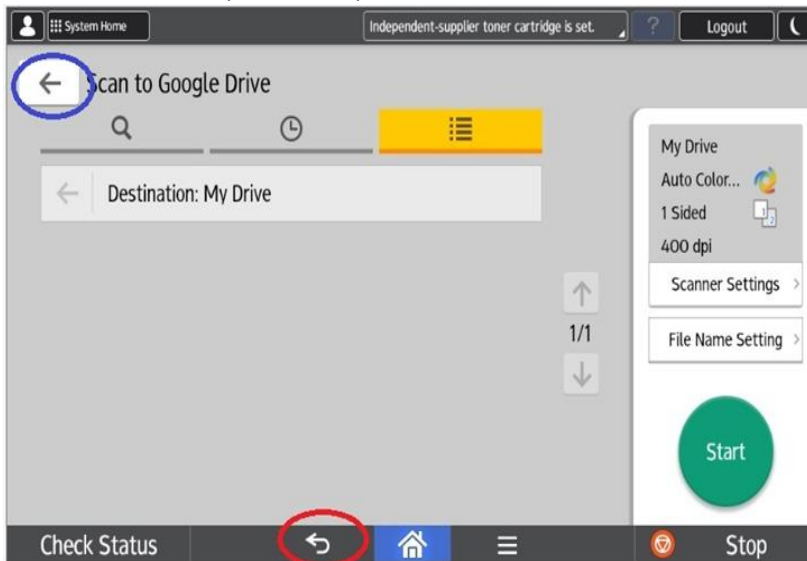
- Following characters are not supported for folder creation. Using these characters in Metadata fields is prohibited, since metadata fields are used to create folders.
~"#%&*:;<>?/\{|}
- Folder Name length and File Name length depends on each cloud service.
- When Remove Blank Page is enabled, Maximum Scan file size is limited to 50MB

User Site Limitations

- Supported Browsers for User Site are:
 - Internet Explorer: 11 or later
 - Edge: Latest Version
 - Chrome: Latest Version
 - Firefox: Latest Version
- Limitations for Home Screen/Applications
 - Home: Maximum 20 for each profile, Max 32 characters for the name.
 - Applications: Maximum 18 for each home screen, Max 32 characters for the name
- User Management
 - Email address is unique in the system; same Email address cannot be used even if user belongs to different Tenants
 - Users belong to same tenant cannot set different time zones
 - User cannot change their login Email address, need admins assistance to change email address

General Limitations

- Once Administrator has logged in to a Tenant on MFP, administrator from another tenant cannot login to same MFP. Refer to guide on 'How to remove registered device'
- Back button inside application display screen must be used, instead for 'Back' button on the operation panel.



- Folder and File Search results varies from Cloud Service to Cloud Service, this depends on the Search API for each service.

OCR Limitations

Category	Phenomenon	Description
Upside-down image rotation	Sometimes misrecognized	We identify the top and bottom from the image as pre-processing of OCR. We use information such as the direction of arrangement of letters, letter / picture / chart layout, ruled line position, etc. to infer which is upper. In the case of the following manuscripts, the OCR may also fail because the top / bottom discrimination fails. <ul style="list-style-type: none"> · Manuscript with only few letters · Manuscript with characters written diagonally · Documents with a dark background / background such as photos
OCR	Unusual fonts cannot be recognized	In OCR, it is based on standardly used fonts such as Arial / Verdana / Times New Roman for foreign languages, MS Ming Dynasty / MS Gothic / MS UI Gothic for Japanese. Therefore, recognition may fail in the following cases. <ul style="list-style-type: none"> · Using a special font · Using extremely large / small font size
	Input image is not clear	Although 200 dpi to 600 dpi is recommended for engine specifications, if the recognition rate is bad at 200 dpi, please raise the resolution and scan again. Also, if the input images are blurred or are not enough contrast, the recognition rate will not improve. Please use clear images.
PDF output	Output size is different	Due to the limitation of the current engine, the size of the output PDF page may

		increase by about 0.3 to 1.7 mm.
	Sometimes impossible to print with EXP machine	When you print PDF with Japanese OCR by EXP machine, if alternative font is not installed in MFP, it may not be printed correctly.
Word output	Layout collapse	The OCR engine writes the character string of the recognition result as Word text and uses the font size / font type / line spacing / text width etc. to try to make it as close to the original as possible, but it is difficult to match with the original perfectly. Therefore, the following phenomena may occur. <ul style="list-style-type: none"> Although the manuscript was 2 pages, it became 3 pages / 1 page Margins increase or decrease
	The number of blank pages increases	If you input multiple pages and try to output them in Word, blank pages sometimes increase.
	Sometimes the footer's page number is incorrect	When outputting a document with a page number in the footer section as an input, Word automatically counts the page count and may be out of alignment with the page number of the document. Example: Manuscript: 2 pages of 3/8, 4/8 Word output result: 2 pages of 1/2, 2/2 (Since there are only 2 pages, Word automatically judges 2 pages, 8 replaces 2 and redoes the page)
	Doc format, that is created by OCR, cannot be displayed in iOS UIWebView	It is said that iOS does not officially support doc / xls etc., it may not be displayed normally on iOS machines. This is because the OCR function creates data in RTF format and then outputs it to

		doc format. Please use docx / xlsx.
	Sometimes blank page is removed	In decision of the current OCR engine, blank page is sometimes removed. So, for example, 4 pages sometimes become 3 pages.
	Cell color/ Frame border are lost	For Word output, the color of the cell or the frame border of the table are lost during the transfer.
Excel output	Color / figure / photo are lost	For Excel output, the color of characters is not reflected. Also, figures and photographs are not reflected. With regard to the part recognized as table, OCR engine uses the cell ruled line / cell combination to create table.

9 Appendix

File Name Formula

Formula functions are similar to Microsoft Excel Formulas. Not all Excel functions are relevant and supported.

Following variables from the workflow application are available to use in the formula

1. TenantId [Smart Integration Tenant ID]
2. UserId [Smart Integration User ID]
3. Metadata1 [From UI as shown below]
4. Metadata2 [From UI as shown below]
5. Metadata3 [From UI as shown below]
6. Metadata4 [From UI as shown below]
7. Metadata5 [From UI as shown below]

The screenshot displays the 'Advanced Scan to Folder' application. At the top, there's a navigation bar with a back arrow, the title 'Advanced Scan to Folder', the user name 'Jay Nuggahalli', and buttons for 'Logout' and 'Job log'. Below the navigation bar, there are five input fields labeled 'Metadata 1' through 'Metadata 5'. Each field has a red asterisk and a yellowed-out text area. To the right of the input fields is a 'Scan Settings' panel with options like 'Auto Colo...', '1 Sided', 'Readable ...', and '300 dpi'. At the bottom right, there is a large green circular button labeled 'Start'.

Sample Formulas

Formula	Result
YEAR(NOW()) & "-" & MONTH(NOW()) & "-" & DAY(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())	2018-12-21-102657
YEAR(NOW()) & "-INVOICE"	2018-INVOICE

_ [UserId] & "-" & YEAR(NOW()) & "-" & MONTH(NOW()) & "-" & DAY(NOW())	TOM-2018-12-21
_ [Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())	DOC-142019-192311

Formula Functions

Formula Evaluation is based on Open Source, Apache POI

Note: Please see link below. All formulas listed may not be relevant to workflow application. Here is list of formulas.

<http://poi.apache.org/components/spreadsheet/eval-devguide.html>

10 Time Stamp Settings

Time format (string)

Specify the time format to stamp.

The stamped time stamps the server time, and the correctness of the time is not guaranteed.

Only y, M, d, H, m, s, z, (half-width space), / (slash),: (colon),, (comma), and. (Period) are valid characters.

y, M, d, H, m, s, and z are character patterns representing time. (* 1)

Maximum value: 128 characters

Minimum value: 0 characters

- Default value: yy / MM / dd H: mm

* 1: The relationship between characters and output is shown in the table below.

y	Year	y	2015	Input of more than 5 digits is 0 padded
		yy	15	
		yyy	2015	
		yyyy	2015	
		yyyyyy	02015	
M	Month	M	9	Even if 3 or more digits are entered, 0 is not padded
		MM	09	
		MMM	9	
d	Day	d	Five	Two or more digits are padded with zeros
		dd	05	
		ddd	005	
H	Time	H	15	

		HH	15	Two or more digits are padded with zeros
		HHH	015	
m	Min	m	8	Two or more digits are padded with zeros
		mm	08	
		mmm	008	
s	Second	s	Five	Two or more digits are padded with zeros
		ss	05	
		sss	005	
z	Time zone	z	Etc / UTC	Does not display if more than 4 digits are entered
		zz	Etc / UTC	
		zzz	Etc / UTC	
		zzzz	(no display)	

Font size (points) (number)

Specify the font size of the characters to be stamped (unit is point).

Valid only for positive half-width integers.

Maximum value: 500

Minimum value: 6

- Default value: 10

Vertical position (string)

Specify the vertical position of the stamp.

The following positions can be specified.

- Top
- Middle
- Bottom

Uppercase / lowercase letters are distinguished.

Default value: Top

Horizontal position (string)

Specify the horizontal position of the stamp.
The following positions can be specified.

- Left
- Center
- Right

Uppercase / lowercase letters are distinguished.

Default value: Left

Vertical margin (number)

Specify the margin of the vertical position of the stamp.

Only positive half-width numbers are valid. You can also enter a decimal point.

The value that can be specified varies depending on the value of position Unit.

Maximum value: 600 (when position Unit = "mm"), 25 (when position Unit = "inch") Minimum value: 0

- Default value: 0

Horizontal margin (number)

Specify the margin of the position next to the stamp.

Only positive half-width numbers are valid. You can also enter a decimal point.

The value that can be specified varies depending on the value of position Unit.

Maximum value: 600 (when position Unit = "mm"), 25 (when position Unit = "inch") Minimum value: 0

- Default value: 0