RICOH

Auto Route Scan

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1 Preface

This guide provides the details on how to use the Auto Route Scan workflow

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 do service connection with external cloud Services like Box, Dropbox, Google Drive, OneDrive for Business, SharePoint Online, RICOH Content Manager.

3. **Configuring Default Values**

   This section contains step-by-step instructions on how to configure default settings related to Auto Route Scan application in User Site

4. **Operation of Auto Route Scan Application**

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

5. **Document Classification Training in Automated Data Capture(CPE)**

   This section describes step-by-step procedure to train Automated Data Capture (CPE) with various document types

6. **Limitations**

   Product Limitations

7. **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 Auto Route Scan workflow?

Auto Route Scan is a workflow application developed on Ricoh Smart Integration Platform.

A typical use case for this workflow is displayed here:

This use case is related to trucking company, but this is applicable to other industries as well. User scans different types of documents using this workflow. Documents are processed through Automated Data Capture (CPE) Classification engine. Documents are automatically matched based on previous training data in to respective category. Documents are stored in to a folder based on the result of Classification engine. To increase the accuracy of the classification, Automated Data Capture (CPE), classification engine needs to be trained with various type of documents used by the company.

.
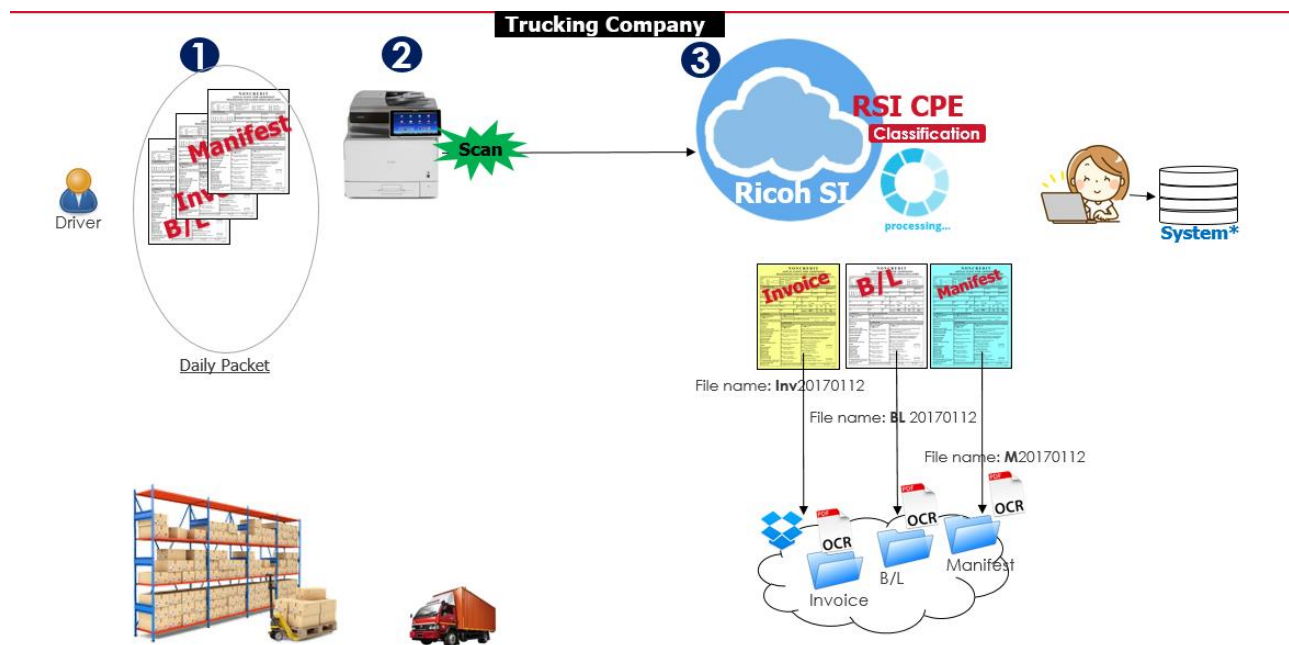
Workflow Specification

OCR	Off, PDF, PDFA, WORD, EXCEL
	Default: Off

Default values can be configured for OCR and Scan Settings.

3 Cloud Service Coordination

What is Cloud Service Coordination?

Before using Auto Route Scan, 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
5. SharePoint online
6. RICOH Content Manager

For each Cloud Service there is a separate Auto Route Scan application available On MFP Operation Panel.

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

4 Configuring default Values

Smart Integration User Configuration Site URL

https://www.na.smart-integration.ricoh.com/site/home

Configuring Default Values for Auto Route Scan

To configure Auto Route Scan, it is necessary to login to user site using **user** credentials.
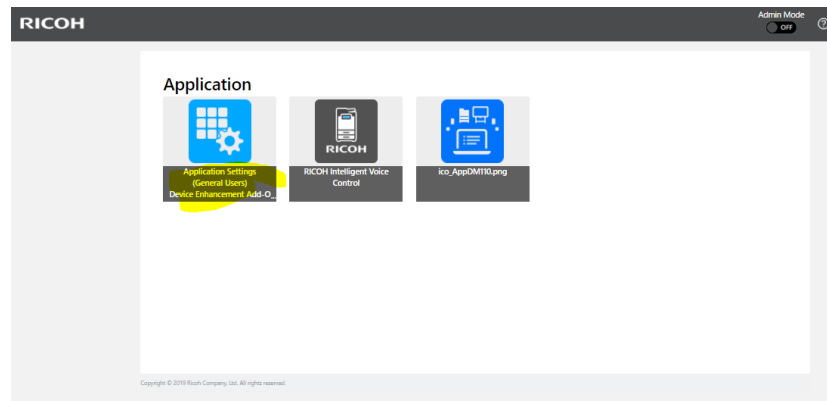
Click on 'Application settings (General User)'
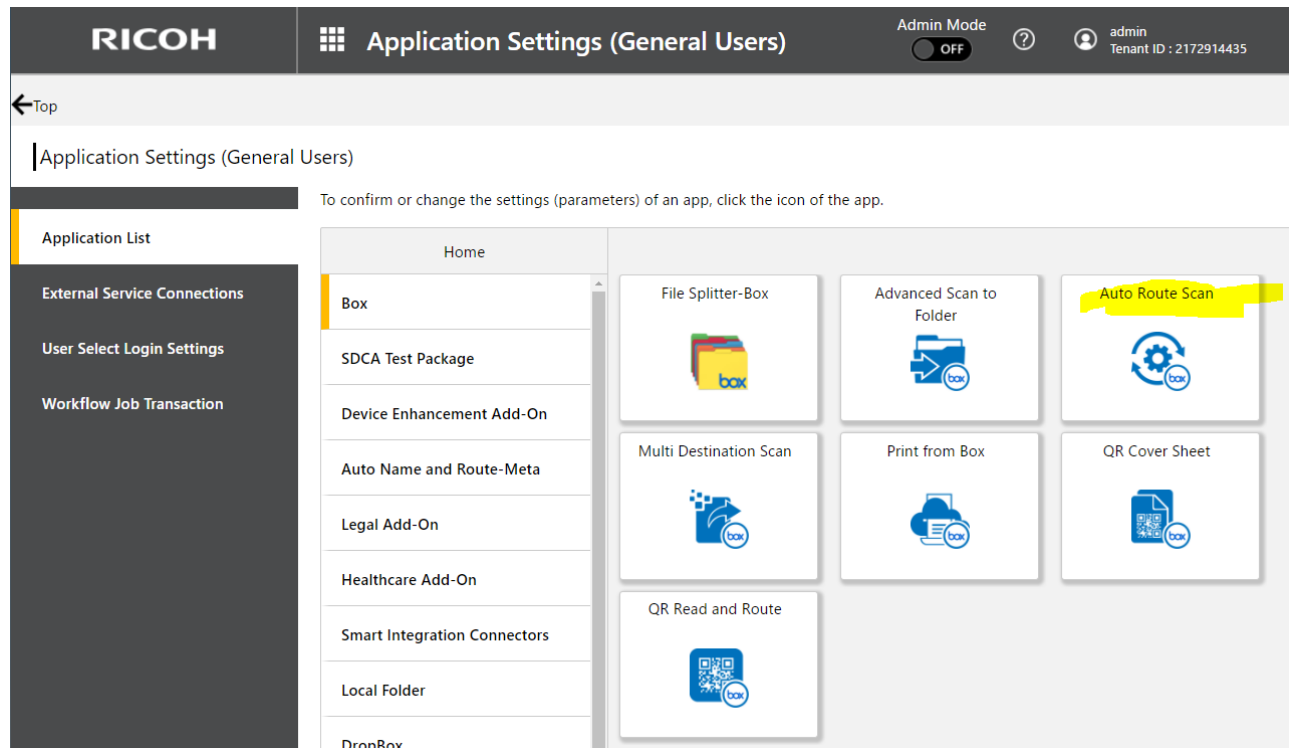
Click on 'Auto Route Scan'. This will display a page where all necessary parameters can be configured.

Application Settings (General Users)

Admin Mode
OFF

← Application List

Auto Route Scan

Cancel Save

* Mandatory field

External Service Settings: 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

OCR	OFF

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

Settings available for Auto Route Scan

OCR

|Default Parameter Settings

OCR   [OFF   ∨]

OCR: PDF, PDFA, WORD, EXCEL

Folder

Root folder can be configured. This setting is only available in User Site.

* Mandatory field

|External Service Settings: Box

Folder *   (Select Folder) All Files

Open External Service Connections ⧉

Clicking on select Folder will open Folder Browsing dialog. Click on desired root folder and click on 'OK' button.

ⓘ Select Folder

📂 All Files

⬆To Upper Folder   ⟳Reload

[   ] 🔍 (Clear Search)

📁 $SI

📁 01162019

📁 123

📁 17MTP

📁 1H2011_Output

📁 1H2012_Output

|◀ ◀ 1 / 3 ▶ ▶|

(Cancel)   OK
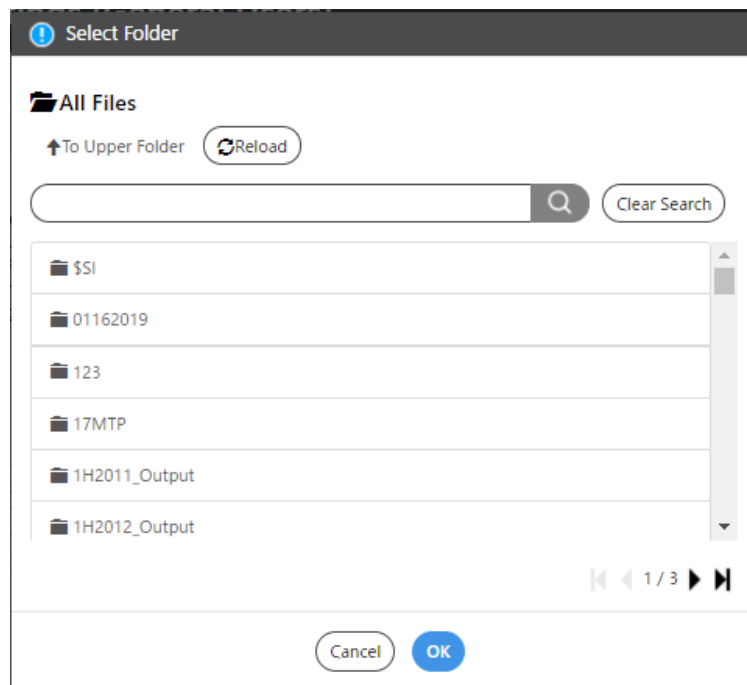
Scan Settings

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 Auto Route Scan Application
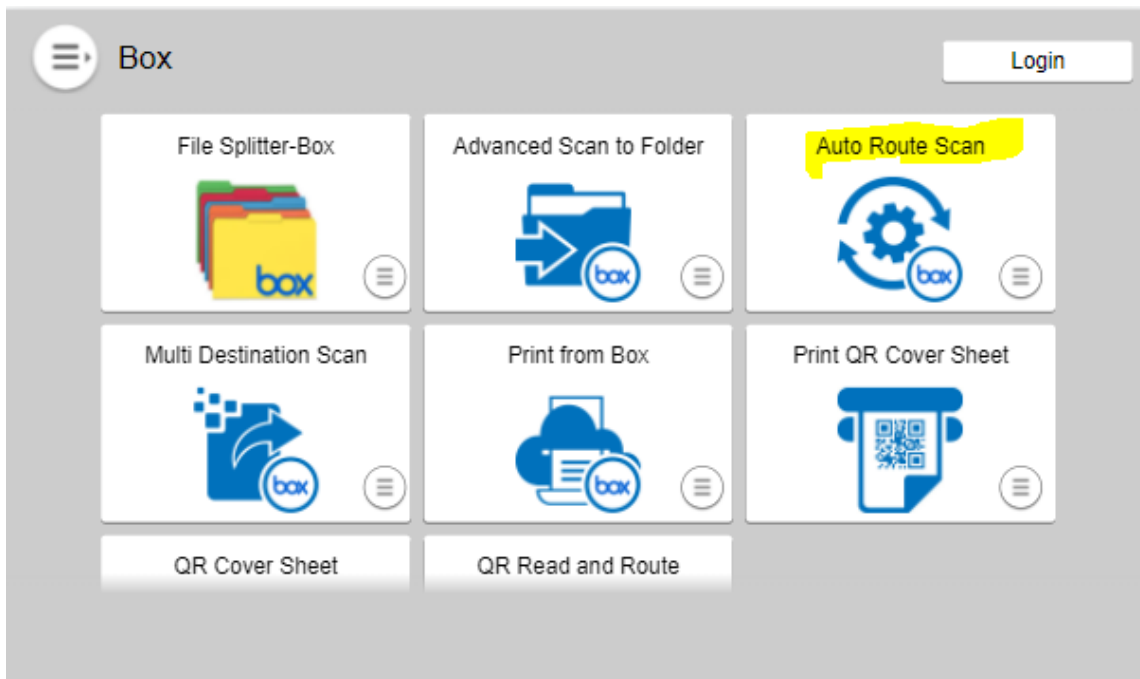
Select 'Auto Route Scan' application.

Users need to Login to the application. Press 'Login' Button to Login after entering credentials.

Note: RSI supports multiple login Methods. Default login method can be configured in RSI portal (Workplace).
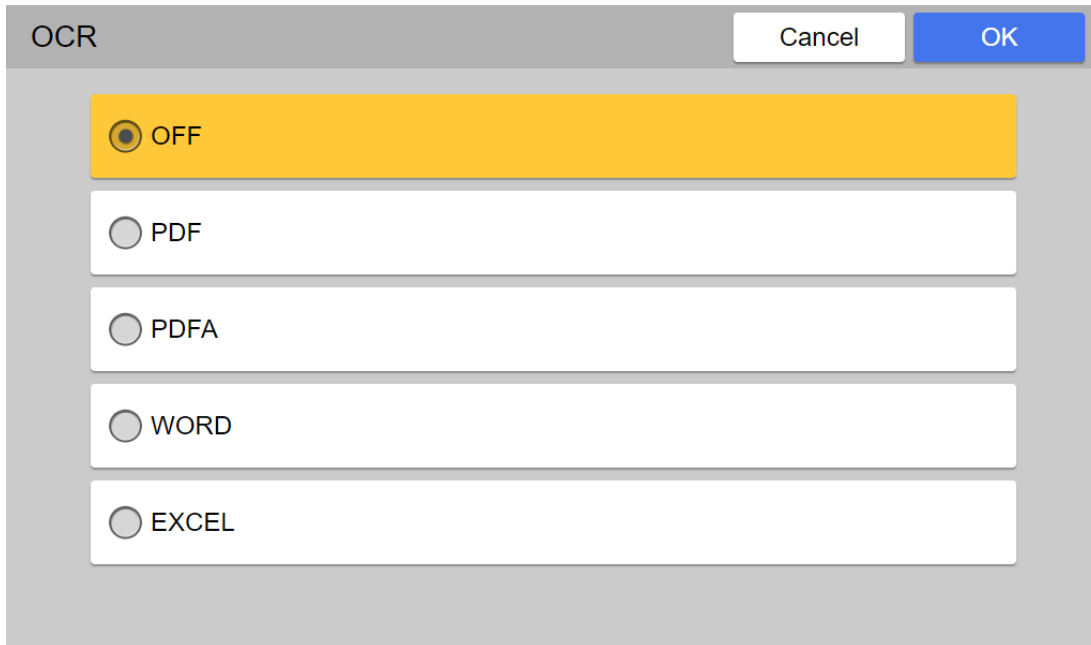
After successful user login 'Auto Route Scan' Application Screen is displayed
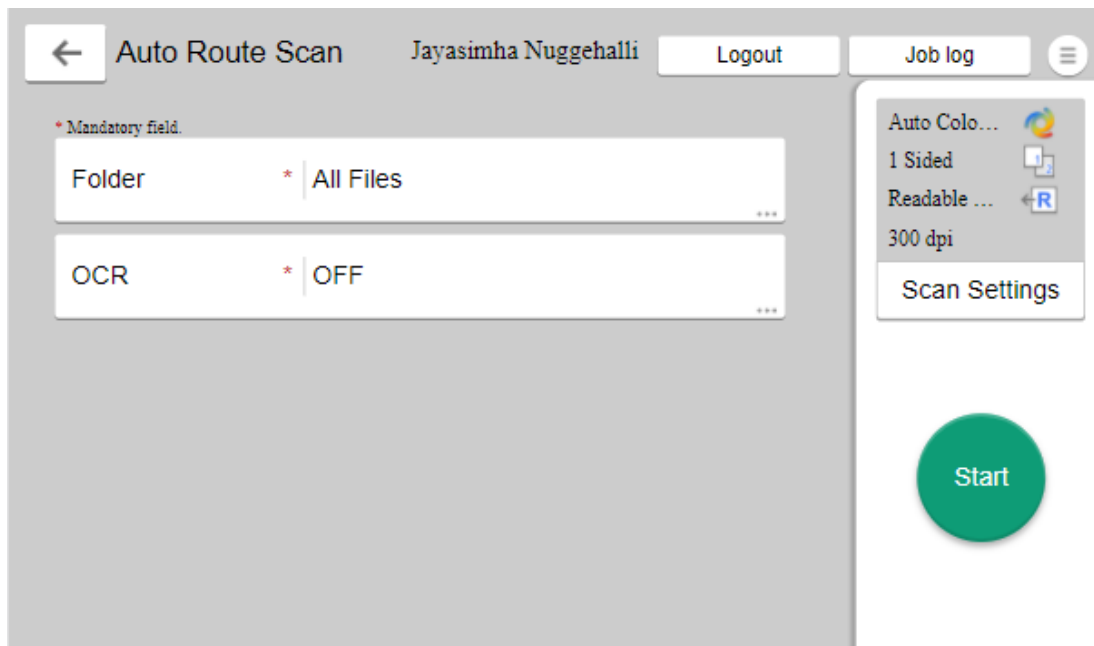
Touching on Folder, opens up Folder Browsing screen to select Folder. Select desired folder
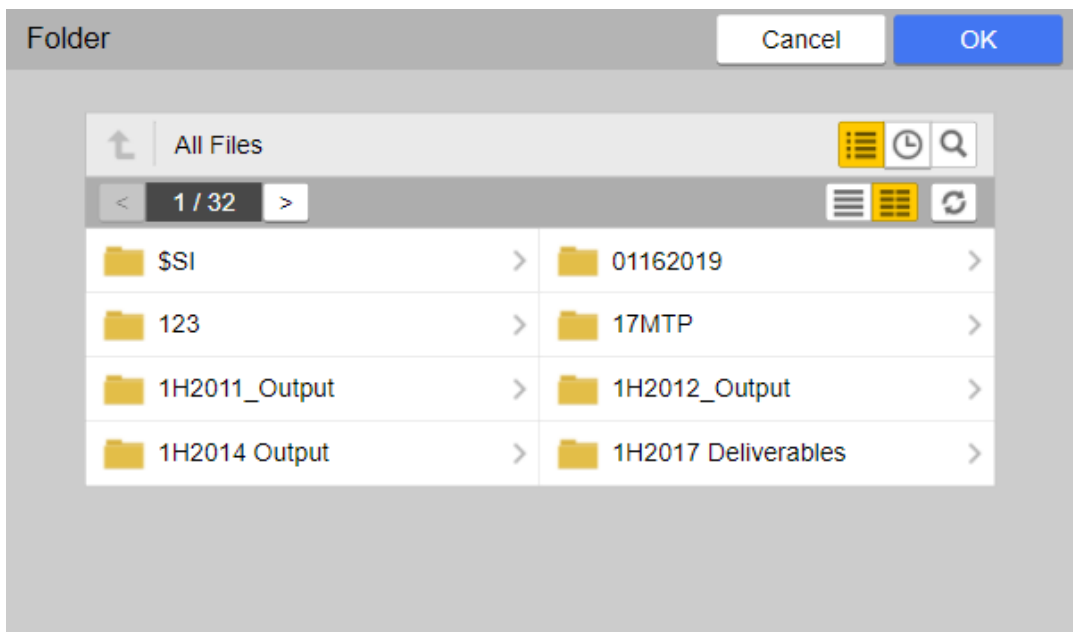
Touching on OCR, selection field displays available OCR Options

OCR	Cancel	OK

- ⦿ OFF
- ○ PDF
- ○ PDFA
- ○ WORD
- ○ EXCEL

Select the desired OCR option.

Scan Settings

Touch on 'Scan Settings' to display Scan Settings Screen

Scan Settings	Available Options
Scan Color mode	
Original Sides	
Document Orientation	
Scan Resolution	

Version 1.3

Document size	
Manual Density	Range -3 to +3
Scan Method	

6 Document Classification Training in CPE

Login to CPE account using you CPE Credentials

URL: https://cpe.ricoh-usa.com

Login with your credentials

Click on 'Classification' Menu and select 'Train Categories'

Note: 'Train Categories' feature is available only for Administrator.

Select 'Use Default categories' to choose the Trained Categories out of the box. Or start creating custom Categories based on your business needs

 Clicking on this will add new category.

Training Classification Model

Expand the categories to add new document to the category. Click on Upload ICON to upload new document to desired category.

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imagine. change.

DASHBOARD   CONTENT PARSING ▾   CLASSIFICATION ▾   SETTINGS ▾   ABOUT

Training Classification Model

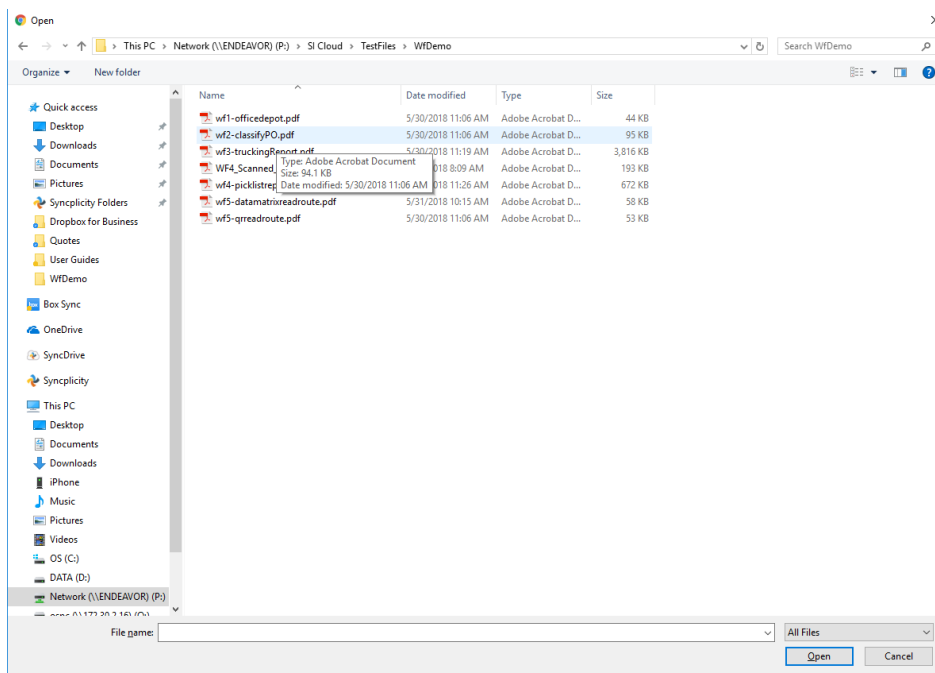### Your Organization

○ Use default categories

● Create and use custom categories

∧ 📄 SDCA Invoice
   ✔ 1-Inv.pdf
   ✔ 1-Inv - Copy (2).pdf
   ✔ 1-Inv - Copy.pdf
   ✚ **wf2-classifyPO.pdf**

∨ 📄 SDCA Quotation

∨ 📄 SDCA Manifest

∨ 📄 SDCA Packing List

∨ 📄 1099-MISC Form

∨ 📄 SDCA Bill Of Landing

∨ 📄 SDCA Purchase Order

Preview

wf2-classifyPO.pdf

New World Company
Floor 100, 100 Main Street
G.P.O. Box 100, Globecity Globeland, 1000
Telephone: (01) 9999 9999
Fax : (01) 9999 8888

PURCHASE ORDER

P.O. Number	NW-01-16366
P.O. Date	Feb/28/2001
Resale No.	SR AC 16-943236
GSA Sale	No
Phone	(999) 999-9999
Contact	John Hancock

TO: Acme Parts Corporation
1223 Kelton Street
Globecity, Globeland 1000
(via FAX 999/999-9999)

SHIP TO: The New World Company
2467 Pioneer Road
Globecity, Globeland, 1000
Attn: Shipping/Mary

FOB: Vendor/Globecity Globeland   SHIP VIA: UPS   TERMS: Net 30 days

ITEM	QUANTITY	PART NUMBER	DESCRIPTION	REQUIRED DATE	U/M	UNIT PRICE	PRICE	QUOTE NO.
001	10	F54749	NW Globe Chassis, 1492 Model	28/02/01	EA	29.50	295.00	Q84645
002	15	F85352	NW Globe Light Kit	28/02/01	EA	19.00	285.00	Q84646
003	6	F84352	NW Globe 30" Oak Stand	28/02/01	EA	30.00	180.00	Q84647
004	20	L86355	NW Atlas Leather-Bound	28/02/01	EA	25.00	500.00	Q84648
005	12	L86362	NW Atlas Young Readers Series	28/02/01	EA	10.00	120.00	Q84649
006	40	A86357	NW Pen Rollerball	28/02/01	EA	7.50	300.00	Q84650
007	25	A86362	NW Pen Fountain	28/02/01	EA	16.00	400.00	Q84651
008	50	A86552	NW Globe Beach Balls, 24"	28/02/01	EA	5.00	250.00	Q84652
009	100	A84352	NW Promotional Calendars	28/02/01	EA	0.10	10.00	Q84653
010	100	A36352	NW Promotional Balloons	28/02/01	EA	0.15	15.00	Q84654

1. PURCHASE ORDER NUMBER, PART NUMBER AND QUANTITY MUST SHOW ON EACH CARTON.
2. Two packing sheets must accompany each shipment.
3. Protection of Material in Transit. All articles delivered on this order to be packed adequately to prevent any damage in shipment and storage. Use of newsprint and glassine bags prohibited. All packages to be properly identified.
4. Seller must execute acknowledgment copy hereof and return to buyer. No other form of acceptance is binding on buyer. Buyer expressly limits acceptance to the terms stated herein and any additional or different terms proposed by seller shall not be binding on buyer, whether or not they would materially alter this order, and are rejected.
5. ANY BOX OVER 50 KILOS WILL BE REFUSED.

P.O. ACKNOWLEDGED BY:
NAME: _____

NW-01-16366

SUB-TOTAL	2,355.00
TAX	141.50
TOTAL	**2,496.50**

BUYER: _John Hancock_   DATE: Feb/28/2001

New document is added to the category. Now the system is trained to recognize this document.

7 Limitations

User Site Limitations

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