

## Auto Route Scan



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# 1 Preface

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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).

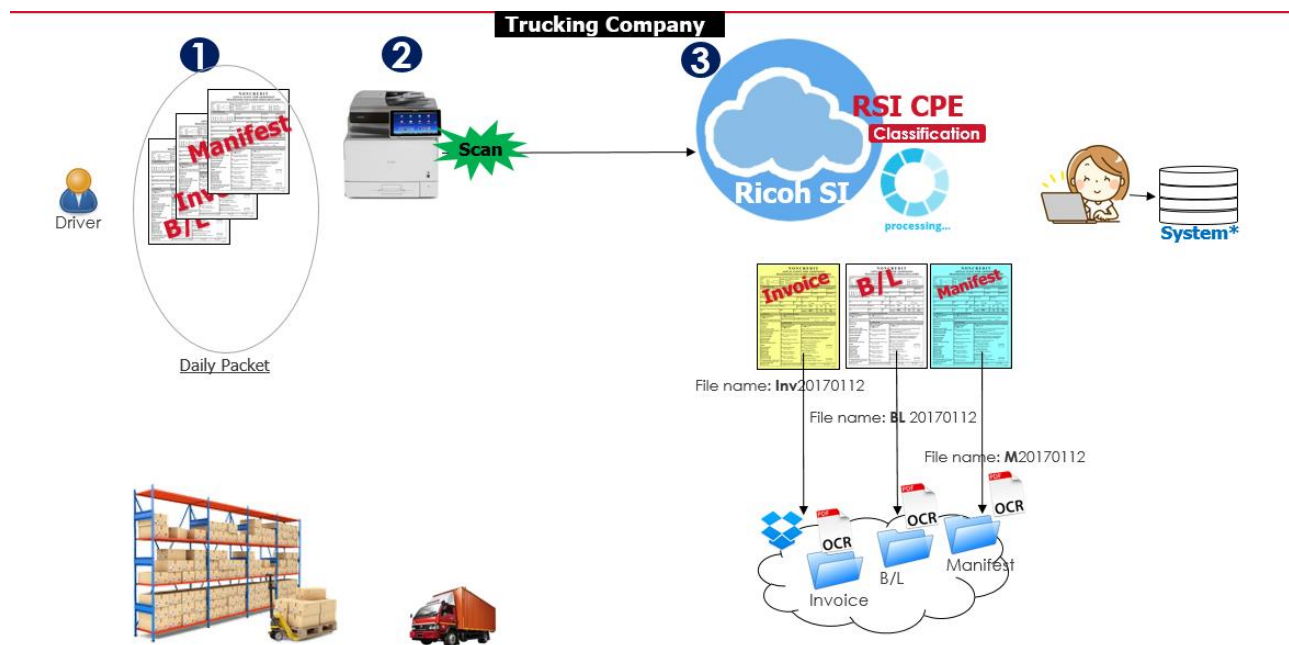
## 2 Introduction

### 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, PDF/A, WORD, EXCEL Default: Off
-----	--

Default values can be configured for OCR and Scan Settings.

### 3 Cloud Service Coordination

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#### 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.**

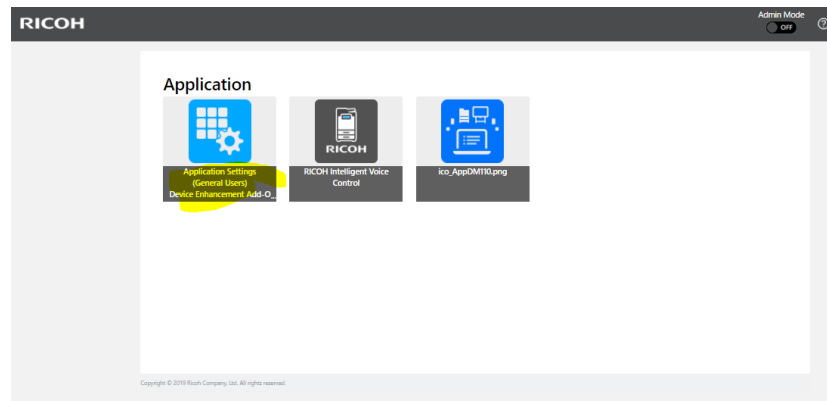
## 4 Configuring default Values

### Smart Integration User Configuration Site URL

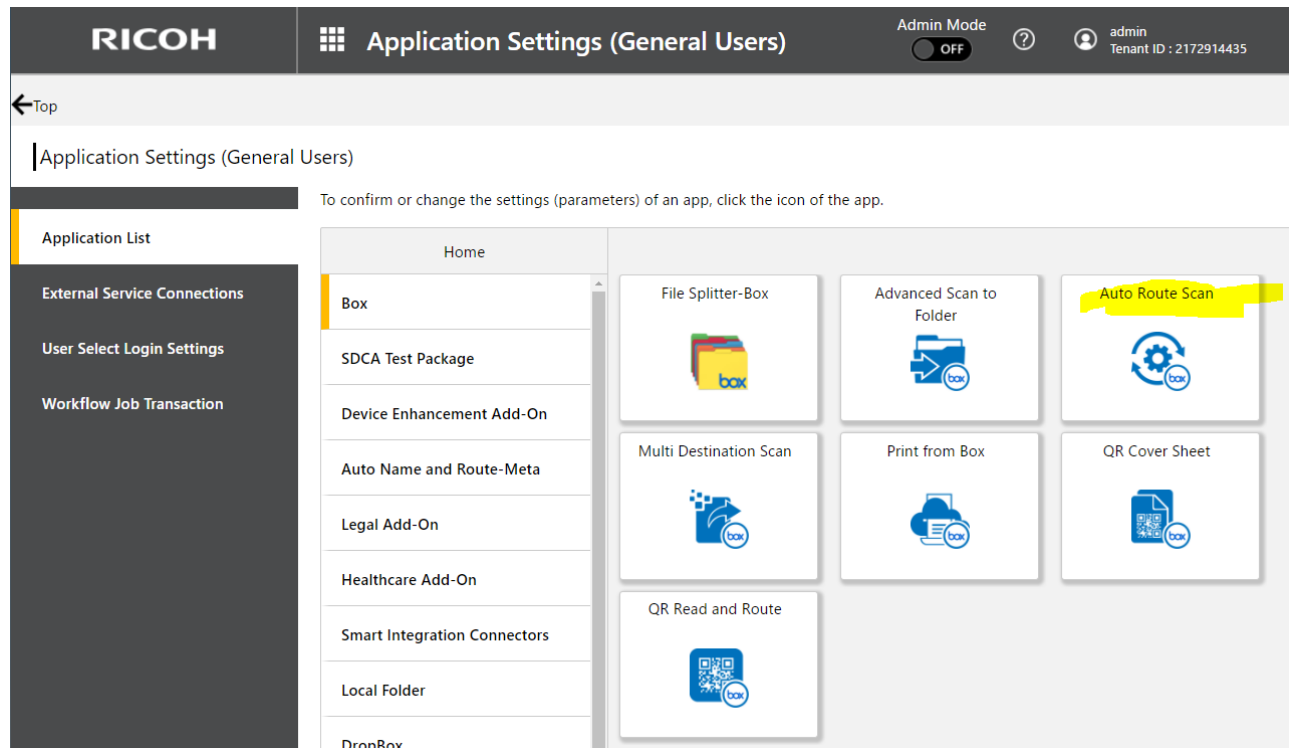
<https://www.na.smart-integration.ricoh.com/site/home>

### 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, PDF/A, WORD, EXCEL

### Folder

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

\* Mandatory field

#### External Service Settings: Box

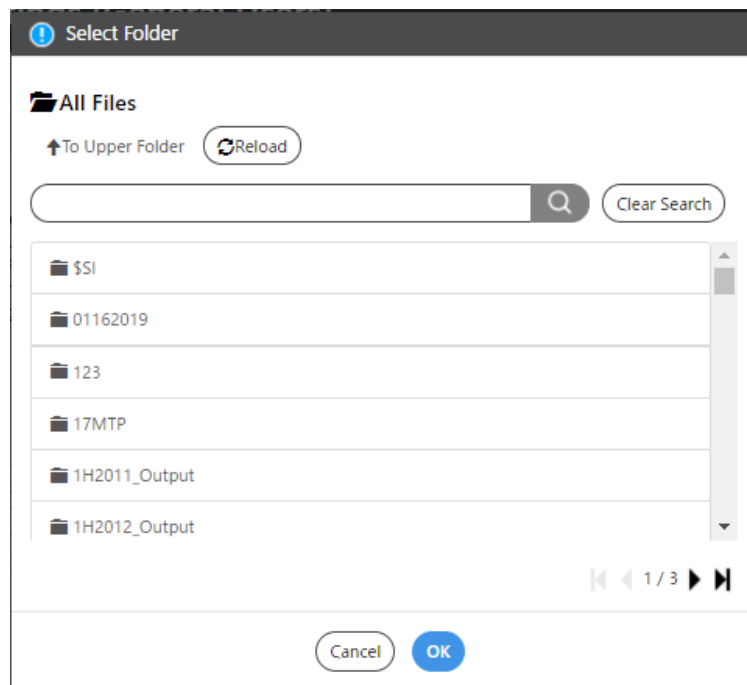
Folder \*

**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.



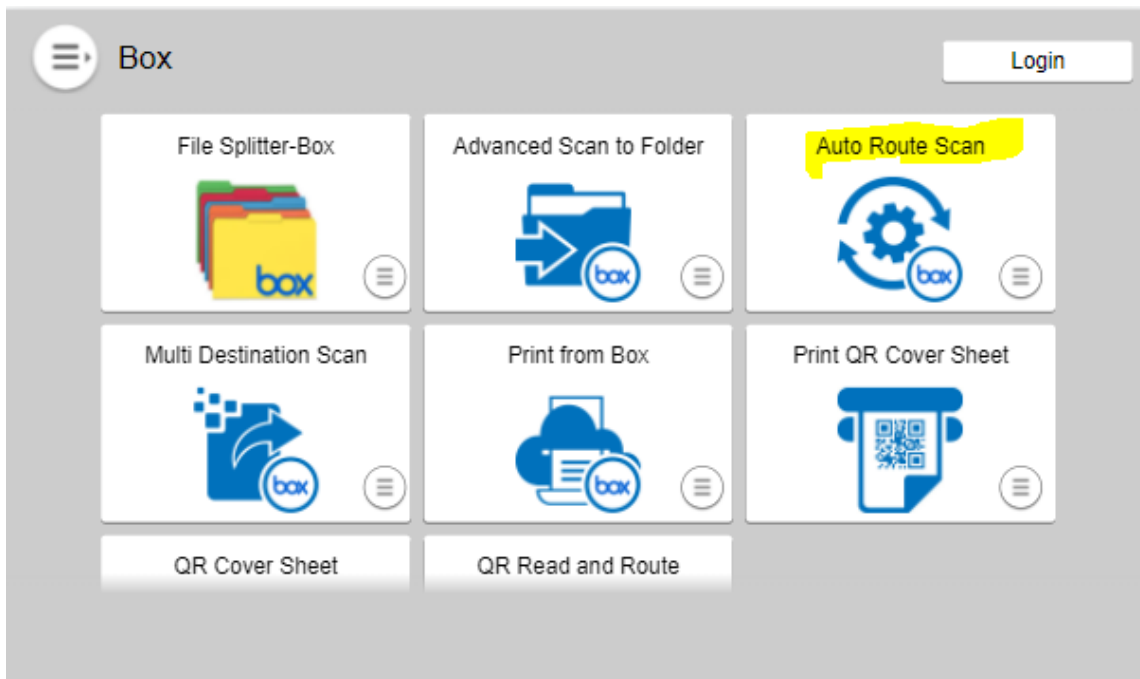
## Scan Settings

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



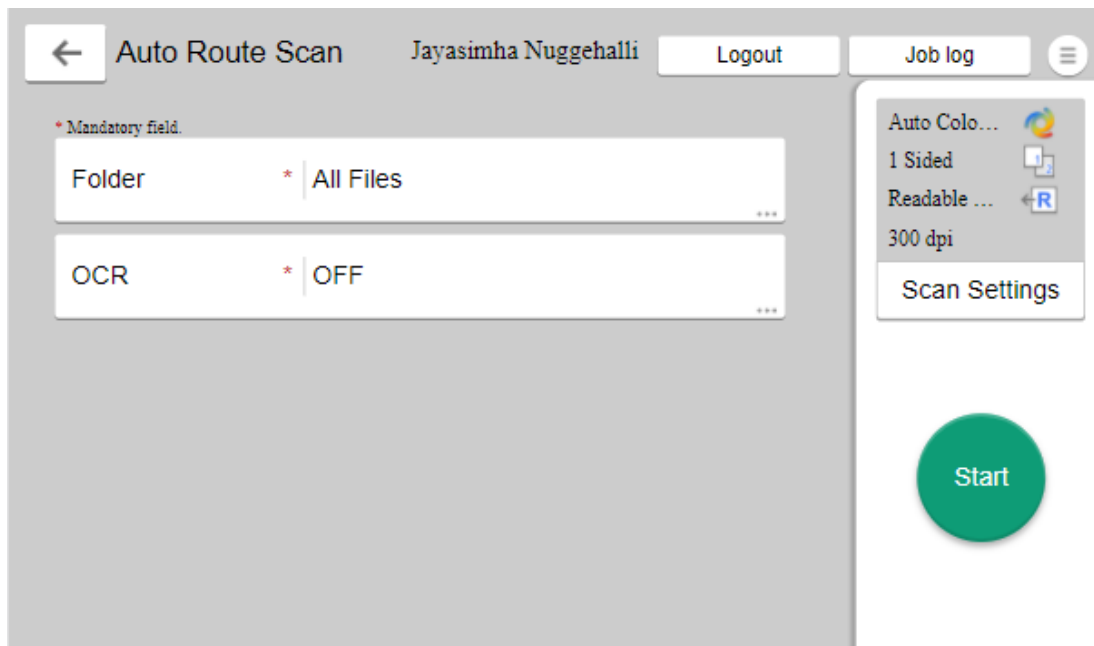
Select 'Auto Route Scan' application.

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

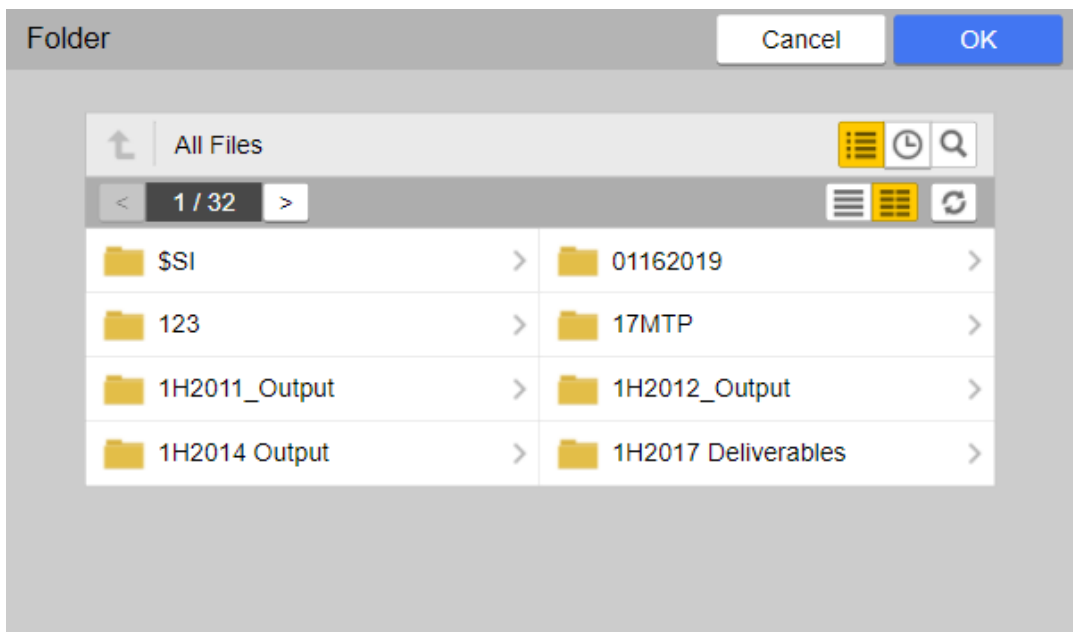
Note: RSI supports multiple login Methods. Default login method can be configured in RSI portal (Workplace).

 A screenshot of the login screen for 'RICOH Smart Integration'. At the top left is a back arrow icon and the text 'Login to RICOH Smart Integration'. Below this is a dropdown menu labeled 'Login with Tenant ID'. There are three input fields: 'Tenant ID' with the value '2172914435', 'User ID', and 'Password'. Below the 'Password' field is a checkbox labeled 'Show password'. At the bottom right is a blue 'Login' button.

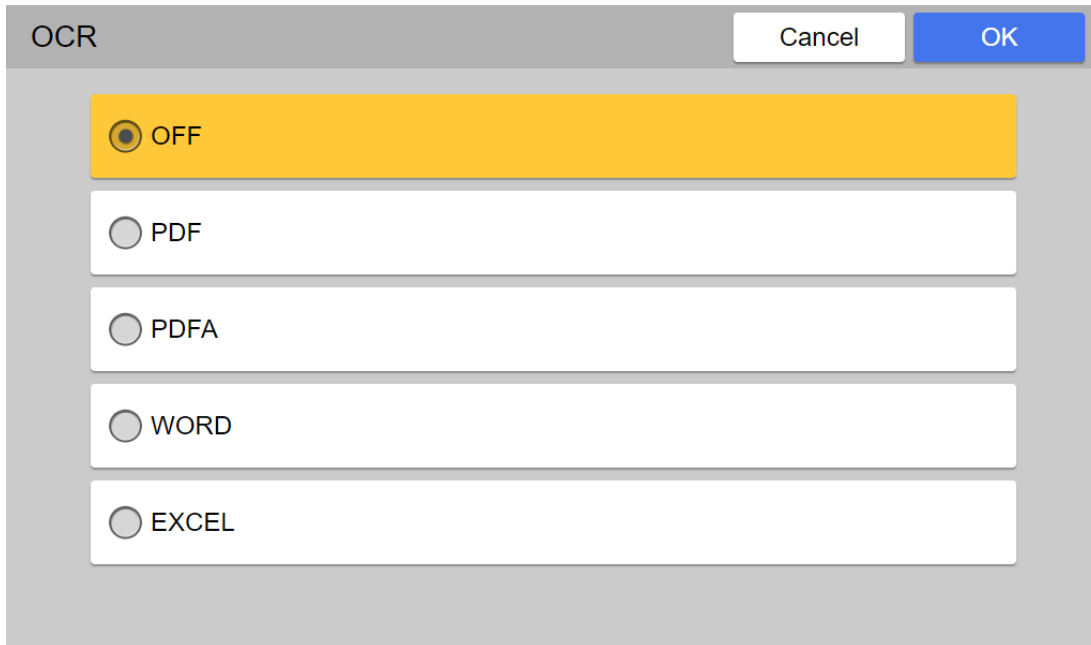
After successful user login 'Auto Route Scan' Application Screen is displayed



Touching on Folder, opens up Folder Browsing screen to select Folder. Select desired folder



Touching on OCR, selection field displays available OCR Options



The image shows a dialog box titled "OCR" with a "Cancel" button and an "OK" button. Inside the dialog, there are five radio button options: "OFF", "PDF", "PDFA", "WORD", and "EXCEL". The "OFF" option is currently selected and highlighted with a yellow background.

OCR

Cancel OK

☒ OFF

☐ PDF

☐ PDFA

☐ WORD

☐ EXCEL

Select the desired OCR option.

## Scan Settings

The screenshot shows the 'Auto Route Scan' interface. At the top, there is a header bar with a back arrow, the title 'Auto Route Scan', the user name 'Jayasimha Nuggehalli', and buttons for 'Logout' and 'Job log'. Below the header, there are two input fields: 'Folder' with the value '123' and 'OCR' with the value 'OFF'. Both fields have a red asterisk indicating they are mandatory. To the right, a sidebar menu is visible with options: 'Auto Colo...', '1 Sided', 'Readable ...', '300 dpi', and 'Scan Settings' (which is highlighted in yellow). At the bottom right of the sidebar is a large green 'Start' button.

Touch on 'Scan Settings' to display Scan Settings Screen

The screenshot shows the 'Scan Settings' screen. It has a header bar with a back arrow and the title 'Scan Settings'. The main area contains several settings cards: 'Scan Color Mode' (Auto Color Select), 'Original Sides' (1 Sided), 'Document Orientation' (Readable Direction), 'Scan Resolution' (300 dpi), 'Document Size' (Auto), 'Manual Density' (0), and 'Scan Method' (Normal). On the right side, there is a yellow 'Preview' button with a checkmark icon and a large green 'Start' button at the bottom.

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

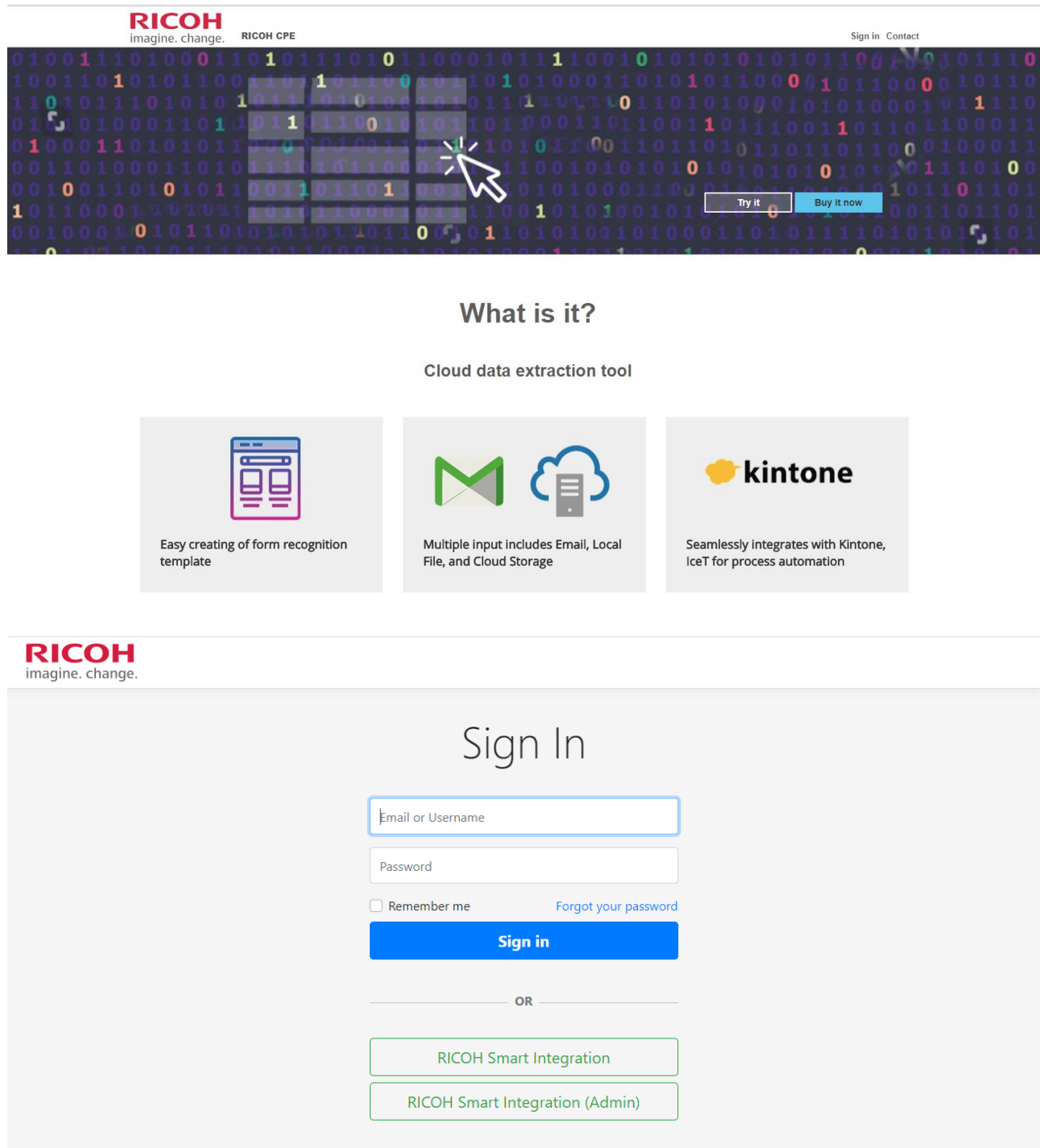


Document size	<div><div><div>← Document Size</div><div><div><input checked="" type="radio"/> Auto</div><div><input type="radio"/> Mixed</div></div><div><div><input type="radio"/> A3 (Horizontal)</div><div><input type="radio"/> JIS B4 (Horizontal)</div></div><div><div><input type="radio"/> A4</div><div><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></div> <div><div>← Document Size</div><div><div><input type="radio"/> A5</div><div><input type="radio"/> A5 (Horizontal)</div></div><div><div><input type="radio"/> 11 x 17 (Horizontal)</div><div><input type="radio"/> Legal (Horizontal)</div></div><div><div><input type="radio"/> 8 1/2 x 13 (Horizontal)</div><div><input type="radio"/> Letter</div></div><div><div><input type="radio"/> Letter (Horizontal)</div><div><input type="radio"/> Invoice (Half Letter Size)</div></div><div><div><input type="radio"/> Invoice (Horizontal)</div></div></div> <div><div>✓ Preview</div><div>Start</div></div>
---------------	--

## 6 Document Classification Training in CPE

Login to CPE account using you CPE Credentials

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



The screenshot displays the RICOH CPE website. The top header features the RICOH logo with the tagline 'imagine. change.' and the text 'RICOH CPE'. Navigation links for 'Sign in' and 'Contact' are in the top right. The main banner has a binary code background with a mouse cursor pointing at a 'Try it' button. Below the banner, the 'What is it?' section describes the 'Cloud data extraction tool' with three key features: easy form recognition template creation, multiple input sources (Email, Local File, Cloud Storage), and integration with Kintone and IceT. The 'Sign In' section includes a form with fields for 'Email or Username' and 'Password', a 'Remember me' checkbox, a 'Forgot your password' link, and a blue 'Sign in' button. Below the button are links for 'RICOH Smart Integration' and 'RICOH Smart Integration (Admin)'.

**RICOH**  
imagine. change. RICOH CPE

Sign in Contact

**What is it?**

Cloud data extraction tool

- Easy creating of form recognition template
- Multiple input includes Email, Local File, and Cloud Storage
- Seamlessly integrates with Kintone, IceT for process automation

**RICOH**  
imagine. change.

**Sign In**

Email or Username

Password

☐ Remember me [Forgot your password](#)

**Sign in**

OR

[RICOH Smart Integration](#)

[RICOH Smart Integration \(Admin\)](#)

Login with your credentials

**RICOH**  
imagine. change.

Welcome [Phuc Nguyen](#) [Contact](#) [Help](#) [Sign out](#)

DASHBOARD CONTENT PARSING CLASSIFICATION SETTINGS ABOUT

### Dashboard

**Parsing Rules**  
Total: 3 parsing rule(s)

**Processed Records**  
Total: 12 record(s)  
Unverified: 0 record(s)

**Recent Parsing**

Train Categories  
Classification Settings  
Classification History  
Classify File

Invoice Empire Import StudentRegForm-PR BillOfLanding

**Recent Processed Records**

✓ invoice1.pdf	Jun 4, 2018 18:46
✓ invoice23.pdf	Jun 4, 2018 18:28
✓ invoice23.pdf	Jun 4, 2018 18:28
✓ invoice1.pdf	Jun 4, 2018 18:27
✓ 1-inv.pdf	Jun 4, 2018 15:19

[More...](#)

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

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

**RICOH**  
imagine. change.

Welcome [Phuc Nguyen](#) [Contact](#) [Help](#) [Sign out](#)

DASHBOARD CONTENT PARSING CLASSIFICATION SETTINGS ABOUT

### Training Classification Model

**Your Organization**

Use default categories

Create and use custom categories

- SDCA Invoice
- SDCA Quotation
- SDCA Manifest
- SDCA Packing List
- 1099-MISC Form
- SDCA Bill Of Landing
- SDCA Purchase Order

**Preview**

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.

**RICOH**  
imagine. change.

Welcome [Phuc Nguyen](#) [Contact](#) [Help](#) [Sign out](#)

[DASHBOARD](#) [CONTENT PARSING](#) [CLASSIFICATION](#) [SETTINGS](#) [ABOUT](#)

## Training Classification Model


Your Organization

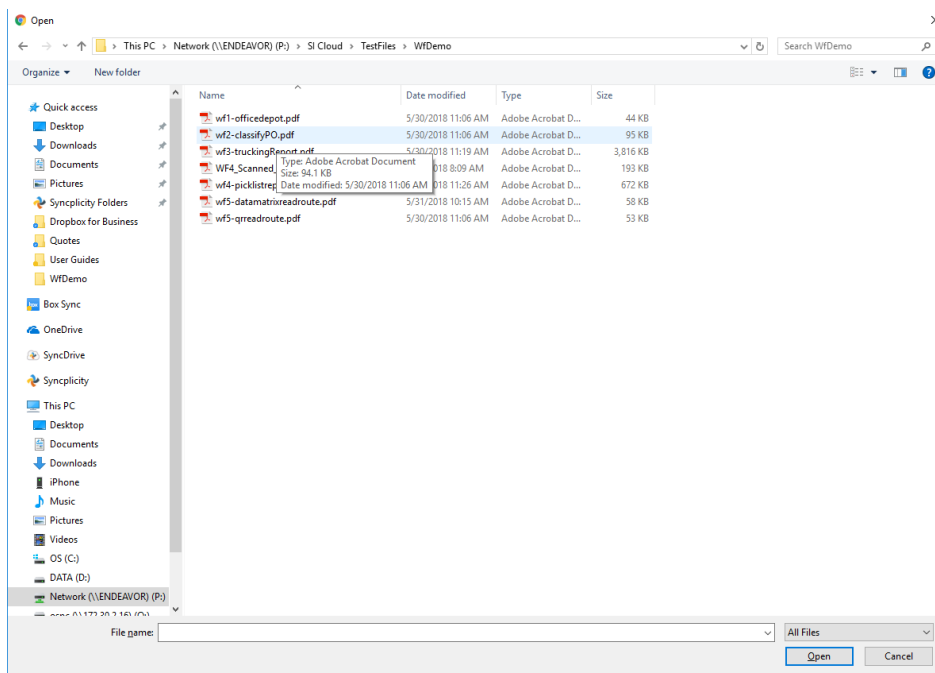
☐ Use default categories

☒ Create and use custom categories

- SDCA Invoice
  - 1-Inv.pdf
  - 1-Inv - Copy (2).pdf
  - 1-Inv - Copy.pdf
- SDCA Quotation
- SDCA Manifest
- SDCA Packing List
- 1099-MISC Form
- SDCA Bill Of Landing
- SDCA Purchase Order

Preview

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





## 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**  
 Place 100, 100 Main Street  
 1223 Kellon Street  
 Globecity, Globeland 1000  
 Telephone: (999) 999-9999  
 Fax: (999) 999-9999

**PURCHASE ORDER**

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

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

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

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: \_\_\_\_\_

BUYER: *John Hancock* DATE: Feb/28/2001

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

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

## 7 Limitations

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### 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