Version 1.0

RICOH

FTP and SFTP Workflows

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1 Preface

This guide provides the details on how to use the workflows which help users to Scan to FTP or SFTP servers. These workflows still can use Smart Integration Cloud components like OCR etc. but upload the scanned document to FTP or SFTP server.

About This Guide

This guide is divided into following primary sections:

1. **Introduction**

   This section lays the foundation for understanding the FTP and SFTP workflow specification

2. **Installation of Enhanced Program**

   This section describes, how an Enhanced Program gets automatically installed on the multi-Function device, when user tries to use FTP and SFTP Workflows

2. **External Service Connection**

   This section describes how to do service connection with FTP or SFTP Servers

3. **FTP/SFTP Workflow Specification & Configuration**

   This section contains specification and step-by-step instructions on how to configure settings related to FTP/SFTP workflow application in User Site

4. **Operation of FTP/SFTP Applications**

   This section contains step-by-step instructions on how to operate FTP/SFTP application on MFP Operation panel

5. **Limitations**

   Product Limitations

6. **Appendix**

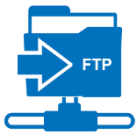
   This section contains additional reference materials

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

FTP/SFTP workflows

Following workflows are supported

1	Scan to FTP	
2	Scan to SFTP	

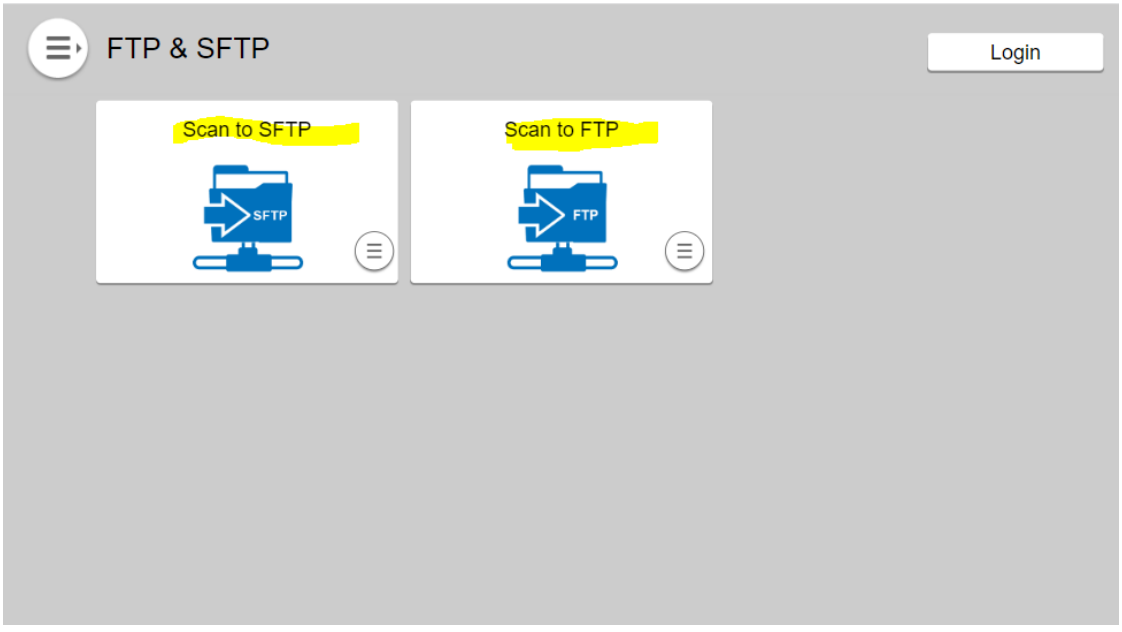
Detailed specification is described in following section, scanned document is uploaded to FTP/SFTP server.

3 Installation of Enhanced Program

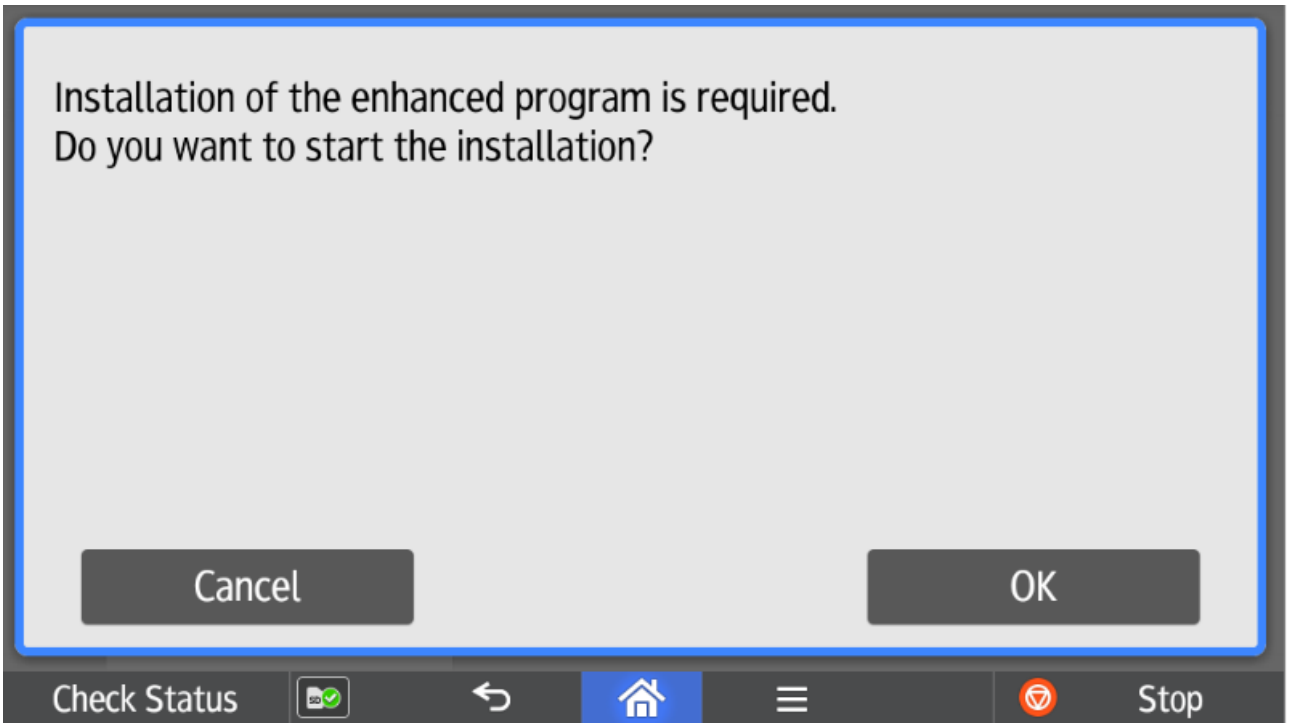
Scan to FTP/SFTP workflows require 'Enhanced Program' application to be installed on multi-Function device. However, installation is automatically done, when user tries to use the workflow. However, MFP administrator need to login to the device to complete the installation.

Touch on one of the Scan to FTP or Scan to SFTP workflow on MFP Panel.

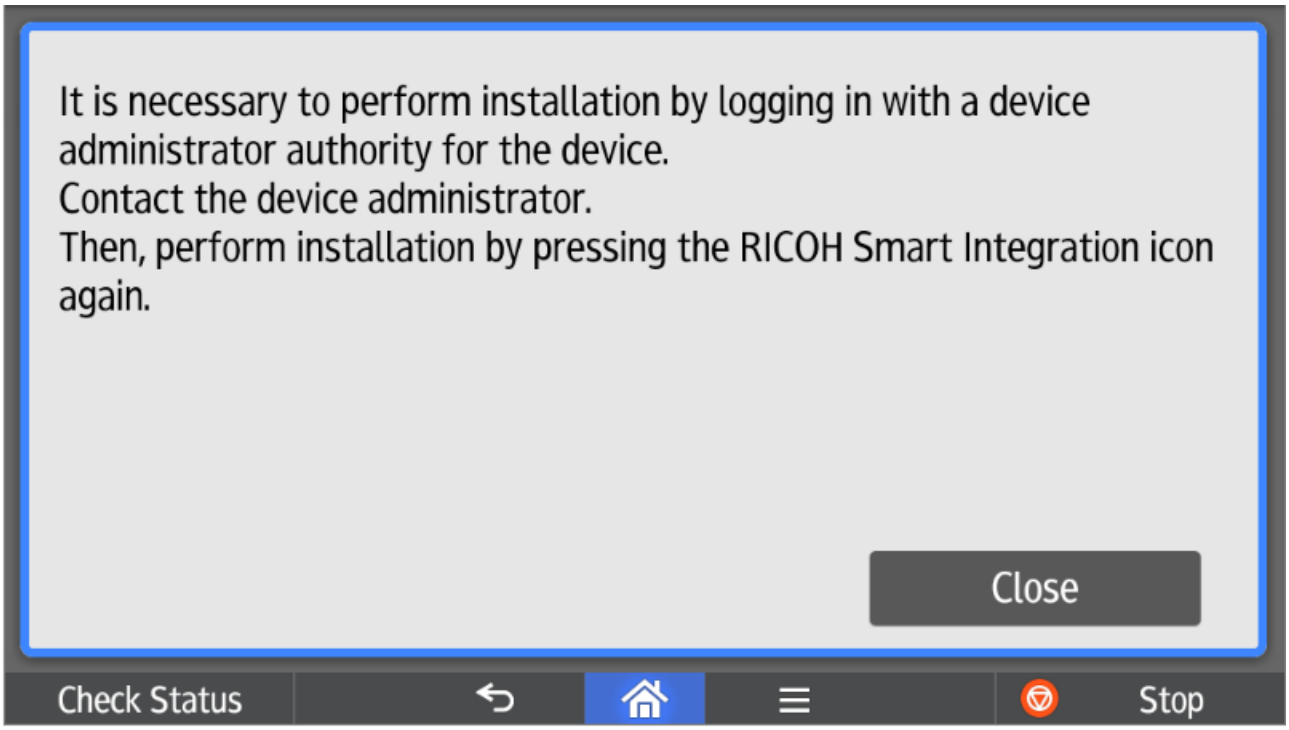
Note: Steps are same when Enhanced Program is not installed, or a new version is available



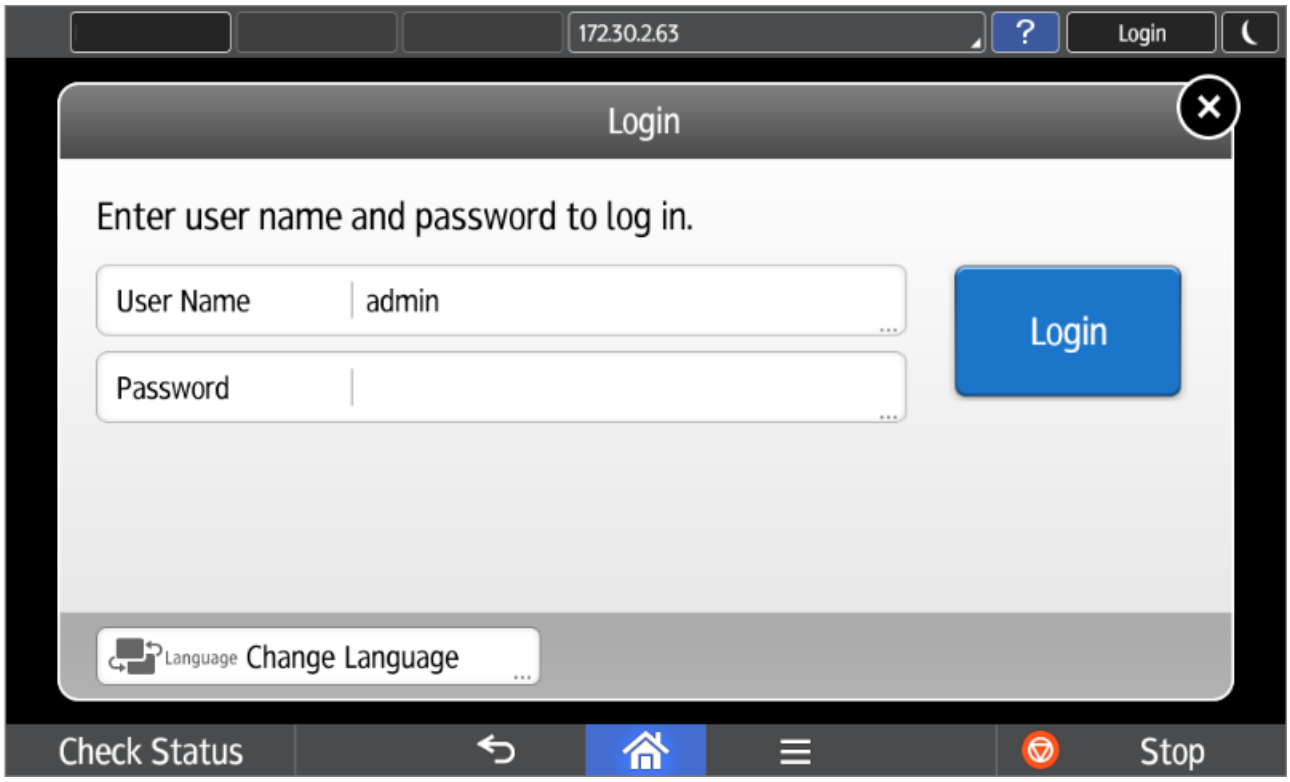
Case 1: When Device Administrator authentication not enabled

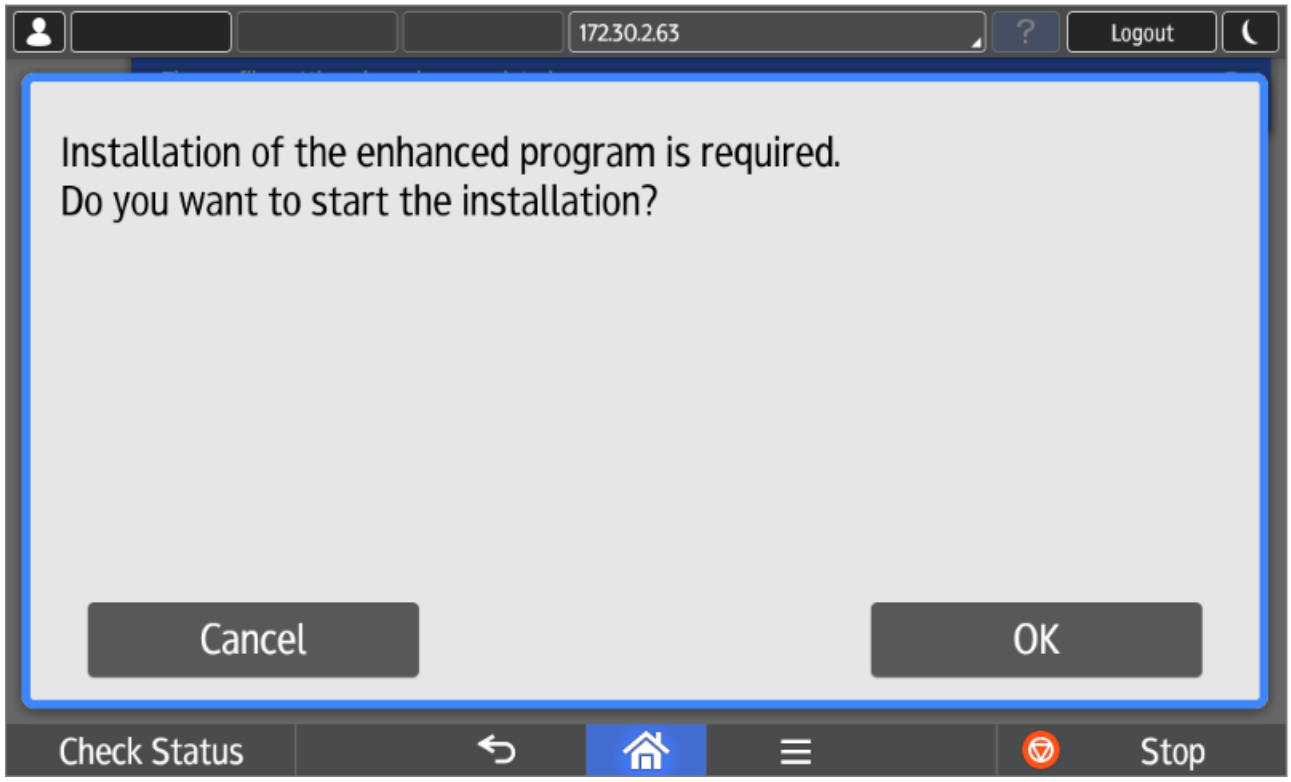


Case 2: When device Administrator authentication enabled

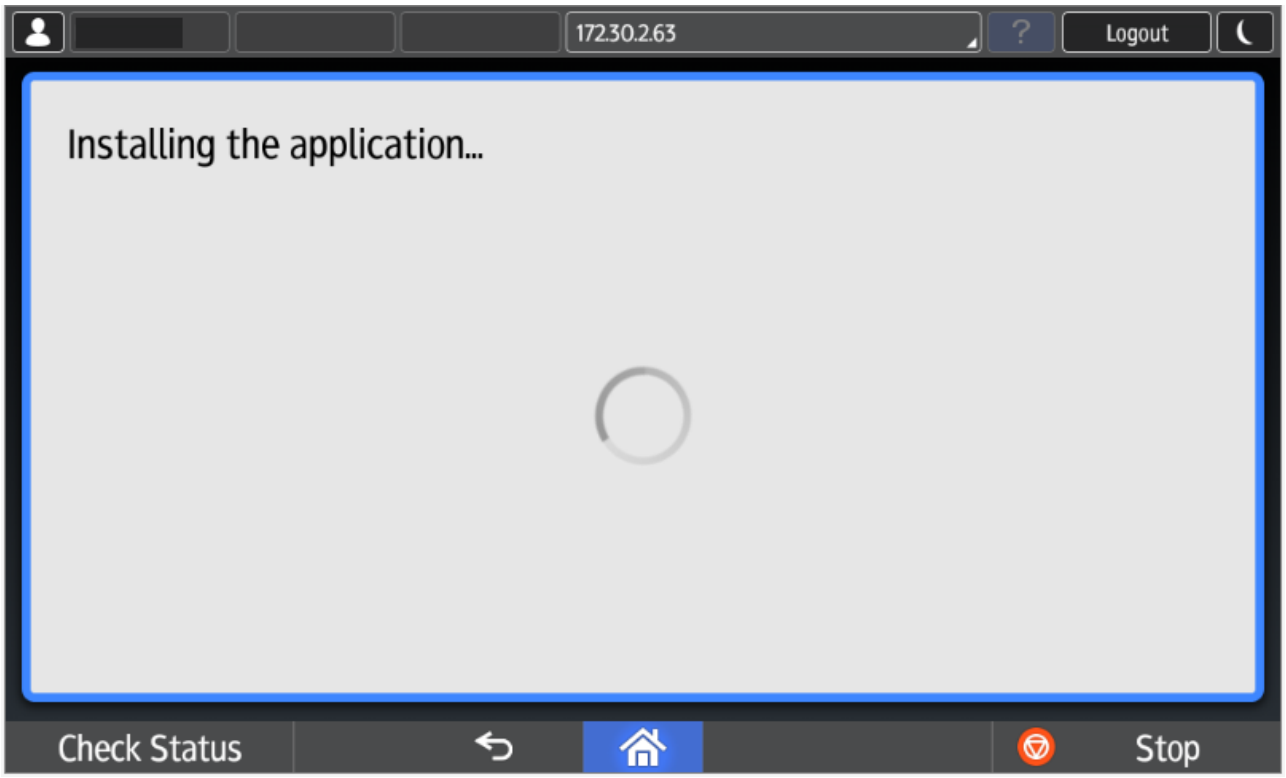


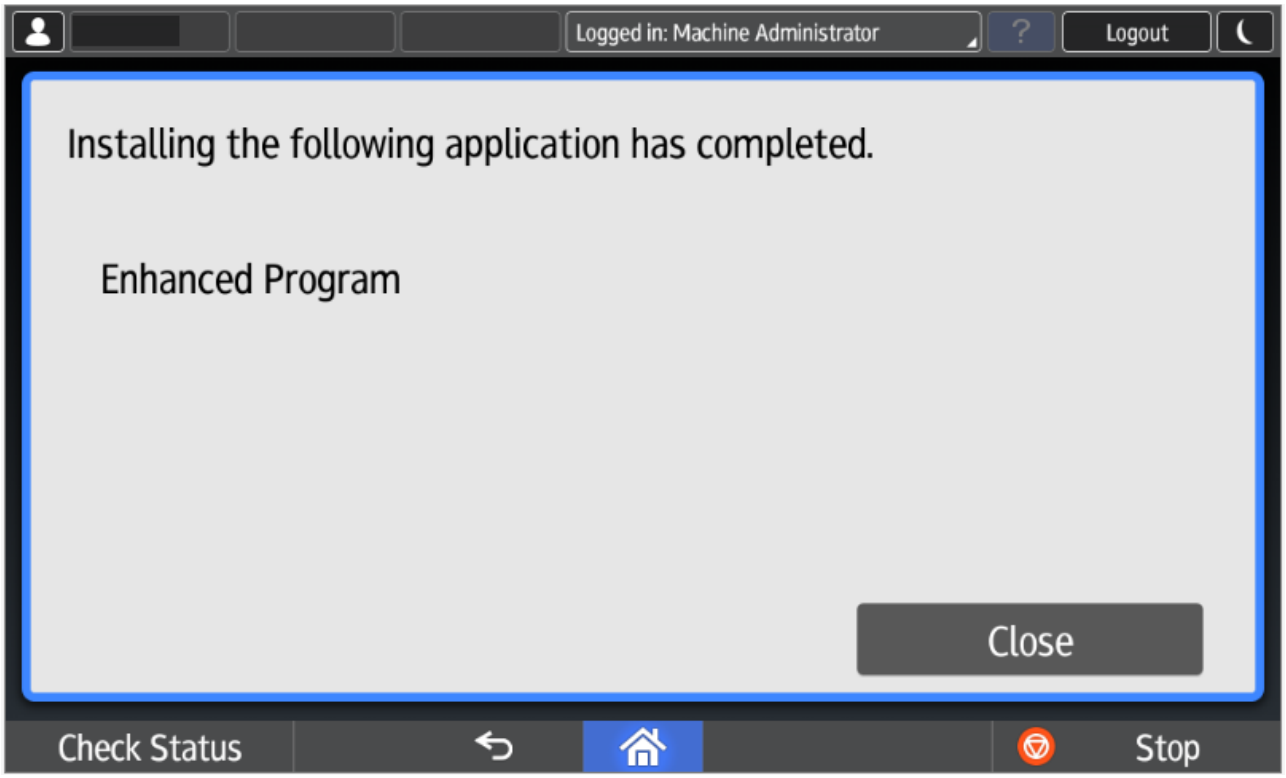
Login to the machine with device administrator credential


172.30.2.63
Login
Login
Enter user name and password to log in.
User Name
admin
Password
Login
Language Change Language
Check Status
Stop


172.30.2.63
Logout
Installation of the enhanced program is required.
Do you want to start the installation?
Cancel
OK
Check Status
Stop

Touch on 'OK'





Touch on 'Close'. This completes installation.

Note: Refer to Appendix for how to check the version of 'Enhanced Program'

4 External Service Connection

What is External Service Connection?

Before using FTP/SFTP workflow, user need to establish connection (authentication) with FTP or SFTP Server. Following information is necessary to configure External Service connection

1. Server IP address or Name
2. User ID
3. Password
4. Port

Smart Integration User Configuration Site URL

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

Pre-requisites

Administrator has registered an account for user, user has following information:

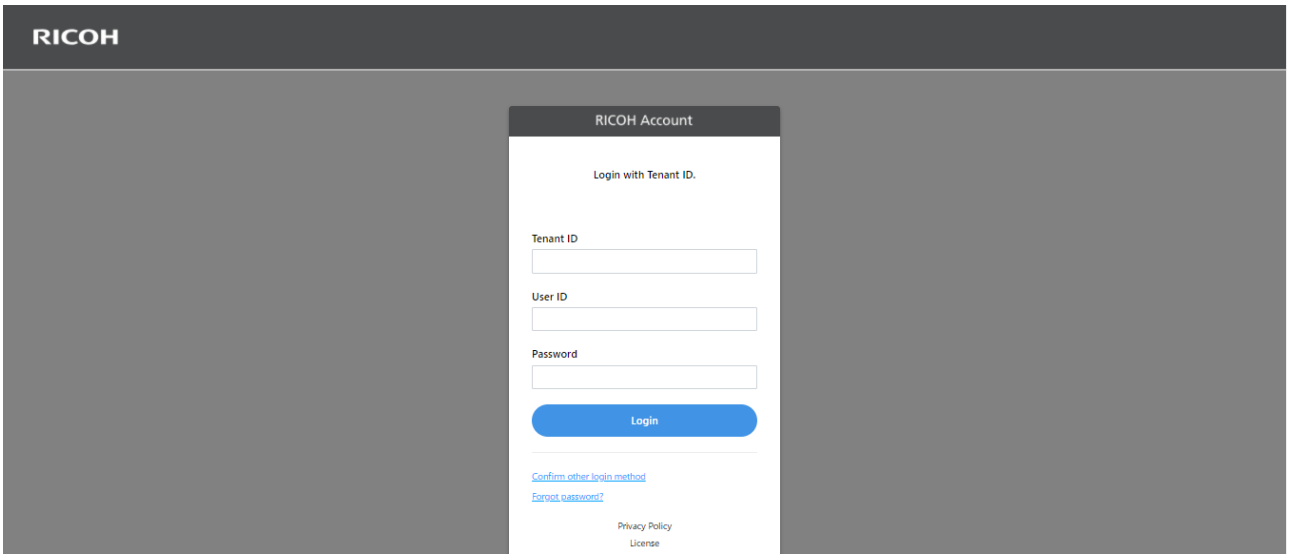
1. Tenant ID
2. User ID
3. Password

Or

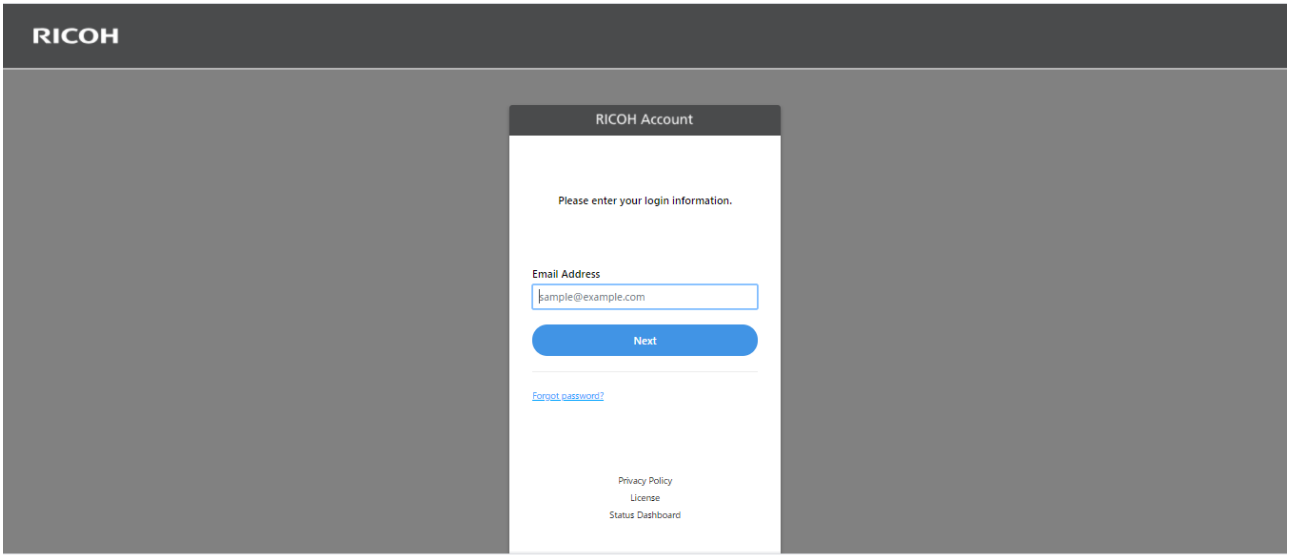
1. Email address (Registered with Ricoh Smart Integration)
2. Password

Logging in to User Site

Option 1: Using Tenant ID, User ID and Password



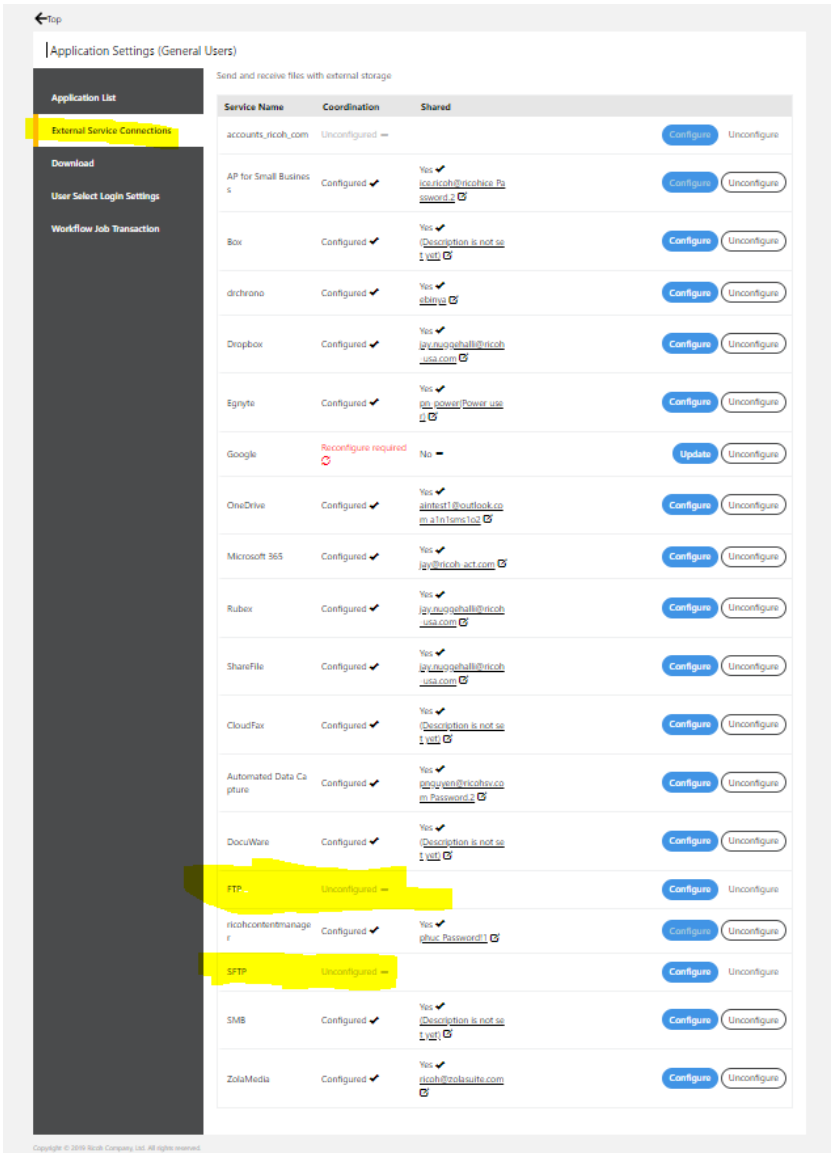
Option 2: Email Address and Password



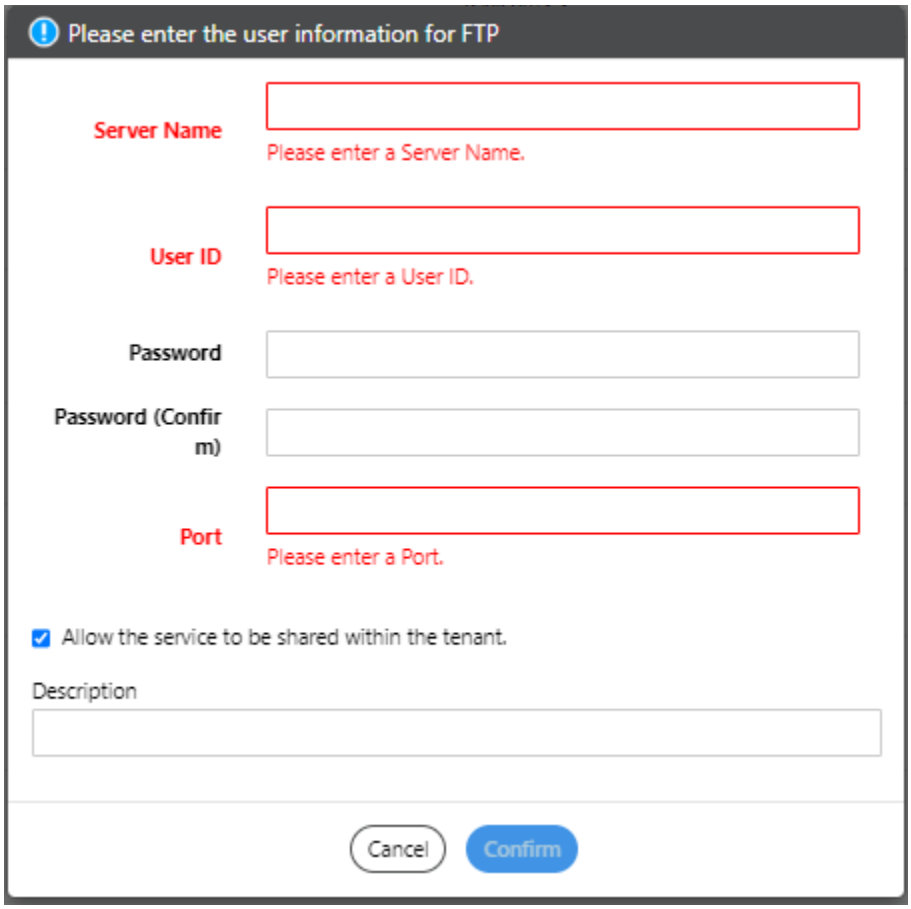
Accessing 'External Service Connection'

Click on 'Application Settings'

Click on 'External Service Connections' on the Menu.



Click on 'Configure' button next to 'FTP' or 'SFTP' to start Service Connection.



Server Name: Enter the Name or IP Address of the FTP/SFTP Server.

Enter the User ID and Password with which you login to your FTP server.

Port: Example: FTP: 21 SFTP: 22 (Check with your SFTP/SFTP server administrator to confirm the port number)

5 FTP/SFTP Workflow Specification & Configuration

Scan to FTP & Scan to SFTP

Workflow Specification

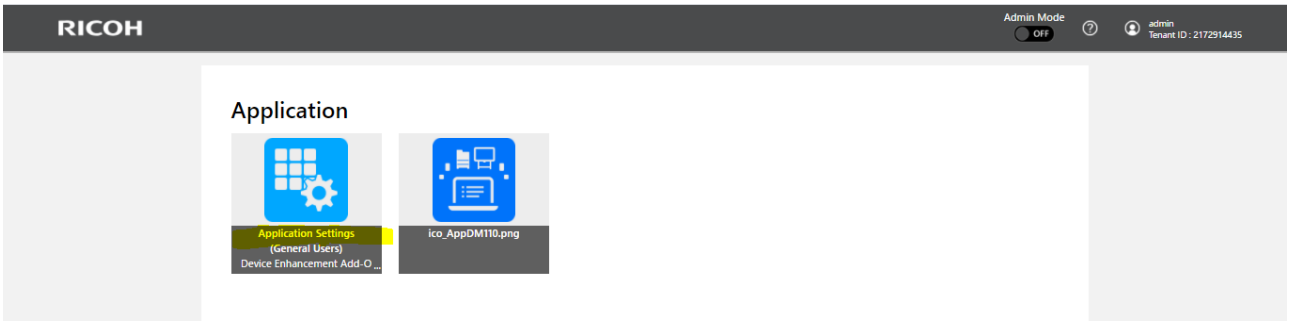
Folder	Select desired folder to which Scanned document needs to be uploaded
OCR	Supports these values Off, PDF, PDFA, WORD, EXCEL Default: Off
OCR Language	English, French, Spanish, Portuguese Brazilian
File Name	Optional (If entered, this value is used as filename) If filename is left blank, filename is created using the formula programed in User Site (Refer to section 'Configuring default Values') Default Formula: **MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())**

Scan to FTP

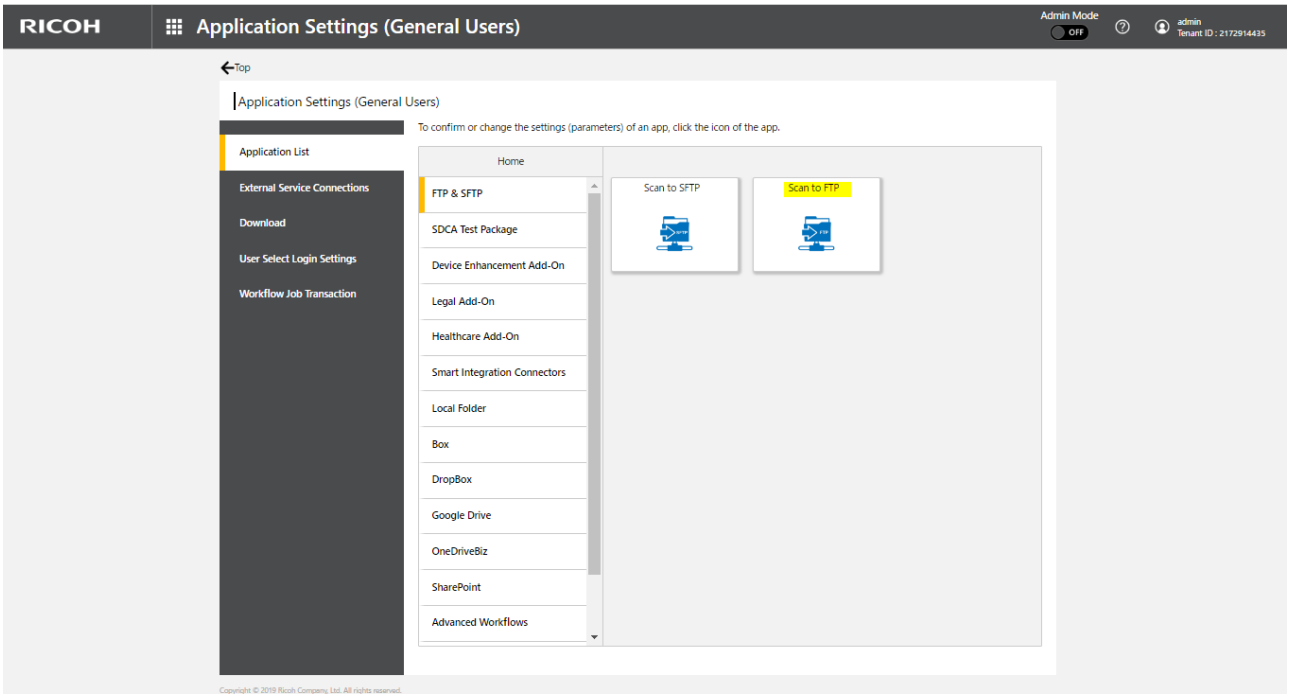
Smart Integration User Configuration Site URL

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

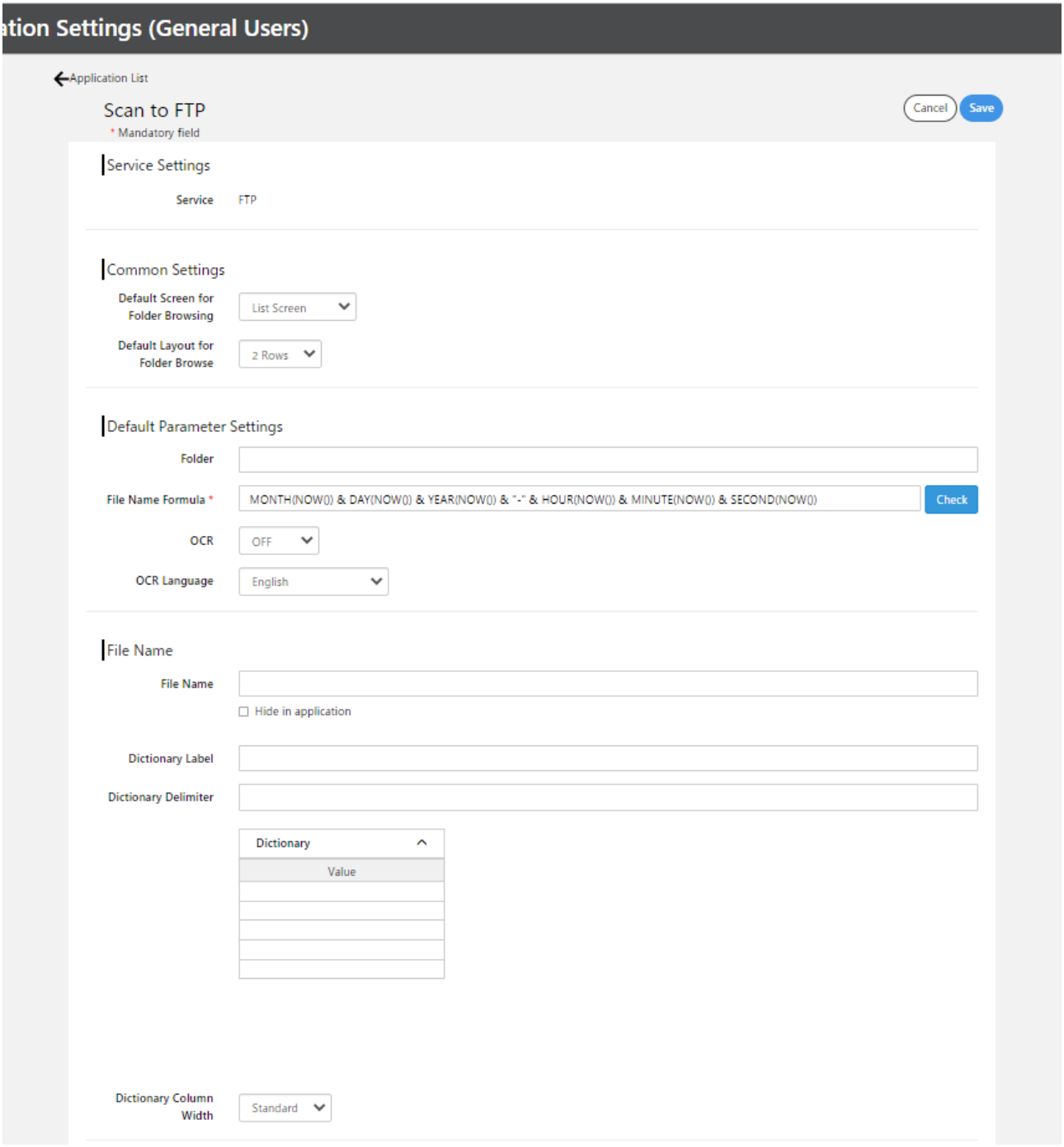
Login to above site using your credentials.



Click on 'Application settings'

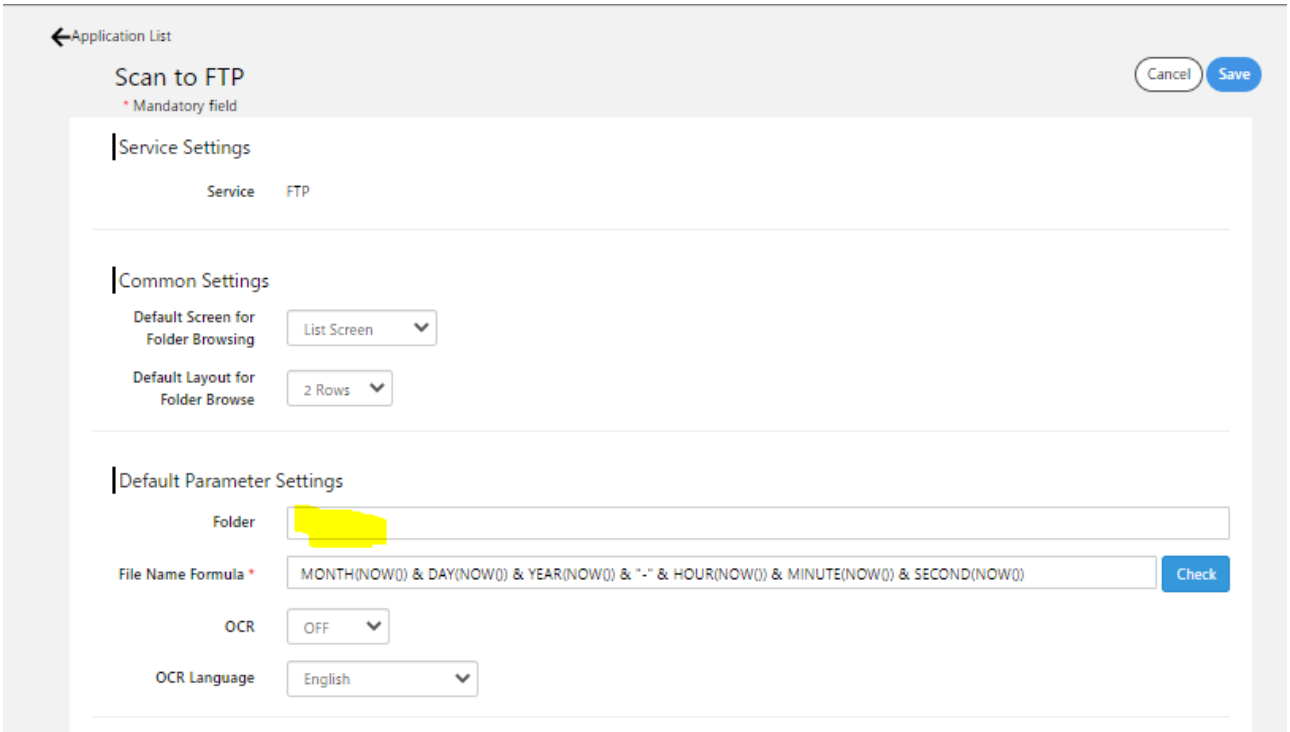


Click on 'Scan to FTP'. This will display a page where all necessary parameters can be configured.



Above settings are available to configure.

Selecting Default folder



Enter the default folder in edit box,

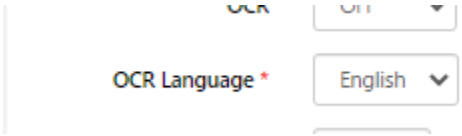
Note: There is no Folder browsing available from User Site to your ftp server. Enter the value as needed. Default folder must already exist on your file server.

OCR

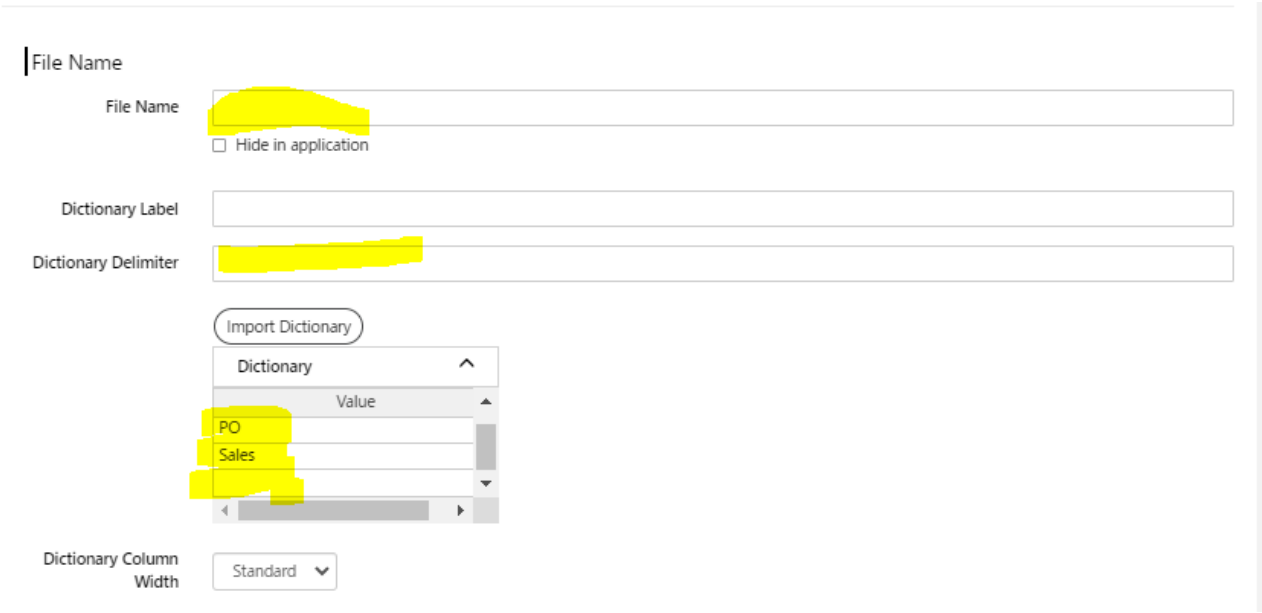
Default value for OCR can be configured.

OCR Language

Default value for OCR Language can be configured.



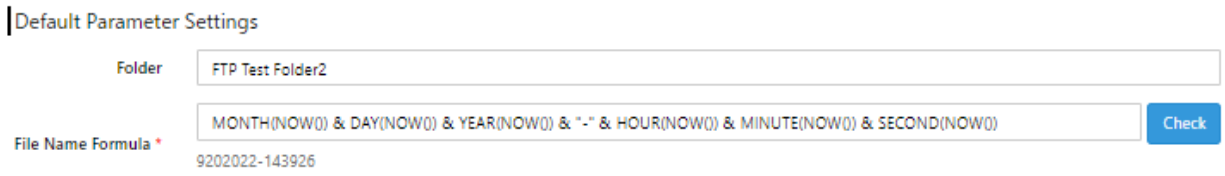
Setting up Default File Name & File Name Key Words



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.



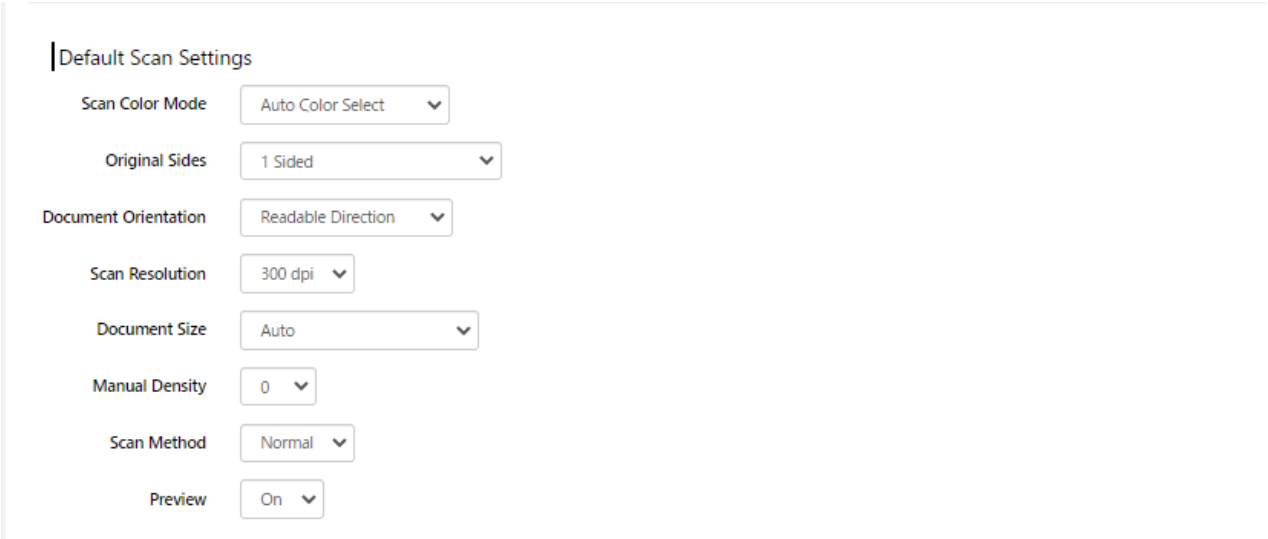
Default Formula:

MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())

Note: Use the 'Check' button to validate the formula, entering bad syntax will cause the workflow to create a file name 'FileNameFormulaFailed'.

Scan Settings

Default Scan settings can be configured here

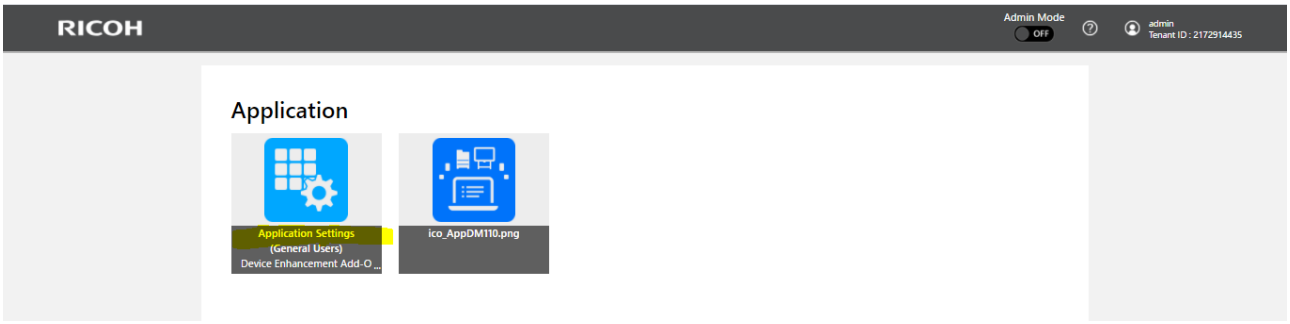


Scan to SFTP

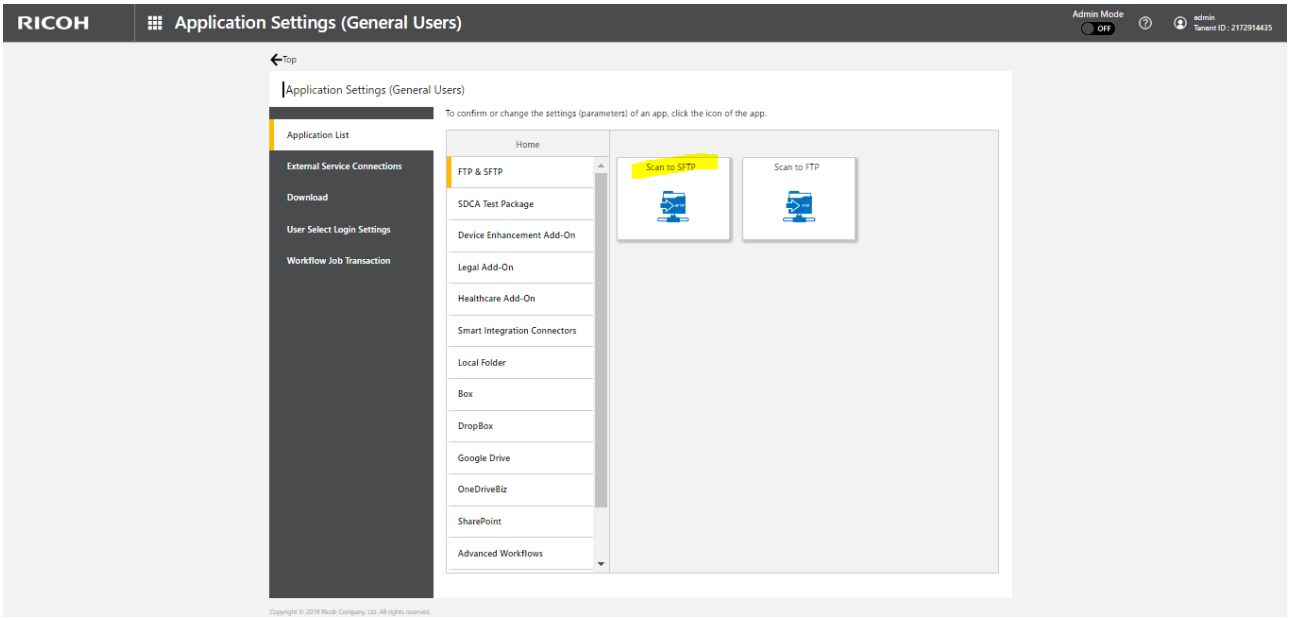
Smart Integration User Configuration Site URL

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

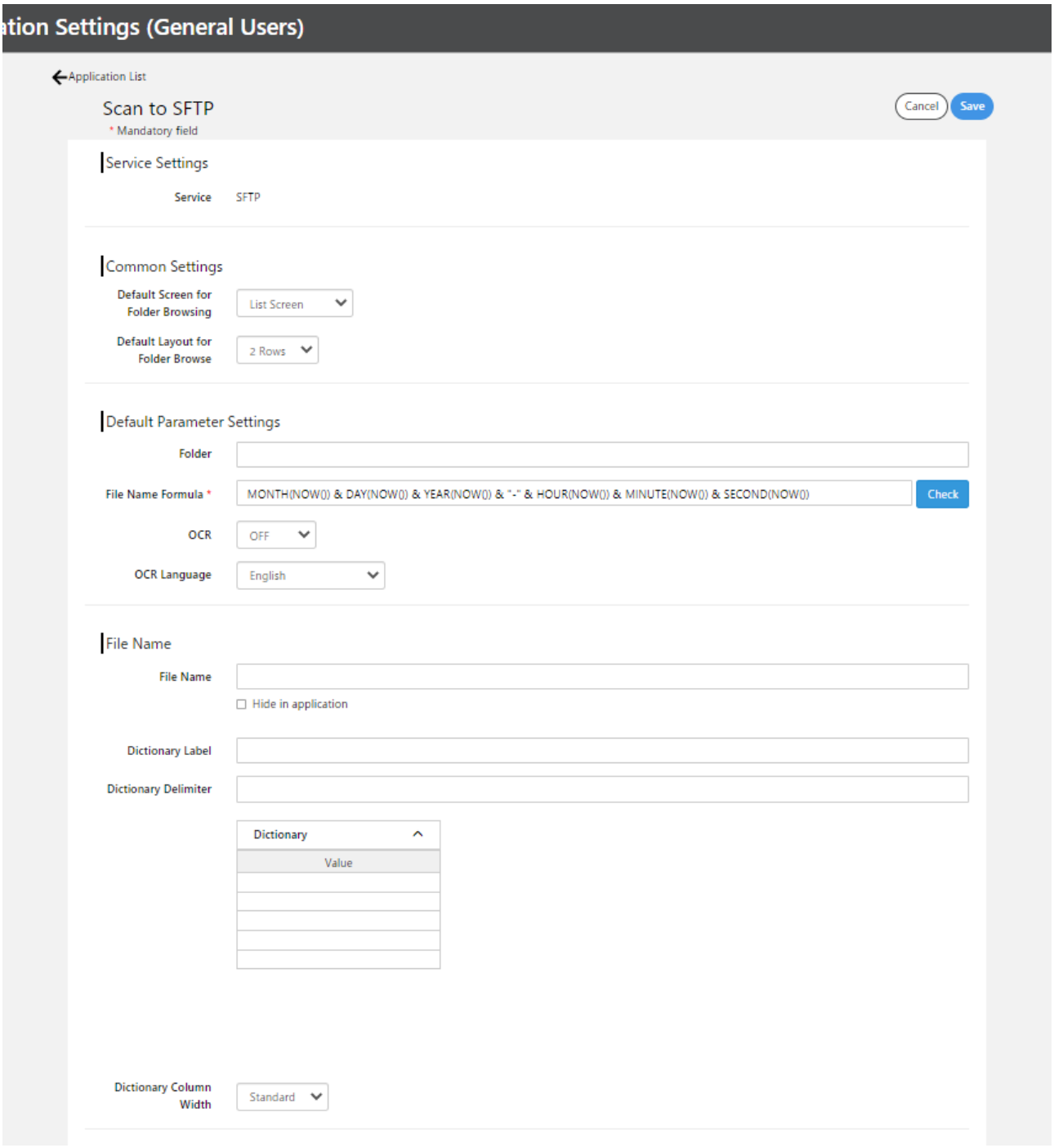
Login to above site using your credentials.



Click on 'Application settings'

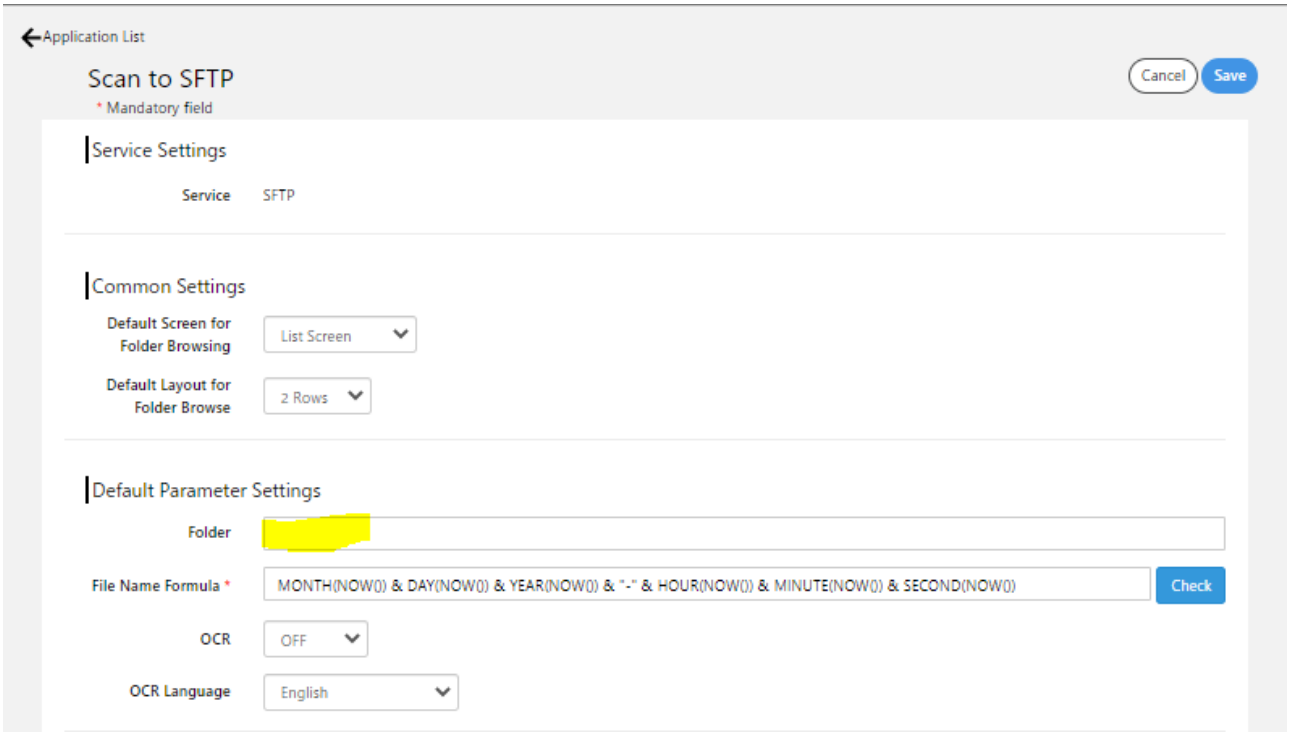


Click on 'Scan to SFTP'. This will display a page where all necessary parameters can be configured.



Above settings are available to configure.

Selecting Default folder



Enter the default folder in edit box,

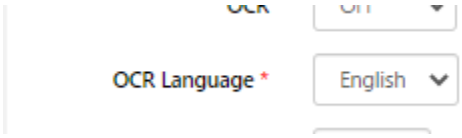
Note: There is no Folder browsing available from User Site to your sftp server. Enter the value as needed. Default folder must already exist on your file server.

OCR

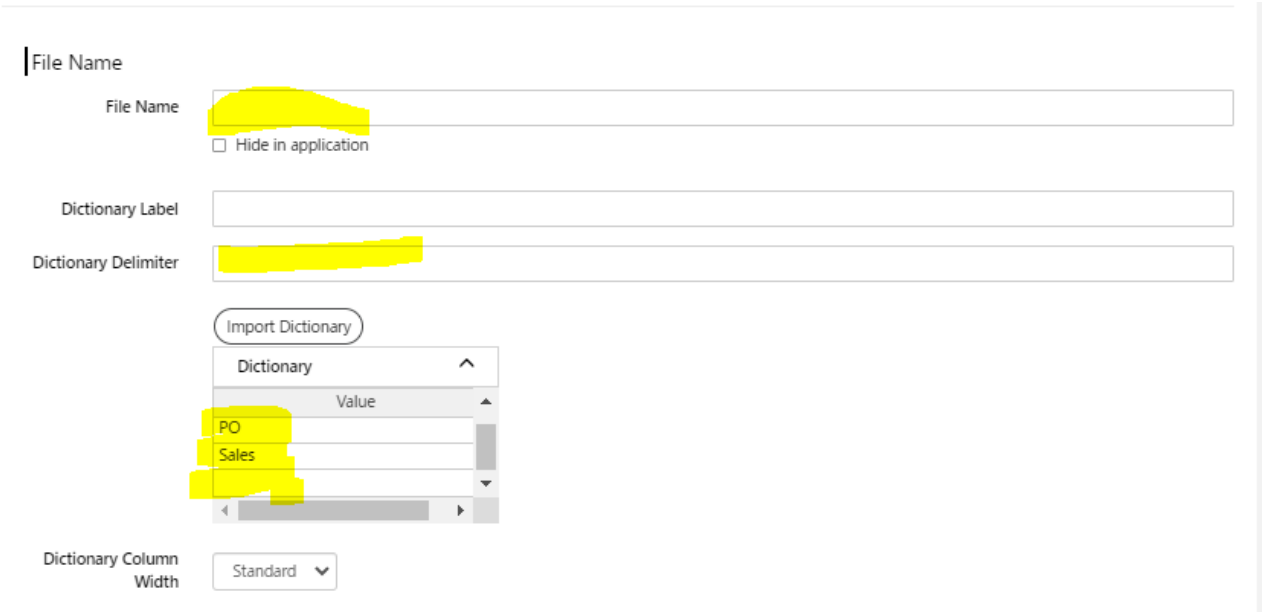
Default value for OCR can be configured.

OCR Language

Default value for OCR Language can be configured.



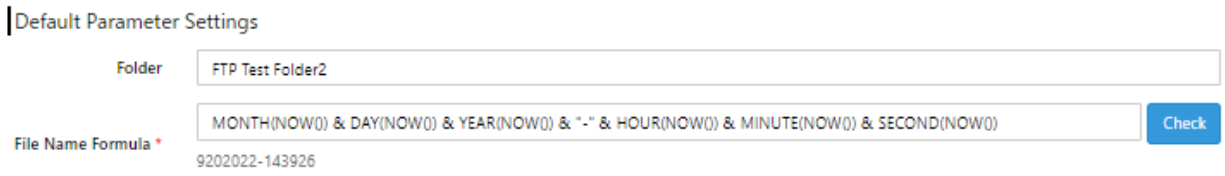
Setting up Default File Name & File Name Key Words



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.



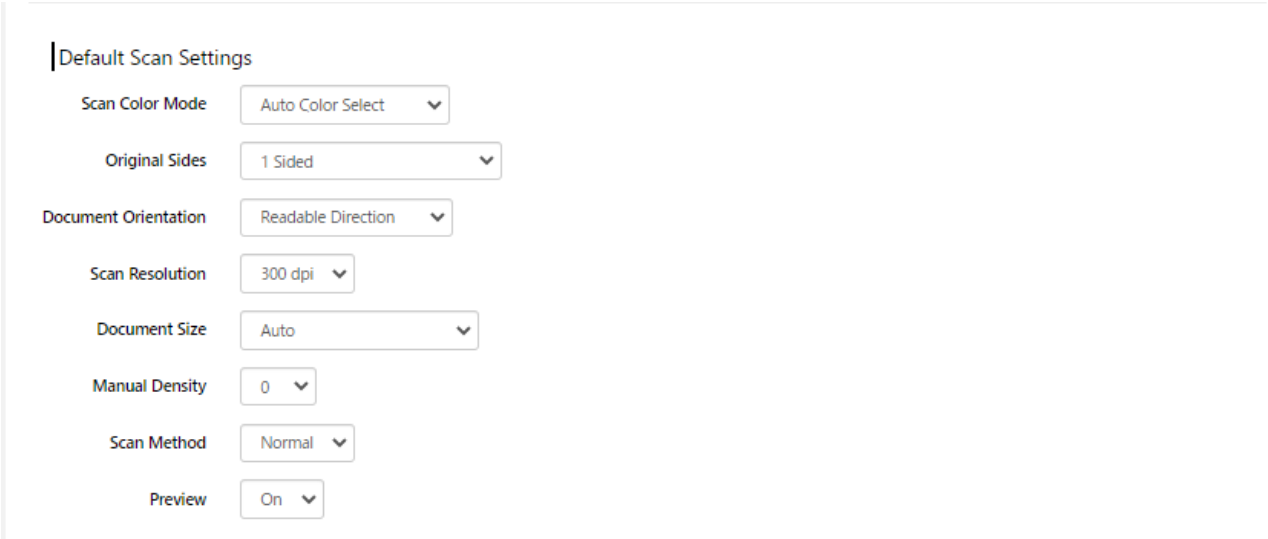
Default Formula:

MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())

Note: Use the 'Check' button to validate the formula, entering bad syntax will cause the workflow to create a file name 'FileNameFormulaFailed'.

Scan Settings

Default Scan settings can be configured here



6 Operation of Scan to FTP and Scan to SFTP Workflow Applications

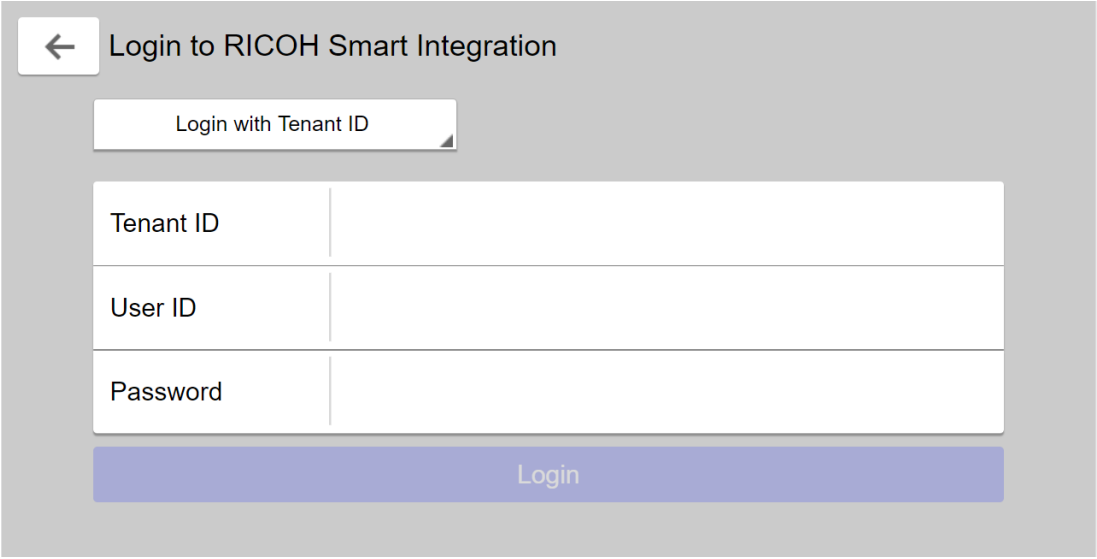
Smart Integration MFP BrowserNX URL

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

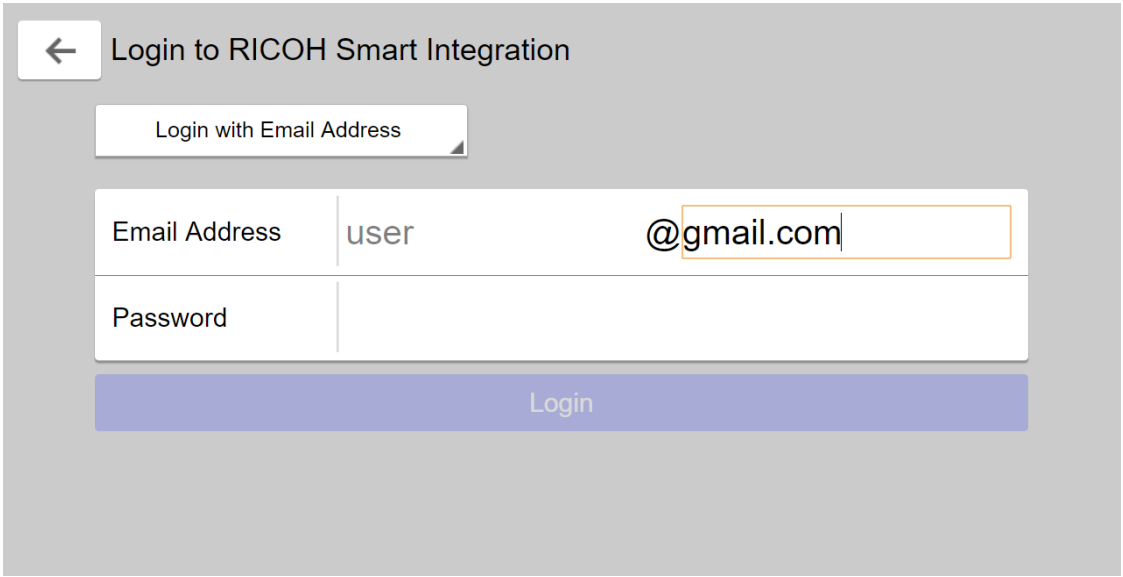
Ricoh Smart Integration Initial Login

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.

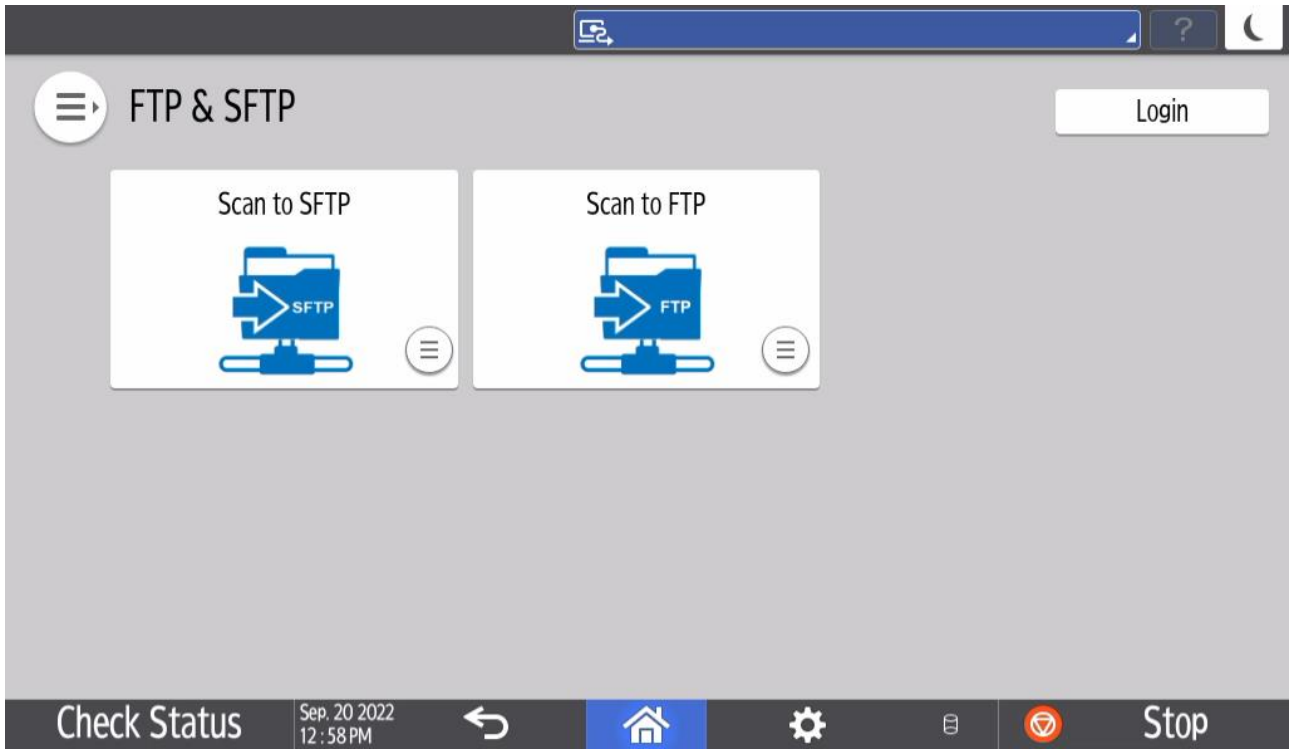
Option 1: Login with Tenant ID



Option 2: Login with Email Address



After administrator login subscribed application will be displayed



Above screen shows workflow applications related to FTP and SFTP. Touch on application you want to use. This will ask user to login with their credentials.

Scan to FTP

After successful user login 'Scan to FTP' Application Screen is displayed

Following Settings are available:

A. Folder

Select desired folder to which Scanned document needs to be uploaded.

B. OCR

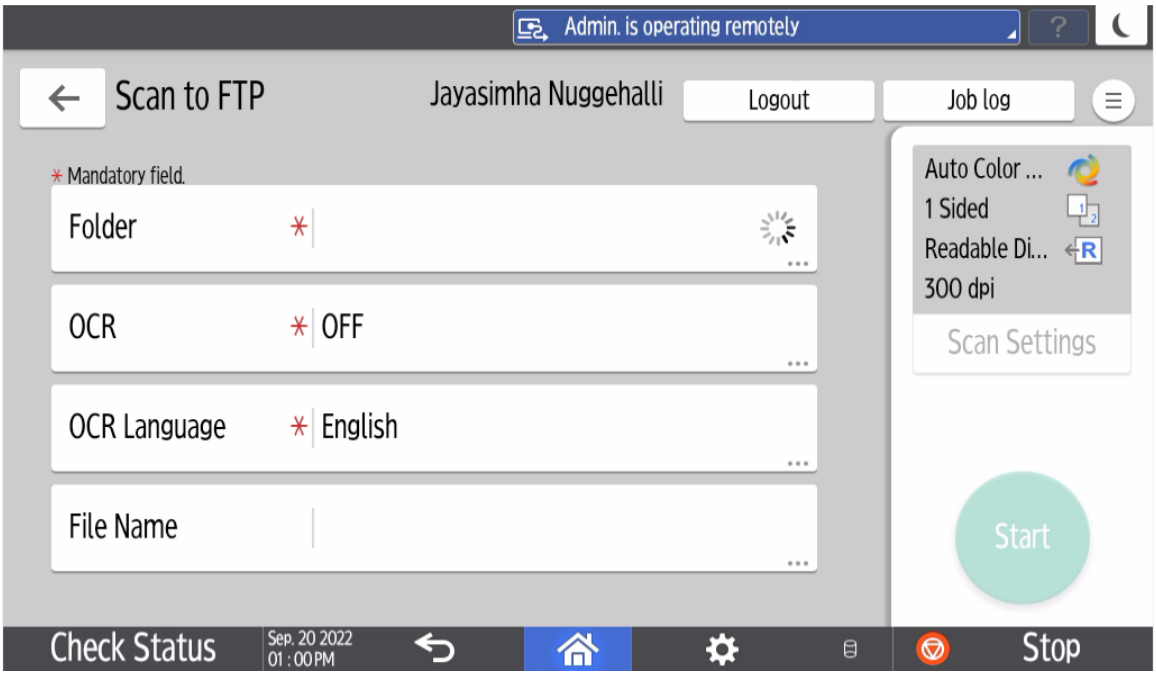
Supports these values: Off, PDF, PDFA, Word, Excel

C. OCR Language

Supports these values: English, French, Spanish, Portuguese

D. File Name

Workflow supports File Name formula, entering file name here overrides filename generated by formula.



Scan to SFTP

After successful user login 'Scan to SFTP' Application Screen is displayed

Following Settings are available:

A. Folder

Select desired folder to which Scanned document needs to be uploaded.

B. OCR

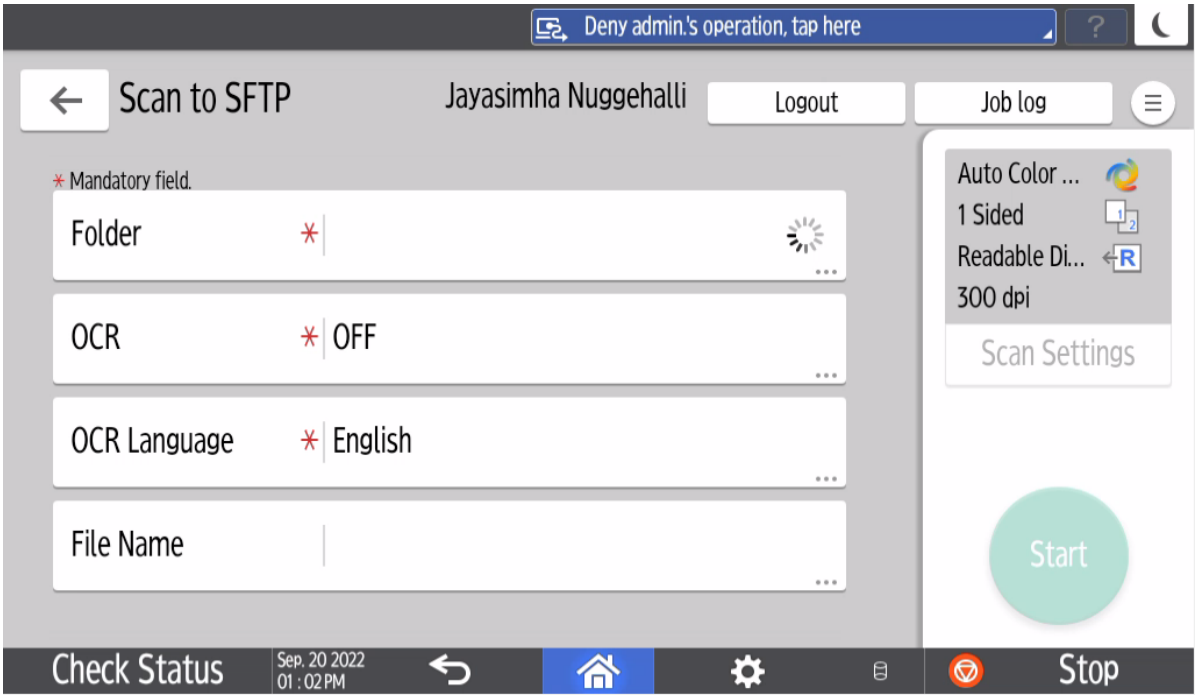
Supports these values: Off, PDF, PDFA, Word, Excel

C. OCR Language

Supports these values: English, French, Spanish, Portuguese

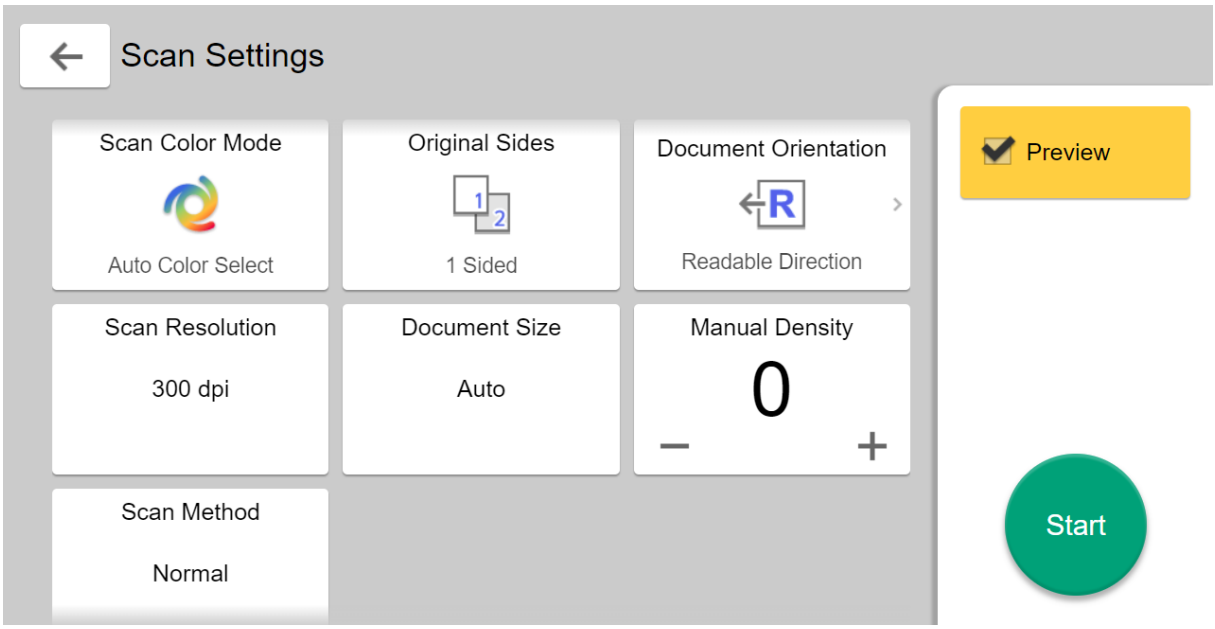
D. File Name

Workflow supports File Name formula, entering file name here overrides filename generated by formula.

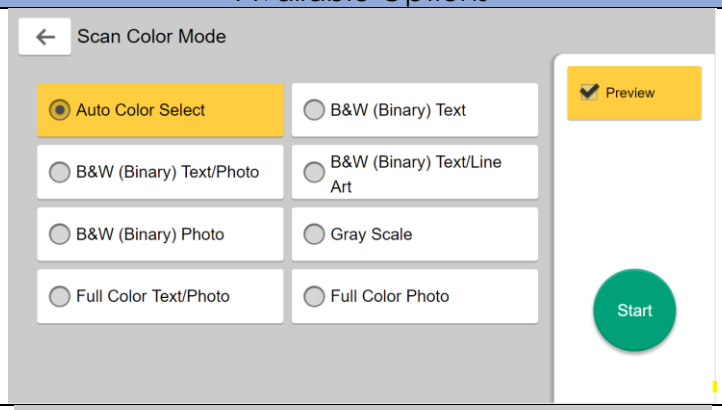
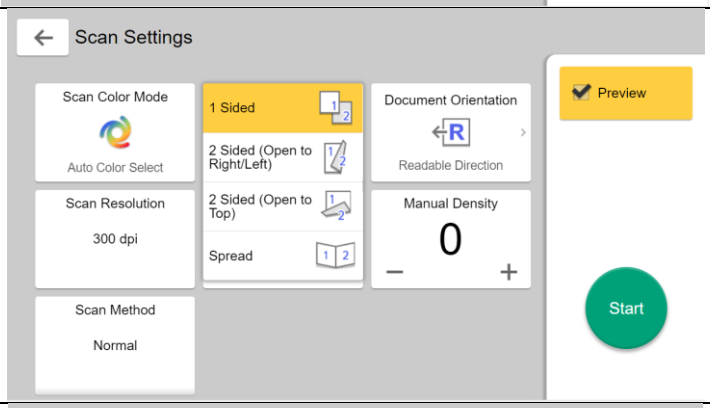
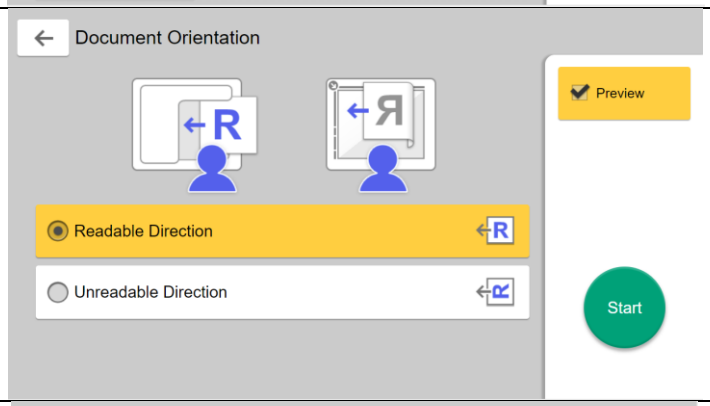
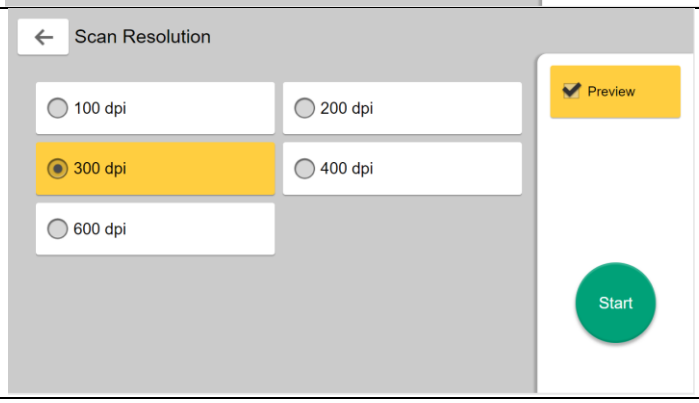


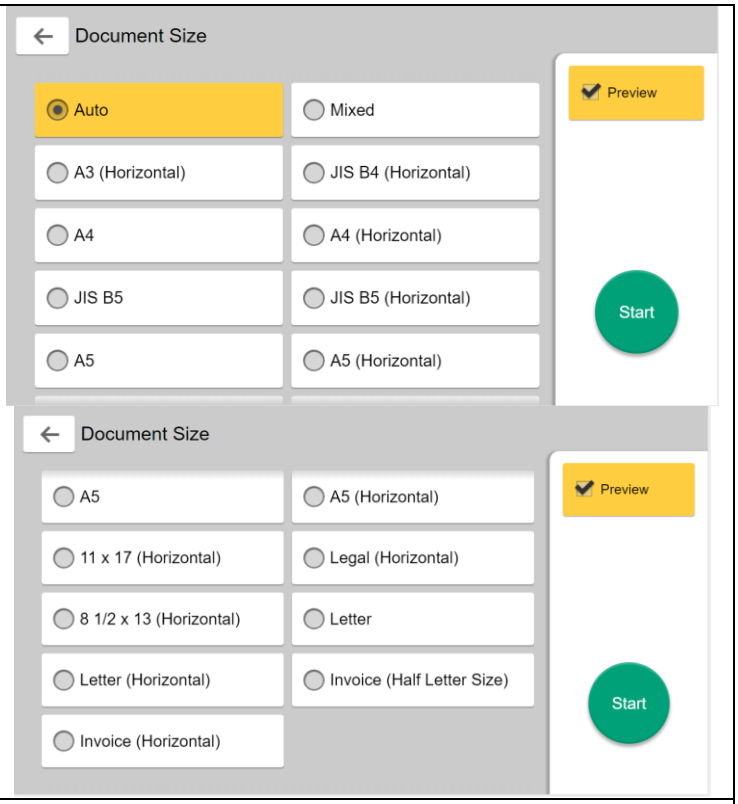
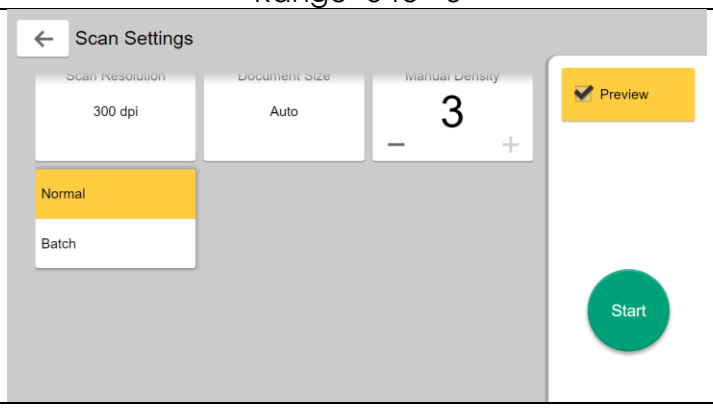
Scan Settings

Touch on 'Scan Settings' in workflow application screen to display Scan Settings Screen



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

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

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

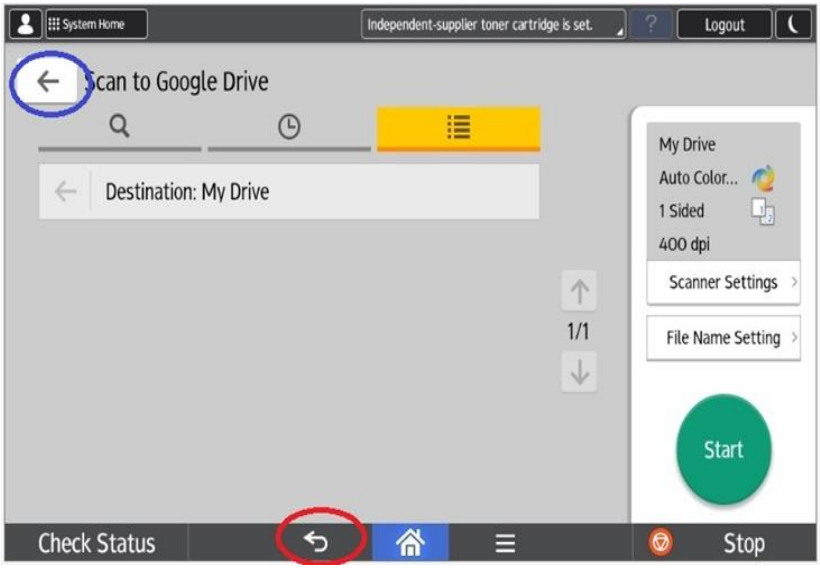
7 Limitations

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
  - 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. · 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. · 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. ・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, which 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.

8 Appendix

File Name Formula

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

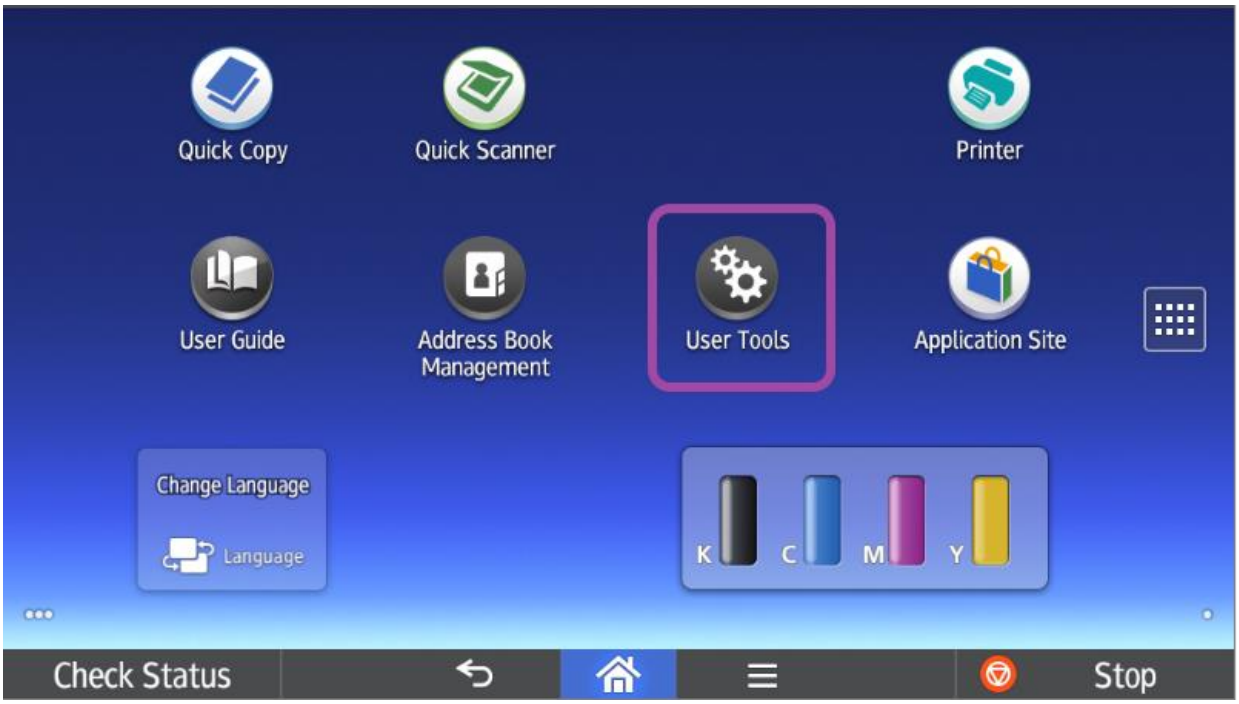
Sample Formulas

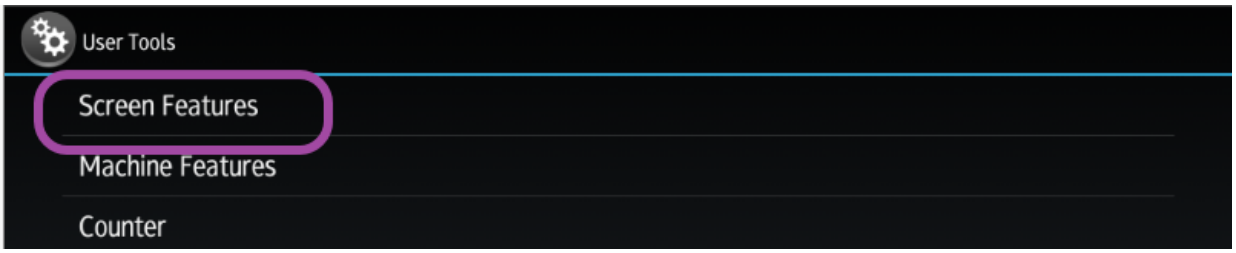
Formula	Result
YEAR(NOW()) & "-" & MONTH(NOW()) & "-" & DAY(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())	2018-12-21-102657
YEAR(NOW()) & “-INVOICE”	2018-INVOICE
_[UserId] & “-“ & YEAR(NOW()) & "-" & MONTH(NOW()) & "-" & DAY(NOW())	TOM-2018-12-21

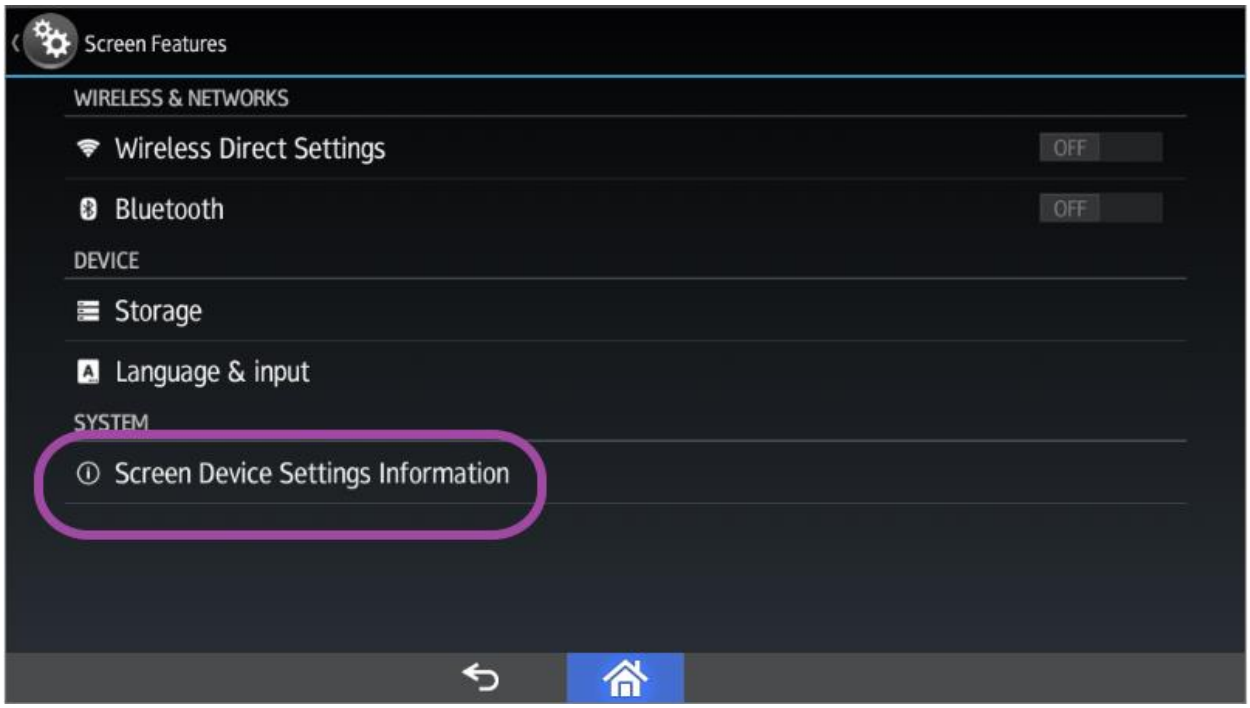
How to check version of required component: Enhanced Program

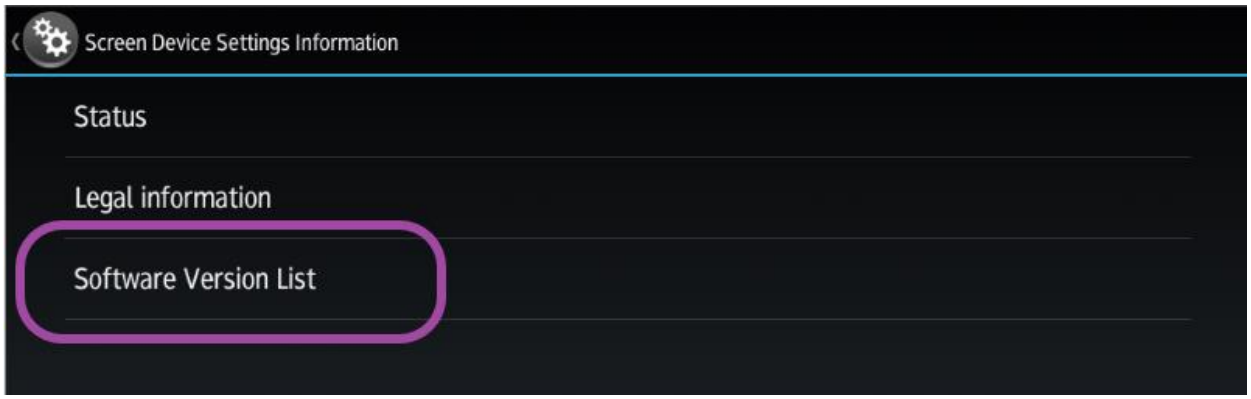
From Panel, touch User Tools > Screen Features > Screen Device Settings Information > Software Version List

Look for 'Enhanced Program'






Screen Features
WIRELESS & NETWORKS
Wireless Direct Settings
OFF
Bluetooth
OFF
DEVICE
Storage
Language & input
SYSTEM
Screen Device Settings Information


Screen Device Settings Information
Status
Legal information
Software Version List

Software Name	Module ID	Part Number	Version
Copy	M2a_SmartCopy	D2411454Z	1.27
CSPF	M2a_cspf	D2411433	2.02.01
Eco-friendly Widget	M2a_WEcoInfo	D2411437G	1.07
Enhanced Program	M2a_RSIEnhPrg	D3J30010A	1.1.0
Fax	M2a_SmartFAX	D2411457X	1.25
Fax RX File Widget	M2a_WFaxInfo	D2411435F	1.04
ICCardDispatcher	M2a_ICCdDisptch	D2411451F	2.01.25