

Fax Routing to Cloud



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1 Preface

This guide provides the details on how to use the Fax Routing to Cloud application and 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 Coordination

This section describes how to do service Coordination

3. Fax Routing to Cloud Installation and Configuration

This section contains step-by-step instructions on how to install and configure embedded application MFP from Application Site

4. Configuring Default Values

This section contains step-by-step instructions on how to Configure settings in Fax Routing Workflow in RSI Workplace by Administrator.

5. Use Case

This section describes a use case of this application

6. Limitations

Product Limitations

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 Fax Routing to Cloud?

Fax routing to Cloud routes incoming fax to Cloud Service folder. There are two components in the Fax Routing to Cloud application:

1. Embedded application which needs to be installed on RICOH Multi-Function Device
2. Subscription to RSI Package which contains Fax Routing workflow.

Also, MFP needs to have a Fax card and connected to Fax line.

Fax Routing to Cloud supports following Cloud Services:

1. Box
2. Dropbox
3. Google Drive
4. OneDrive for Business
5. SharePoint

Note:

1. Only one cloud destination can be configured at a time, depending on the Fax Routing Workflow configuration.
2. There is no workflow related user interface is available on the MFP panel. Workflow configuration is done in RSI workplace by administrator.
3. Fax Routing Embedded app provides user interface to configure proper workflow.

Fax Routing Workflow Specification

Even though there is no user interface on the operation panel for the workflow. Following items are available for configuration in Workplace.

External Service	Dropbox Box Google Drive OneDrive for Business SharePoint
Service Account	Select Admin User
Folder	Default Folder
OCR	OFF, PDF, PDF/A, WORD, EXCEL
OCR Language	English, French
File Name	Optional (If entered, this value is used as filename)
File Name Formula	If filename is left blank, filename is created using the formula programmed in User Site (Refer to section 'Configuring default Values') Default Formula: YEAR(NOW()) & "-" & MONTH(NOW()) & "-" & DAY(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW()) Example: 2018-12-21-091654.pdf

3 Cloud Service Coordination

What is Cloud Service Coordination?

Before using Fax Routing workflow, Admin user need to establish External Service Coordination with preferred choice of Cloud Service.

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

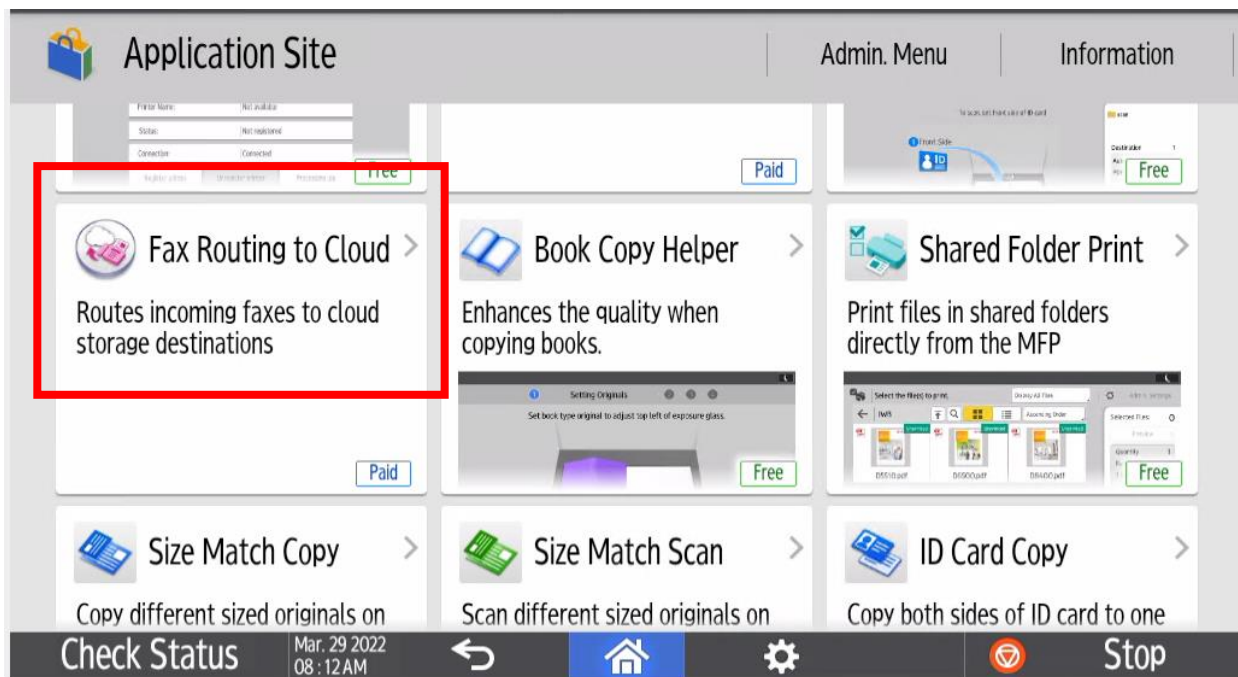
4 Fax Routing to Cloud Application Installation & Configuration

'Fax Routing to Cloud' is embedded application, needs to be installed on MFP, which works in conjunction with Fax Routing Workflow.

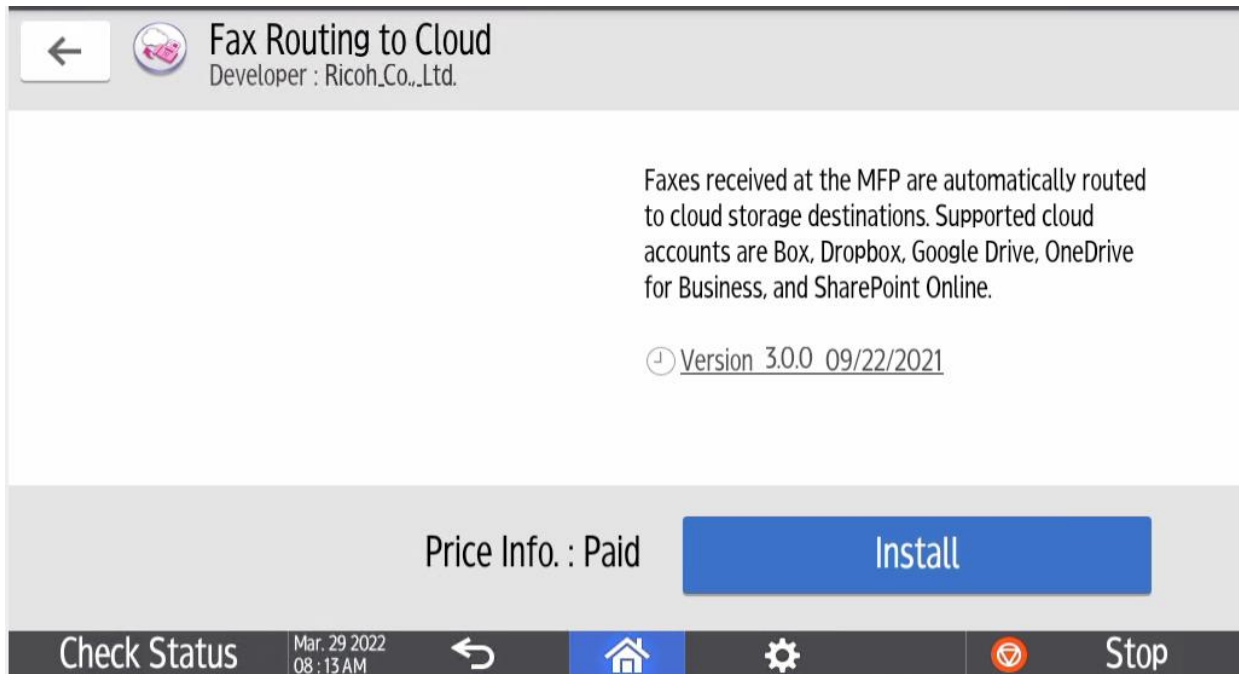
Fax Routing to Cloud Installation

Step 1: Open Application Site on MFP

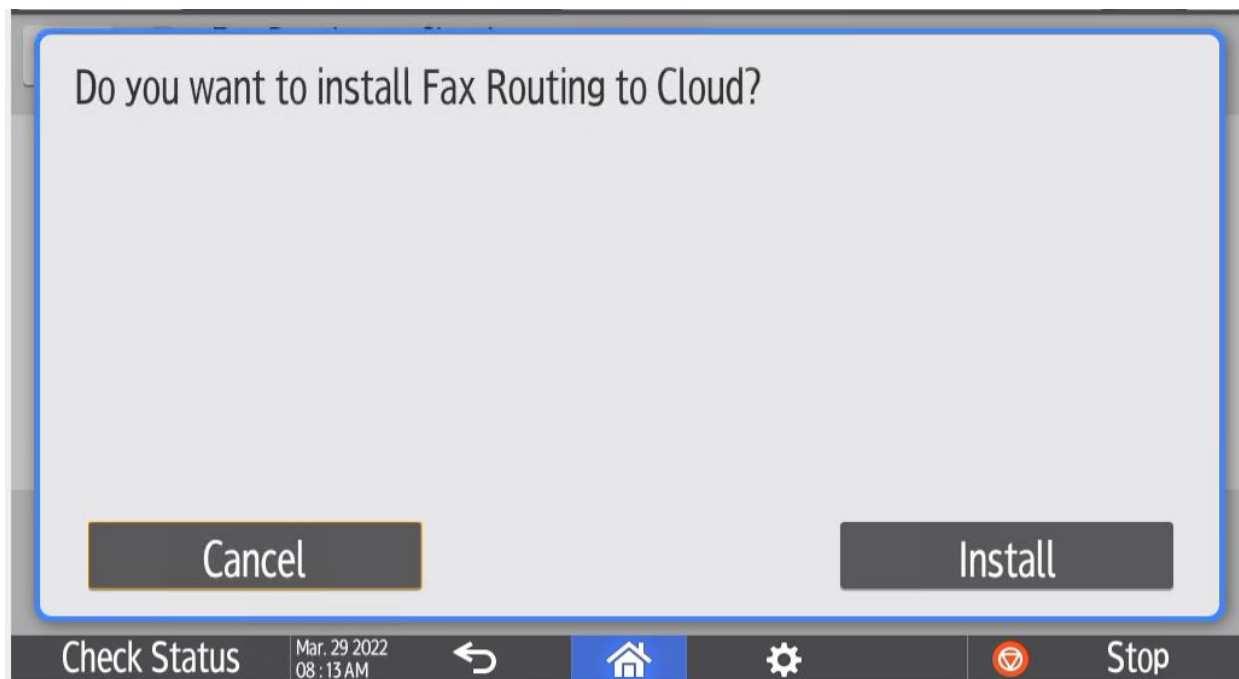
Application Site: Touch on 'Fax Routing to Cloud'

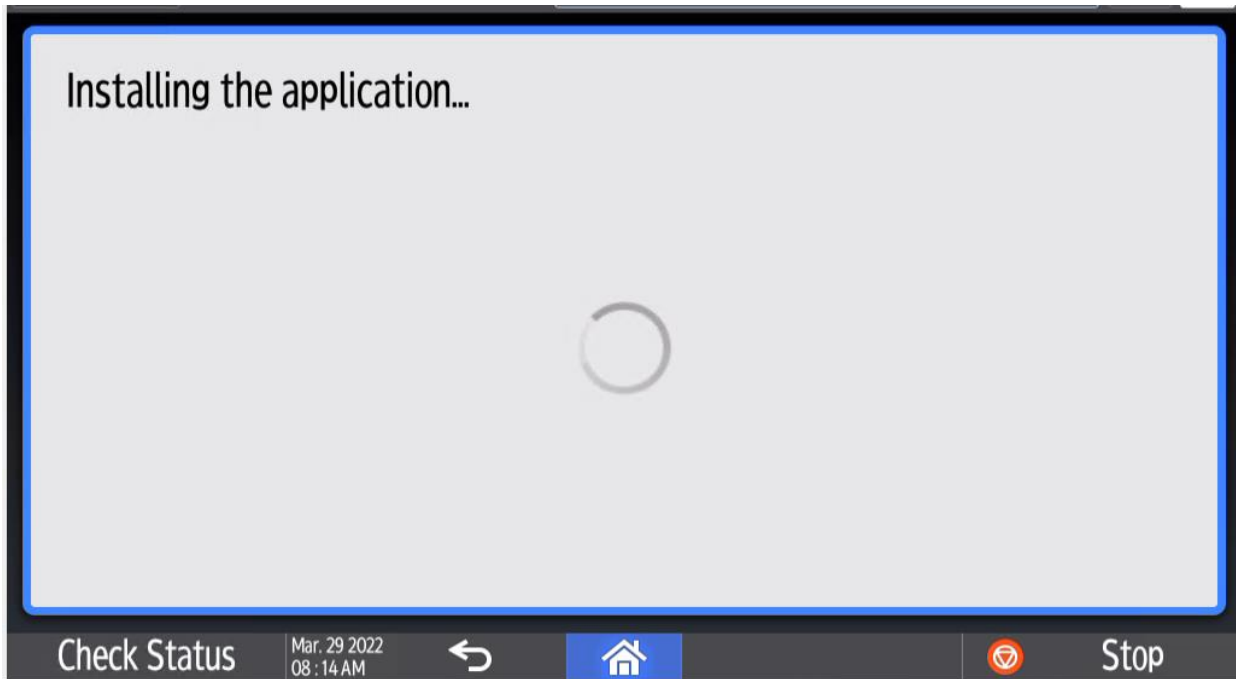


Step 2: Touch on 'Install' button

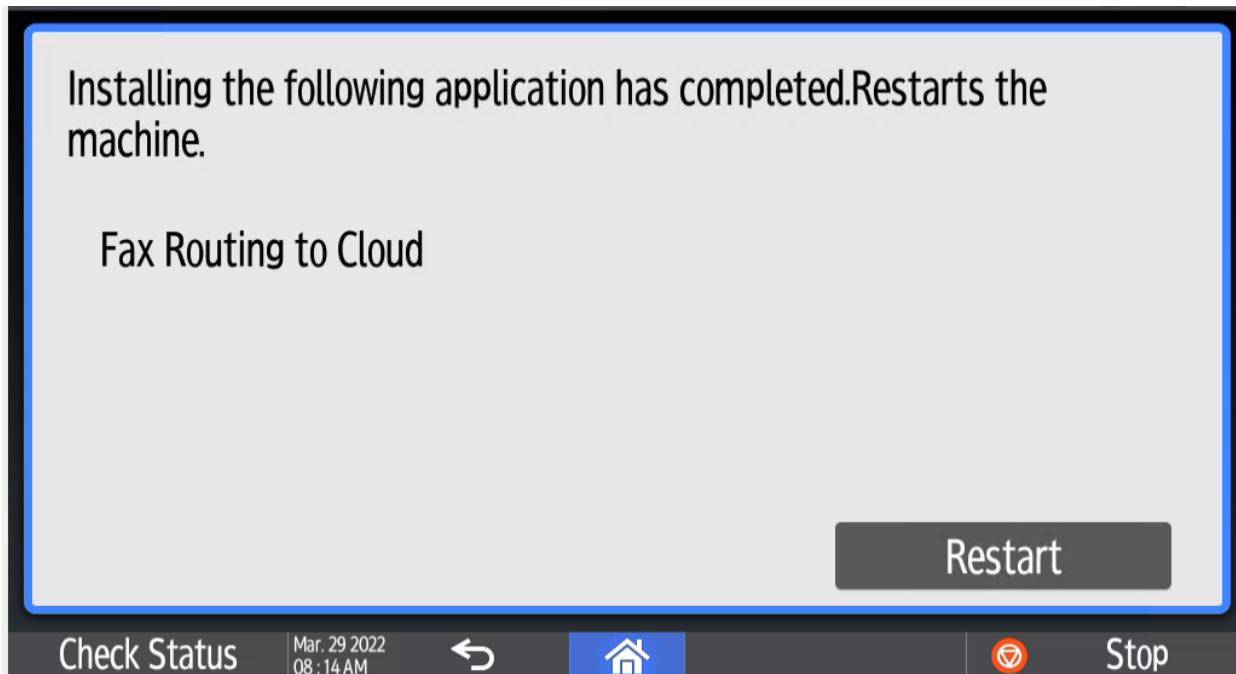


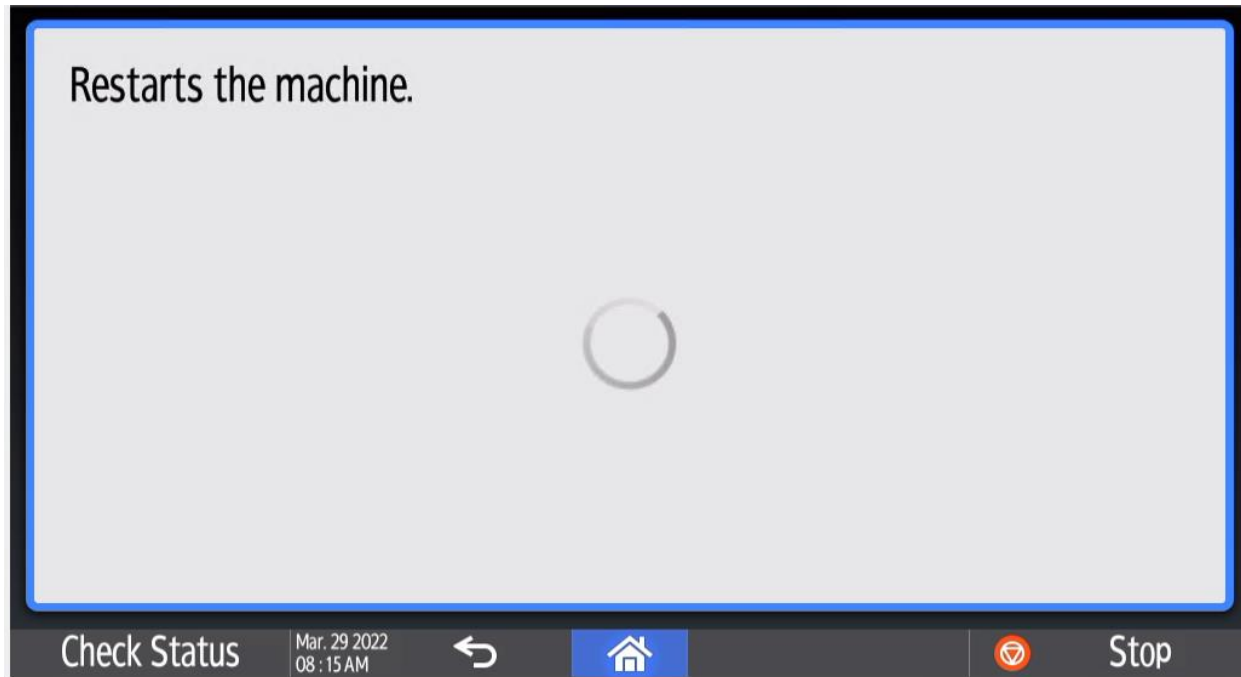
Step 3: Touch on 'Install' on this dialog





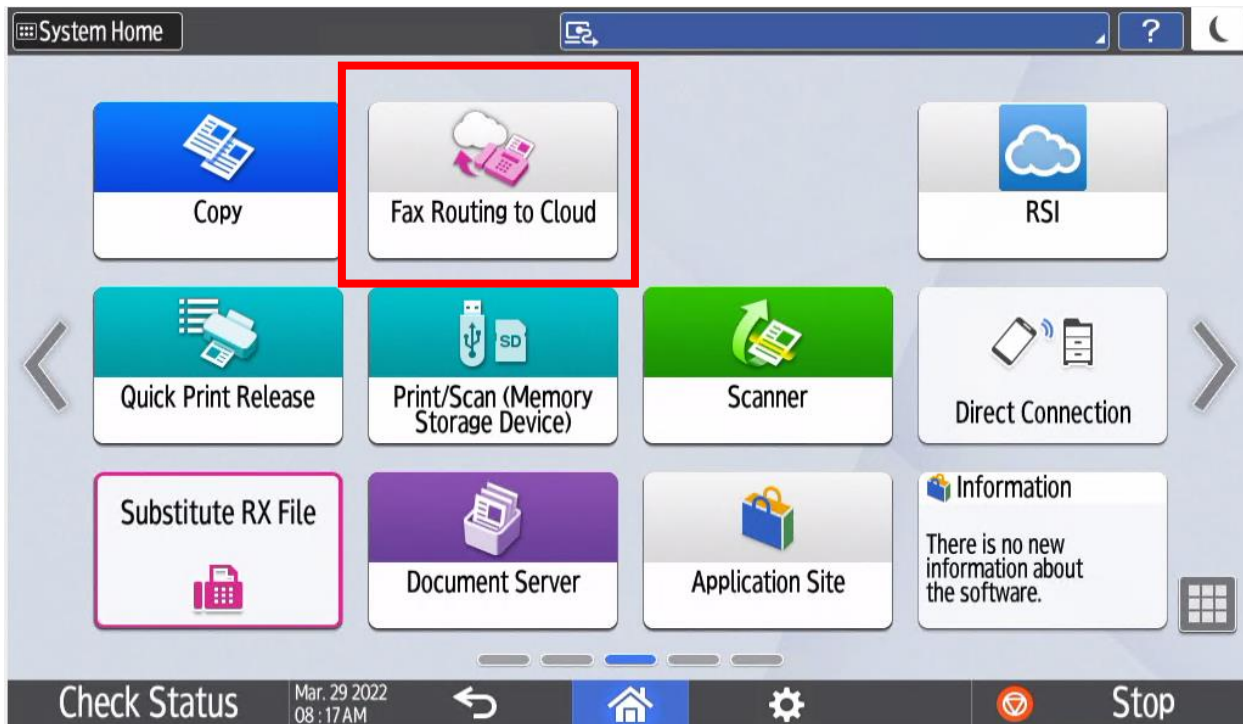
Step 4: Touch on 'Restart' to restart MFP.



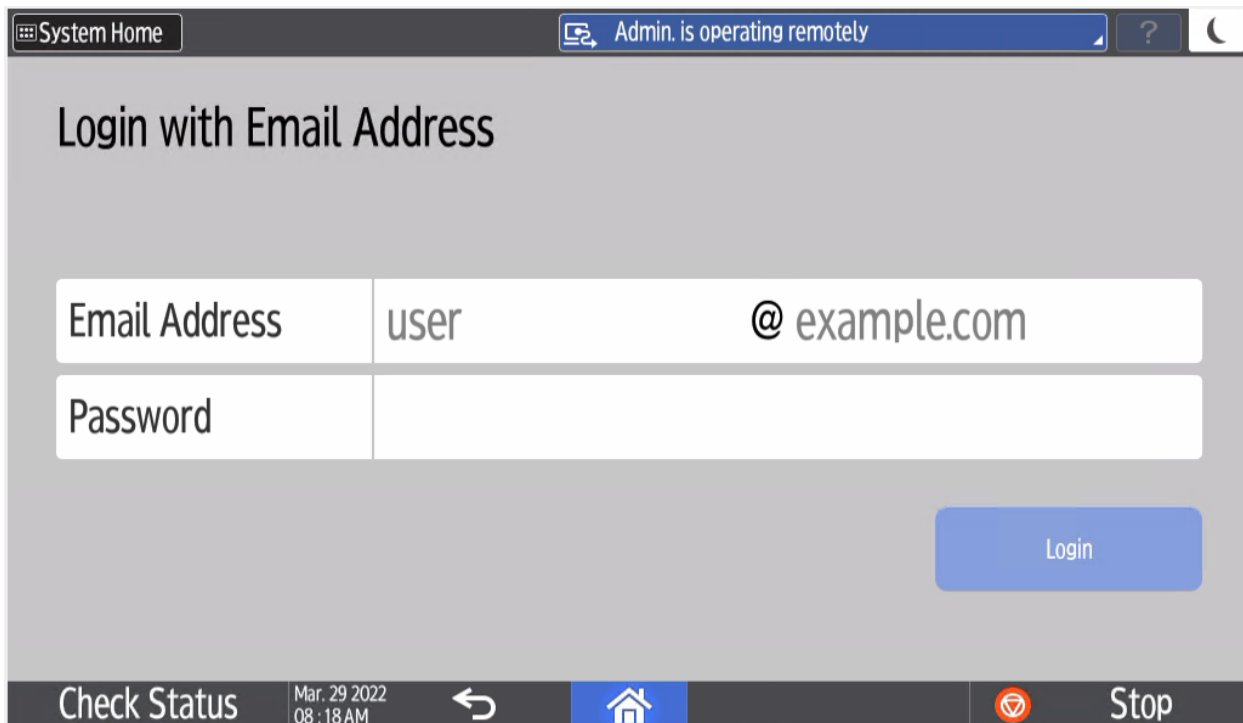


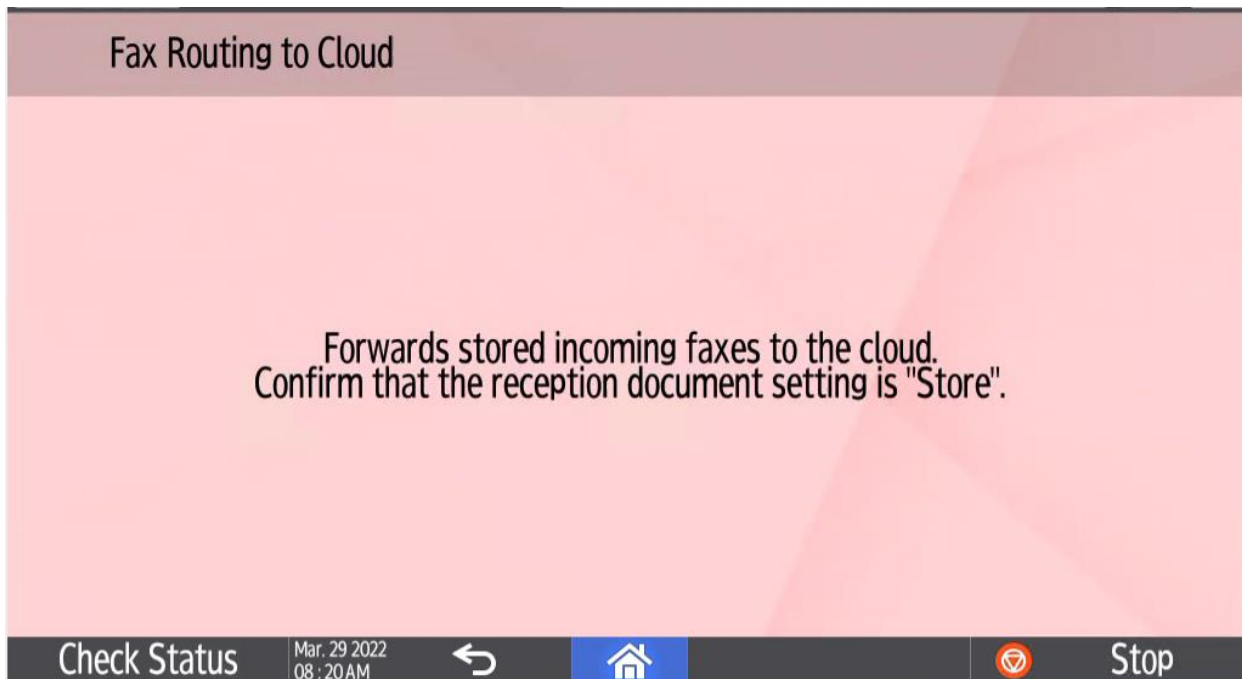
Fax Routing to Cloud Configuration

Step 1: Launch 'Fax Routing to Cloud' by touching on the ICON.

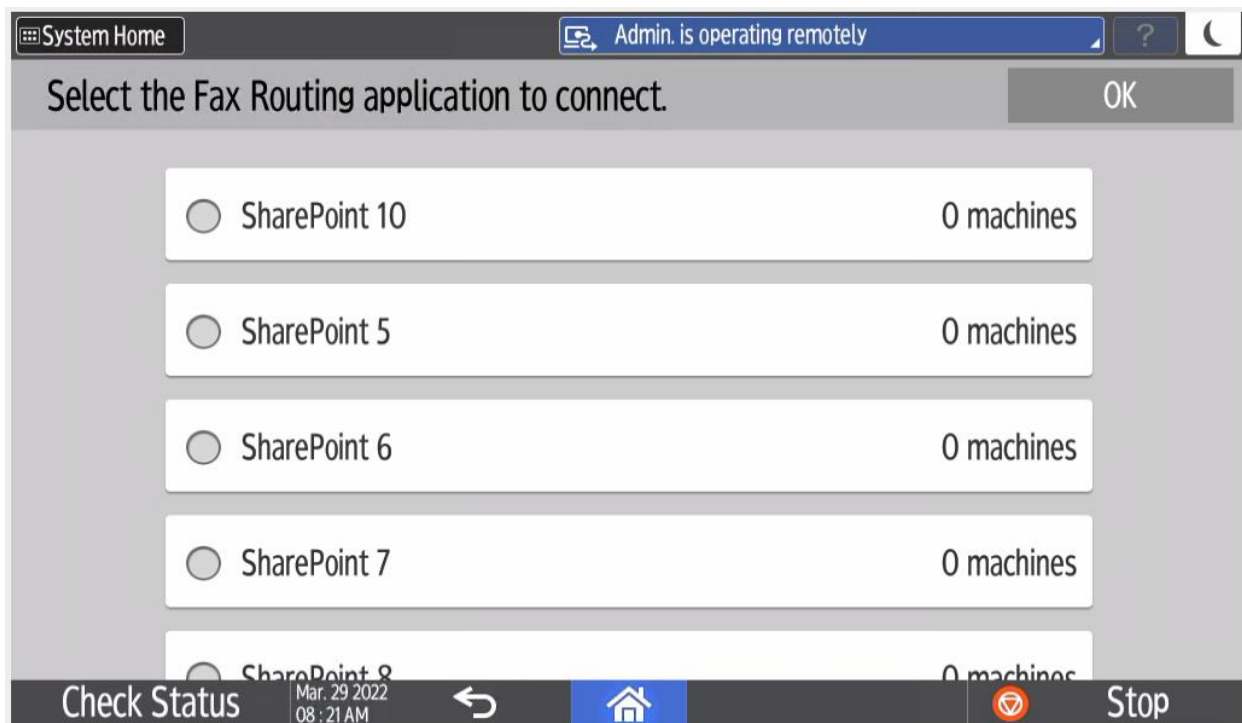


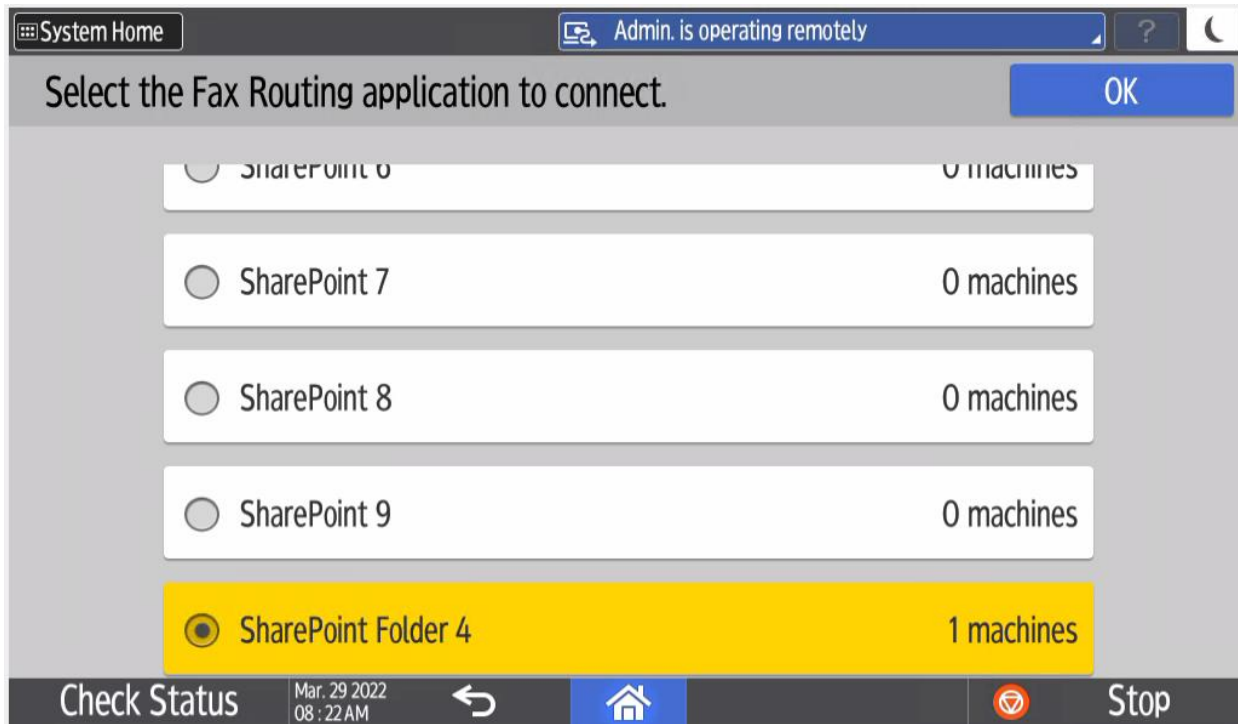
Step 2: Login using RSI Administrator Credential



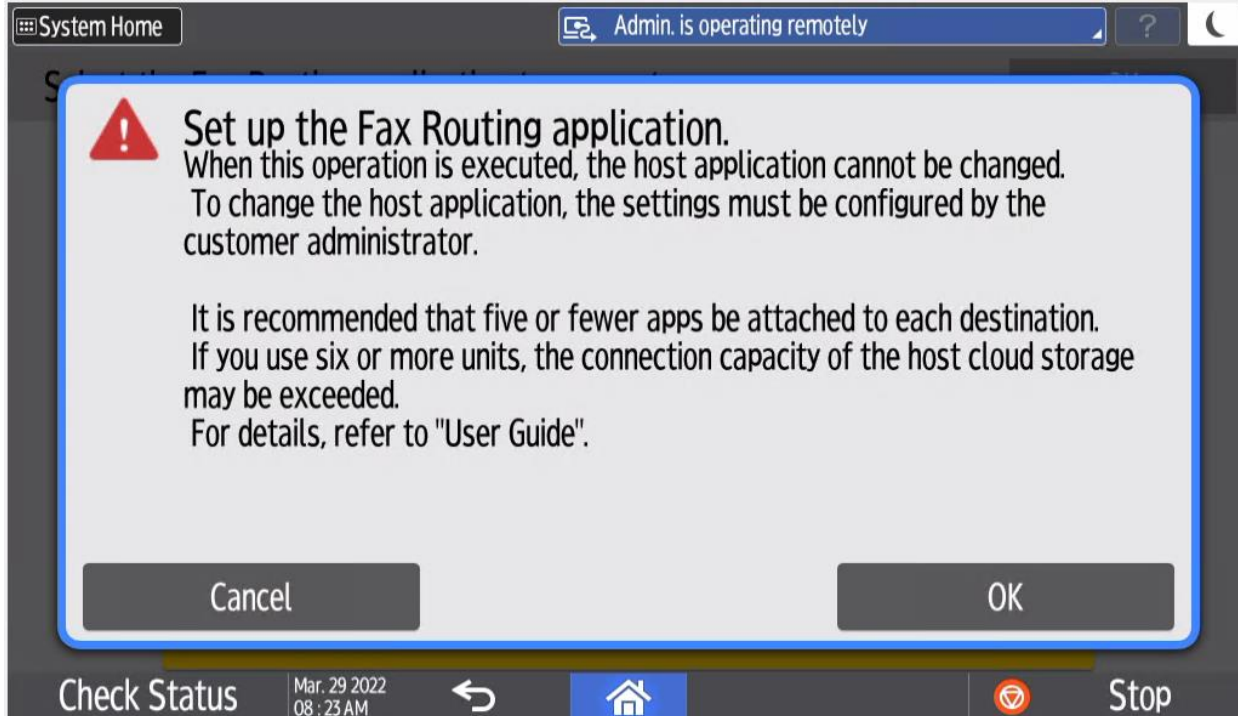


Step 3: Select a workflow [This screen displays list of Fax Routing Workflows available in your RSI Tenant]

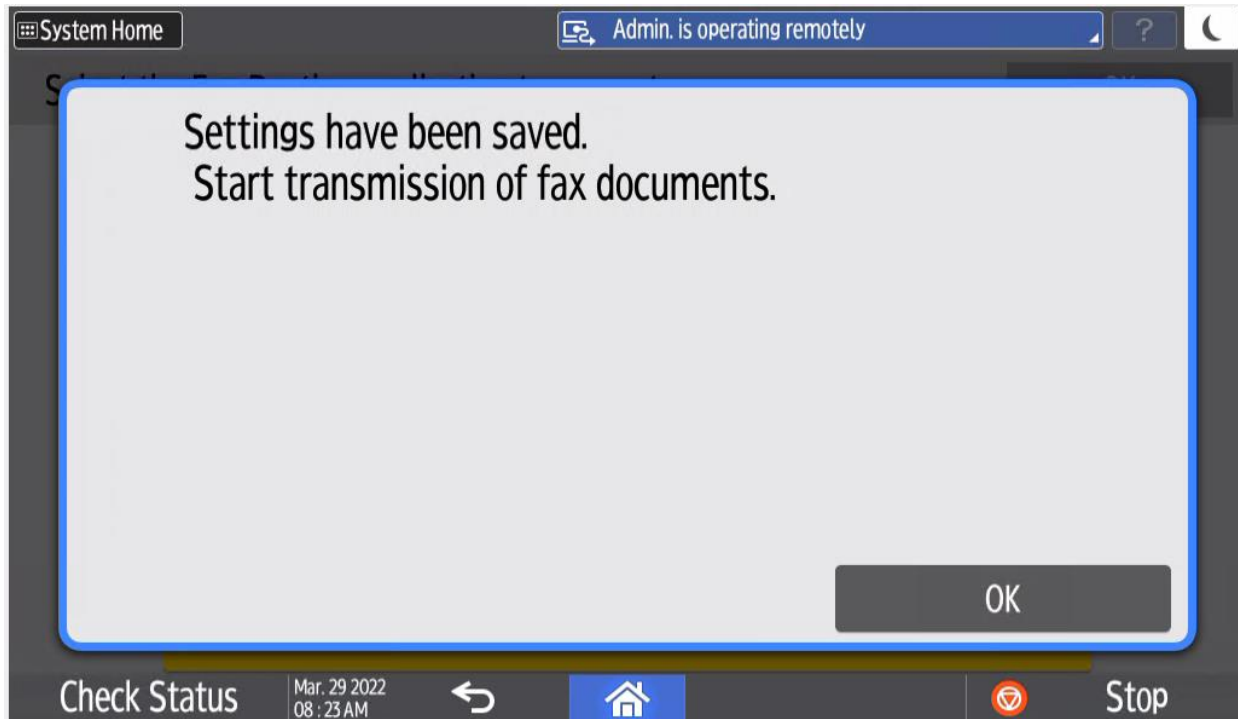




Step 4: Touch on 'OK' to complete the configuration

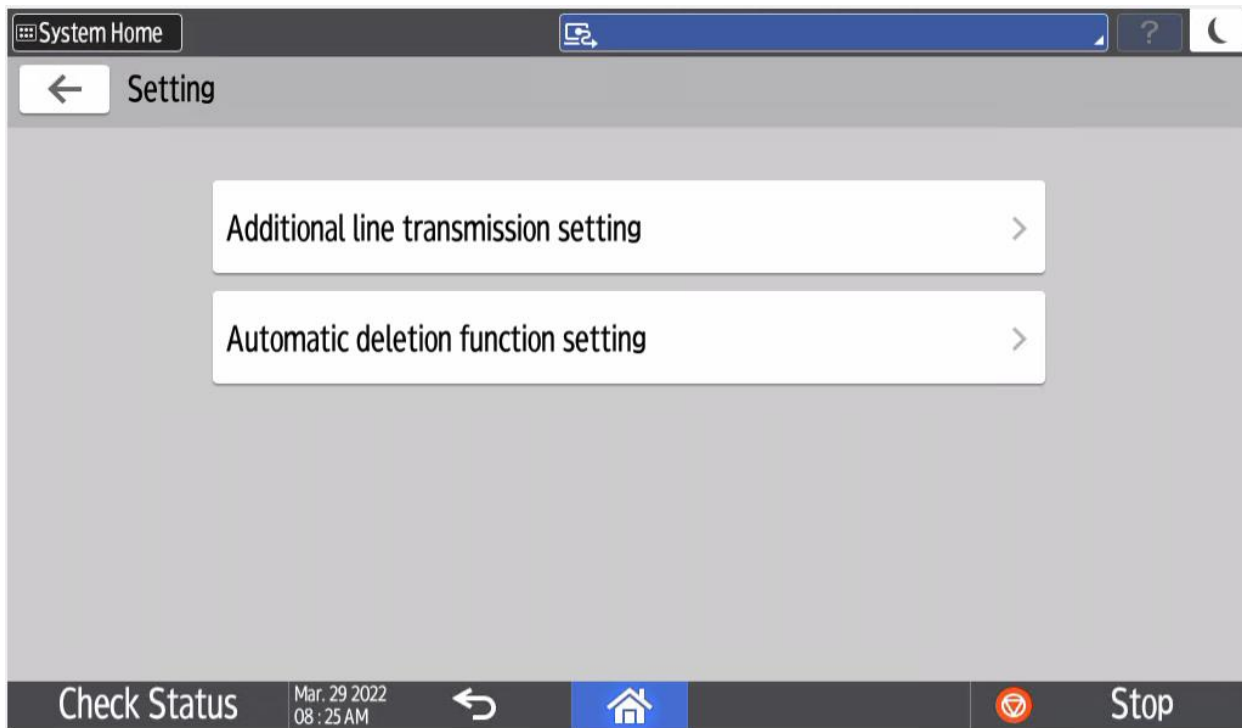


Step 5: Touch on OK on this Screen to complete.



Admin Settings in Fax App

Here are couple of settings available under 'Admin Setting'

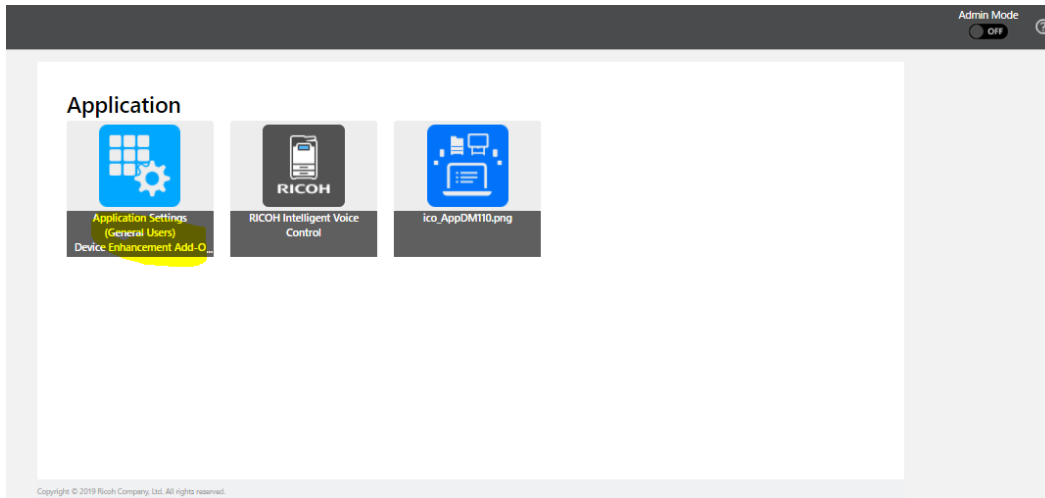


5 Configuring default Values

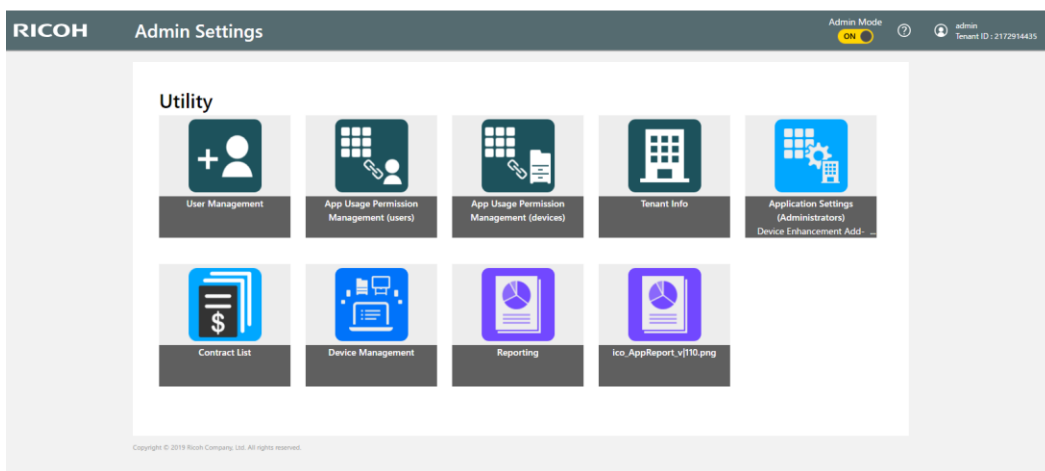
Smart Integration User Configuration Site URL

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

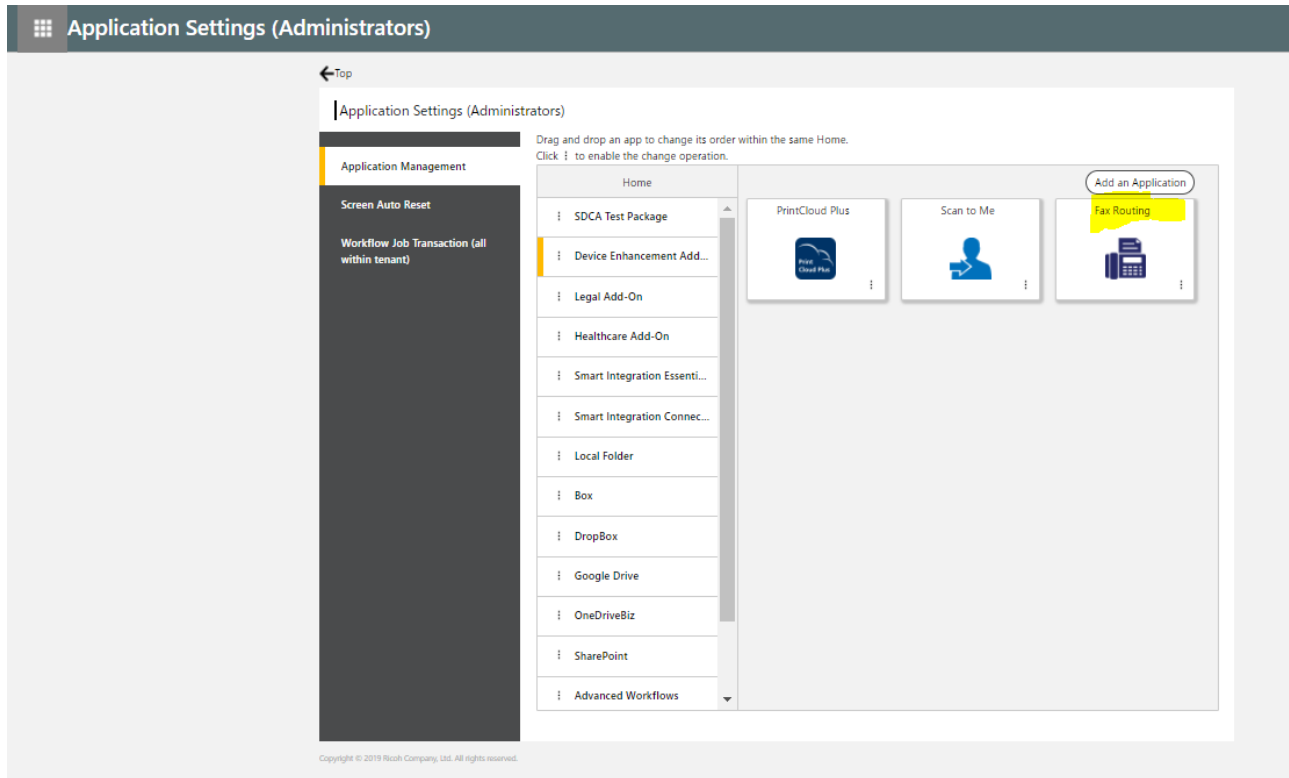
Login to above site using your credentials.



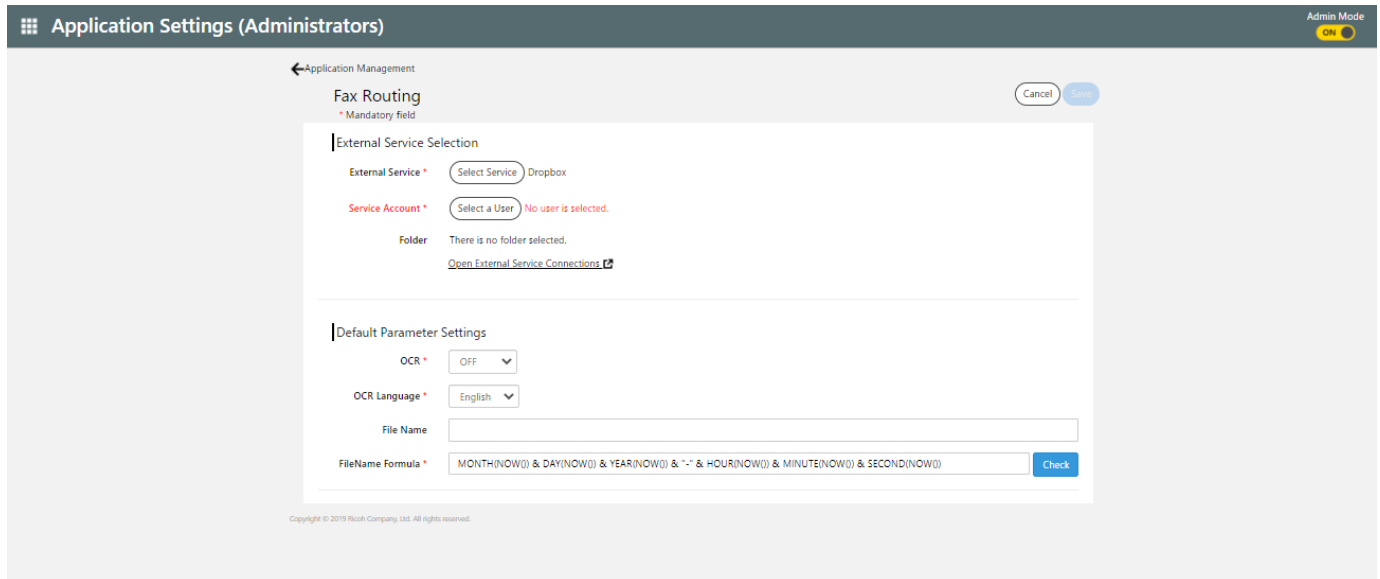
Switch to 'Admin Mode'



Click on 'Application settings'



Fax Routing



Above settings are available to configure.

Application Settings (Administrators)

← Application Management

Fax Routing

* Mandatory field

Cancel Save

External Service Selection

External Service * Select Service Dropbox

Service Account * Select a User jay.nuggehalli (admin) jay.nuggehalli@ricoh-usa.com

Folder Select Folder /

[Open External Service Connections](#)

Default Parameter Settings

OCR * OFF

OCR Language * English

File Name

FileName Formula * Check

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External Service	Dropbox Box Google Drive OneDrive for Business SharePoint
Service Account	Select Admin User Note: Admin should have done External Service connection with respective Cloud Service
Folder	Browse and Select Default Folder
OCR	OFF, PDF, PDF/A, WORD, EXCEL
OCR Language	English, French
File Name	Optional (this value is used as filename, when entered)
File Name Formula	If filename is left blank, filename is created using the formula programed in User Site (Refer to section 'Configuring default Values') Default Formula: YEAR(NOW()) & "-" & MONTH(NOW()) & "-" & DAY(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW()) Example: 2018-12-21-091654.pdf

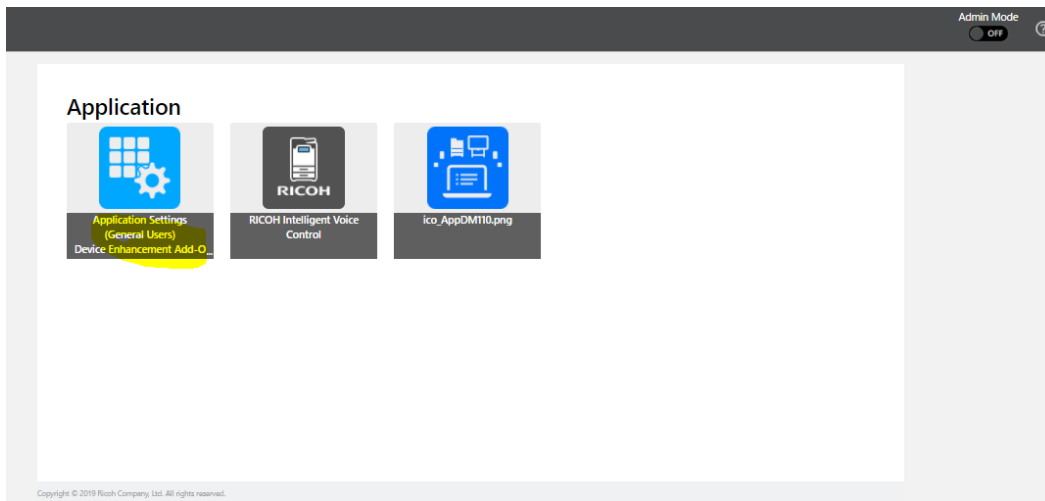
6 Use Case

One of the Use cases is to configure each MFP to route fax to a specific Folder. To Achieve this please follow these steps.

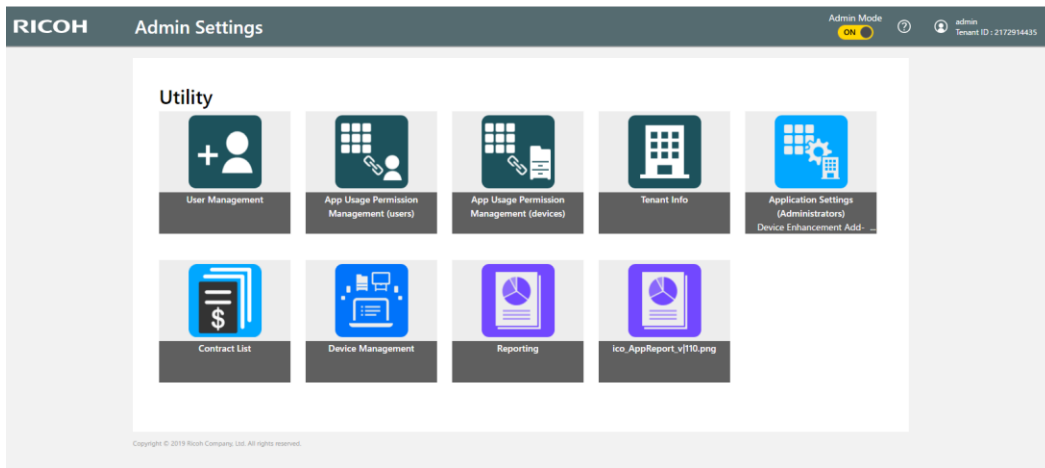
Step 1: Login RSI Workplace and Switch to Admin Mode.

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

Login to above site using your credentials.



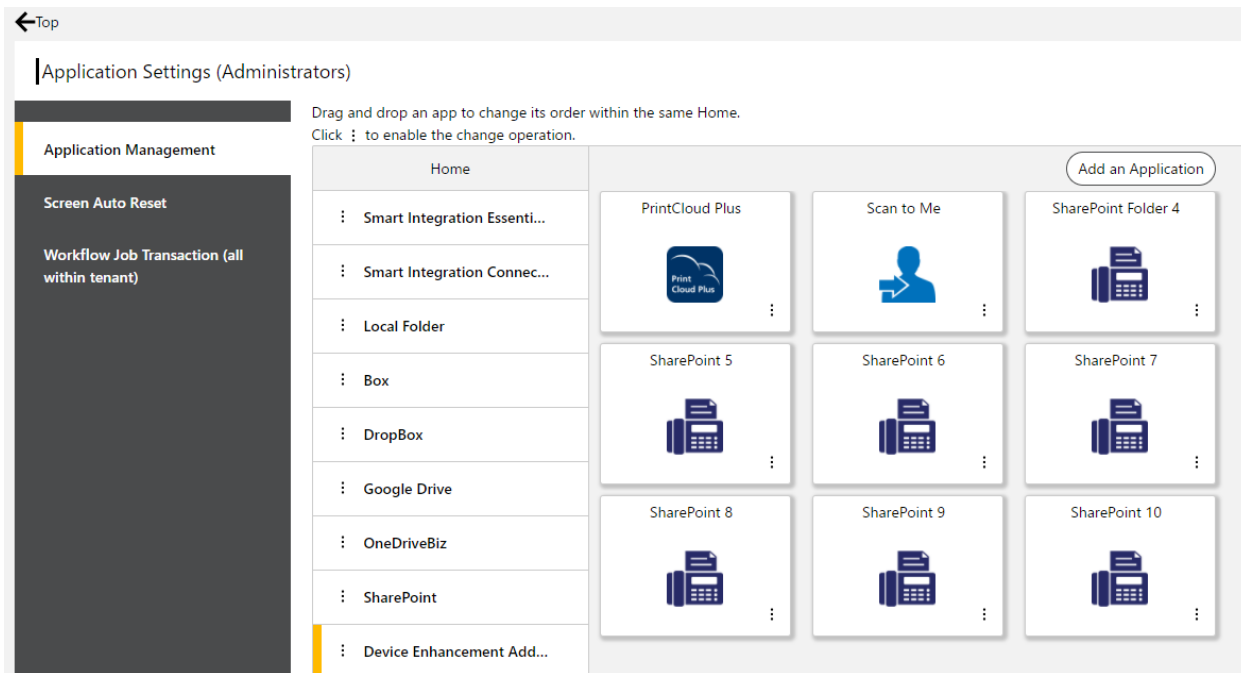
Switch to 'Admin Mode'



Click on 'Application settings'

Step 2: Make Copies of 'Fax Routing' Workflow

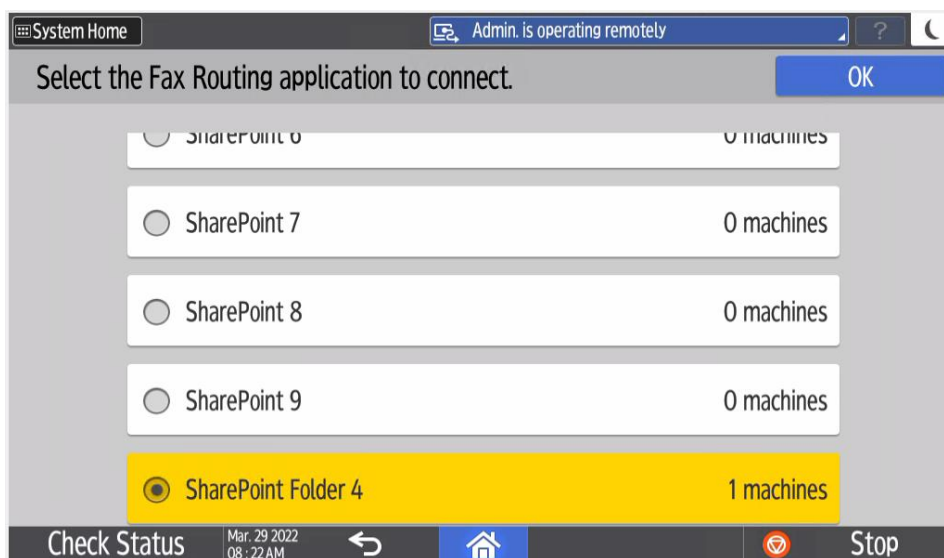
As shown below:



Step 3: Configure each workflow with Proper

- A. External Service
- B. Admin User
- C. Default Folder [This can be unique for each Workflow]

Step 4: Install Fax Routing to Cloud App on each MFP and Configure each MFP with a unique Workflow. Depending on the Default Folder configured in the workflow, Fax gets routed to specific folder.



7 Limitations

Limitations

- Fax Routing to Cloud App once configured for a specific Workflow, cannot be reconfigured for a different workflow. Requires uninstallation and reinstallation to reconfigure the workflow.
- It is recommended to connect five or fewer MFPs to connect to same Fax Routing workflow.